



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, modify email content, agreements, report cards) 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/SMS Templates, Email Blast, or Maintain Report Card.

1. Click the Insert/Edit link icon
2. Click on the camera icon to find file
3. Select a file from the PetExec File Manager, or drag and drop to download a file from your device to the file manager. Double Click on the desired document.
4. You can edit the text to display the link. Click OK.

Maintain Agreements

Contract #1

Title *

General Contract

Description *

1 Click on the "Insert/Edit Link" icon

Contract Description.

2 WORDS

Details *

Contract Text. These are the details of your contract or agreement.

11 WORDS

Insert link [X]

Url [Camera icon]

Text to display

Title

Target

Ok Cancel

2

Click on the camera icon to find the file

PetExec File Manager [X]

Navigation icons: back, forward, up, down, refresh, search, etc.

945

- 1066124
- 1072355
- 1074617
- 1145276
- documents**
- petpics
- Trash

945/documents

Canine Flu Vaccination...

3

Select a file from the PetExec File Manager, or drag and drop to download a file from your device to the file manager. Double click on the desired document.

4 You can edit the text to display the link. Click OK.

The link to the document will appear in the agreement or email where the cursor was placed.

Don't forget to click the Update or Save button at the bottom of the page to save your changes before previewing or sending.

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 download the document, complete the form you have created, scan it and 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).