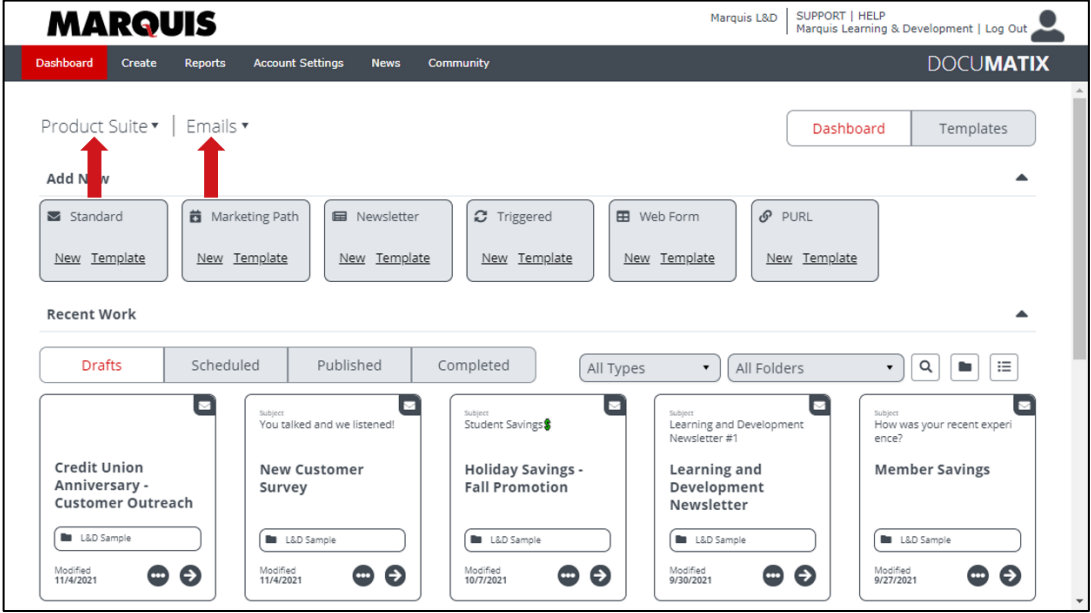
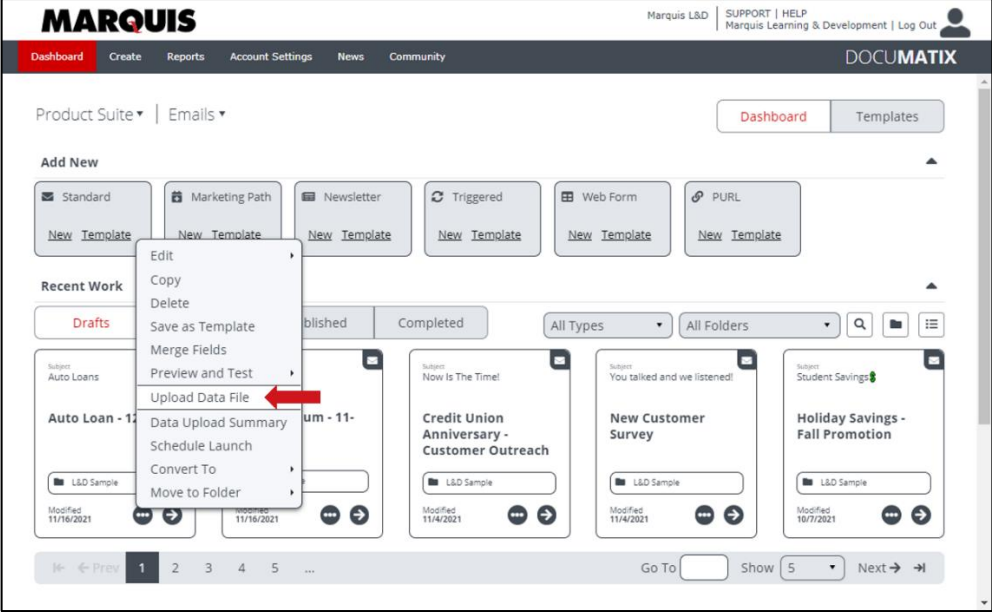


