



Linking Documents to Agreements and Emails

You can add documents to the PetExec server and then insert a link to them in an Agreement or Email. This method works for all the graphical email sections (i.e., Email Blasts or Modify Email Content) within PetExec. Once a document is added to the server, it is always available regardless of where it was uploaded from.

From the main menu go to Company Preferences -> Maintain Agreements, Modify Email Content, or Email Blast.

To insert a document into an Agreement or Email, place your cursor or highlight the text where you want the document URL to show up. Then click on the "link" button.

Maintain Agreements ?

Contract #1

Title *

Terms and Conditions

Description *

Please review our Terms and Conditions [here](#)

Email Blast Details

Who do you want to send this to? *

Owners

Owner Filter

All Owners

Breeds

All Breeds

Email Subject *

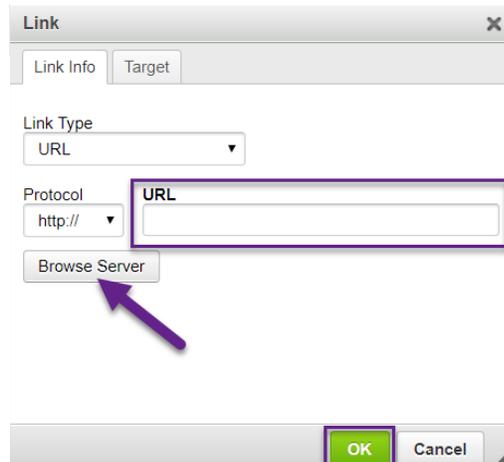
Canine Flu Vaccinations

Email Content *

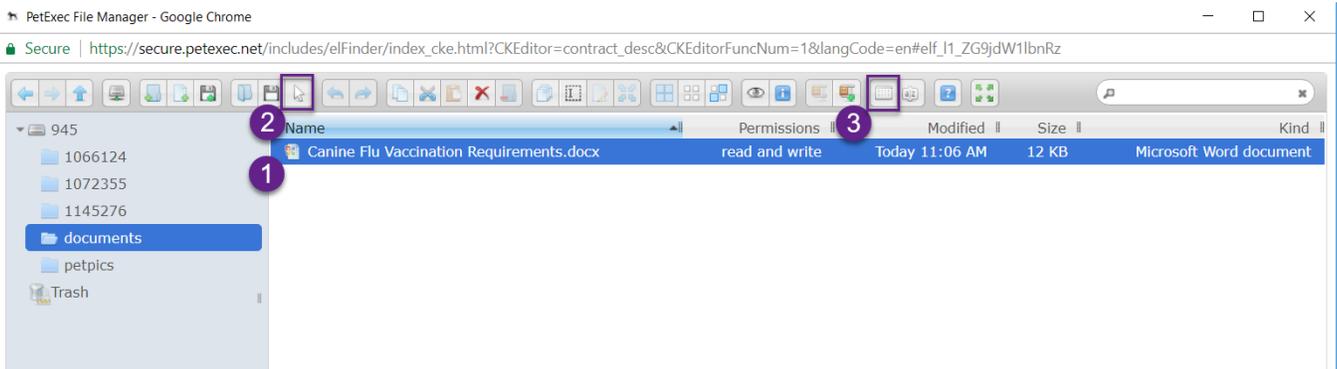
Starting September 1, we will require all dogs to be vaccinated for Canine Flu. Please see requirements [here](#)

You can enter the URL to the document if it exists on your web server or somewhere on the internet, then click the “OK” button and the document will be linked to the place you have chosen in the Agreement or Email.

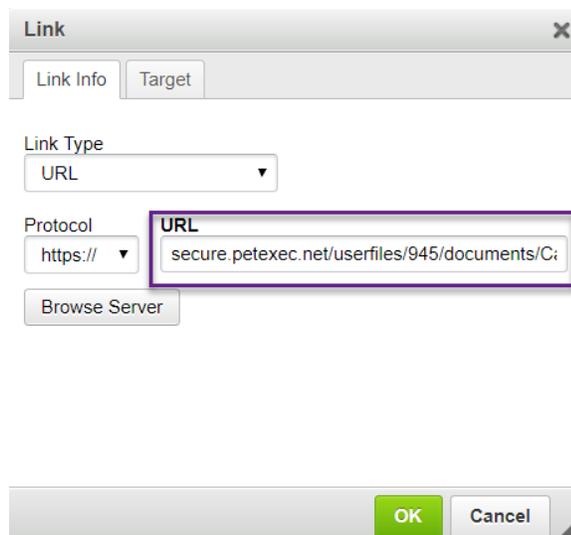
If it exists on your web server, but you don’t know the URL, click the “Browse Server” button.



