



Add Additional Attachment to Statement Email

2017- Fall Edition

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Overview

The **Office System** has the ability to send **additional attachments** with the Statement PDF when sending **Statement Emails**. These additional attachments are attached in the form of a **Hyperlink** within the body of the Statement Email. In this guide, we will walk through the process of adding additional attachments.

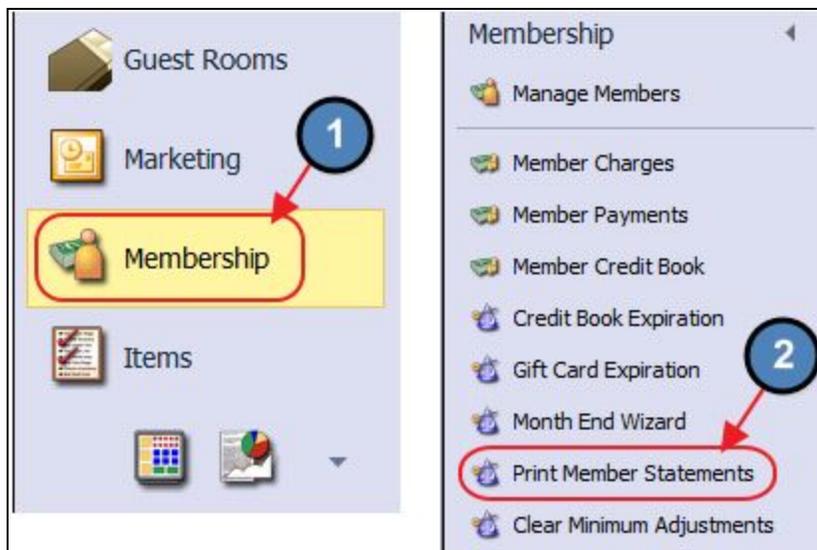
Please Note: The Office System can only send **PDF** and **JPG** files as attachments.

Use Case(s)

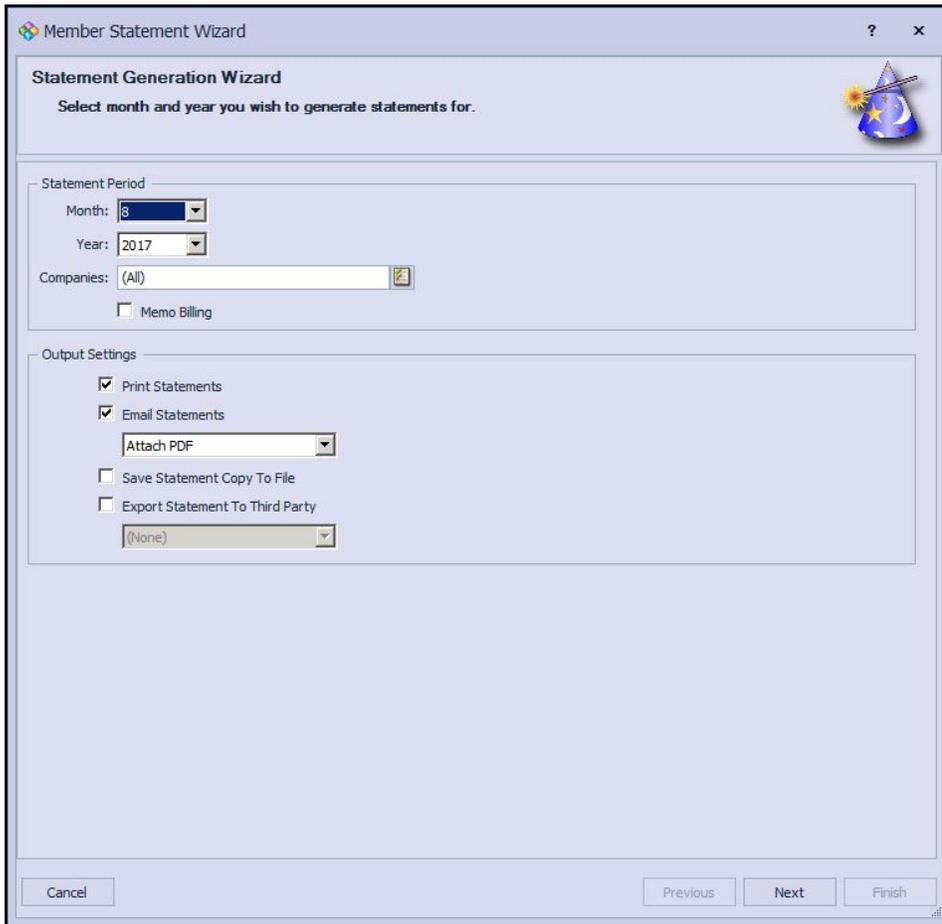
- A Membership Director wants to send an additional Event Flyer with their Statement Emails.
- The Club wants to attach a Newsletter to their Statement Emails.
- Event Registration forms are sent with Statement Emails to help accelerate the registration process.

