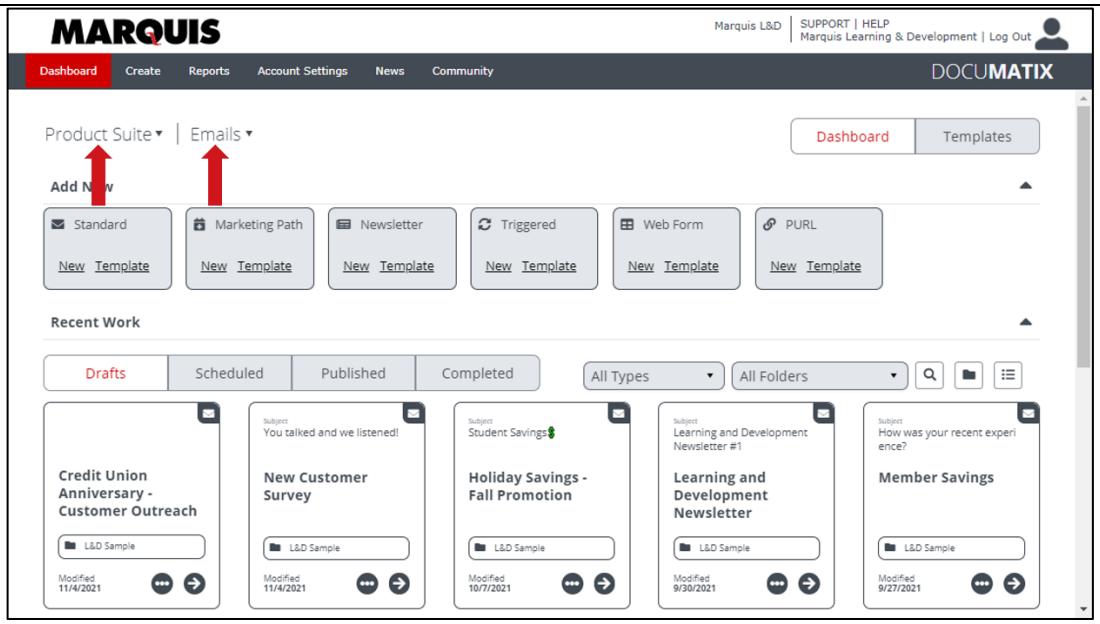
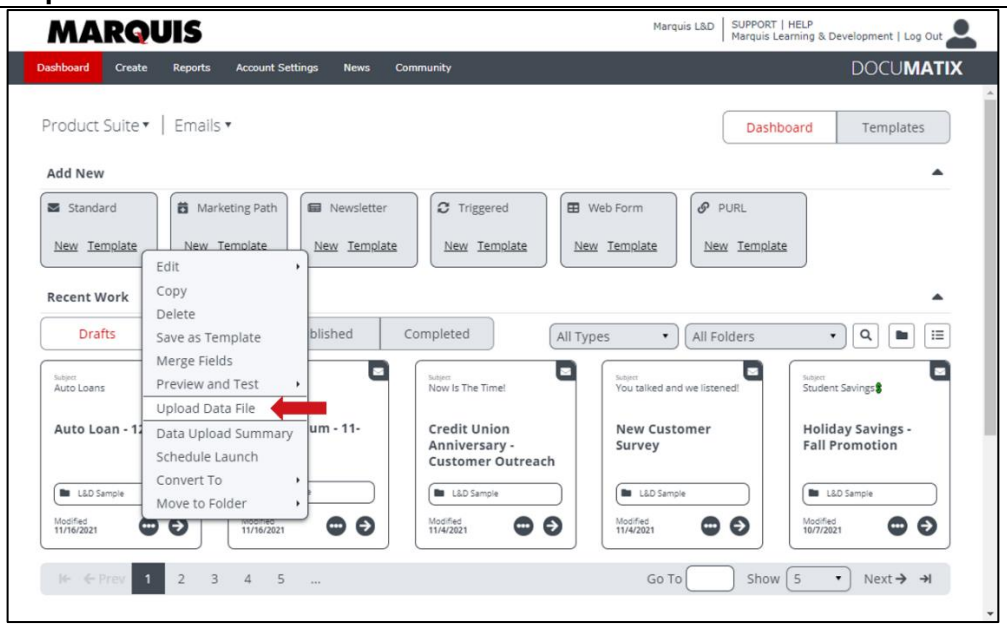
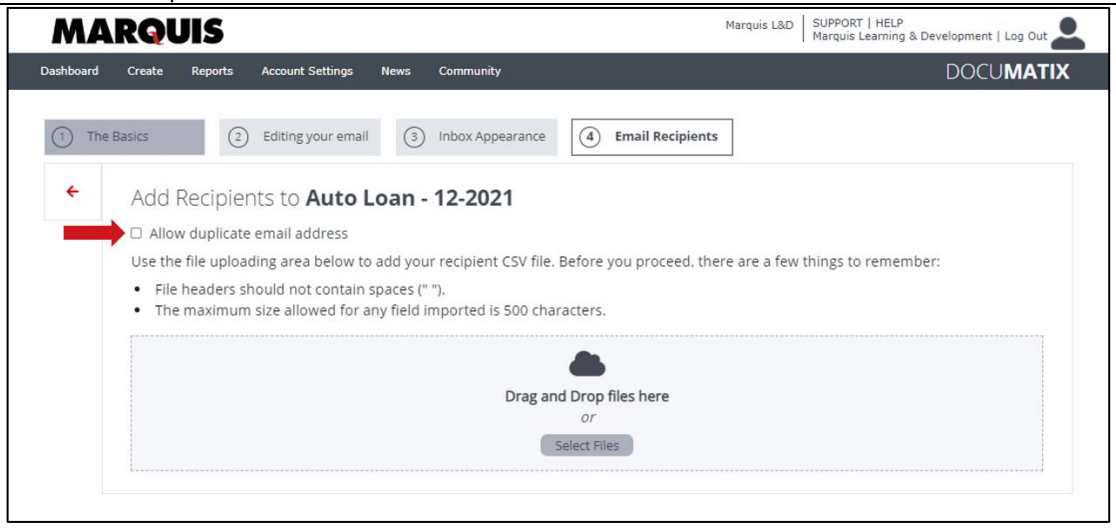
