

Book'em! Email Attachments

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General Info and Overview

As of version 4.5, documents saved on your computer's hard drive may be attached to confirmation and mail merge letters that are sent as email. Examples of documents that you may want to attach are contracts, release forms, maps, pictures, etc.

Document Format and Compatibility

In this usage, the words "document" and "file" are synonymous, and "type" and "format" are synonymous.

It's important that the person you're sending the email to is able to open and view or print the attached document(s). In most cases you won't know what software the recipient has or even what kind of computer they use. Many programs create documents in proprietary formats; the files can only be opened by the program that created them. Unless your goal is to frustrate and anger your customers you must avoid sending documents in proprietary formats.

Also, it's a good idea to use commonly-used fonts such as Times or Helvetica. If your document contains fonts the recipient doesn't have, appearance will be unpredictable.

Some examples of formats that all but the oldest computers should be able to open are .jpg (JPEG picture), .txt (plain text file), .htm (HTML file, which may be opened with a web browser), and .pdf (Portable Document Format - which is opened with the free and now nearly ubiquitous Adobe Acrobat Reader.)

The beauty of an Acrobat document is that it can be created by any program that can print. It can contain pictures and text and will retain its original look regardless of the recipient's computer platform, software, and fonts. The full version of Acrobat, which is used to generate the documents, costs a few hundred dollars and is probably not worth it if you just want to attach a few standard forms. Some copy shops (Kinko's, etc.) will convert your documents to .pdf for a reasonable charge, and Kinko's rental computers have full version Acrobat installed.

File Extensions

On Windows computers the document format is indicated by a 3-character extension following a period. For example, the extension ".doc" indicates that the file Greetings.doc is a Microsoft Word document. (While many computers have MS Word or programs that can open Word documents, many do not, and this is *not* a good choice of format.) The extension tells the operating system what program to use when a user opens a document. Even though the Macintosh operating system doesn't require extensions, Book'em! does. This is to ensure that your Windows-using customers will be able to open them.

File Size

Even if you have a very fast broadband internet connection, remember that some of your customers have a slow dialup and receiving large attachments may be a burden. When creating the documents you intend to attach to emails, keep the files as small as possible. Anything under 50 K should be fine. The Stored Document Manager displays the size of each document.

Test Your Files!

It's recommended that you test any documents you intend to attach to emails to customers. Arrange to send copies to friends with computer environments different than yours, and ask them how the files look. Outside Technology will check your attachments for compatibility if you let us know in advance that they're coming. Send to support@outsidetech.com.

Receipt is Not Assured!

Please be aware that despite your best efforts, some recipients may not receive the attachments you send due to issues on their end. Their email or antivirus software may be set to block attachments. Also, some web mail systems do not support attachments.

Document Management

When sending an email, you may select a document from disk and attach it to that email. But since it's likely you'll want to attach the same document(s) every time you send a certain email (a release form with a specific confirmation letter, for example), Book'em! also allows you to attach documents to letter templates. Once a document has been attached to a letter template it will be available to attach to any other letter or letter template.

The documents are stored inside the datafile. In a client/server system the same document is available to all workstations and doesn't have to exist as a disk file on the local computer. If the original disk file is modified, the changes will *not* be reflected in the stored attachment unless the modified document is re-added to the database.