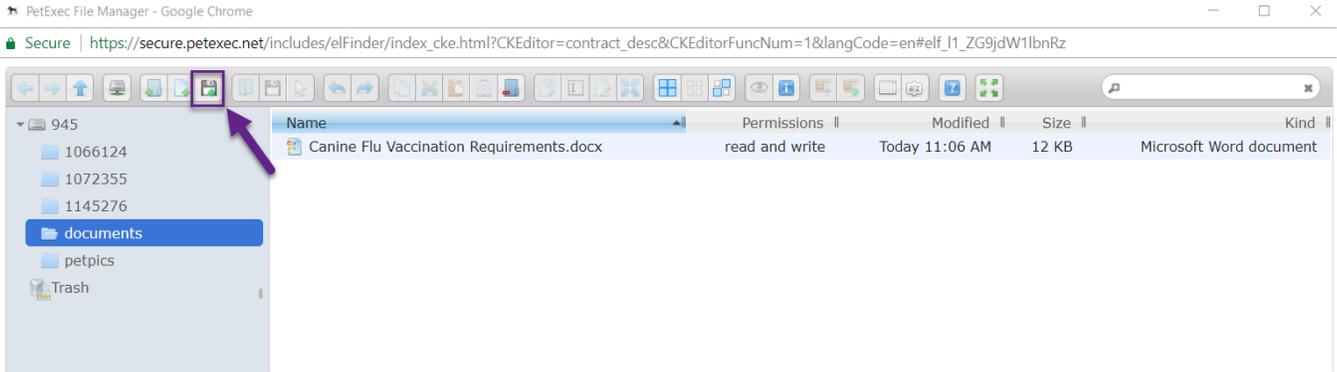
- 1) Select the document from the list of files on the PetExec File Manager and
- 2) Click the “Select files” icon. Hovering over the icons will display their function.
- 3) Note you can change the view from List to Icons and vice versa by clicking on the “View” icon.



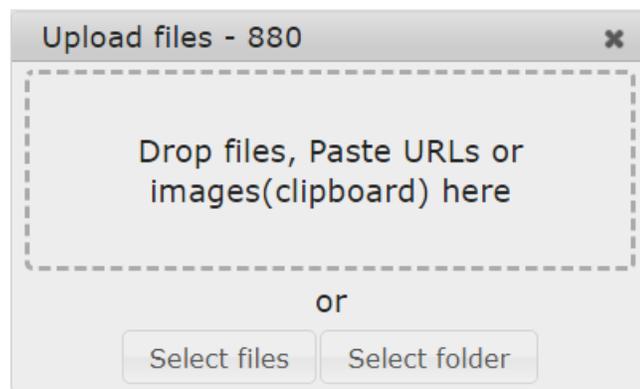
You will then see the URL listed, and you can click “OK” to insert the document into the Agreement or Email.



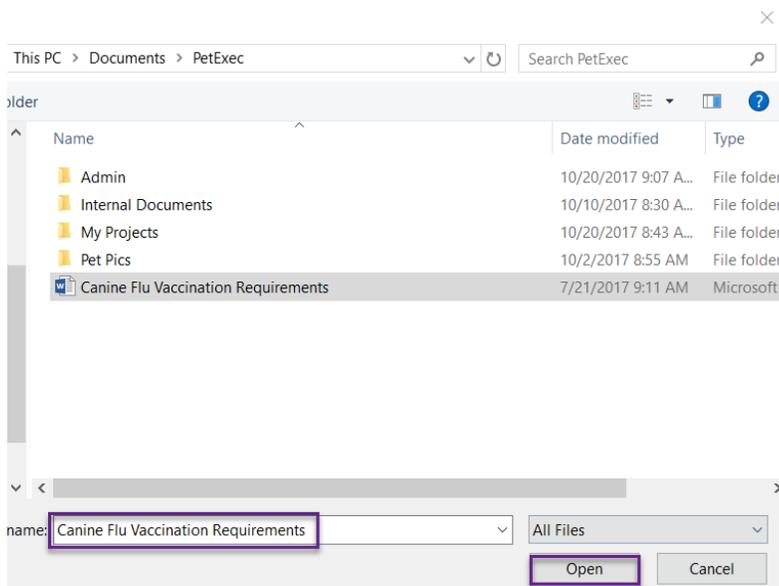
If you would like to upload a document from your computer to the PetExec servers, click the “Browse Server” button and then the “Upload files” icon.



