

Creating Custom Merge Documents Class Syllabus

Topics Covered:

- I. Creating New Merge Documents
 - A. Adding a New Document or Envelope
 - B. Inserting Dynamic Merge Fields
 - C. Inserting Images into a Merge Document
 - D. Changing the Attach Mode of an Image
 - E. Using Formatted Date Fields
 - F. Using the Basic Text Editing Tools

- II. Creating Headers and Footers in a Document
 - A. Adding a Header or Footer
 - B. Saving a Header or Footer to Use in Another Document
 - C. Loading a Previously Saved Header or Footer
 - D. Deleting a Header or Footer

- III. 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

- IV. Changing the Page Setup of the Document
 - A. Adjusting Page Margins
 - B. Switching to Landscape Orientation

- V. Creating Custom Merge Envelopes

- VI. 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

- VII. 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

VIII. Q & A