



Sending Documents in Emails

2016 - Winter Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Uploading the Document](#)

[Adding the Hyperlink](#)

[FAQs](#)

[Best Practices](#)

Overview

Add additional content to **blast emails** by including an **attachment** such as a **PDF** or **Microsoft Office document**.

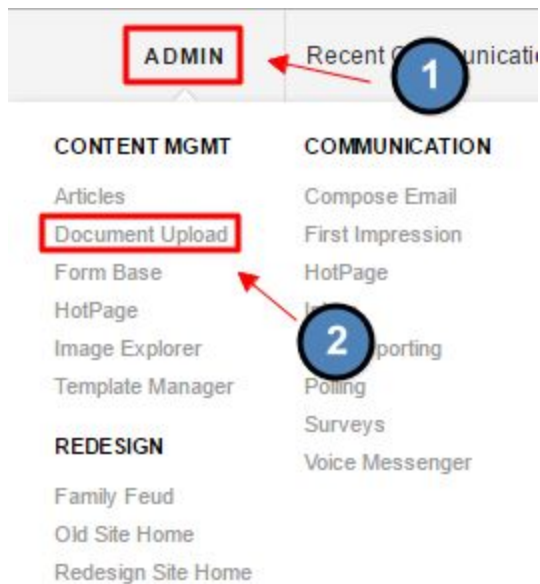
Use Case(s)

Clubs looking to send a **flyer** for an **event**, **monthly newsletter** or other **club documents**.

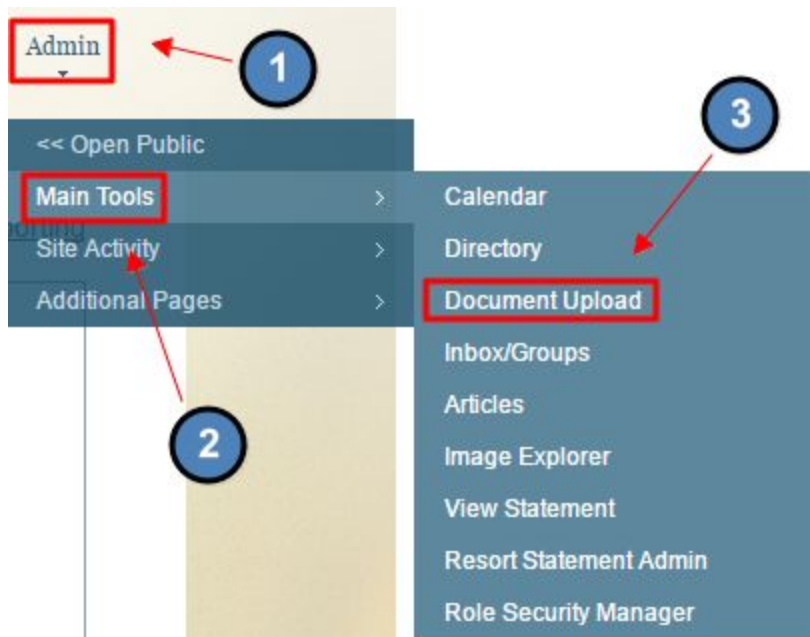
Uploading the Document

To access the **Document Upload**, follow the steps below depending on your access role.

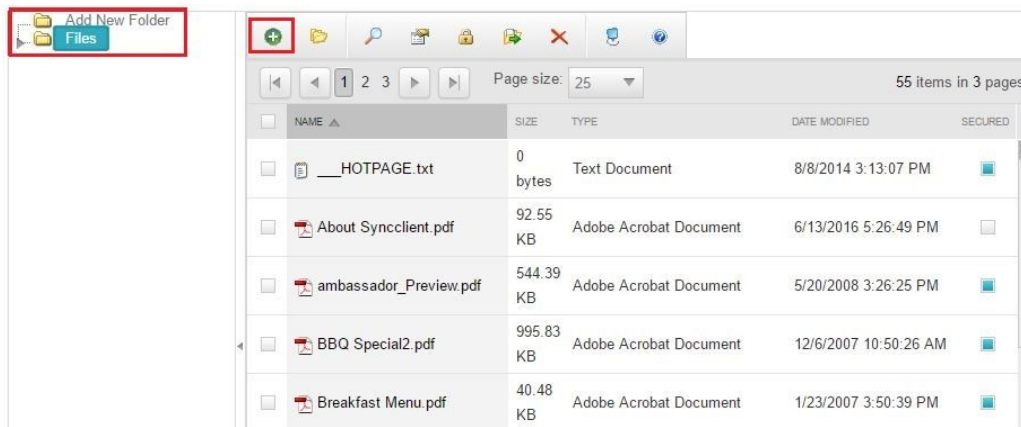
Admins, hover over Admin > Document Upload.



