TRAINING REFERENCES

PrintMail jobs determine the type of documents you send out, who they will be sent to and the period from which those documents are taken

Creating a New PrintMail Job

1 Select the **New** button on the top toolbar of the Jobs screen

2 Select the details of the job on the General tab:

1. Enter the **Description**
2. Select: Contact Type, Period (Months), and Trust
3. Select **Collation Period**: Specifies the number of months that PrintMail will look back through the archived documents of the specified types
4. **Sort Field 1**: This setting only relates to collated documents that are printed and controls the order in which each collated bundle will be sent to your printer
5. **Sort Field 2**: Provides a sub-sort field for printed document bundles
6. Select **Month** for merge field: either Current or Previous month
7. Select from Available Groups and Document Types
   - **Document Type**: Lists the document types that will be collated in this Job design
   - **Group Name**: The Archive Group in which the documents of the type specified are archived
   - **Primary Document**: If a document is selected as a Primary Document then the other documents won't be collated for the particular contact unless there is a Primary Document available for them

3 Create the Email template:

1. Enter the Subject for the email: Check the Append month to Subject checkbox to automatically add the relevant month to subject line
2. Complete the body of the email
   - The **Home** toolbar has features that work in a similar manner to most word-processors
   - The **Insert** toolbar allows you to insert into the email body at the current cursor position
   - **Line**: Insert a horizontal line
   - **Picture**: Insert a picture or graphic from an internet URL or a local file
   - **Hyperlink**: Insert a hyperlink to a webpage or copy of a local file, usually a PDF document
   - **Symbol**: Insert symbols that are not on your keyboard, such as copyright symbols, trademark symbols, paragraph marks, and Unicode characters
   - **Insert Merge Field**: You can insert fields such as Name or Address, which will automatically be replaced with information from your property management trust database

4 You must click the **Save** button on the top toolbar of the Jobs screen to save your changes

See the Rockend Knowledgebase for more information on how to create new and edit existing PrintMail jobs