



Dolphin Dynamics

Document Setup

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Dolphin Dynamics Ltd.
3rd Floor, 162-164 Upper Richmond Road
London, SW15 2SL

www.dolphind.com

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Introduction

This document provides an overview of how to configure your documents in Dolphin's Booking Management Module, personalise them with headers and footers as well as how to set up more than one version of the same document.

User Security Settings

Select **Options > Access Profiles-> Security Profiles** > enter/search and *select the required security profile* - >go to the **Access/Updates** tab.

The screenshot shows the 'Edit Security Profile' window with the following details:

- Profile Name:** Training Profile
- Profile Description:** (Empty)
- Tabs:** Financials, Interfacing, Tkt Match, Folder, Reconciliation, **Access/Updates**, Roles/Profiles
- Data Section:**
 - Fares
 - Remarks
 - Currencies
 - Vendor
 - Hotel Vendor
 - Arrivals/Destinations
 - Product Codes
 - Reference Data
 - Group Codes
 - Pricing Profiles
 - Export Templates
 - Can Link Companies
 - Client Del/Undel
 - Company Del/Undel
 - Agency / Del/Undel
 - Agency Users
 - Fold Pricing Items
 - Pkg Pricing Items
 - Allow Language Editing
- Access Section:**
 - Can Export
 - Can Generate Mktg Campaign
 - Brochures
 - Advanced Reports
 - Can Use Folder Adv. Search
 - Can Edit Vendor Due Dates
 - Can Use Accounts Export
 - Cust Pmt Conditions
 - Can Rename Folder Stats
 - Can Bulk Print
 - Can Logout In AD Mode
 - Can Edit Pricing/Pref Rules
 - Can Change Credit Card Type
 - Can Edit Contracts
 - Can Send Bulk Vendor Comms
 - Can Configure Ins
 - Document Config
- Access/Updates Section:**
 - Users Own Profile
 - Dispatch Details
 - Cust Credit Limit
 - Can Export Amex
 - Checklist Questions
 - Design Reports
 - Cust Web Access
 - Can View Encrypted Data
 - Can Configure Bulk Printing Templates
 - Can Add/Delete Pricing/Referencing Rules
 - Can Edit PE Pricings/Fees/Discounts
 - Can Configure Bulk Vendor Comms Templates
- Other Settings:**
 - View Others Inbox
 - Can Email HTML
 - Can Use Accounts Posting
 - Can Edit Credit/Debit Card Fees
 - Can Edit Branch Fees
 - Restrict Pricing/Referencing Rule Access to Multi-Branch
 - Can Use Customer Sales Transaction Export
 - Can Edit Package Template Groups
 - Can Edit Customer Acct Data
 - Can Configure Audit History
 - Can View Audit History
 - Can Edit Vendor Payment Discrepancy Thresholds
 - Can Bulk Change Folder Owners
 - Can Configure Accounts Export Templates
 - Can Configure Auto Vendor Reconciliation Templates

Document Config This setting allows the user to access the **Document Setup** for each branch from **Options > Documents**. With the setting deselected the options is greyed out.

Can Email HTML Select this setting to allow the user to edit the email section within the document set up. The setting also allows the user the option to select the document type of HTML when emailing from the booking management module.

Configuring Documents

Select **Options > Documents** > enter the required branch code > enter the all/part of the document type or alternative document type name.

Branch Code	Document Type	Document Alternative
-------------	---------------	----------------------

Branch Code If you have multiple branches available in Dolphin, it is possible to configure different versions of the same type of document per branch.

Document Type Enter the name of the document type, i. e. Customer Booking Confirmation, Customer Invoice and Customer Quotation. Type a space and click the Enter button on your keyboard to display the list of the documents available in Dolphin. You can also use the % sign either side of the word to display a list of document types that contain the word.

Alternative Type Alternative types allow you to configure different versions of the same document type. Each standard document is available as Normal and Resale Pax Doc by default.

To configure a document, select a **Document Type/Document Alternative** and click **Retrieve**.

Document It shows the document type, i. e. Customer Booking Confirmation, Customer Invoice and Customer Quotation.

Type It shows the document alternative name as you are able to have different flavours of each document. For further information, see the section on **Setting up different types of documents**.

Edit Allows you access to **Add/Delete or Rename** a copy of an existing standard document.