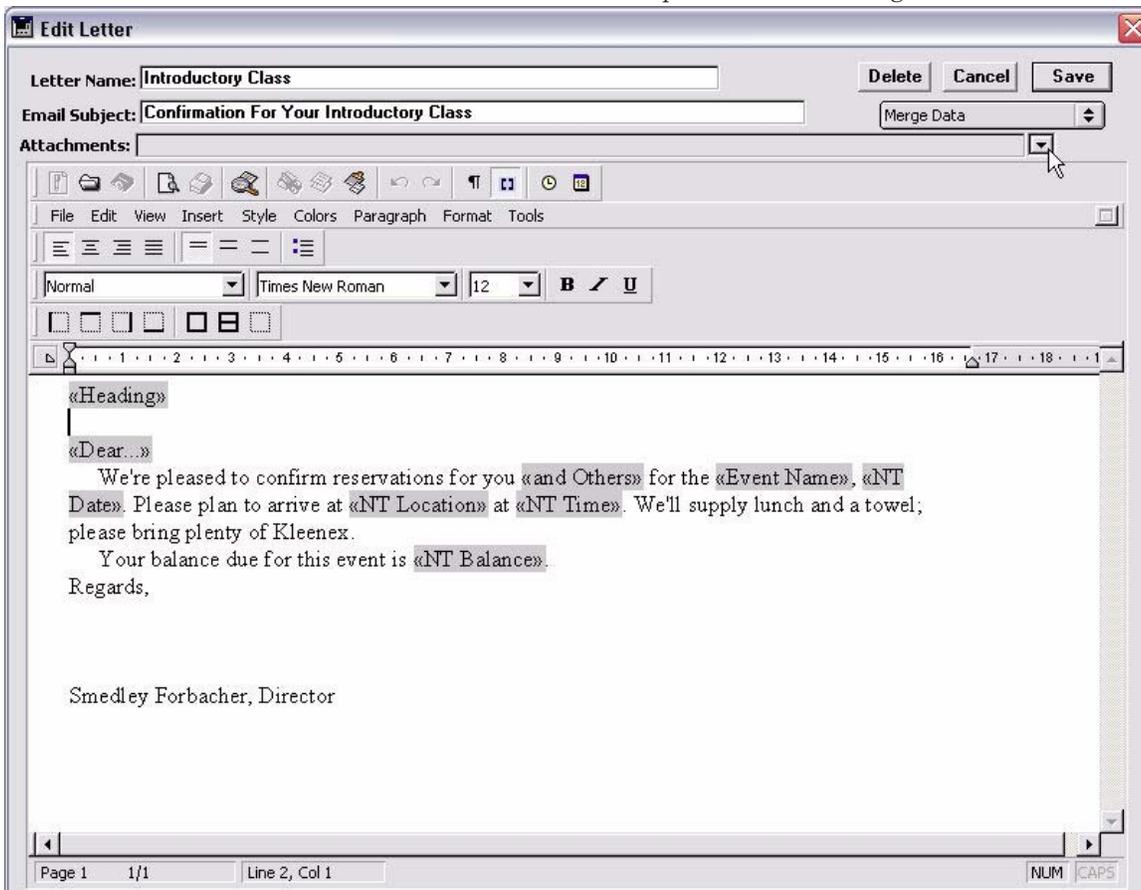
Assigning to Letter Templates

When you assign documents to a letter template, they will be attached every time you send an email based on that template (unless you remove it at the time of sending.) Also, the documents are stored internally and will be available to add to other templates or emails.

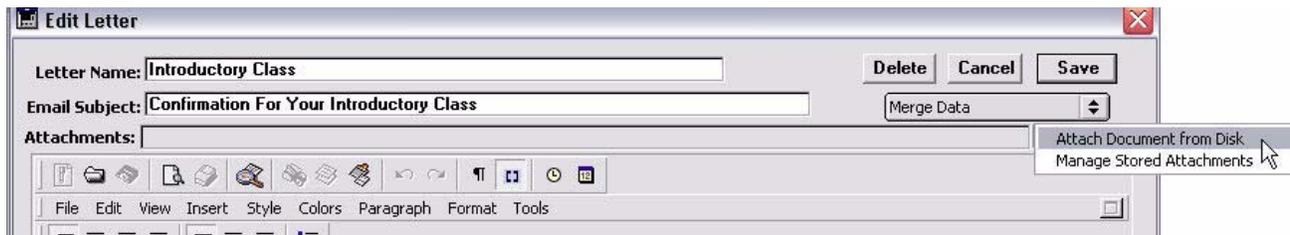
If you attach a document to an email before sending it is attached only to that single email and is not stored internally.

Adding New Documents

Open a letter template from an Event Master or the Mail Merge section of one of the people databases (Customers, Staff, Contacts). Notice the Attachments Bar (3rd line), and the dropdown menu on its right side.

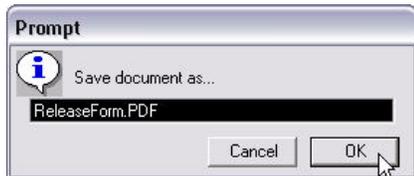
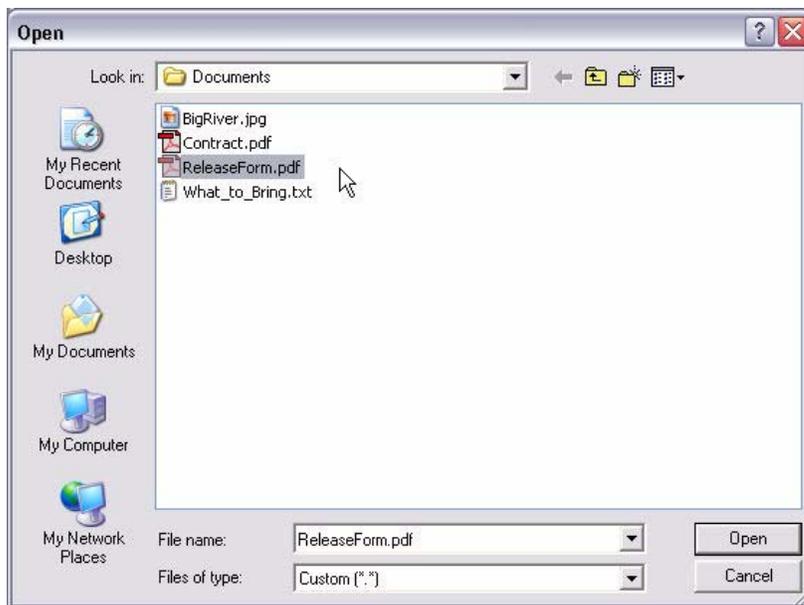