MARQUIS

DMX374	How to Upload a CSV file
	Use this step-by-step process to upload a CSV file to an email once the merge fields have been established.
Order of Steps	Tasks
Note: Before completing these steps, merge fields must be set up. Refer to the procedure Setting Up Merge Fields, DMX318 for this process.	
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Emails module
	
Step 3	Click the Options icon (⋮) on the email card
Step 4	Select Upload Data File
	

MARQUIS

Note: The data file must be in a CSV format with the header row located within the first row. The header row cannot contain spaces, numbers, or special characters.

Step 5 Drag and Drop the file into the box or click **Select Files** to browse and select the desired file

Step 6 To include duplicates, select the check box, if desired

The screenshot shows the Marquis DocuMatix interface. The navigation bar includes 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The breadcrumb trail is '1 The Basics', '2 Editing your email', '3 Inbox Appearance', and '4 Email Recipients'. The main content area is titled 'Add Recipients to Auto Loan - 12-2021'. Below the title is a checkbox labeled 'Allow duplicate email address' with a red arrow pointing to it. Below the checkbox is a text prompt: 'Use the file uploading area below to add your recipient CSV file. Before you proceed, there are a few things to remember:'. A list of instructions follows: 'File headers should not contain spaces (" ")' and 'The maximum size allowed for any field imported is 500 characters.' Below the list is a large dashed box for file upload with the text 'Drag and Drop files here' and 'or' and a 'Select Files' button.

Note: At the completion of the data file being uploaded, the record information will appear under the header of the Map Merge Fields page.

The screenshot shows the Marquis DocuMatix interface. The navigation bar is the same as in the previous step. The breadcrumb trail is '1 The Basics', '2 Editing your email', '3 Inbox Appearance', and '4 Email Recipients'. The main content area is titled 'Map Merge Fields to Auto Loan - 12-2021'. Below the title is a green 'Continue' button. Below the button is the status '4 Records | 4 Valid Records' with a red arrow pointing to it. Below the status is a table with the following columns: 'Merge field', 'Field from file', 'Action if blank', and 'Default value'.

Merge field	Field from file	Action if blank	Default value
Email Address	[Select field containing email]		
First Name	[Select field containing data]	Use default value	
Custom Field 1	[Do not use custom field]		
Custom Field 2	[Do not use custom field]		
Launch date	[Do not use launch date]		

Step 7 Complete the **Map Merge Fields** page

Note: Mapping is the process of aligning the merge fields created within DocuMatix to the header fields contained in the CSV file.

7.1 Using the drop-down arrow, select the **Email Address** from the list

The screenshot shows the Marquis Documatix interface. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. Below that, a breadcrumb trail shows '1 The Basics', '2 Editing your email', '3 Inbox Appearance', and '4 Email Recipients'. The main content area is titled 'Map Merge Fields to Auto Loan - 12-2021' and shows a table with columns: 'Merge field', 'Field from file', 'Action if blank', and 'Default value'. The 'Email Address' row has a dropdown menu open for 'Field from file', listing options like 'RepresentativeName', 'RepEmail', 'CustomerMember', 'VariableImageURL', 'RecipientName', 'RecipientEmail', and 'FullURL'. A red arrow points to 'RecipientEmail'.

7.2 Use the drop-down arrow to select the appropriate field for each required merge field

7.3 Use the drop-down arrow to select the desired Action if blank:

- **Use default value:** The default value entered will be used in place of a custom value
- **Reject record:** The email will not be sent to that recipient
- **Remove merge field from the email:** The merge field will be removed from the email

The screenshot shows the same Marquis Documatix interface. The 'Action if blank' dropdown for the 'First Name' row is now open, showing three options: 'Use default value' (highlighted in blue), 'Reject record', and 'Remove merge field from email'. The 'Field from file' dropdown for 'Email Address' is still open, showing '[Select field containing email]'.