File The file name and path of where the documents are stored on your PC. It is configured by Dolphin Dynamics and must not be changed.

Note: Having a path in the field ensures a document/document alternative type is available in the list of documents to be printed.

Browse This allows you access to the file where the documents are stored.

Copies Enter the default number of copies you wish to print out for each document.

Include Folder Air Itinerary Select this checkbox to include air itinerary information to the document.

Include Folder Non Air Itinerary Select this checkbox to include non air (ground products) itinerary information to the document for the items that are flagged as paid to vendor locally or in advance.

Print Separate Itinerary If checked, this allows you to print a separate itinerary document alongside the document you are currently setting up within the document set-up screen. Choose the correct Itinerary version from the drop down box and that document will print out alongside.

Print Separate Giro/ATOL Cert This dropdown works the same as the Print Separate Itinerary checkbox as above and it allows you to print the ATOL certificate in conjunction with the main document you are producing.

Print Separate Copy If checked, this allows you to print a separate copy of the alternative document alongside the document you are currently setting up. Directly underneath is a dropdown listing all possible document alternative types that can be selected as the additional copy (in order to be valid, the document alternative must have a populated File path)

When an additional copy document type has been selected, an additional dropdown appears allowing the user to restrict the additional copy further by customer/folder type. The options are Agent Only, All Types, Client Only and Company Only.

This option is mainly applicable for resale business where bulk printing/invoicing feature is active. This helps to ensure that Normal type of the document as well as Resale Pax doc with Resale Split Commission suppressed are send alongside in one email.

Automatic Brochure This enables you to use automatic brochure sending function within the system. You can set a specific brochure code on certain documents / types, (the right mouse lookup function is available here), so that when you select a printer as the destination for the document the code will appear at the bottom of the printout. This code will then remind you to send required brochure/marketing material etc out with the document to your client.

As the system prints this brochure code on the document it will insert a record in to the customer contact table in the customer profile, to register that the relevant brochure has been sent. For more information, please refer to the Marketing Campaign user manual.

If No Sent Within This setting links to the automatic brochure code field. The number of days = in which you can indicate that an auto brochure should NOT be sent if the customer contact table within the Customer Profile already contains a brochure request for the same brochure with in the number of days specified.

For example:

1. You set X = 90 days on your Booking confirmation document along with a default brochure code. Your client books a holiday and pays a deposit amount; you print off a booking confirmation, which is complete with brochure code that reminds you to send the brochure to the client with the document.
2. They then call 2 weeks later and ask you for a second copy of the booking confirmation – this will be printed off **without** any brochure codes as the previous brochure was sent within the 90 days.
3. When they come to pay their balance and you print another booking confirmation – if it is over the 90 days since the last brochure went out, the brochure code will print out onto the document again, reminding you to forward a new brochure to the client with the document.

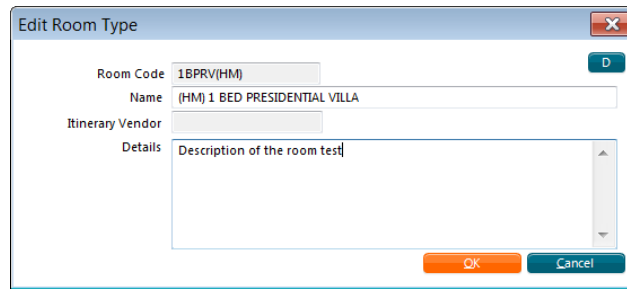
As you receive a brochure code on your documents an entry will be made into the customer contact grid within the customer profile to say the brochure has been requested and sent out.

Publish To Web If this checkbox is ticked it will be possible for your clients to view this particular document type if you use Dolphin's Web Customer Service module. Please note that if you have more than one type of this document set up, you can only choose one type to Publish to Web. Contact Dolphin Dynamics for more information on Web Customer Service.

Include Images Select this checkbox to include images loaded in the images tab of a Vendor profile to the document.

Include Room Type Description Select this checkbox to include the room type description/details to the document. You can add/edit description of a particular type by going to Search option in the

main -> Itinerary Reference Data-> Room Type-> retrieving a room type code and updating the details field.



Include Traveller Notes. This setting is only enabled for the following document types: Quotations, Booking Confirmations, Itineraries, Receipts, Refunds, Invoices and Credit Notes. When selected this will populate a new text area, above the manual folders notes fields in the document, labelled "Traveller Notes". In this area each passenger that has any notes saved in the passenger notes field will be listed with their notes immediately under their name.

