

Attaching a Specific Document to Your Outgoing Email Campaigns:

WorkCenterU CRM users can add a specific document to their outgoing email marketing campaigns or single emails. This is accomplished by creating a mail merge field link in your library document referring to the location and name of said document you wish attached to your outgoing emails.

For this example, we have decided to attach a specific PDF marketing flyer to a selected email document in our library. Every time we select this document and email it to a contact record, the PDF file will automatically be attached. This will work for a single emails or if you have this selected email document in an action plan.

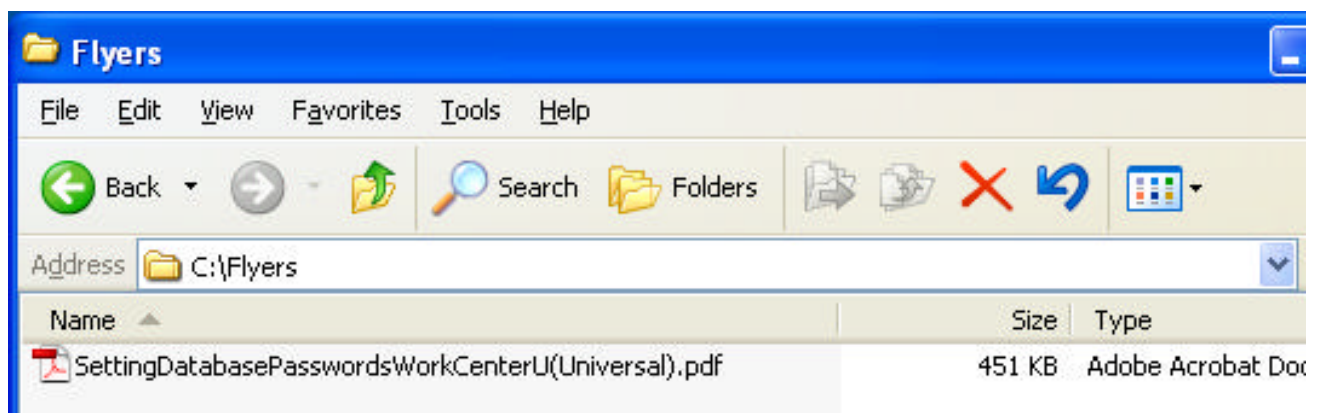
The name of the document that we will be attaching to this email is:

Setting Database Passwords – WorkCenterU (Universal).pdf

Step#1: We suggest that you eliminate all spaces in your document by renaming your document. To do this, right click on the actual document and select “Rename”. Once you have renamed your document, it will now look like this:

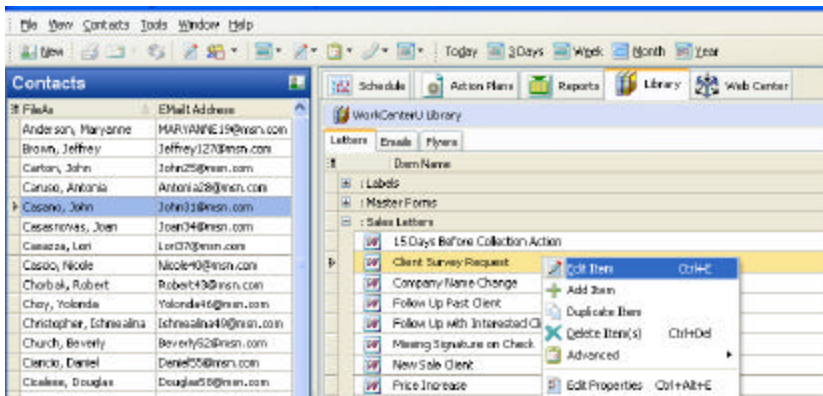
SettingDatabasePasswordsWorkCenterU(Universal).pdf

Step#2: We recommend that you copy this document into a folder that has only a single name. This process along with step #1 will reduce your chances of a typing error when creating your document link. For this example, we will create a folder named “C:\Flyers folder”. Once that has been completed, copy the file into this folder.



Step#3: We will now need to open the document that you wish to attach this PDF form to when emailing. For our example, we will open the “Client Service Request Form” by going to our library tab and click the “+” next to “Sales Letters”. We will now need to get the form in an “Edit Mode” so we can create the link attaching the PDF document to this library form.

We will now need to right click on the selected form (for this example the form will be “Client Survey Request”) and then select “Edit Item”.



The document will open and you will notice mail merge fields with red marks around them. We will go to the bottom of the document and create our link. Type the following:

<C:\Flyers\SettingDatabasePasswordsWorkCenterU(Universal).pdf, asAttachment>

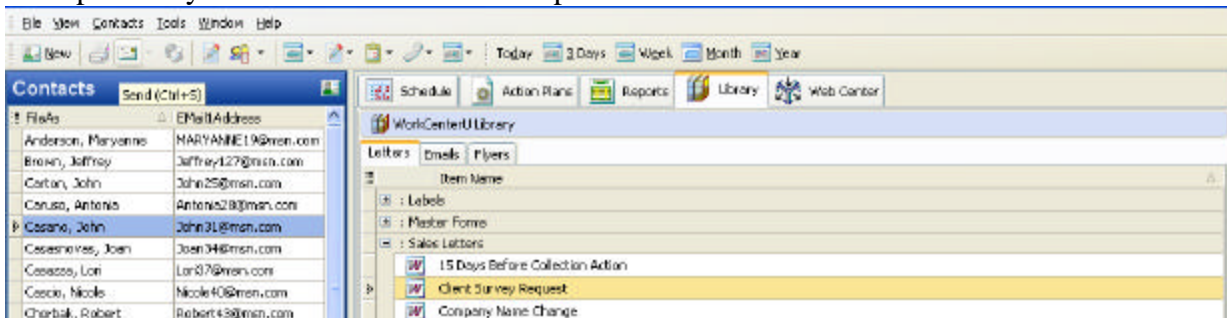
(Please notice the < > brackets around the file name & the space between the , and “as”.



Save the edits in the library by clicking on the save icon located at the top of the document ().

Step#4: Test your library document making sure the attachment fixes to the outgoing email. Select a contact record, click on the library document and then click on the “Send” icon. The icon is located at

the top left of your screen view next to the printer icon



WorkCenterU will now open your Outlook and attach the document to your outgoing email as displayed below.

