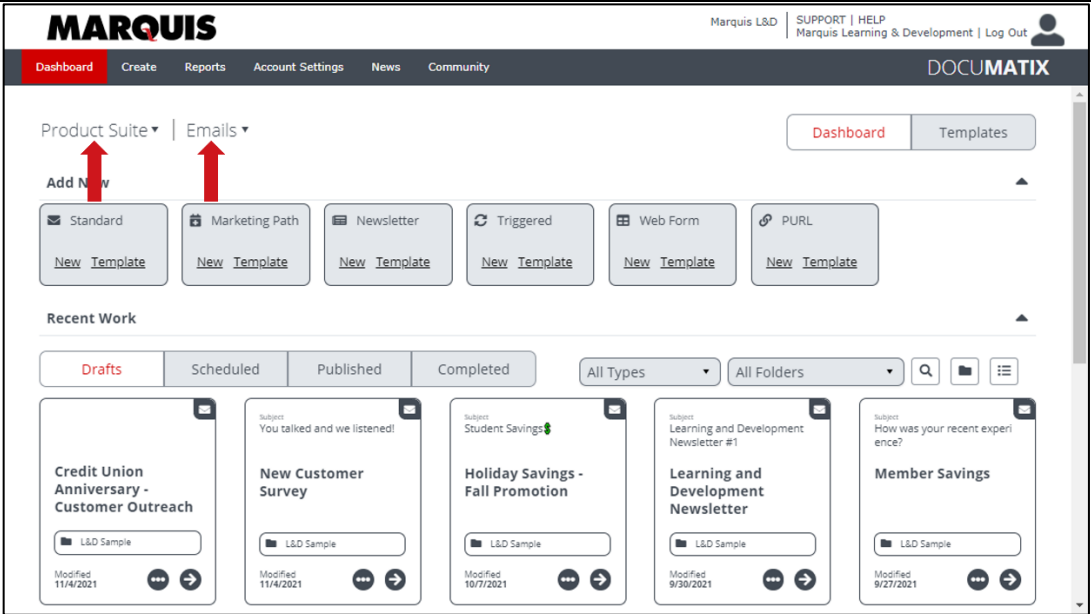


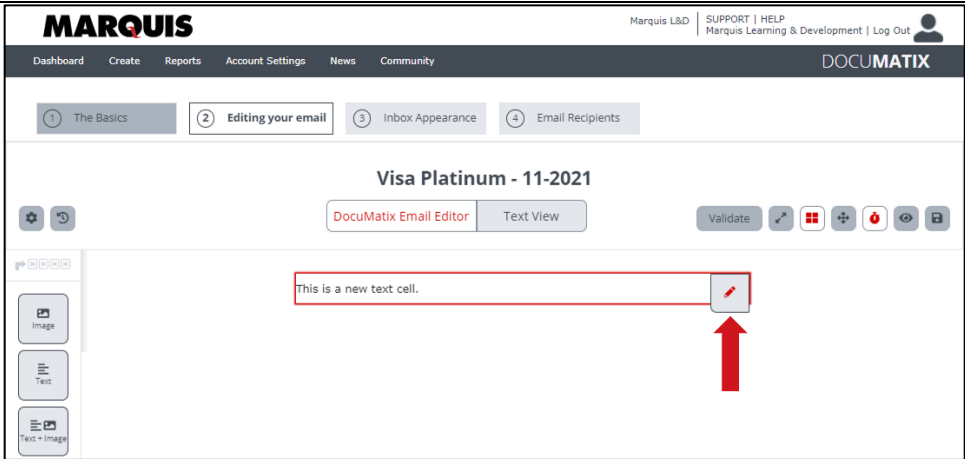

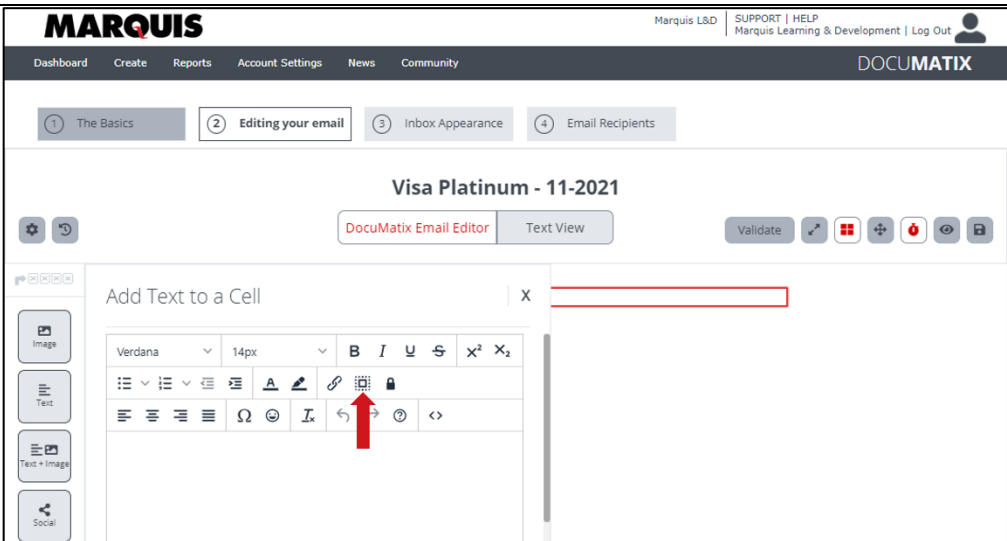