Note: There will be no info shown on the document if the setting is selected within the document setup but no notes are present within the passenger's tab.

Move Page Number Below Footer Image When ticked, the page number and printed date information will appear below any footer image that has been configured for that document. When unticked, this information will appear above the footer image.

Include Client Name On Doc If this checkbox is ticked the lead passenger's name will always be added above the agency address whenever that document is printed in a resale folder.

Include IATA Regulations If this checkbox is ticked standard IATA regulations will be printed on of the document chosen.

Archive Document Select this check box if you want to archive each printed copy of an Invoice, Credit Note, Receipt and Refund (and their sub types), when they are created within the travel folder.

When this check box is selected for a particular document type, and an instance of this document type is created, the booking management module will create the document and archive a copy to a specified database or network folder. The booking management module will archive the documents every time they are printed via the Print, Email, Fax and Window print methods. The entire content of the original issued document will be saved in PDF format as originally issued, including the header/footer, itinerary, price and remarks of the document.

Note that copies of financial documentation can still be reprinted from within the financial buttons in the travel folder, but they will not be the archived copies. These reprinted documents draw information from the folder at the time of printing, which is subject to change and therefore may not print an exact replica of the required document. Retrieving archived documents is done from the **Print History** tab within the **History** tab of the travel folder.

If you want to archive only documents that are printed, ensure that the **Allow No Print when saving new financial transactions** check box is not selected in **Site Details > Branch 3** tab. This will remove the **No Print** option from the **Print** dialog box, and as a result all documents will be printed and archived.

Note: Please contact Dolphin Dynamics for further information on the functionality.

Default to Include E-Tkt Rcpt This setting is visible on the itinerary document only. The setting ensures that the e-ticket receipt check box is selected by default when an itinerary document is printed.

In the **Air Ticket** window, the ticket type must be set to ETK and the **Itin Details** tab must be completed for the correct information to be shown. For BSP tickets an e-ticket can only be printed if a ticket number is present in the air ticket window within the ticket number box. For non BSP tickets a ticket number is not required.

Print Payee Details On CC Transactions This setting is visible for Receipt and Refund setup only. If this check box is checked, it ensures that if the payee name or address fields are amended when issuing a credit/debit card Receipt or Refund, the Payee's name and address rather than the name and address from the client profile will appear at the top of the printed receipt or refund.

Including Validating Carrier on Tkts This setting is visible for booking confirmation, credit note, invoice and receipt document types only. If selected, the name of the validating carrier will be shown on the documentation within the text related to the ticket.

Use Agency Header You will see this setting if the agency header functionality has been activated in your database. For more information about this functionality, see the [Configuring Images for Resale Passengers Documents](#) section.

Suppress Resale Split Comm Select this checkbox to remove the split commission information from the document.

Note: Please note that document types/sub types that have 'Suppress Resale Split Comm' checked will not be available for selection in the print dialog in a non-resale folder as resale split commission does not exist in such a folder.

Use Lead Pax Contact Info If checked, then the lead passenger's name and address will always be added instead of the agency address whenever that document is printed in a resale folder.

Suppress No Records Message This setting is related to the ability of printing a separate ATOL certificate. If selected, you will not display a pop up message informing you that there are no records eligible for the ATOL certificate.

Header Image This is a lookup control that allows you to locate a header image to appear on the document. Press **F4** or right click with your mouse and select **Lookup** to display the **Document Image Search** window and select the header image.

Footer Image This is a lookup control that allows you to locate a footer image to appear on the document. Press **F4** or right click with your mouse and select **Lookup** to display the **Document Image Search** window and select the footer image.

Footer Text This field allows you to enter notes that you wish to see print out on the bottom of every document of the type selected from the **Document** drop down menu. It is free text but the system will not spell check the text. The text can be formatted using HTML commands/tags if you wish.

Note: If you have text which you wish to appear on some but not all documents of a certain type (e.g. not on every single Booking Confirmation) it may be better to set up pre-set remarks in the Notes tab of your travel folders rather than adding them to Footer Text. This is because it is not possible to remove Footer Text from individual documents.

Email Subject This field allows you to enter default text which will be added into the email subject line each time you send this particular type of document to a client by email. It is free text but the system will not spell check the text. The text can be formatted using HTML commands/tags if you wish.