Member Statement Wizard

To begin, navigate to the **Membership** Module on the left-hand user menu and then select **Print Member Statements**.



The **Member Statement Wizard** will launch.

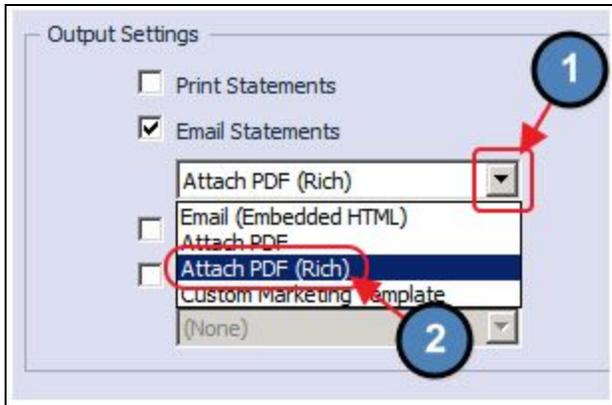


Select the applicable **Month** and **Year** of the Statement Email being sent.



Output Settings

Uncheck Print Statements, and change the Output Settings to **Attach PDF (Rich)**.



Click, **Next**.



Member Selection/Statement Details

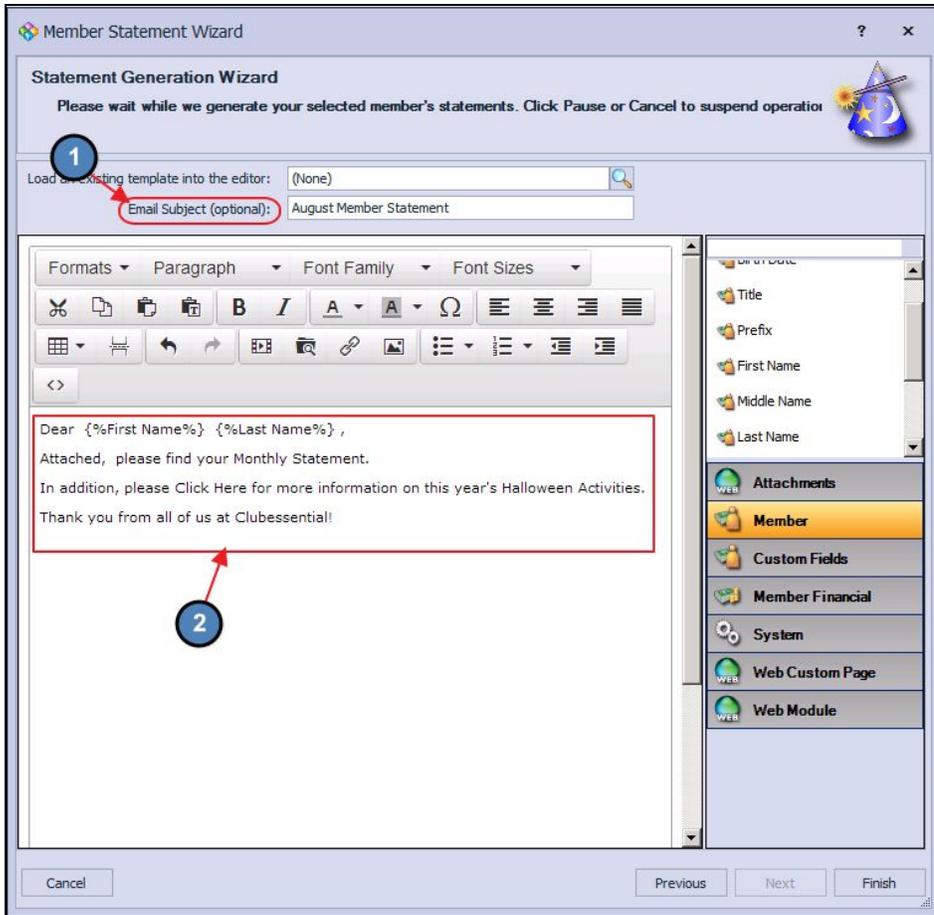
On the next screens, select Members who are configured for an Email Statement, and the applicable **Statement Details settings** as normal.