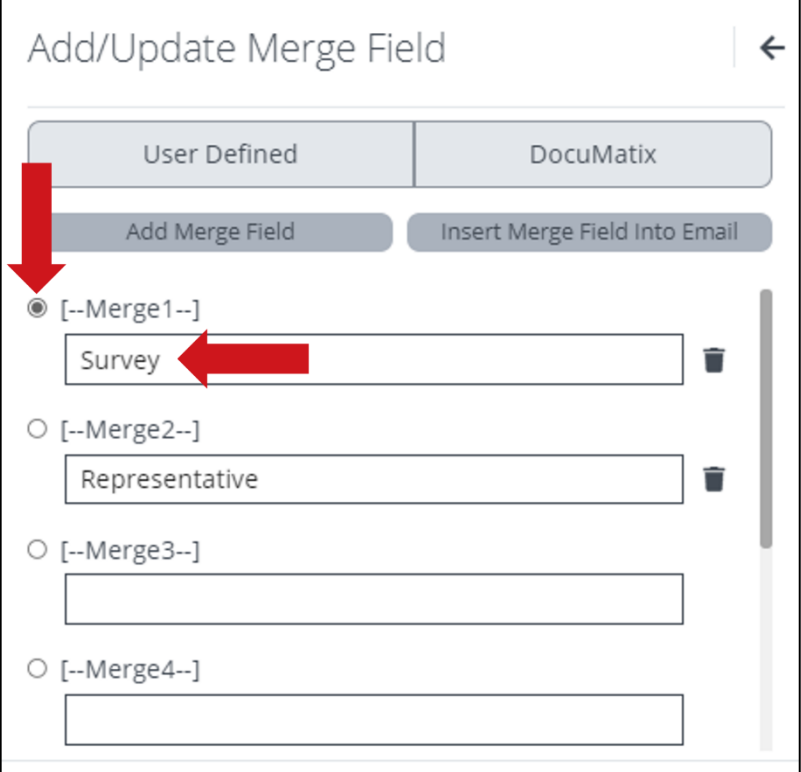
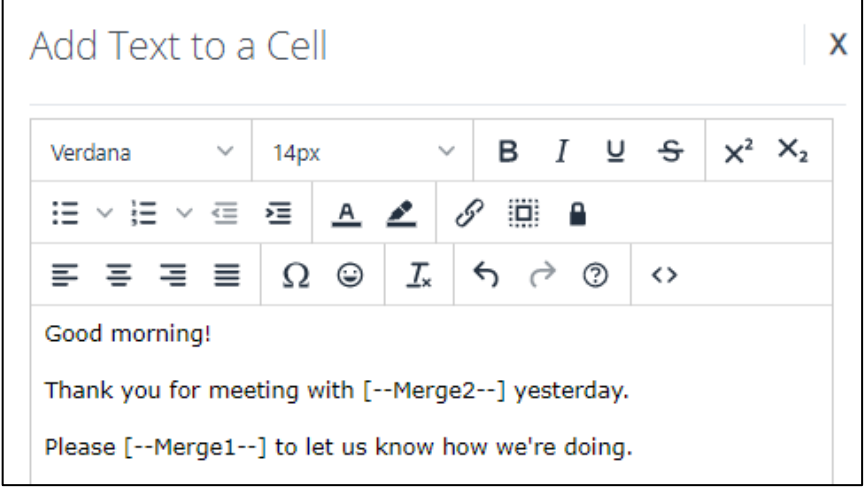
# MARQUIS