Default Email This field allows you to enter default text which will be added into the main email field each time you send this particular type of document to a client by email.

Default Attachment Name This field allows you to enter an attachment name different from the defaulted one (Document).

Note: Subject, Default Email and Default Attachment Name support Mail Merge Tags.

Standard This automatically sets all document paths to the one you select for the booking confirmation. If you have all of the document templates sitting on the server, clicking the Standard button will save you going through each document type in the dropdown and typing in the path. Just choose the location of the booking confirmation and Dolphin will automatically set the same path for all of the other document types.

Help Click this button to access the Help Files.

OK Click this button to save all the details of the **Document Setup** screen.

Cancel Click this button to close the window and ignore any change made.

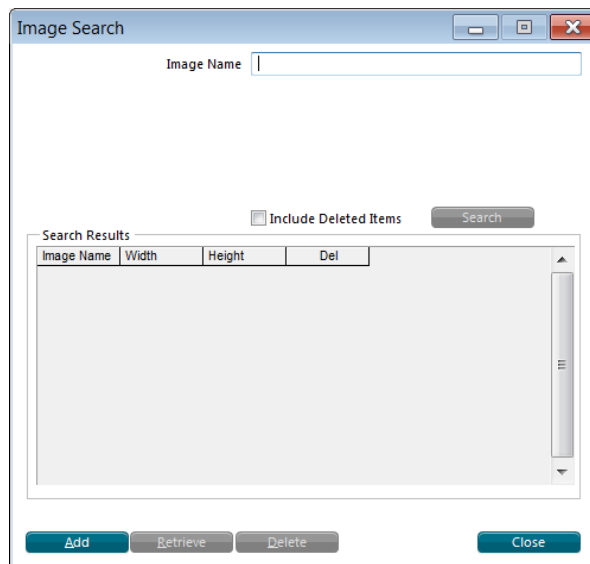
Configuring Document Images

This functionality allows you to customise documents' header and footer sections with images of your choice, thus enabling you to display specific images per document type (i. e. booking confirmations sent to your American customers can show different logos than those sent to your European customers). Ultimately, this means that any time you require header/footer changes; you can do it on your own without referring to Dolphin Dynamics.

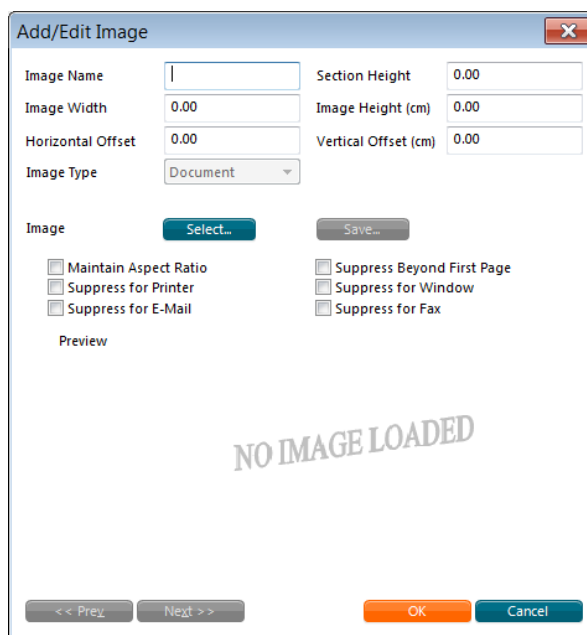
Note: If you want a number of images (logos) to be present on your header/footer, you need to combine them into one image.

To upload an image to Dolphin

1. Go to **Search** in the main menu -> **Document Images**-> the **Image Search** window opens.
2. Enter the **Image Name** to retrieve a particular image or type a space and press **Enter** to retrieve the list of the images available.
3. Select the **Destination** or the **Document** option from the image type dropdown list.



4. To add an image, click the **Add** button. The **Add/Edit Document Image** window opens.



5. Fill in the following:

Image Name Type the image name.

Section Height This field allows you to set the containing header/footer height, The value entered in this field is the number of centimetres from the left hand margin the image should be positioned.

Image Width/Height The dimensions of the image.

Horizontal Offset The value entered in this field is the number of centimetres from the left hand margin the image should be positioned.