If there are no documents stored in the database the dropdown menu looks like this:

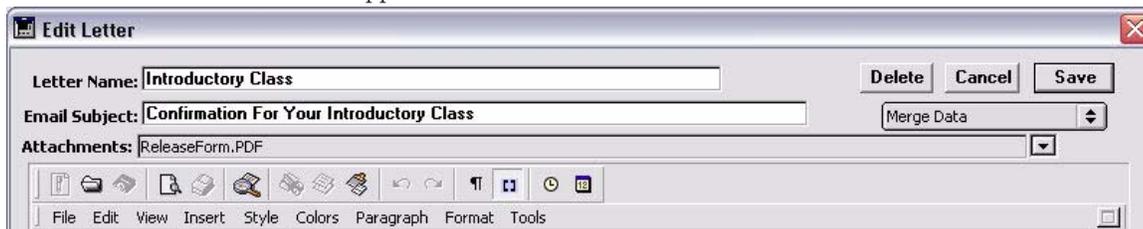


Select Attach Document from Disk and select the document to attach:

Click Open and choose the name that the document will be stored as. The name does not have to be the same as the disk file name, although that is offered as the default. The name *must* end with a 3-character file extension (see See “File Extensions” on page 1.)

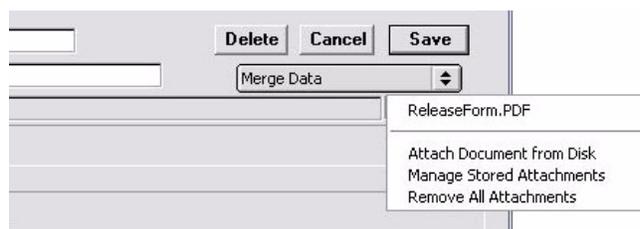


The name of the document now appears in the Attachment Bar:



Assigning Stored Documents to Templates

Once a document has been stored, its name appears in the dropdown menu, and it may be added to any other letter template:

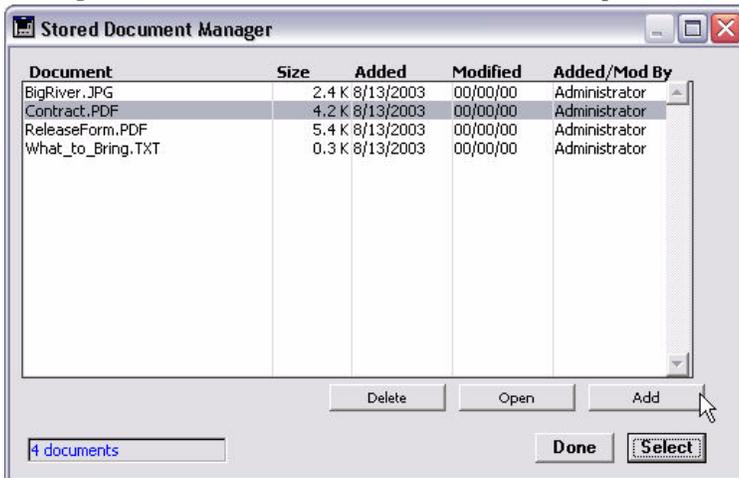


Modifying Stored Attachments

Book'em! does not allow Stored Documents to have duplicate names. If you choose the "Attach Document From Disk" command and save the file with a name that's already in the database, the existing document will be replaced. The selected disk file name doesn't matter; it's the name you give the document when you add it to Book'em!.

There are two ways to approach this:

- If the master document stored on disk has been modified, simply re-add it to Book'em! using the same name it's currently stored as.
- If you don't have an updated document on disk and want to modify the one that's stored in the Book'em! datafile, select "Manage Stored Documents" from the Attachments dropdown menu. The Stored Documents Manager opens.



Select the document to be modified and click the Open button. The document is opened by the program that created it (assuming the program exists on the current computer.)