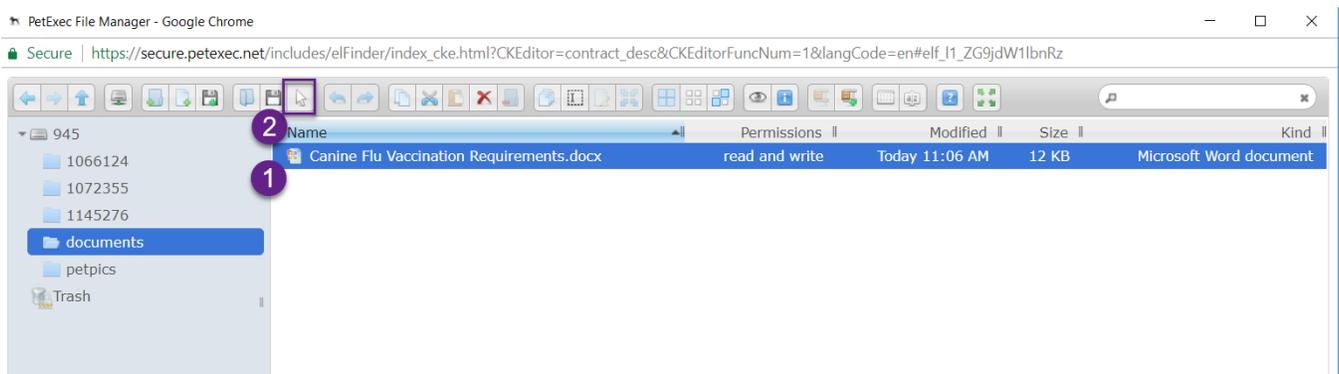
You can then Drop files, Paste URLs or images into the dashed box, or you can search for the files on your hard drive by clicking the “Select files” button. If you would like to upload a whole folder, then click the “Select folder” button.



Choose the document that you would like to upload, and select the “Open” button.

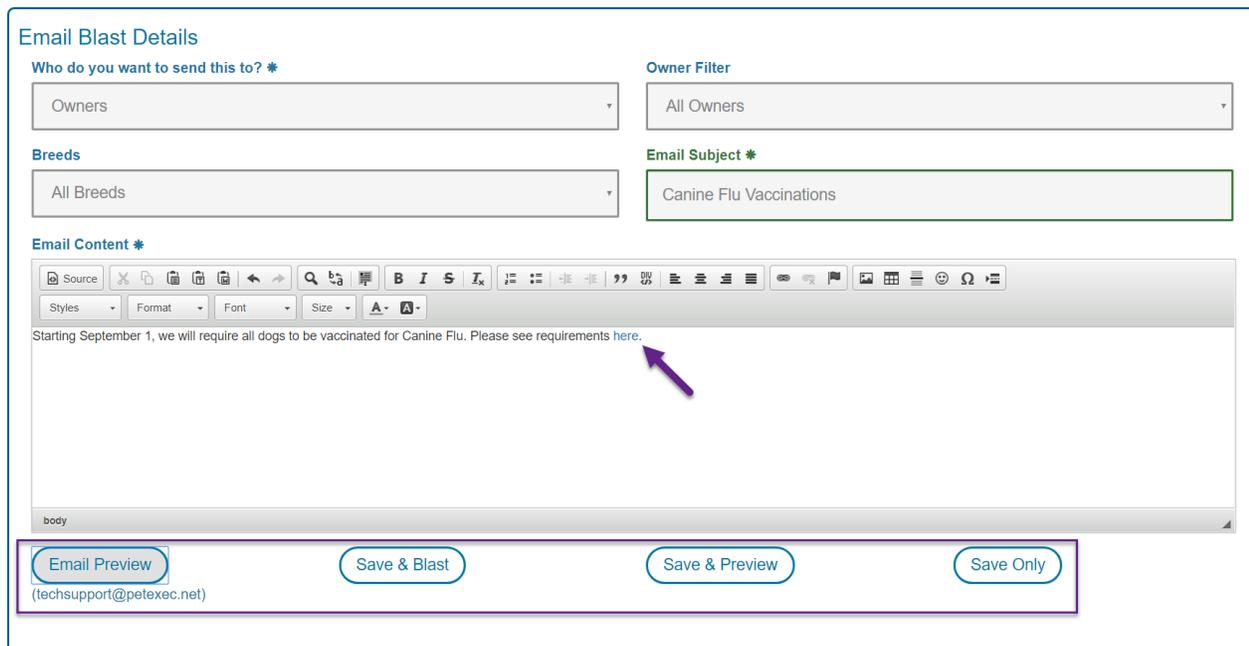


This will save the document to the PetExec servers for your use. Once the document is on the server, you can use it for any of your Agreements or Emails. Just 1) click on the image and 2) click on the "Select files" icon. Keep in mind that files need to be less than 8 MB in size.



The document will appear in the Agreement or Email where the text was highlighted or the cursor was placed previously. If you highlighted text, then the URL will be hidden and the text will turn light blue.

Note: Placing a link in an Agreement will allow your customers to download that document. However, it will not allow them to submit responses (eg, fill in blanks or initial). If you would like them to submit responses on a document then they would need to upload the completed document on the owner portal using the "File Uploads" button or submit a hard copy of the completed document (which you could scan and upload to their Owner Record).



Don't forget to save your email and preview before sending.

For more information on using the other formatting icons, please click here for the [Click Source User's Guide](#). Scroll down to the *Text Styling*, *Text Layout*, and *Creating Rich Text areas*. Not all the links listed in the user's guide are included in the PetExec toolbar. Hover over an icon in PetExec to see the name/identifier.