Vertical Offset The value entered in this field is the number of centimetres the image will be displayed from the bottom of the text.

Image Type: This will be defaulted to Document and greyed out.

Source Image URL: Insert URL for the image you want to upload.

Image

Select Click the button to point Dolphin to the location where the picture is saved.

Save Click on the button to save an image already uploaded to Dolphin. You will need to browse to the location where you would like to store it, enter name and extension for the file you are saving.

Maintain Aspect Ratio Select this checkbox to keep the width and height settings proportional.

Suppress for Printer Select this check box to suppress the image when selecting the **Printer** button in the **Print** dialog box.

Suppress for Email Select this check box to suppress the image when selecting the **Email** button in the **Print** dialog box.

Suppress beyond first page Select this check box to suppress the image beyond the first page.

Suppress for Window Select this check box to suppress the image when selecting the **Window** button in the **Print** dialog box.

Suppress for Fax Select this check box to suppress the image when selecting the **Fax** button in the **Print** dialog box.

Preview Once you have selected the file, this area becomes populated with the image.

Prev/Next Use these buttons to navigate from one image to the previous or next one.

OK Click **OK** to save all the settings selected.

Cancel Click **Cancel** to close the window and lose any changes made.

Example of a header image:



Example of a footer image:



Note: To be able to view branch name and address, it is now necessary to be part of the image used for the header. Likewise if the ABTA/IATA/ATOL numbers were previously generated from your site detail configuration, this will now also need to be included in the image.

Configuring Images for Resale Passengers Documents

1. This functionality is controlled by a database setting and you need to contact Dolphindynamics to activate it.
2. Once this functionality is activated, every agency profile shows an additional **Logos** tab.

Click the **Add** button to add a logo and display the **Add/Edit Logo** window.

Retrieve Click **Retrieve** to retrieve a logo.

Delete Select a logo in the grid and click **Delete** to delete it.

3. Add/Edit Logo window:

Logo For Select from the dropdown the document type where the logo will be used. Note that only the Booking Confirmation, Cost Quote or Itinerary document types are available.

Note: Only one image can be loaded per each document type.

Name The name of the image.

Label A description of the image.

Link Url The Url where the picture was taken. This is for information only.

Source Url The Url where the picture was taken. This is for information only.

Image

Select Click the button to point Dolphin to the location where the picture is saved.

Save Click on the button to save an image already uploaded to Dolphin. You will need to browse to the location where you would like to store it, enter name and extension for the file you are saving.

Suppress for Printer Select this check box to suppress the image when selecting the **Printer** button in the **Print** dialog box.

Suppress for Email Select this check box to suppress the image when selecting the **Email** button in the **Print** dialog box.

Suppress beyond first page Select this check box to suppress the image beyond the first page.

Suppress for Window Select this check box to suppress the image when selecting the **Window** button in the **Print** dialog box.

Suppress for Fax Select this check box to suppress the image when selecting the **Fax** button in the **Print** dialog box.

Maintain Aspect Ratio Select this checkbox to keep the width and height settings proportional.

Width/Height The dimensions of the image.

Vertical Offset The value entered in this field is the number of centimetres the image will be displayed from the bottom of the text.

Horizontal Offset The value entered in this field is the number of centimetres from the left hand margin the image should be positioned.

Preview Once you have selected the file, the **Preview** area becomes populated with the image.


Prev/Next These buttons allow you to display the previous and/or next logo loaded.

Copy This button allows you to copy the logo and assign it to another document type.

OK Click **OK** to save the logo.

Cancel Click **Cancel** not to save the logo.

Help Click **Help** to access the Help Files.

4. To override the general Header Image, go to **Options>Documents>**retrieve the document type Customer Booking Confirmation, Customer Quotation or Customer Itinerary>select the  checkbox.

Mail Merge Tags

When emailing customer documents from a travel folder it is possible to configure mail merge style tags in the **Document Setup** area, so that the footer text section and the email's subject line, default email body and default attachment name can automatically include some folder/customer level information such as the folder number, customer name and folder destination.

The documents that are applicable for merge tags are the following:

- Booking Confirmation
- Credit Note

- Itinerary
- Refund
- Receipt
- Invoice

Below is the list of the supported tags:

[BRANCH_CODE]

[FOLDER_NUMBER]

[INVOICE_NUMBER]

[CUSTOMER_TITLE]

[CUSTOMER_FIRST_NAME]

[CUSTOMER_NAME] This will be the last name for a client or the company name for a company and the agent name for an agent.

