



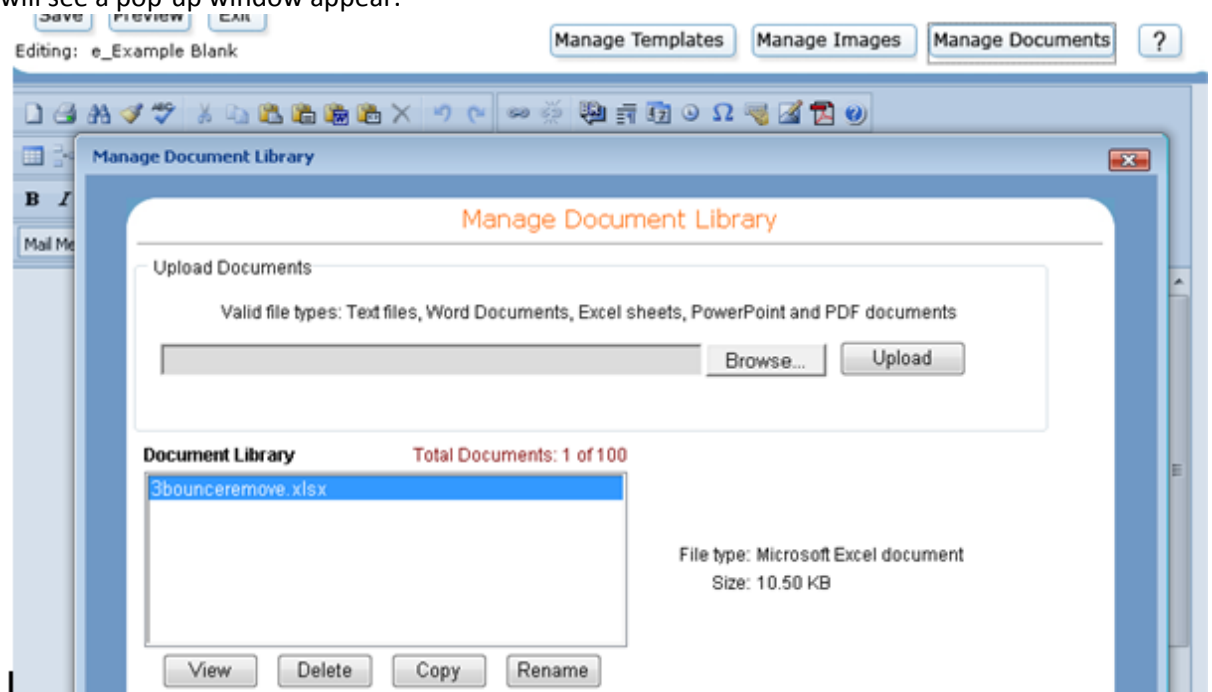
Sage E-marketing for Sage CRM

Quick Start Guide To:

PDF's a.k.a. Documents Linked to Text in Advanced Template Editor

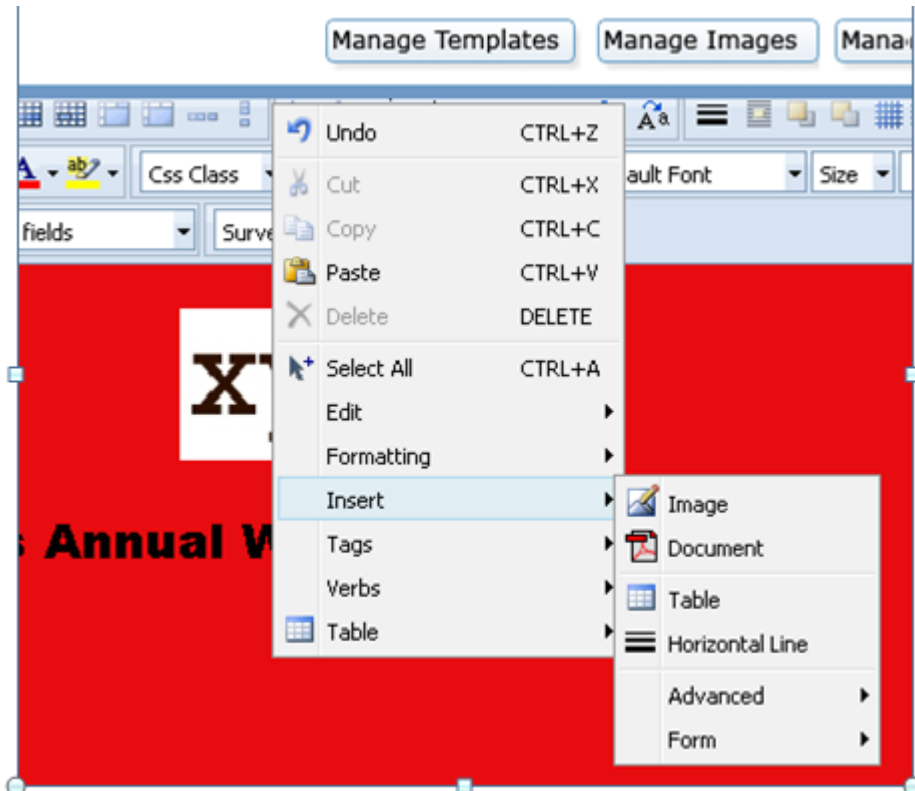
This guide will walk you through how to upload, store, delete, and hyperlink PDF's and other documents to text in the Advanced Template Editor.