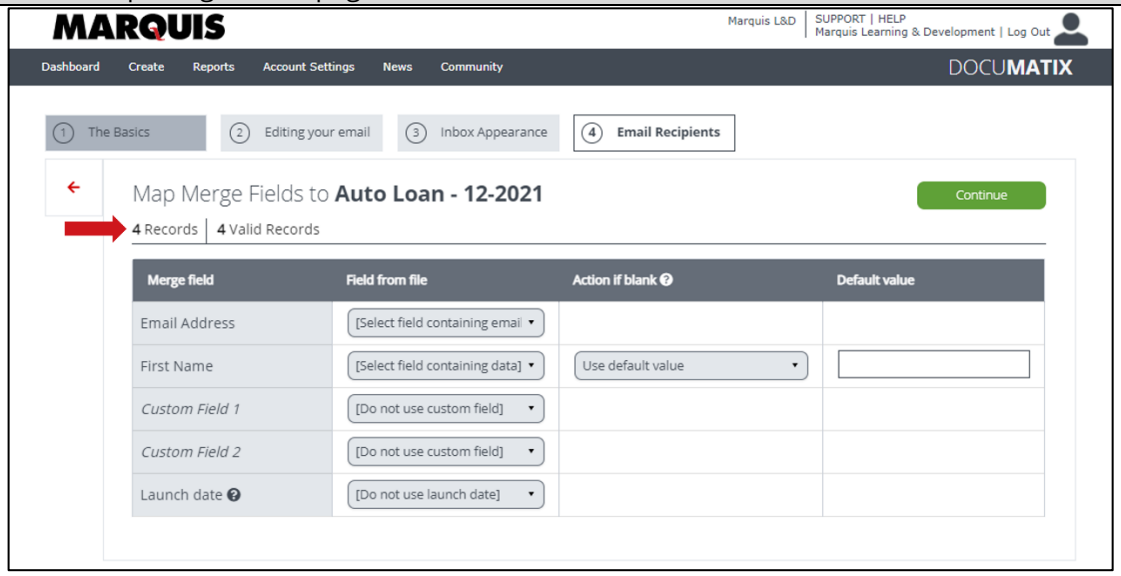
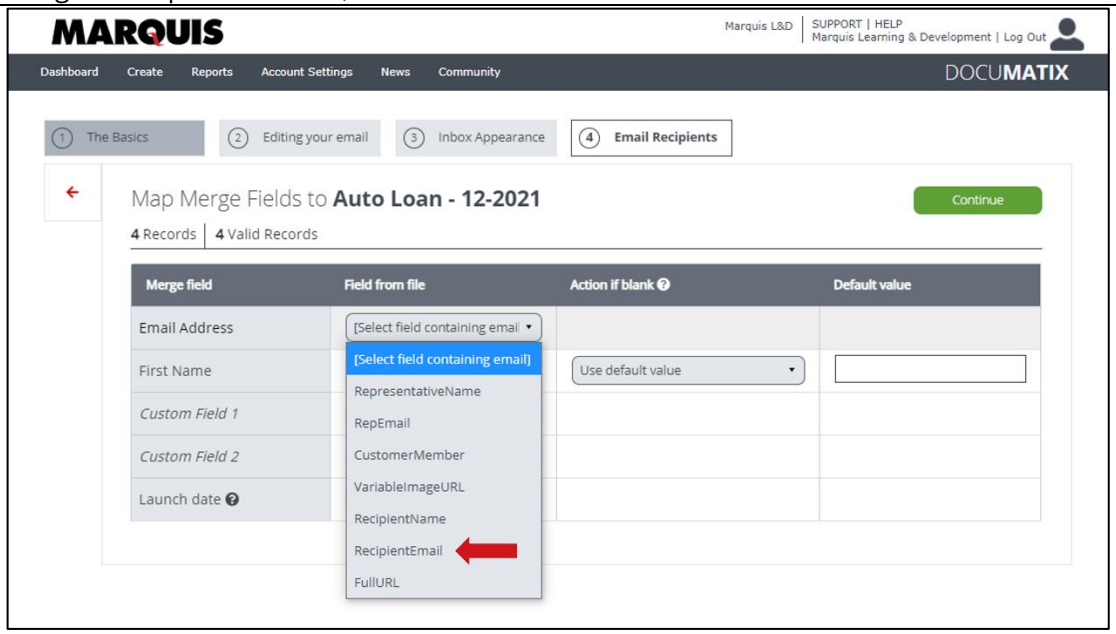
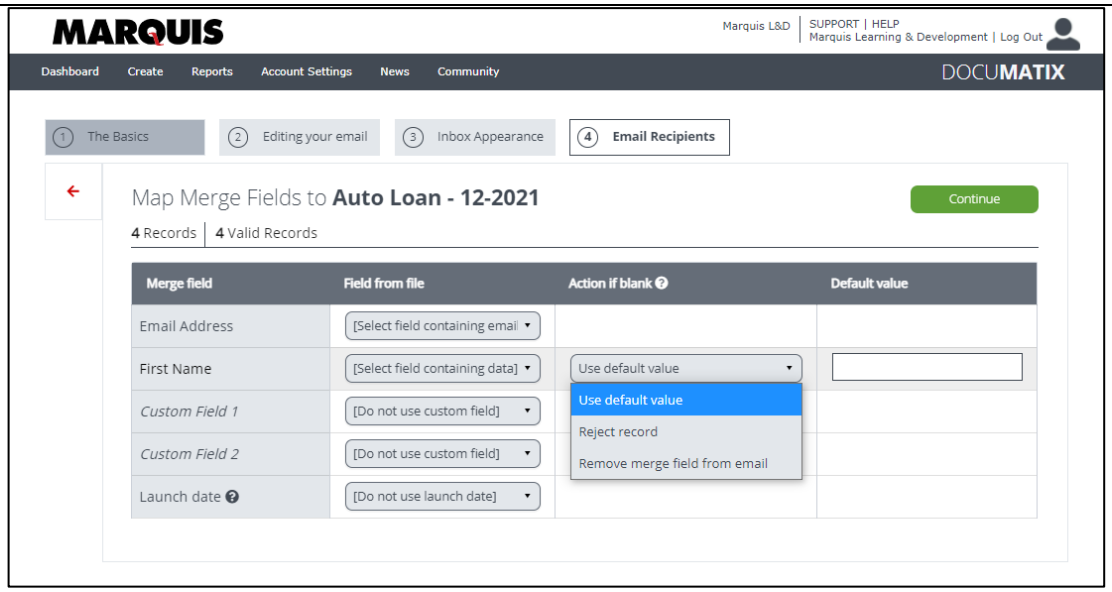