[COMPANY_NAME]

[LEAD_PAX_TITLE]

[LEAD_PAX_FIRST_NAME]

[LEAD_PAX_LAST_NAME]

[DESTINATION]

[DEPARTURE_DATE] This will be the folder departure date.

[FOLDER_OWNER_NAME]

[FOLDER_OWNER_PHONE]

[FOLDER_OWNER_EMAIL]

[FOLDER_BOOKED_BY]

For example, for folder number 12345 created in branch HQ, if the Booking Confirmation document is configured with email subject 'Your Booking: [BRANCH_CODE][FOLDER_NUMBER]', the recipient of the booking confirmation via email would see 'Your Booking: HQ12345' as the subject.

Note: Subject, Default Email and Default Attachment Name support Mail Merge Tags.

Footer Text HTML Editor

You have the ability to change the format of the footer text that appears on the bottom of your documentation. This is achieved by using HTML tags to produce various formats such as bold, italics, underlined text. Some examples of which are shown below.

Starting a New Paragraph

HTML tag <p>paragraph</p>

```
Footer Text
<p>
Please ensure you have a valid passport for at least 6 months after your return date.
</p>
```

Adding a Line Break

HTML tag `
`

```
Footer Text
<p>
Please ensure you have a valid passport for at least 6 months after your return date.<br>Thank you for booking
with London Travel Centre.
</p>
```

Bold Text

HTML tag `this text is bold`

```
Footer Text
<B>This is a Bold header</B>
Please ensure you have a valid passport for at least 6 months after your return date.
Thank you for booking with London Travel Centre.
Hope you have a great holiday.
```

OK Standard

Adding Italics to Text

HTML tag `<i>italic text</i>`

```
Footer Text
<i>Thank you for booking with Dolphin Dynamics.</i>
```

Displays on the document as follows:

ATOL: All travel provisions in this folder are protected under ATOL License number 77854 Neptune Travel Ltd

This is a Bold header

Please ensure you have a valid passport for at least 6 months after your return date.

Thank you for booking with Dolphin Dynamics.

Hope you have a great holiday.

Additional HTML Tags

Tag	Description
<big>	Defines big text
<small>	Defines small text
<p> </p>	Enters a blank line
<sub>	Defines subscripted text
<sup>	Defines subscripted text
	Defines strong text

For more advanced editing, you will need to look into HTML formatting yourself.

You must ALWAYS enter <HTML> at the start of the footer text and </HTML> at the end of the footer text to activate HTML formatting.

Email HTML Editor

Within the **Email** section > **Default Email**, type the default text you would like to populate when you are emailing this document type from the booking management module.

This will normally appear as plain text when emailing.

Document Setup

Document Setup

Document: Customer Booking Confirmation Type: Normal

File: \\dc\dolph_st\documents\r14.2.4\quoteandconfi Browse Copies: 1

Include Folder Air Itinerary
 Include Folder Non Air Itinerary
 Print Separate Itinerary
 Print Separate Giro/ATOL Cert
 Print Separate Copy
 Print Separate Copy

Automatic Brochure (None) If Not Sent Within 0 Days Customer Type Filter All Types

Publish To Web
 Include Client Name On Doc
 Include Validating Carrier on Tkts
 Include IATA Regulations
 Include Images
 Archive Document
 Suppress Resale Split Comm
 Include Room Type Desc
 Use Lead Pax Contact Info
 Include Traveller Notes
 Suppress No Records Message
 Move Page Number Below Footer Image

Header Image: dolphin header Footer Image: dolphin footer

Footer Text

Passports
Please ensure you hold a 10 year British Passport for each passenger, including infants and children, valid for six months after you return to the U.K.