Make any desired changes, save them, and close the document. *The document must be closed before it can be reloaded back into Book'em!*

The modified document is now on disk, in the Attachments folder in your Book'em! folder. If you want to keep a copy on disk, move it from Book'em!'s Attachments folder elsewhere on your drive, since that folder is deleted when Book'em! quits.

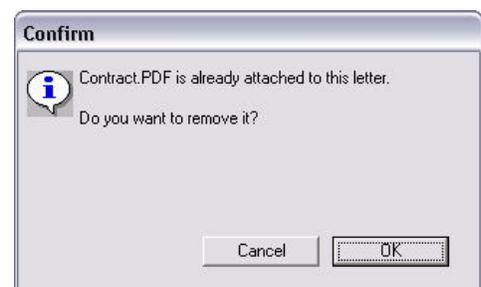
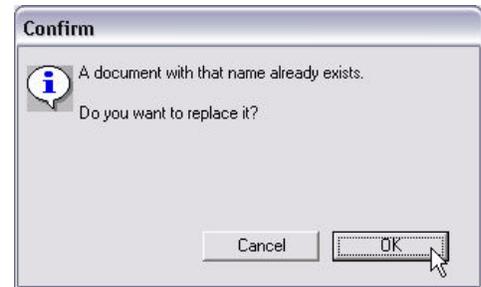
Click the Add button, navigate to the Attachments folder inside the Book'em! folder, and select the document. Keep the same name and confirm the Replace dialog.

The new version of the document will now have replaced the old one for all templates it was assigned to, and for all users of the database.

Removing and Deleting Attachments

If a document is attached to a letter template and you want to remove it from the template, select it from the dropdown. Confirm the Do You Want to Remove It dialog, and it will be.

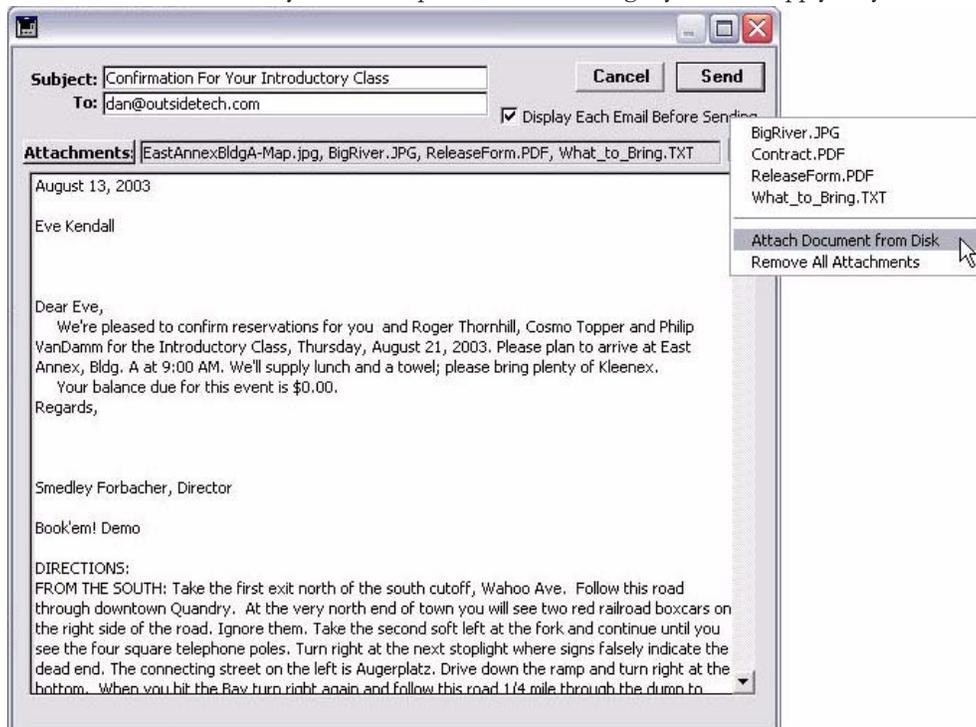
If you want to delete a document from the system, open the Stored Document Manager. Select the document and click Delete. The document will be completely deleted and all of its assignments to letter templates will be cleared.



Sending

When sending confirmations or mail merge letters, if the 'Display Each Email Before Sending' checkbox is not marked, all documents assigned to the template will be attached. If the checkbox is marked, each individual email may be modified. The checkbox appears during the setup, and is persistent for each send instance.

The controls work like they do for templates, but the changes you make apply only to this one specific instance.



If you select the name of a document that's not attached to this template, it will be attached to this email only.

If you select the name of a document that's already attached to this template, it will be removed from this email only.

If you choose 'Attach Document from Disk' from here, the document is attached only to this email, and is *not* added to the datafile.