1. In the Advanced Template Editor, click on the Manage Documents button at the top and you will see a pop-up window appear.

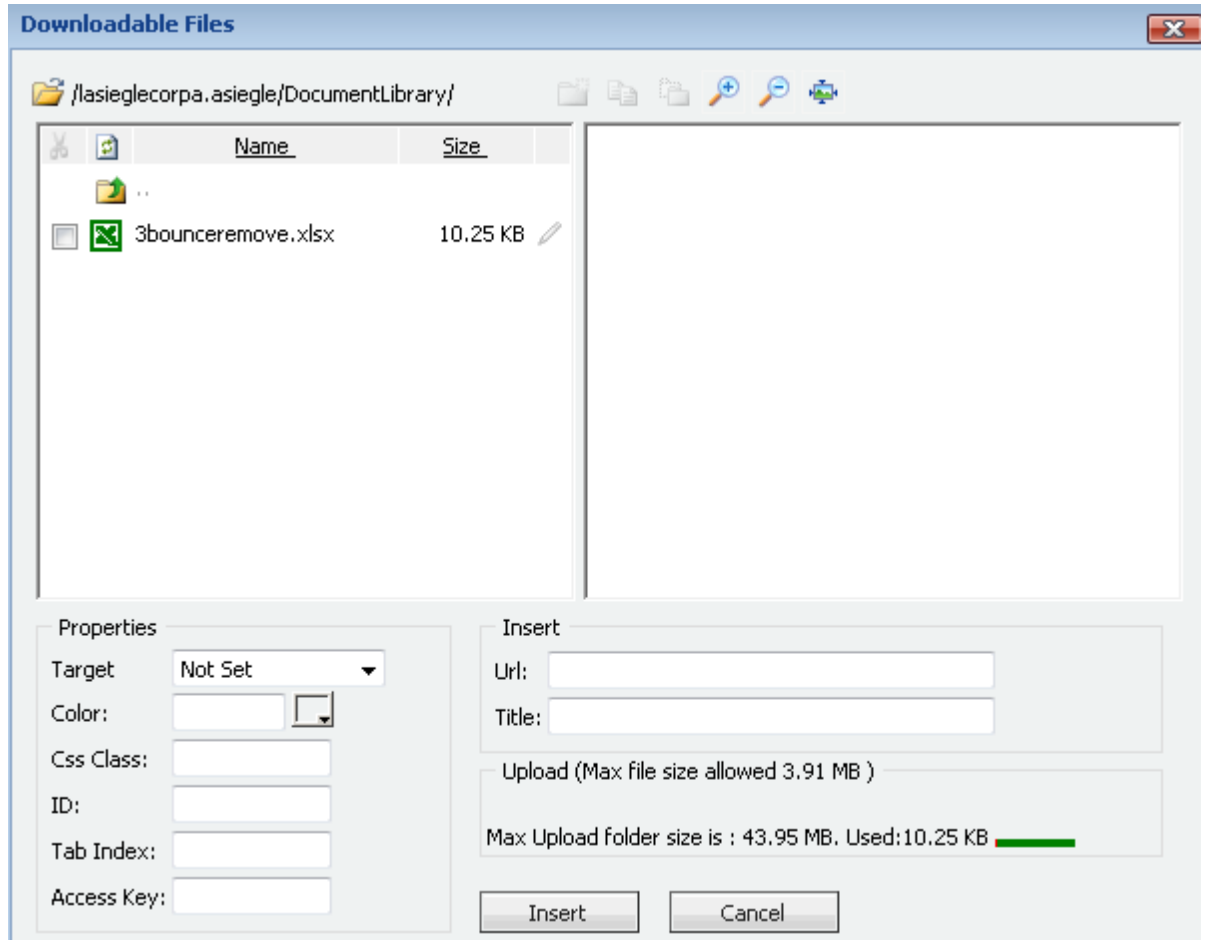


2. This is where you will manage your documents. To upload a new PDF/document, press the Browse button and Upload the new PDF/document to your library. **NOTE:** You can have up to 100 documents to the Document Library at a time.

3. You will also notice buttons below the list of documents. View allows you to see the selected document in the library. Delete removes the document from your library. Copy creates a copy of the selected document. Rename allows you to give the document a new name.
4. Once your document has been uploaded to the document Library, close this window and return to your template. Highlight the text you would like to hyperlink the PDF/document to and right-click. Select Insert > Document:



5. You will see the Insert Document menu. Here you can select the document you uploaded to your document Library.



6. When ready, select Insert and you have successfully linked your PDF/document to text!