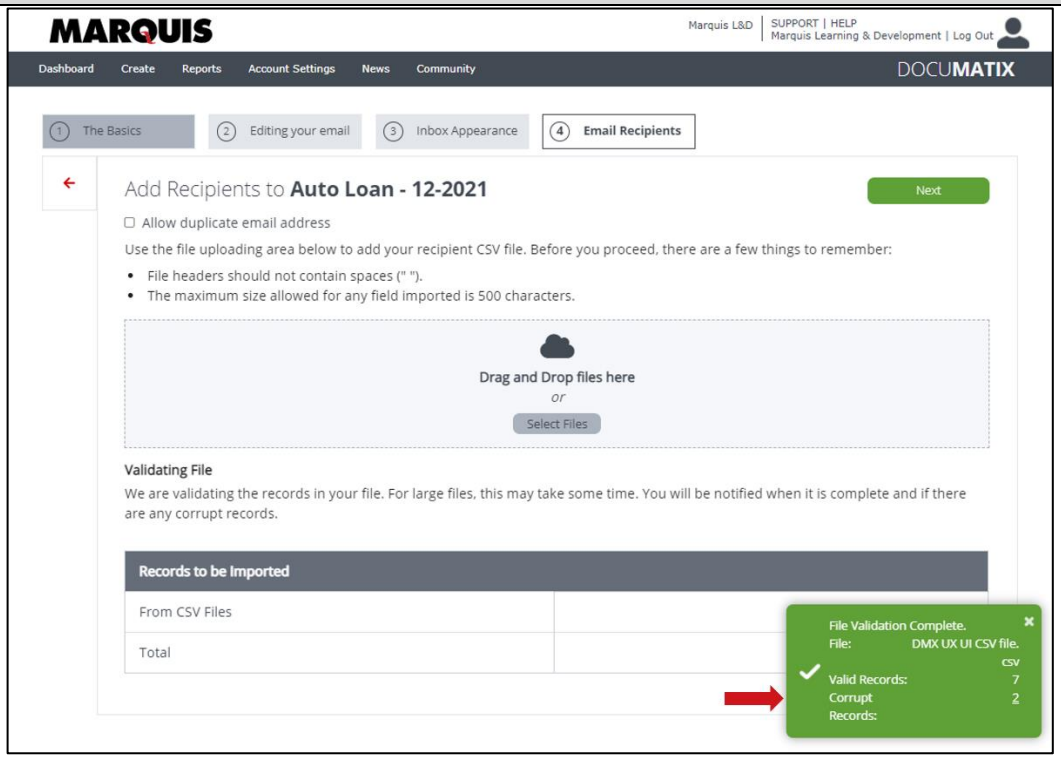
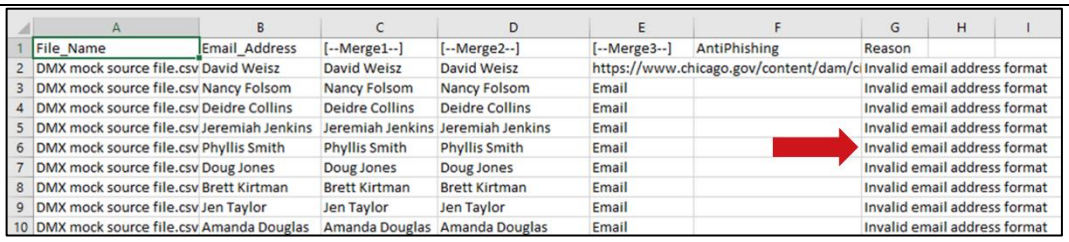
DMX374	How to Upload a CSV file
	Use this step-by-step process to upload a CSV file to an email once the merge fields have been established.