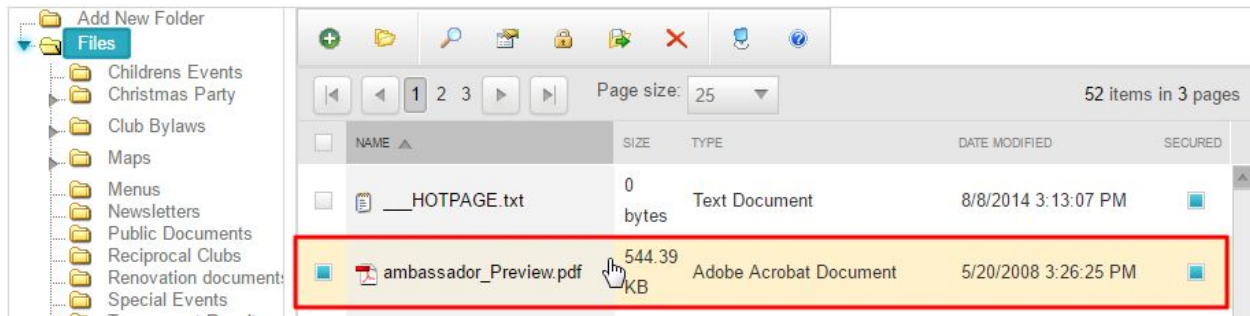
Editors, hover over Admin in the main navigation > Main Tools > Document Upload.



Select the folder you wish to upload into or click “Add New Folder” at the top to add more. Click the green plus button sign to upload a document.

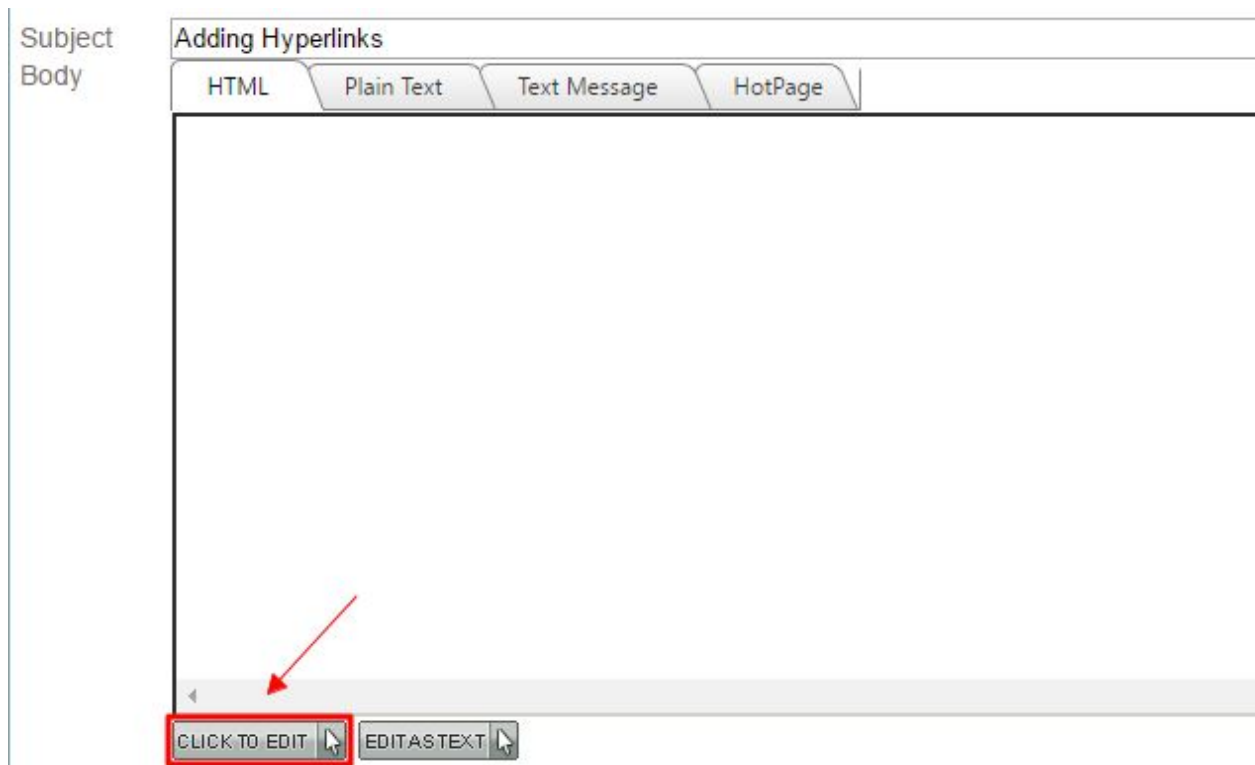


Select the document(s) you want to upload.