Email

Subject: Booking Confirmation [FOLDER_NUMBER] to [DESTINATION]

Default Email

Dear [LEAD_PAX_TITLE] [LEAD_PAX_LAST_NAME],
Please find attached your confirmation for folder number [FOLDER_NUMBER].
Best Regards,

Default Attachment Name: Your holiday details [LEAD_PAX_LAST_NAME]

<< Prev Next >> Standard Help OK Cancel

Email Window

The 'Booking Confirmation Print' dialog box contains the following elements:

- Type(s) to print:** A list box with 'Normal' selected. Other items include 'Balance reminder', 'resale lols test', 'Chris', 'Amex1', 'PAB', 'quotation 45', 'simontest', 'Final Demand', 'IAN', and 'Hannah'.
- Settings for Normal type:**
 - Copies:** 1
 - Language:** English
 - Pax List:** Folder Pax List
 - Include Folder Air Itinerary
 - Include Folder Non Air Itinerary
 - Include E-Tkt Receipt(s)
 - Print Separate Itinerary
 - Print Separate Giro/ATOL Cert
 - Print Separate Copy
 - Use Company Address
 - Use Alternative Printer
 - Include CAD Fields
- Buttons:** Print Setup, Printer, Window, Email (highlighted), Fax, Bulk Print, Cancel, Add Brochures, Help.

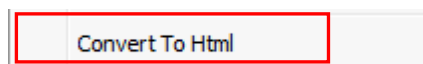
The 'Email' dialog box contains the following elements:

- Format:** PDF
- From Name:** training@dolphind.com
- From Addr:** training@dolphind.com
- To:** test@test.com
- CC:**
- Reply-To:** training@dolphind.com
- BCC:** training@dolphind.com
- Subject:** Booking Confirmation 5657 to New York, NY
- Default Attachment:** Your holiday details Test.pdf
- Additional Attachment:**
- Message:** Dear Mrs Test,
Please find attached your confirmation for folder number 5657.
Best Regards,
Reservations
- Buttons:** Insert Link, Send, Cancel

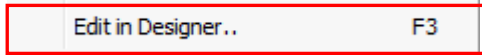
Change Text to HTML

If you have the [security settings](#) mentioned while in the document setup you can change the text to HTML.

- Right click in the **Default Email** area
- From the new menu, select **Convert to Html**

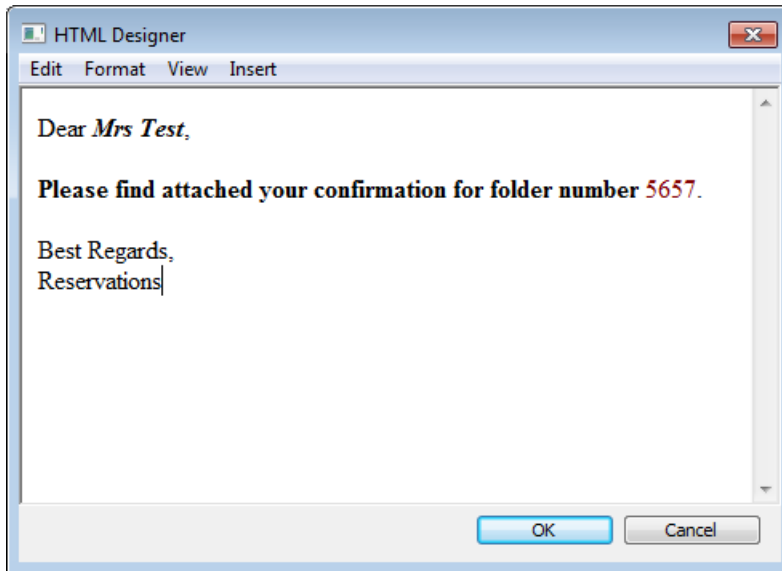


- Press **F3** or Right click > Edit in Designer to bring up the **Designer**



HTML Designer

Use the HTML designer window to edit the text and apply text styles such as font size, bold, italics, underline, bullet point lists, numbered lists etc.



Edit

Use this menu option to cut, copy, paste etc.

Undo	Ctrl+Bksp
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Del
Find...	Ctrl+F
Select All	Ctrl+A

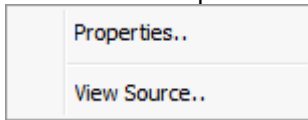
Format

Use this menu option to apply changes to font size, to have specific text in bold/italics, create a list (numbered or bullet points) etc.

Font..	
Bold	Ctrl+B
Italic	Ctrl+I
Underline	Ctrl+U
Remove Format	Ctrl+spc
Orderer List	
Unordered List	
Horizontal Rule	

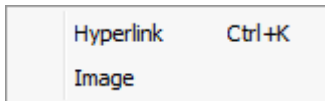
View

Use this menu option to view the properties or to view the entire text with HTML codes applied.

