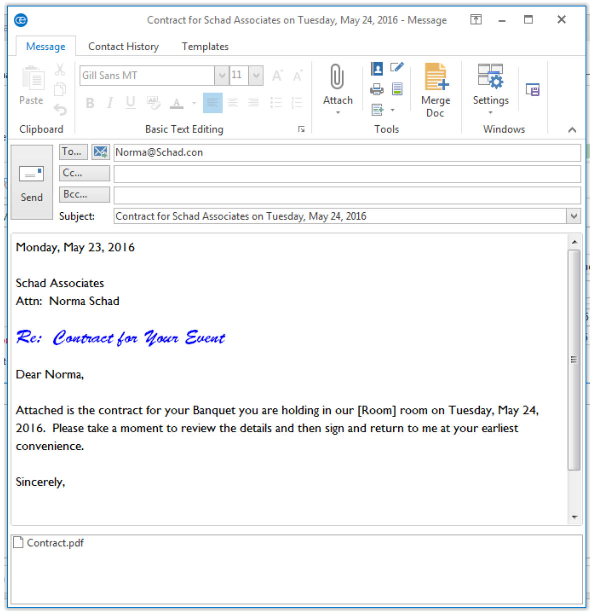
E-mail a Custom Merge Document

1. Open **Event Manager** on the specific event from which you want to e-mail a document.
2. Click the **E-mail** button, located at the top of the screen.
3. Click the **Attach** button and select any prints or files you would like to attach to the e-mail.
4. Select the title of the document(s) you want to e-mail.
5. Type or select the e-mail Subject.
6. Type the body of the e-mail or select a custom merge document.
7. Click **Send**.



See Sending Email from Event Manager
See Sending Email from Account Manager

Additional Resources

Inserting a Hyperlink into a Document
Inserting a Page Break or Page Number/Count
Creating a New Merge Formula
Setting a Paper Color
Using Formatted Date Fields
Adjusting Page Size, Margins, and Orientation

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Quick Reference Guide

Marketing Tools

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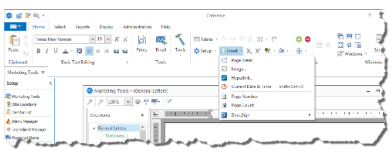
Add a New Merge Document

1. Click the **Marketing Tools** button from the **Setup** sidebar.
2. Click the **Add Record** button , located in the **Home** ribbon tab, towards the top right-hand side of the screen.
3. Click **Yes** at the confirmation prompt.
4. Type your new document's name into the field, and then press **[Enter].**

See Adding New Merge Documents

Insert Images or Logos

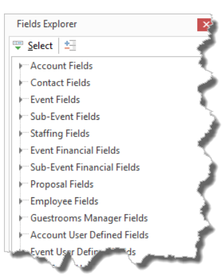
1. Click into the body of a Marketing Tools document.
2. Click the **Insert** button , located on the **Home** ribbon tab, and choose **Image.**
3. Browse to the file location.
4. Double-click to insert the image.



See Inserting Images into a Merge Document

Add Merge Fields

1. Click into the body of a Marketing Tools document.
2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your screen, and choose **Insert Fields** .
3. Click the arrow to the left of a category to expand the field.
4. Select the desired field, inserting it before or after any typed text, by double-clicking on the field.
5. Click **Close.**

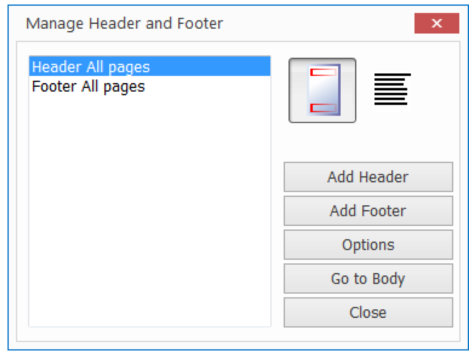


See Inserting Dynamic Merge Fields

Create Headers and Footers

1. Click into the body of a Marketing Tools document.
2. From the **Home** ribbon tab, click **Setup** > **Headers & Footers.**
3. Choose **Add Header** or **Add Footer.**
4. Select which pages to include.
5. Type the header/footer text and format as desired.
6. Click **Options** > **Save Text** to save for future use.
7. Click **Close.**

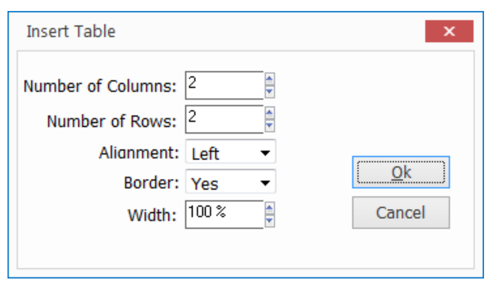
Note: *It is common to insert images into Headers/Footers.*



See Adding a Header or Footer

Insert a Table

1. Click into the body of the Marketing Tools document, where you would like to add a table.
2. From the **Home** ribbon tab, click **Tables** > **Create Table.**
3. Set the number of columns and rows.
4. Align on the right, left, or in the center.
5. Choose whether or not to have borders around the table's cells.
6. Choose the Width parameters.
7. Click **OK**.



See Inserting a Table

Tables help organize a document and arrange details.

Insert a Merge Table

1. Click into the body of the Marketing Tools document, where you would like to insert your table.
2. From the **Home** ribbon tab, click **Tools** > **Insert Merge Tables**.
3. Select a merge table from the drop-down list.
4. Select the merge table details by clicking into the checkboxes of the fields you would like to display.
5. **[Optional]** Choose to filter the results by selecting the appropriate filter option.
6. **[Optional]** Click into the Add Summary Row checkbox to insert a summary column at the bottom of the table.
7. Click **OK.**

See Inserting a Merge Table

Insert dynamic merge tables into a document to include such details as menu items, staffing, payments, etc.

Print a Merge Document from Event Manager

1. Open **Event Manager** on the specific event from which you want to print a document.
2. Click the **Merge Documents** button , located in the toolbar at the bottom of the screen.
3. Select the title of the document.
4. Click the **Print** button to generate a Print Preview.
5. Click the **Print** button at the top of the Print Preview.

Use a Merge Document as an E-mail Message

1. Open Event Manager on the specific event from which you want to e-mail a merge letter.
2. Click the **Merge Documents** button , located at the bottom of the Event Manager screen.
3. Select (highlight) the title of the merge letter you want to e-mail, and then click the **Email** button.
4. Type or select the e-mail Subject.
5. Click **Send.**

See: Sending Email from Event Manager