Please Note: For more information on selecting Members and the Statement Details screen, please see our [End of Month - Month End Wizard guide](#).

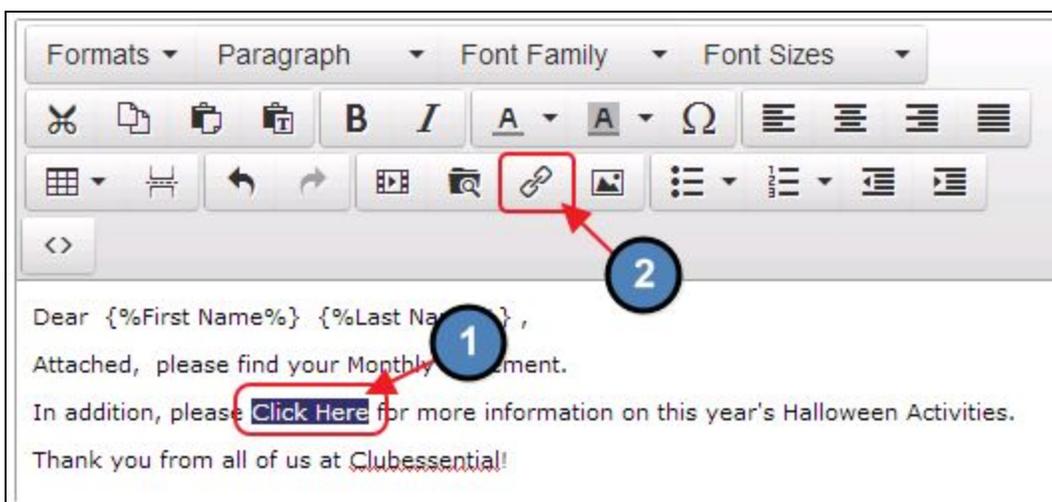
Adding the Attachment

Attach additional attachments in the form of a **Hyperlink** within the body of the Statement Email by following the below instructions:

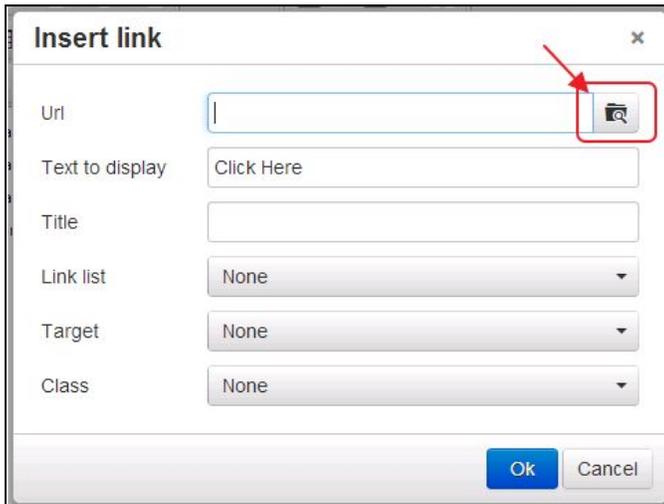
- 1) Enter a **Subject** for the Email Message (Optional). Then, write out the Email Message that will be sent along with the Statement.