<b>DMX371</b>	<b>Add a Variable URL Link with Full Merge Fields</b>
	<p>This procedure is intended for DocuMatix users who wish to include a different URL in an email for varying recipients. The entire variable URLs will be located in the CSV file.</p> <p>For example: this process could be used when different loan officers have helped different customers, and the merge fields might be their signatures.</p>
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>DocuMatix</b>
<b>Step 2</b>	Select the <b>Product Suite</b> product and the <b>Emails</b> module
	
<b>Step 3</b>	Under the Add New section, click <b>New</b> or <b>Template</b> on the card of the desired email type
<b>Step 4</b>	Complete the <b>The Basics</b> page
	<p><b>Note:</b> Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.</p>
	<ul style="list-style-type: none"> <li>• Name</li> </ul>
	<ul style="list-style-type: none"> <li>• Description (optional)</li> </ul>
	<ul style="list-style-type: none"> <li>• Store your email in a folder</li> </ul>
	<ul style="list-style-type: none"> <li>• Layout Mode</li> </ul>
	<p><b>Note:</b> Mobile Layout Mode is for a single column email making it easier to view on a mobile device and Desktop Layout Mode allows for multi-column emails for viewing on a computer.</p>


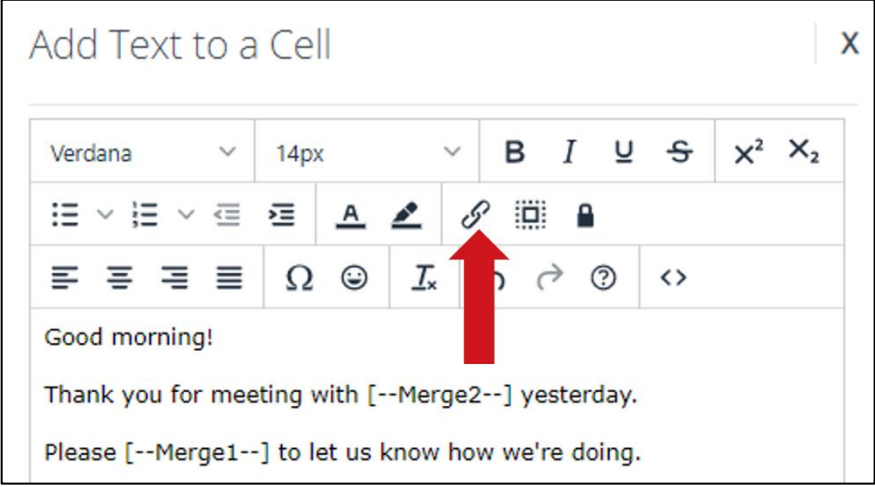
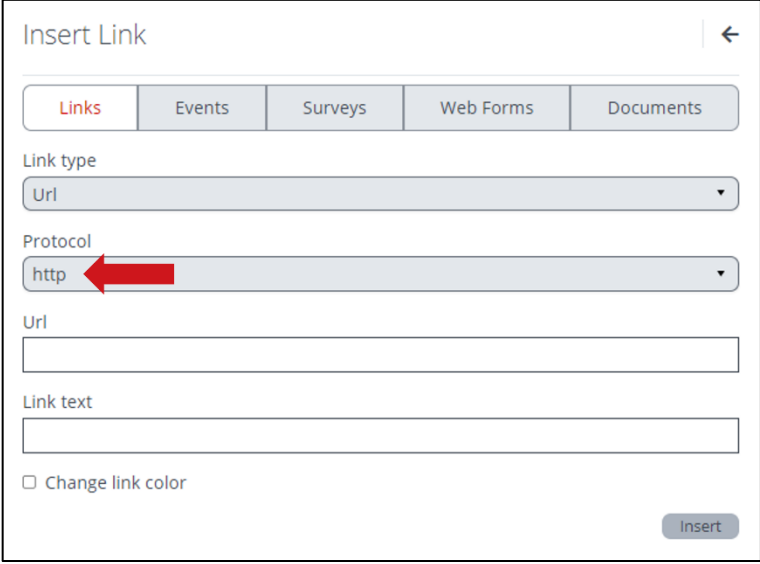
# MARQUIS

