Creating Custom Merge Documents
Class Syllabus

Topics Covered:

I. Accessing the Marketing Tools Package
II. Adding a New Document
  A. Entering a Title for a New Document
  B. Adding a Document as a Sub-Record
  C. Inserting Images into a Document
  D. Changing the Attach Mode of an Image
III. Typing the Body of a Letter
  A. Adding Merge Fields to a Document
  B. Advanced Merge Field Options
IV. Creating Headers and Footers
V. Inserting a Table into a Document
  A. Adding Columns or Rows
  B. Modifying a Table
  C. Adding Color to a Row, Column, or Cell
  D. Adding Background Color to Text
  E. Inserting Merge Formulas
  F. Setting up the Merge Formula Default
  G. Establishing Conditions for a Formula
  H. Inserting Merge Formulas into a Document
  I. Inserting a Hyperlink
  J. Inserting a Page Break
VI. Changing the Page Setup of the Document
  A. Adjusting Page Margins
  B. Switching to Landscape Orientation
VII. Creating Custom Merge Envelopes
VIII. Inserting a Merge Table into a Document
  A. Establishing Display Options
  B. Establishing Filter Options
  C. Modifying a Merge Table
  D. Working with Nested Merge Tables
IX. Printing and E-mailing Merge Documents
  A. Making a One-Time Modification to a Document
  B. Using the Floating Print Selection Tool
  C. E-mailing a Merge Document
  D. Using a Merge Document as the Body of an E-mail
  E. Copying Sent E-mails into Contact Manager
  F. Generating E-mails from Event Manager
X. Printing a Document from Account Manager
  A. Picking an Event for Merge Documents
XI. Printing Documents for a Batch of Events
XII. Emailing Documents for a Batch of Events
XIII. Q & A