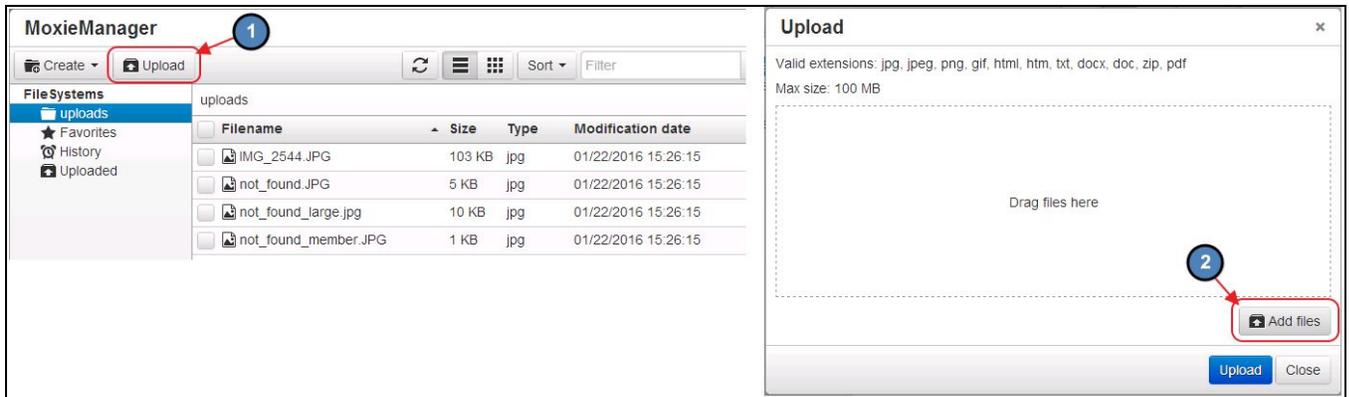
2) Highlight the **Text** that will serve as the hyperlink, and choose the **Insert Link Icon** on the toolbar.



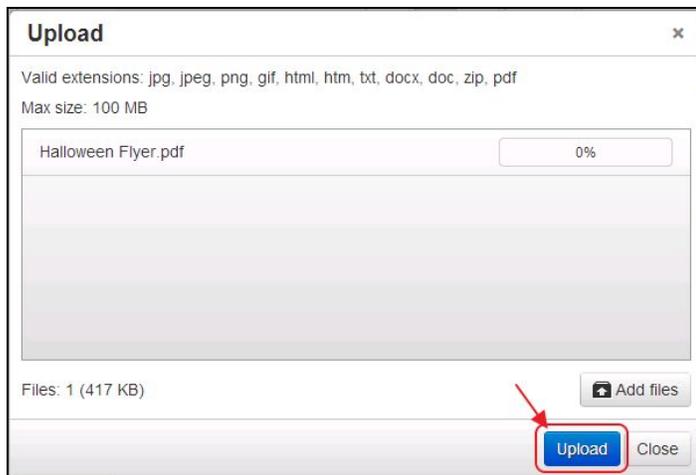
3) Click the **Browse** Icon to Upload/Browse to the desired PDF or JPG file.



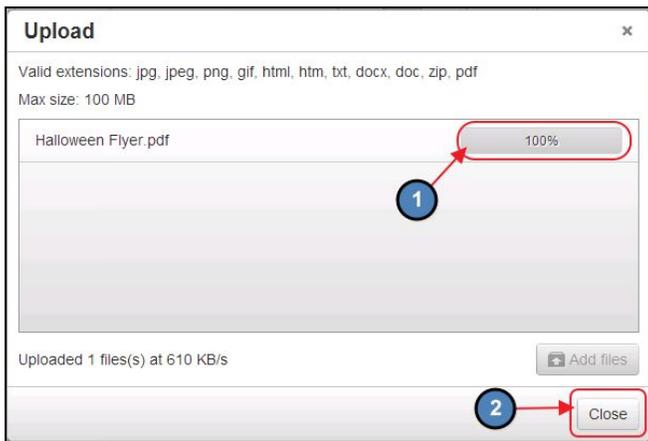
4) To upload the desired file, select the **Upload Icon**, and then choose **Add Files**.