<b>Step 5</b>	Click <b>Continue</b> to advance to the <b>Editing your email</b> page
<b>Step 6</b>	Select the text icon  and “Click, Drag, and Drop” the icon into the body of the email being created
<b>Step 7</b>	Hover over the blank text cell and click the <b>Edit</b> icon  to access the editor
	
<b>Step 8</b>	Once inside the text cell editor, click the merge field  icon
	
<b>Step 9</b>	Click the radio button next to the available merge field

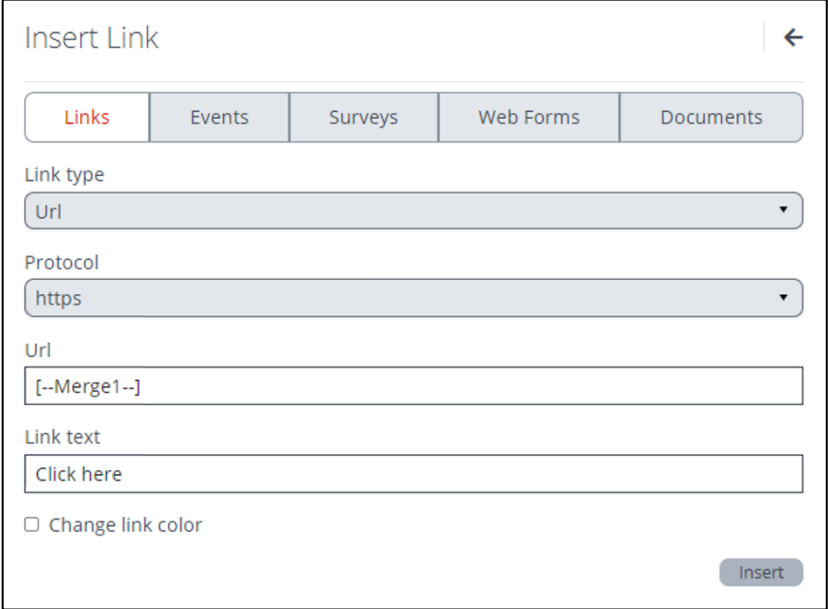

# MARQUIS

<b>Step 10</b>	Enter the desired name for the merge field in the blank field
	
<b>Step 11</b>	Click <b>Insert Merge Field Into Email</b>
<b>Note:</b> The merge field may be copied and pasted in other areas as needed. Within the cell editor, select and copy the merge field.	
	