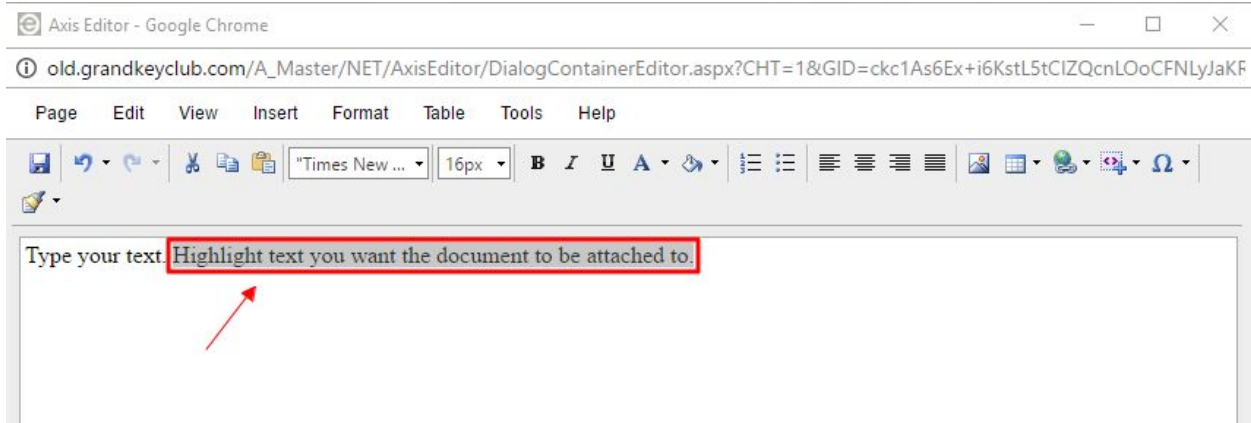


Adding the Hyperlink

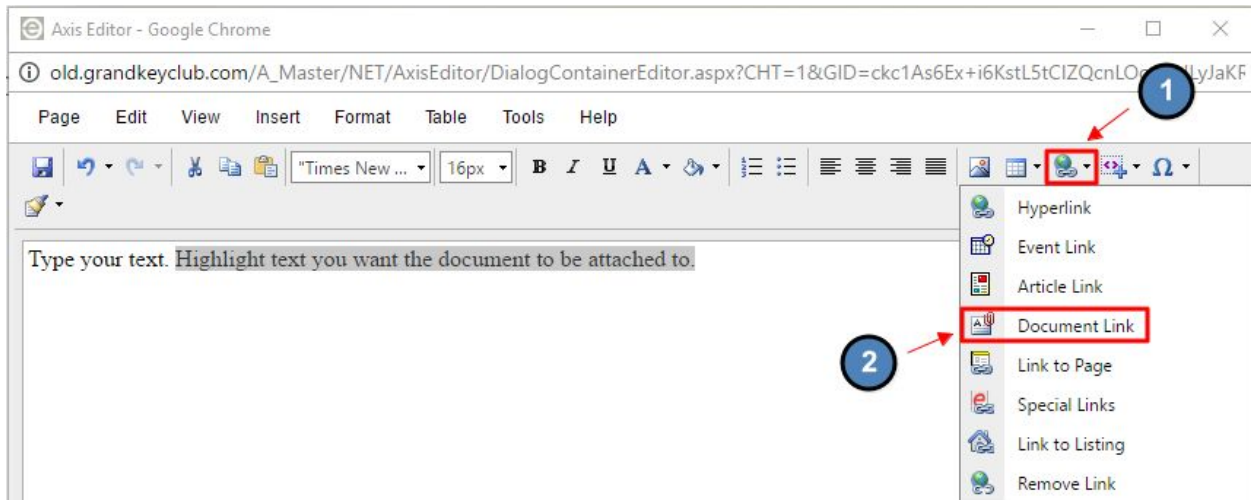
Open the **Editor** to **edit** the content of the **email**, and begin **composing** the **email**.



