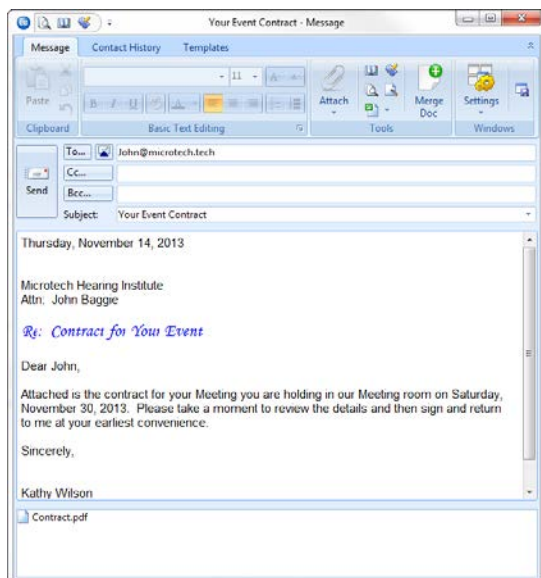## E-mail a Custom Merge Document

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 Including Attachments.

Additional Resources

Inserting a Hyperlink into a Document
Inserting a Page Break or Page Number/Count
Creating a New Merge Formula
Creating Custom Merge Documents User Manual

catering & event management software

a product of
Horizon Business Services, Inc.
Naples, FL 34102
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help@caterease.com

catering & event management software

Quick Reference Guide:
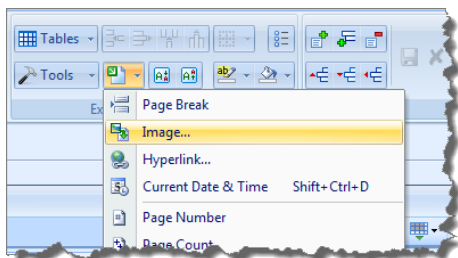
Marketing Tools

800.863.1616
www.caterease.com

Add a New Merge Document

1. Click the **Marketing Tools** button from the **Setup** sidebar.
2. Click the **Add Record** button, located 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 a New Document or Envelope.

Insert Images or Logos

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

See *Inserting an Image into a Document.*

Add Merge Fields

1. Click into the document.
2. Click the **Insert Merge Fields** button, located at the top of the Marketing Tools window.
3. Click the plus sign 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.
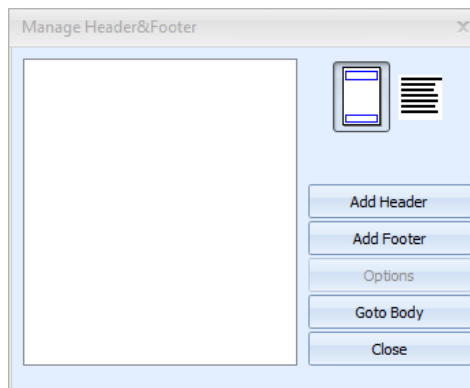5. Click **Close.**
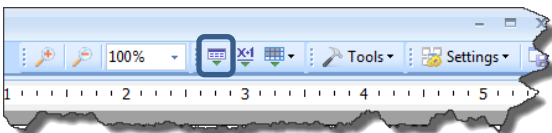
See *Inserting Dynamic Merge Fields.*

Create Headers and Footers

1. Click **Tools** > **Headers & Footers.**
2. Choose **Add Header** or **Add Footer.**
3. Select which pages to include.
4. Type the header/footer text and format as desired.
5. Click **Options** > **Save Text** to save for future use.
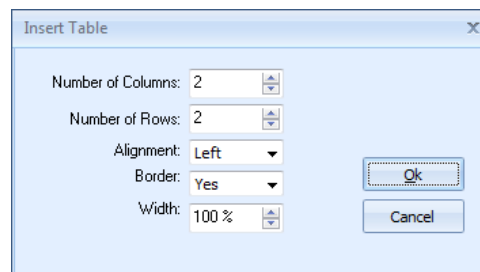6. Click **Close.**
   Note: It is common to insert images into Headers/Footers.

See *Adding a Header or Footer.*

Insert a Table

1. Click into the document.
2. 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 into a Document.*

Tables help organize a document and arrange details.

Insert a Merge Table

1. Click into the area of the document where you would like to insert your table.
2. Click the **Insert Merge Table** button, located toward the top of the window.
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 into a Document.

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.

See Printing a Custom Merge Document.

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 Using Custom Merge Letters as the Email Body.