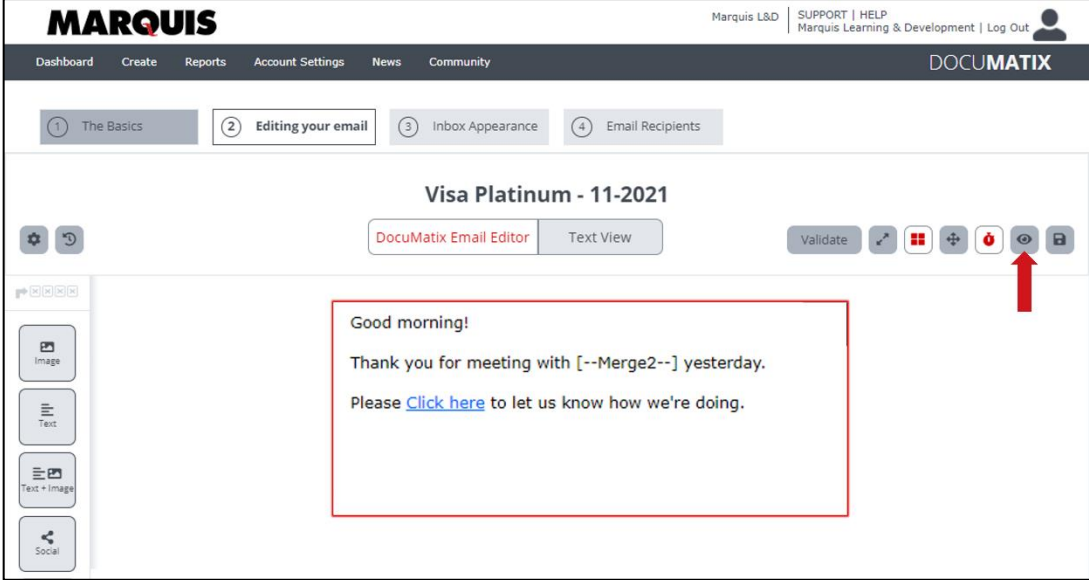
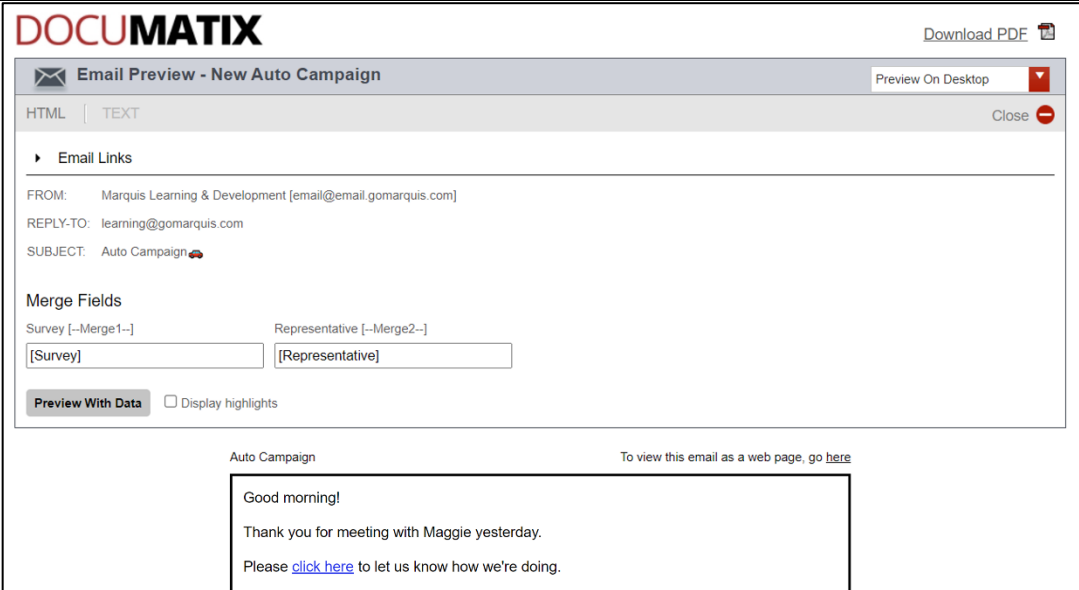
# MARQUIS

<b>Step 12</b>	Highlight the merge field, right click, and select <b>Cut</b>
<b>Step 13</b>	Click the link icon 
	
<b>Step 14</b>	Select URL within the Link Type drop-down
<b>Step 15</b>	Click the <b>Protocol</b> drop-down arrow, and select <b>http or https</b>
	

# MARQUIS

<b>Step 16</b>	Paste the merge field into the <b>Url</b> field
	
<b>Note:</b> By default, the <b>Link text</b> (or displayed text) will be populated with the merge field that was defined in the body of the email.	
<b>Step 17</b>	Delete the default text from the <b>Link text</b> field
<b>Step 18</b>	Type in the desired text to display as a hyperlink in place of the URL, such as "click here", etc.
<b>Step 19</b>	Click <b>Insert</b>
<b>Note:</b> Additional modifications and updates can be made within the email editor if desired.	
	Click here to let us know how we're doing.'" data-bbox="271 551 814 793"/>
<b>Step 20</b>	Click <b>Save</b> 

# MARQUIS

<b>Step 21</b>	When the text cell is ready, click the <b>X</b> at the top right-hand corner of the box to close the <b>Add Text to a Cell</b> window
<b>Step 22</b>	Optional: Preview the email by clicking the <b>Preview</b> icon 
22.1	Select the desired preview option.
	
	<ul style="list-style-type: none"><li>Here, <b>preview with data</b> by typing placeholder data into the fields below, to display a preview of the email.</li></ul>
	
	<ul style="list-style-type: none"><li>Alternatively, the <b>preview with uploaded data</b> option will populate the designated merge fields with data from a CSV file. The CSV file needs to be attached to the email to be able to use this function.</li></ul>