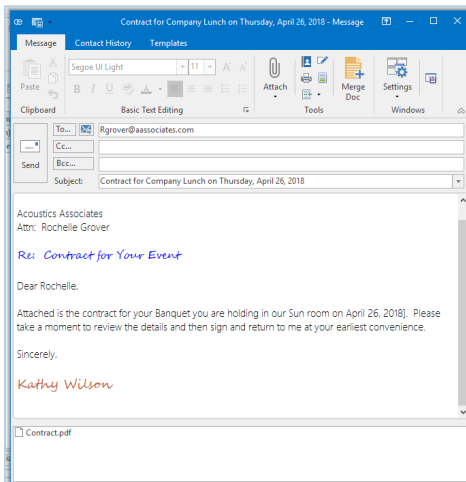


E-mail a Custom Merge Document

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](#)

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](#)



a product of
Horizon Business Services, Inc.
Naples, FL 34102
T: 239.261.6617
F: 239.261.0067
www.caterease.com
help@caterease.com




Quick Reference Guide:

Document Builder

800.863.1616
www.caterease.com




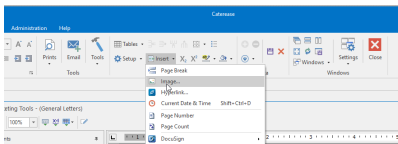
Add a New Merge Document

1. Click the **Marketing Tools** button from the **Setup** sidebar.
2. Click the **Add Record** button , located 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

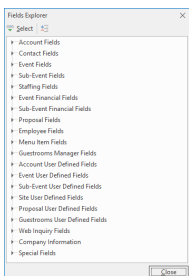
1. Click into the body of a Marketing Tools document.
2. Click the **Insert** button , located on the **Home** ribbon tab, and choose **Image**.
3. Browse to the file location.
4. Double-click to insert the image.



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, 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**.

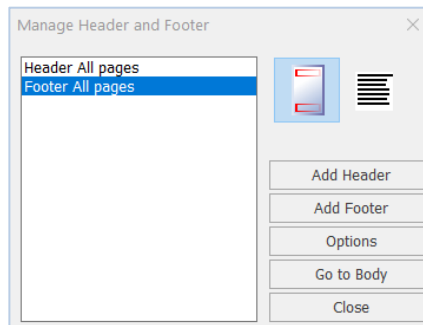


See [Inserting Dynamic Merge Fields](#)

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**.

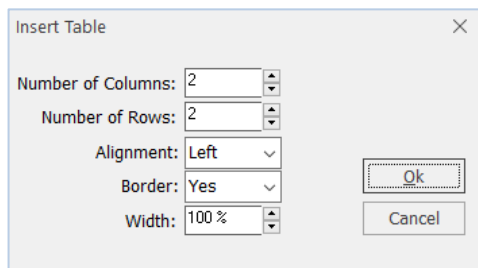
Note: It is common to insert images into Headers/Footers.



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 > Insert Table**.
3. Set the number of columns and rows.
4. Align on the right, left, or in the center.
5. Choose if you want 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 food/service 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 Marketing Tools document.
2. Click the **Merge Documents** button , located in the toolbar on the right-hand side 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 in the toolbar on the right-hand side 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](#)