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