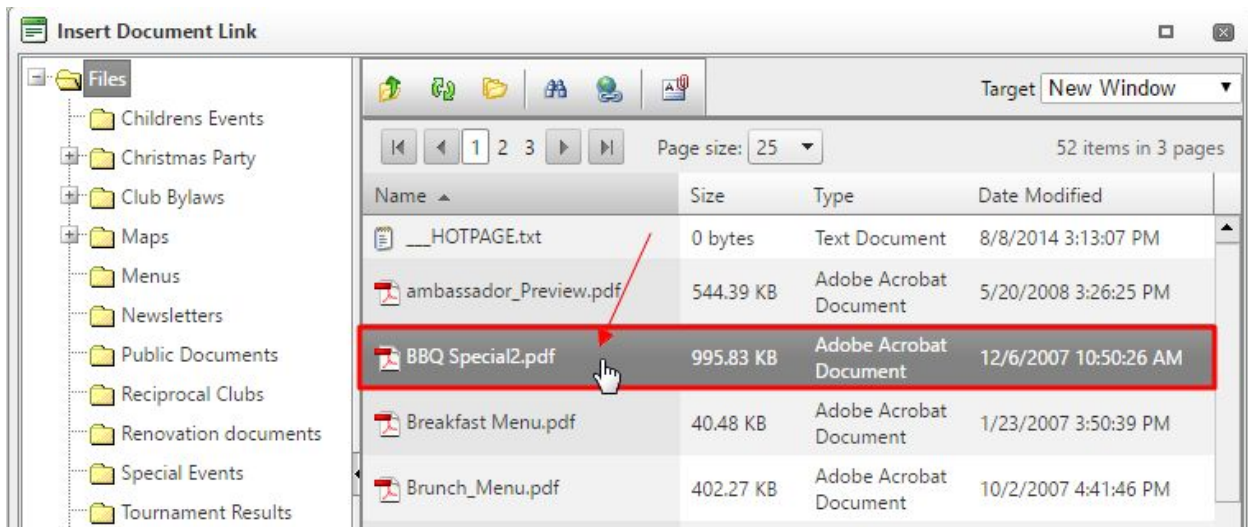
Highlight the **text** you would like to make open the **document**.



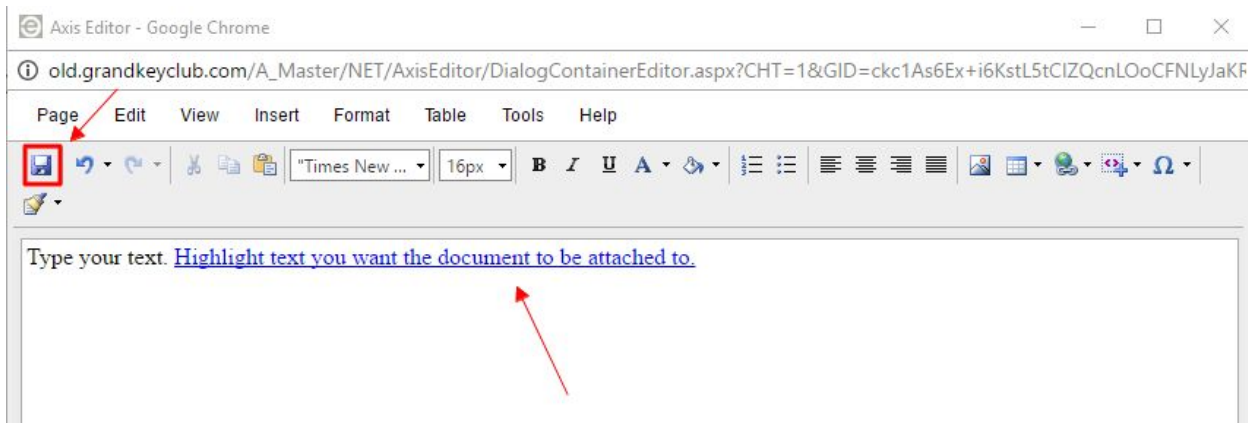
Click the **"Hyperlink"** button on the right side of the **toolbar**, and select **Document Link** option.



Double Click the document you want to link.



This will **attach** the **document** in the **email**. **Click Save** to continue with the steps of sending an **email**.



FAQs

Q: How can I make it so members don't have to **login** to **view** the **document**?

A: Going back to the "**Document Upload**" in the "**Admin**" bar you can **unselect** the **box** on the right of the document labeled "**Secured**". When a **document** is set as **secured** it **requires a login** to view it.

Q: Can I use an **image** instead of **text** to **link** to the **document**?

A: Yes, just **select the image** instead of text and follow the same instructions for adding a **hyperlink**.

Best Practices

1. If you're sending a document that has secure information, it will be best to keep the document secured so members must login to view it. This should reduce the chance of the member forwarding the email to a non-member. (Note, documents can still be downloaded and saved).
2. If you must send longer content via email, try putting the content into a document or PDF. This way, members may download the document or PDF, instead of reading a lengthy email.