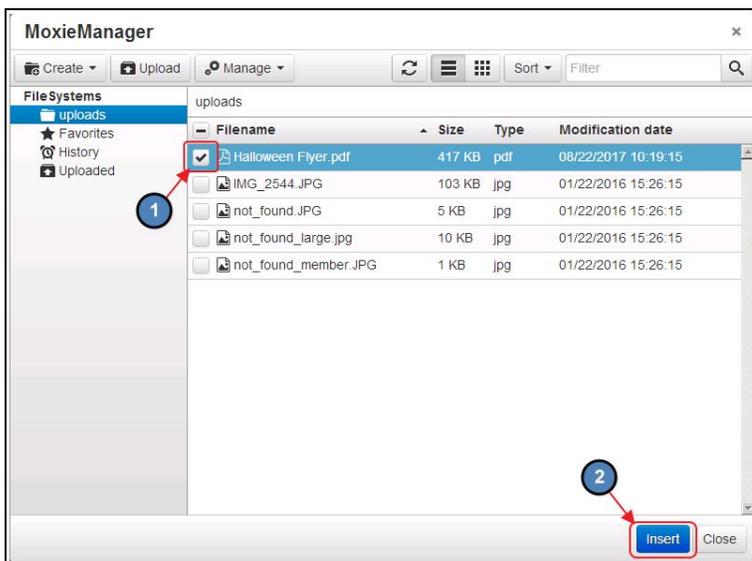
5) Navigate to the desired file and choose **Upload**



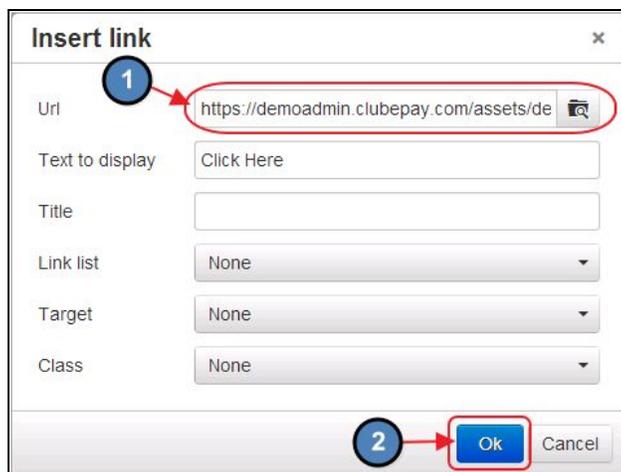
6) Once upload is complete (Finished at 100%), **Close** the Upload screen.



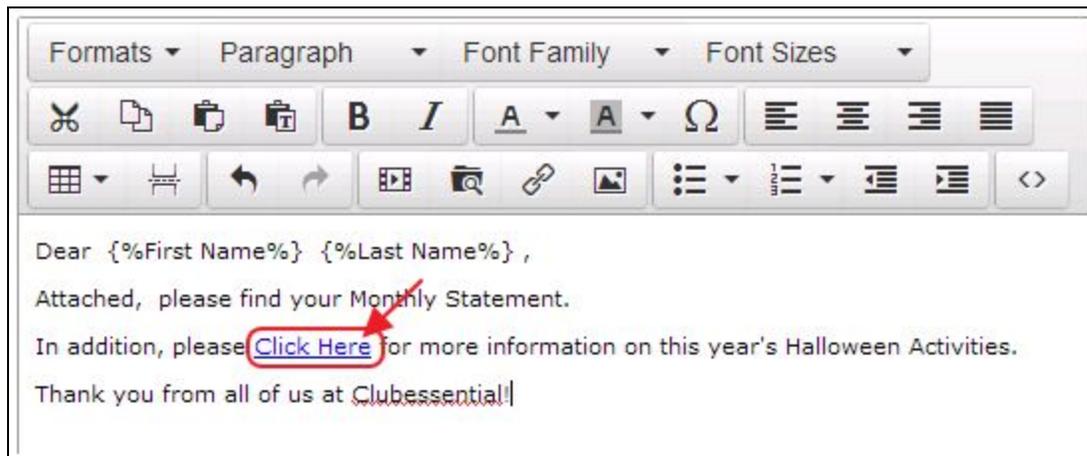
7) Select the newly uploaded file and choose **Insert**.



8) The **URL** to the file will be loaded automatically. Click **OK** to finish inserting the Hyperlink.



9) The Text highlighted previously will now link directly to the uploaded file.



Sending the Email

Once the necessary attachments have been inserted, select **Finish** to send the Email.



Best Practices

1. The Office System can only send **PDF** and **JPG** files as attachments.
2. Information on **Members** and the **Statement Details** screen, please see our [Month End Manual](#).

FAQs

Q: Can I include more than one additional attachment to the statement email, or am I limited to just one?

A: Yes, since the documents are attached as a hyperlink in the body of the email, you can add as many attachments as you like.