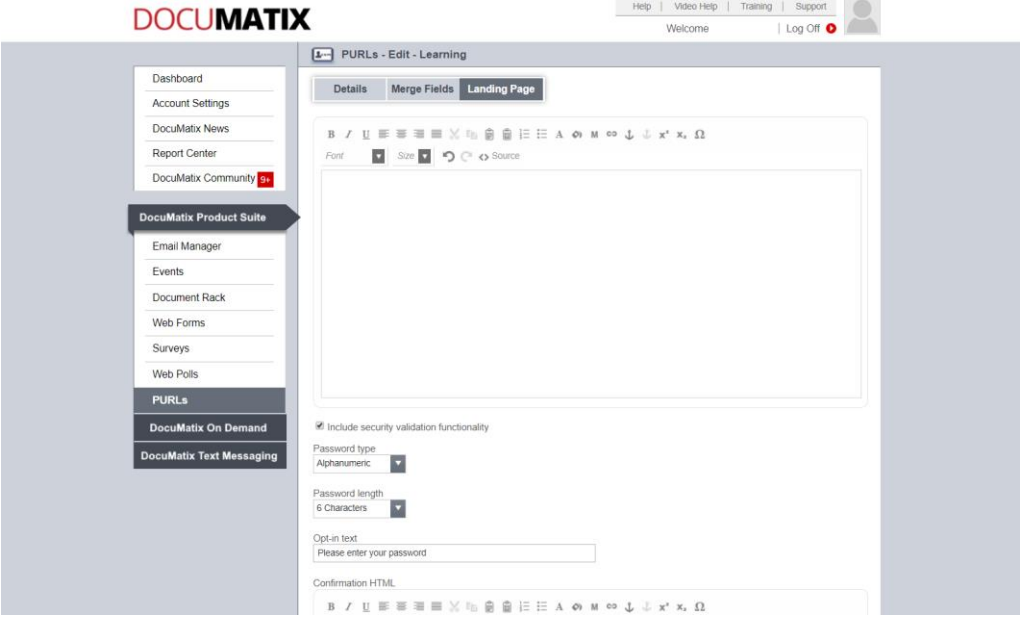


MARQUIS

DMX 340	Add a PURL
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Click on " PURLs " located in the menu on the hand left side of the page
Step 3	Click the green " Add New " button
Step 4	Complete the " Details " page
Note: Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.	
	<ul style="list-style-type: none"> • Name
	<ul style="list-style-type: none"> • Description (optional)
	<ul style="list-style-type: none"> • Place in folder (optional)
	<ul style="list-style-type: none"> • Sub-domain
	<ul style="list-style-type: none"> • Use Default (optional)
	<ul style="list-style-type: none"> • Campaign name
	<ul style="list-style-type: none"> • PURL Example
	<ul style="list-style-type: none"> • Expire notification email
	<ul style="list-style-type: none"> • Expire date
	<ul style="list-style-type: none"> • Expire type
	<ul style="list-style-type: none"> • Redirect URL or Expire message (based on Expire Type selection)
Step 5	Click " Next "
Step 6	Complete the " Merge Fields " page
Step 7	Click " Next "
Step 8	Update the Landing Page settings
Step 9	Check the " Include security validation functionality " (optional)
9.1	If selected, there will be additional security options to select

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	<ul style="list-style-type: none"> • Password type
	<ul style="list-style-type: none"> • Password length
	<ul style="list-style-type: none"> • Opt-in Text
	<ul style="list-style-type: none"> • Confirmation HTML
	
Step 10	Click “Finish”
Step 11	Click on the PURL and click “Publish”
Step 12	Drag and drop the CSV data file into the box OR click the box to browse out and select the file
Step 13	Click “Next”
Step 14	Complete the “Publish PURL” page
	<ul style="list-style-type: none"> • PURL Identifier
	<ul style="list-style-type: none"> • Email Address
	<ul style="list-style-type: none"> • Custom Fields (optional)
	<ul style="list-style-type: none"> • Merge Fields
	<ul style="list-style-type: none"> • Notification Email Address

MARQUIS

Publish PURL

Import Records
 Total records to import: (4652)
 Please select the field containing the email addresses.
 If you used any merge fields throughout your PURL HTML then please map those fields to the fields containing the data in your uploaded file. If you would also like to send the PURL link in an email message then be sure to include email addresses for those individuals.

PURL Identifier
 PURL ID [Select Field Containing PURL IDs]

Email Address
 Email Address [Select Field Containing Email Address]

Custom Fields (optional)
 Custom Field 1 [Do Not Use Custom Field]
 Custom Field 2 [Do Not Use Custom Field]

Anti-Phishing Field
 Anti-Phishing Field (Last 3 of SSN) [Select Field Containing AntiP...]

Merge Fields
 First Name [Select Field Containing Data]
 Last Name [Select Field Containing Data]
 Pre-approved Amount [Select Field Containing Data]
 Loan Rate [Select Field Containing Data]
 Last 4 of Member # [Select Field Containing Data]

Notification Email Address

Step 15 Click "Next"
 A **Summary** page will appear with the **Imported** records, **Duplicate** record totals and **Corrupt** records.

Step 16 Click "X" to get back to the PURLs page

Publish PURL

Summary
 Below is a summary of the records that were imported:

Imported Records	
Total	0

Rejected records	
Duplicate	0
Corrupt	4652 (csv xls xlsx)