7.4 If "Use Default Value" action is selected, enter the desired text into the **Default value** field

7.5 Select the optional fields, if desired

Note: The Merge fields containing "Custom Field" in the name are optional data fields that can be populated for reporting capabilities but will not be placed in the email.

MARQUIS

7.6 | Select the launch date if one is present in the file

Note: When selecting a launch date field, if a record contains a blank in the Launch Date field, the email will not be sent out.

7.7 | Click **Continue**

Note: If the data file contains **Invalid** and/or **Corrupt Records**, they will be automatically removed, and the file will be uploaded. Clicking the underlined number to the right of **Corrupt Records** will open an Excel file which provides reasons the records were classified as corrupt. **Invalid Records** indicate there is missing data and **Corrupt Records** indicate that an email address is not in the correct format.

The screenshot shows the 'Add Recipients' step in the MARQUIS DOCUMATIX interface. The page title is 'Add Recipients to Auto Loan - 12-2021'. There is a 'Next' button in the top right. Below the title, there is a checkbox for 'Allow duplicate email address' and instructions for file uploading. A file upload area is shown with a 'Select Files' button. Below that, a 'Validating File' section indicates that records are being validated. A table titled 'Records to be Imported' shows the following data:

From CSV Files	Total

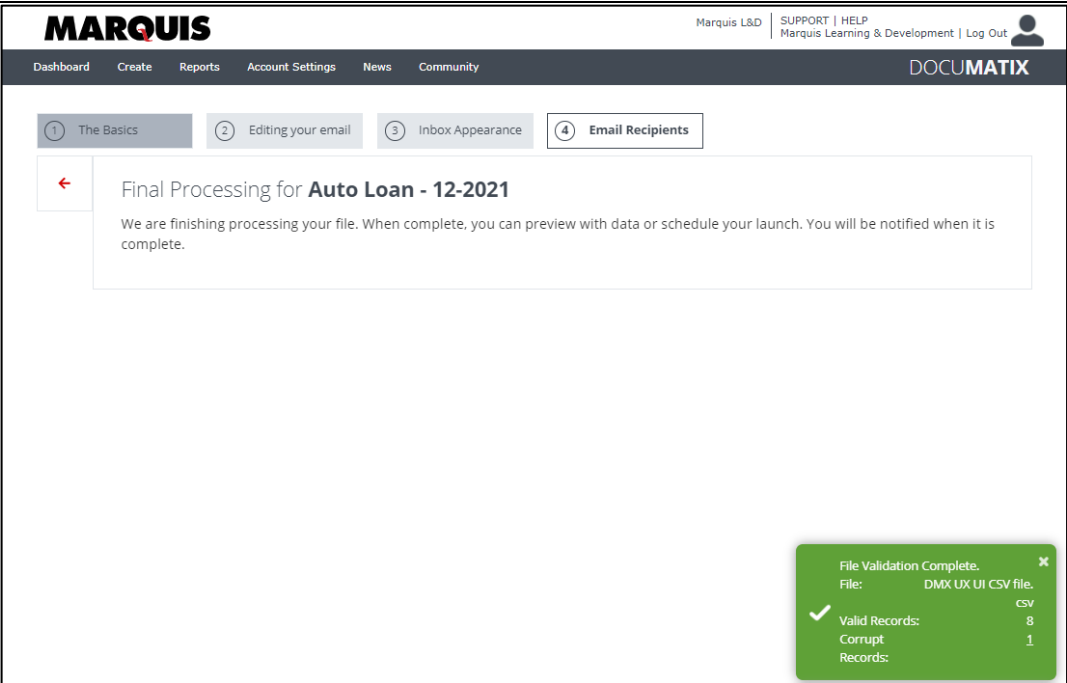
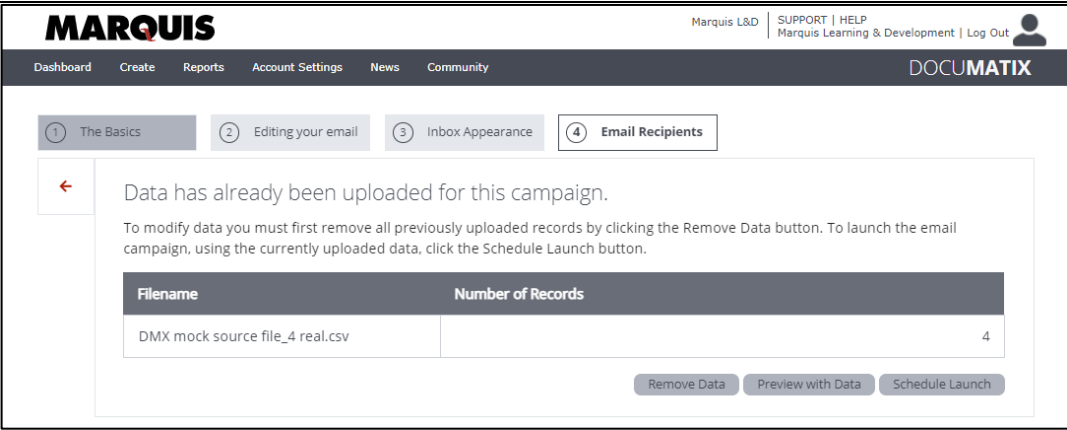
A green notification box in the bottom right corner displays the following information:

- File Validation Complete.
- File: DMX UX UI CSV file.
- Valid Records: 7
- Corrupt Records: 2

A red arrow points to the 'Corrupt Records' count of 2.

	A	B	C	D	E	F	G	H	I
1	File_Name	Email_Address	[--Merge1--]	[--Merge2--]	[--Merge3--]	AntiPhishing	Reason		
2	DMX mock source file.csv	David Weisz	David Weisz	David Weisz	https://www.chicago.gov/content/dam/c		Invalid email address format		
3	DMX mock source file.csv	Nancy Folsom	Nancy Folsom	Nancy Folsom	Email		Invalid email address format		
4	DMX mock source file.csv	Deidre Collins	Deidre Collins	Deidre Collins	Email		Invalid email address format		
5	DMX mock source file.csv	Jeremiah Jenkins	Jeremiah Jenkins	Jeremiah Jenkins	Email		Invalid email address format		
6	DMX mock source file.csv	Phyllis Smith	Phyllis Smith	Phyllis Smith	Email		Invalid email address format		
7	DMX mock source file.csv	Doug Jones	Doug Jones	Doug Jones	Email		Invalid email address format		
8	DMX mock source file.csv	Brett Kirtman	Brett Kirtman	Brett Kirtman	Email		Invalid email address format		
9	DMX mock source file.csv	Jen Taylor	Jen Taylor	Jen Taylor	Email		Invalid email address format		
10	DMX mock source file.csv	Amanda Douglas	Amanda Douglas	Amanda Douglas	Email		Invalid email address format		

A red arrow points to the 'Reason' column for row 6, which contains 'Invalid email address format'.

Step 8	<p>To continue, click Next</p>  <p>The screenshot shows the Marquis interface with the 'Email Recipients' step selected. A message indicates 'Final Processing for Auto Loan - 12-2021' and that the file is being processed. A green notification box in the bottom right corner displays the following information:</p> <ul style="list-style-type: none">File Validation Complete.File: DMX UX UI CSV file.Valid Records: 8Corrupt: 1Records: 1				
Step 9	<p>Click Schedule Launch. For more information, please refer to procedure DMX375 How to Schedule an Email Launch.</p>  <p>The screenshot shows the Marquis interface with the 'Email Recipients' step selected. A message indicates 'Data has already been uploaded for this campaign.' Below the message is a table with the following data:</p> <table border="1"><thead><tr><th>Filename</th><th>Number of Records</th></tr></thead><tbody><tr><td>DMX mock source file_4 real.csv</td><td>4</td></tr></tbody></table> <p>Buttons for 'Remove Data', 'Preview with Data', and 'Schedule Launch' are visible at the bottom of the interface.</p>	Filename	Number of Records	DMX mock source file_4 real.csv	4
Filename	Number of Records				
DMX mock source file_4 real.csv	4				