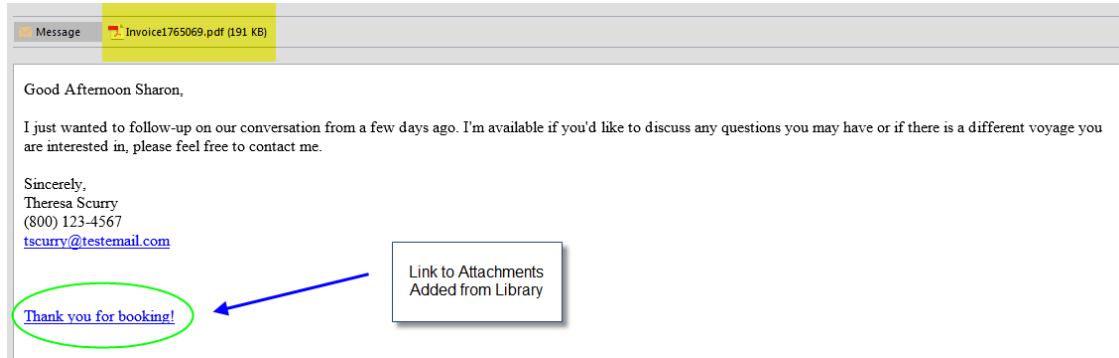


Attaching Documents to an Emailed Invoice from the Library

There is an option to attach to an emailed invoice additional items from an AgentMate Library. The invoice will be attached as an Attachment to the email. The items added from the AgentMate Library will appear as a public link at the bottom of the email, allowing the user to view the document from a URL.



Uploading Documents into the Library

Before a document can be available for attachment to an emailed invoice, it must first be uploaded to the Library.

1. Navigate to **Utilities > Agency Defaults**
2. Select the radio button for **CRM / Marketing Defaults**
3. Click on the tab for **Store Attachments**; a new screen will appear where you will maintain your *Attachments Library*
4. **To Upload a New Document to the Library:**
 - a. Click the first line in the list at the top marked **< NEW >**
 - b. Enter the **Name and display URL** (the link displayed to the recipient)
 - c. Enter a **Description** of the attachment
 - d. Select **Category** from the drop down
 - e. **Add Date** is auto-populated to today's date (this is for tracking only; not used for 'scheduling')
 - f. **Expire Date** is auto-populated to 1-yr from add date (date attachment will no longer be available for selection). **Extend** will add 1 yr to the Expire Date.
 - g. 'Drop files' or click on the box to **Browse** your computer for the attachment
 - h. Press **Save**
5. **To Edit:**
 - a. Navigate to **Utilities > Agency Defaults**
 - b. Select the radio button for **CRM / Marketing Defaults**
 - c. Click on the tab for **Store Attachments**; a new screen will appear where you will maintain your *Library*
 - d. Select the Attachment you wish to edit by clicking on it with your cursor to highlight
 - e. Once selected, the details will appear in the selection boxes below
 - f. Make desired edits

- g. Press **Save**
6. **To Delete:**
 - a. Repeat steps **a – d** above (*To Edit*)
 - b. Once the item for deletion is selected, press **Delete**

Utilities \ Store Attachments

Agency / Reservation / Invoice / Accounting Defaults CRM / Marketing Defaults Vendor Integrations

Guest Defaults Vendor Profile Marketing Sources Interest Setup Guest Comms CE Reminders Letter Templates Group Publishing Photo Store Attachments

Name and display URL	Description	Category	Add Date	Expire Date	Attachment URL
< NEW >	TO CREATE NEW ATTACHMENT				
Thank you for booking!	Just a few "here's what you should know"...	Just Booked - Cruise	01 Aug 2017	01 Aug 2019	http://app.azure.primero1.com/public/Dat...
Thank you for making final payment	after final payment	Final Payment	02 Aug 2017	02 Aug 2019	http://app.azure.primero1.com/public/Dat...
test add date	test add date	Final Payment	09 Aug 2017	04 Aug 2019	http://app.azure.primero1.com/public/Dat...
You Are Ready to Travel!	Recap of pre-travel activities	Final Payment	07 Aug 2017	07 Aug 2018	http://app.azure.primero1.com/public/Dat...

Name and display URL
You Are Ready to Travel!

Description
Recap of pre-travel activities

Category
Final Payment

Add Date
07 Aug 2017

Expire Date
07 Aug 2018
Extend

Attachment URL
http://app.azure.primero1.com/public/DataFileView.aspx?fileId=MjAwMjU5M
Attachment

Drop files here, or click to browse.

Save Cancel Delete

7. **To Add a Category to the Drop-down List of the Library:**
 - a. Navigate to **Utilities > Agency Defaults**
 - b. Click on the **Agency / Reservation / Invoice / Accounting Defaults** radio button
 - c. Click on the **General List** tab
 - d. Locate **Attachment Categories** under the **List Type**
 - e. Click on **< NEW >** to activate the **Description** field
 - f. Add the new Category name into the **Description** field
 - g. Press **Save**

Attaching Documents to an Emailed Invoice

The option to attach a document from your *Library* to your invoice is available when selecting the *Email* option for the invoice.

1. Select the **Invoice** tab from any reservation, press **Preview Invoice**
2. Select the **Email** option at the top right side of the generated invoice
3. When the pop-up window is presented, select which attachments you'd like to include under the area **Include Attachment from Library** towards the bottom of the screen
 - a. You may select one or more attachments to include with the email
 - b. You may preview the attachments from the screen by pressing the magnifying glass icon under the **Preview** column
4. When you have finished selecting attachments, and making other adjustments to the email you wish to make, press **Send**

Email

From:

To:

BCC:

☐ BCC Agent of Record

Subject:

Attachments: [Invoice1765069.pdf](#)

Dear Theresa,

We are delighted you have chosen x-Cruise Holidays - Demo DB to plan your trip with Royal Caribbean International! We know that you have many options when buying travel and thank you for putting your trust in us.

Attached to this email is your current invoice, which includes your total price, payments, and outstanding balance, if any. We've reviewed the information thoroughly but we still encourage you to check the details as well.

Of course, I am at your service should you have any questions.

Theresa Scurry
800.866.7245
www.cruiseholidays.com

CHECK BOXES
TO SELECT
ATTACHMENT

Include Attachment from Library

Name	Category	Description	Preview	
Thank you for booking!	Just Booked - Cruise	Just a you sh the cu booked a cruise.	PREVIEW ATTACHMENTS	☒
Thank you for making final payment	Final Payment	after final payment		☒

***NOTES:**

- The attachments added to an emailed invoice are not actual attachments to the email; they will appear as public links in the email that the customer receives.
- Adding multiple Attachments to emails increases the likelihood that an email sent will end up in SPAM/Junk Filters.