Order of Steps	**Tasks**
Note: Before completing these steps, merge fields must be set up. Refer to the procedure **Setting Up Merge Fields**, **DMX318** for this 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**
	

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

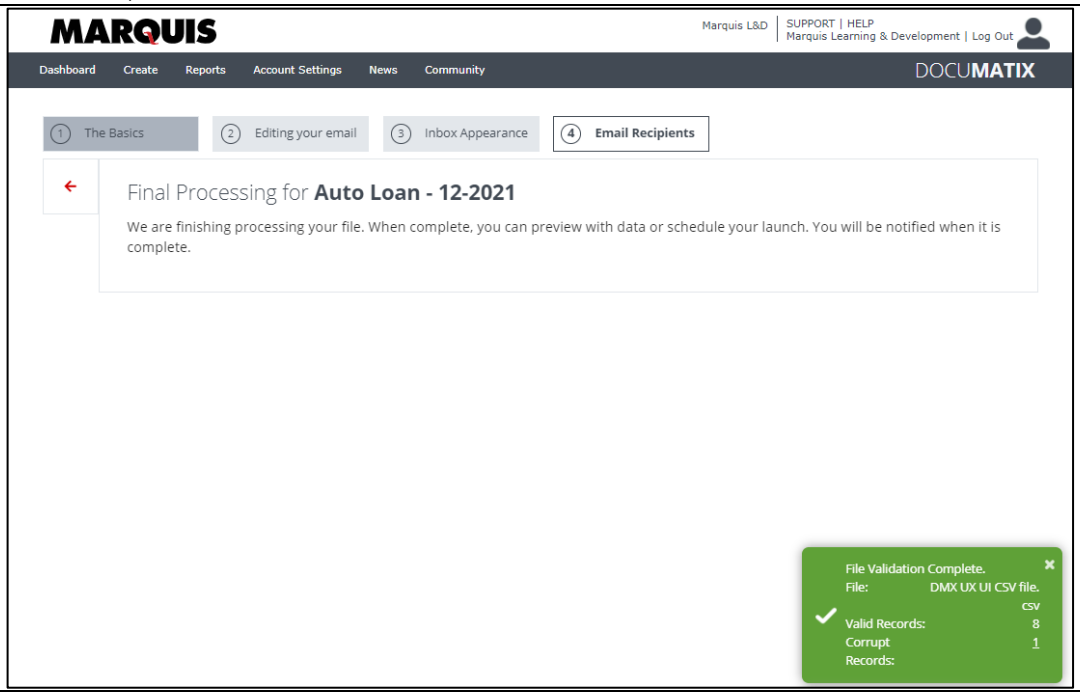
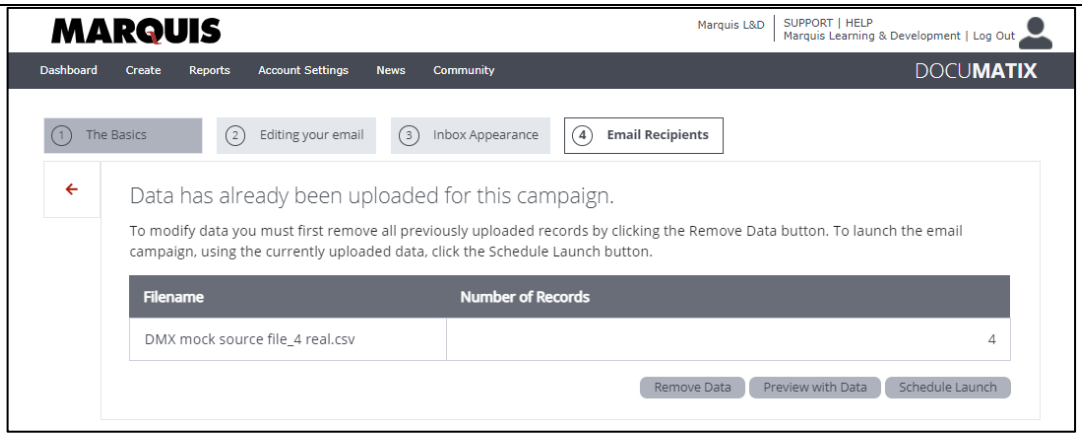
7.1	Using the drop-down arrow, select the **Email Address** from the list
	
7.2	Use the drop-down arrow to select the appropriate field for each required merge field
7.3	Use the drop-down arrow to select the desired Action if blank:
	• **Use default value**: The default value entered will be used in 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
	
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.	

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.	





	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		

Step 8	To continue, click **Next**
	
Step 9	Click **Schedule Launch**. For more information, please refer to procedure **DMX375 How to Schedule an Email Launch**.