

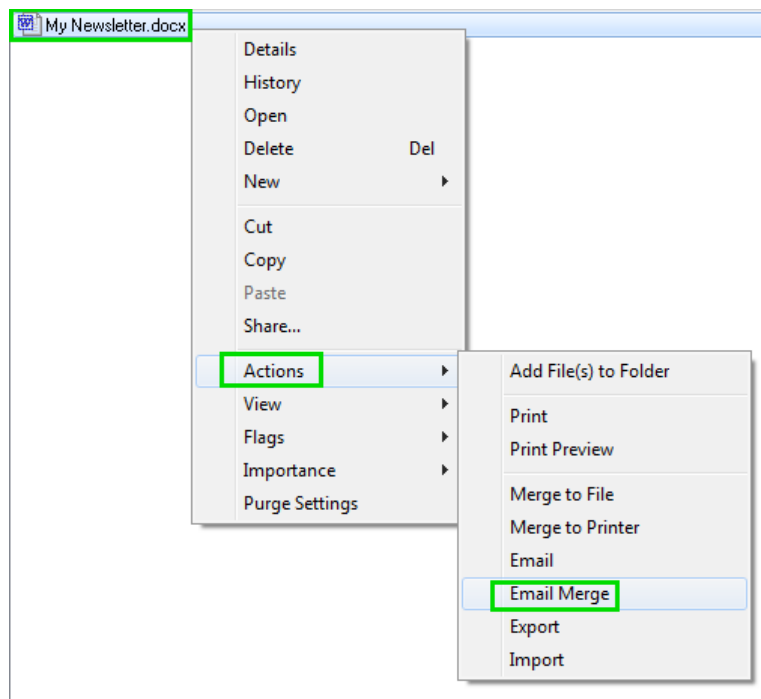
Email Merge: Attaching Documents and Adding Text

Attaching extra documents and adding text when doing email merges

When performing an email merge you have the ability to attach extra documents and add text to the body of the email.

Document Manager needs a "**Microsoft Word Merge**" document to generate the email merge. The extra document(s) and text can then be added during email merge process.

1. Create a **Word Merge** document, with at least one merge field, in the normal manner.
2. Right-click the Merge Document, point to **Actions** and click **Email Merge**.



3. In the **Print Documents for** window, complete the fields and click **OK**.
4. In the **Confirm Client Email** window, you can add the additional document and / or text.
5. Once the **Confirm Client Email** window is completed, click **OK**.

Confirm Client Email

Email Merge Options

Merge file name: Newsletter One View final report

Create Email Out events in Practice Manager - Contact Link merged documents to client folders

Description for Practice Manager - Contact: Newsletter One sent to client

Email Details

Subject: Email merge from Document Manager Body: To view Newsletter One open the attached pdf.

Attachments: My Newsletter One.pdf

John Smith
Your Accountant

Ref	Email Address
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Attachments: Add your additional attachments here.

Body: Add your additional Text here.

Notes

- If you are using the facility to send out a newsletter in a PDF format, use just the reference as a merge field in your Word Document and then, in the Body of the email, tell the client to open the PDF or the other attachment for the Newsletter
- The Merge file name will appear as the subject line of the email, and can be edited in the **Confirm Client Email** window, in the **Merge file name** field.