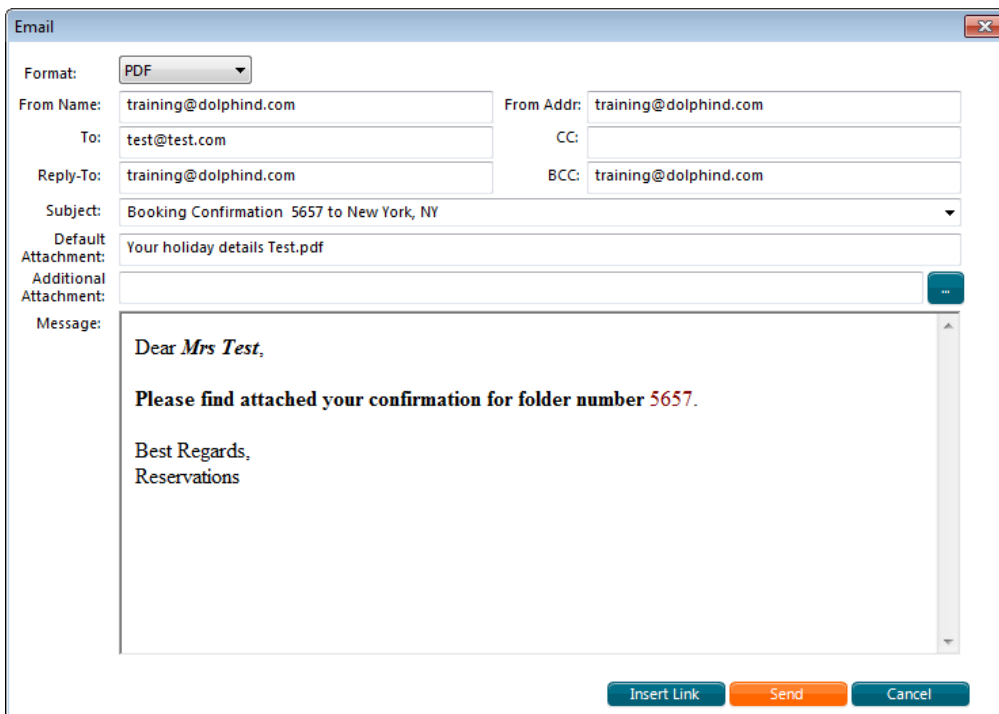


Insert

Use this menu option to insert a hyperlink or an image.



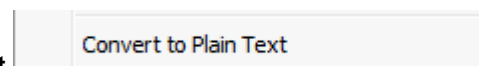
Once the changes have been made, select **OK** to save.

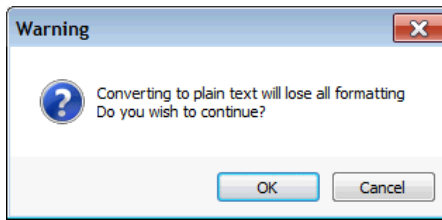


Change Text to Plain

If you have the [security settings](#) mentioned while in the document setup you can change the text to plain text.

- Right click in the **Default Email** area
- From the new menu, select **Convert to Plain Text**





- A warning box will appear. Select **OK** to continue.

Emailing From a Travel Folder

For the best results when emailing, select PDF or Word for the format of the attachment.

If you select HTML the attachment will now form the body of the email which may also see some unexpected results with regards to the layout.

Alternative Document Type

Setting Up Different Types Of Documents

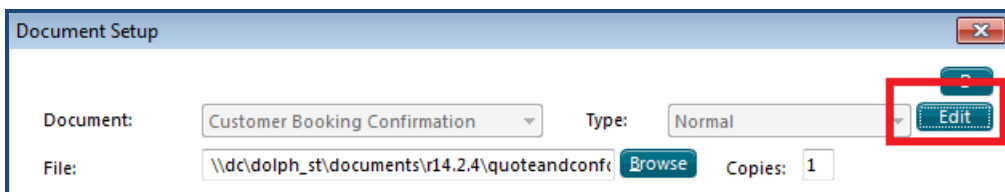
It is possible to set up more than one type or version of the same document.

For example, you may wish to send different versions of a particular document to your corporate clients and your leisure clients. To do this, set up different document types with different titles, for example Corporate and Leisure. You can also set up different document types with different footer text and/or different email subjects and default email text.

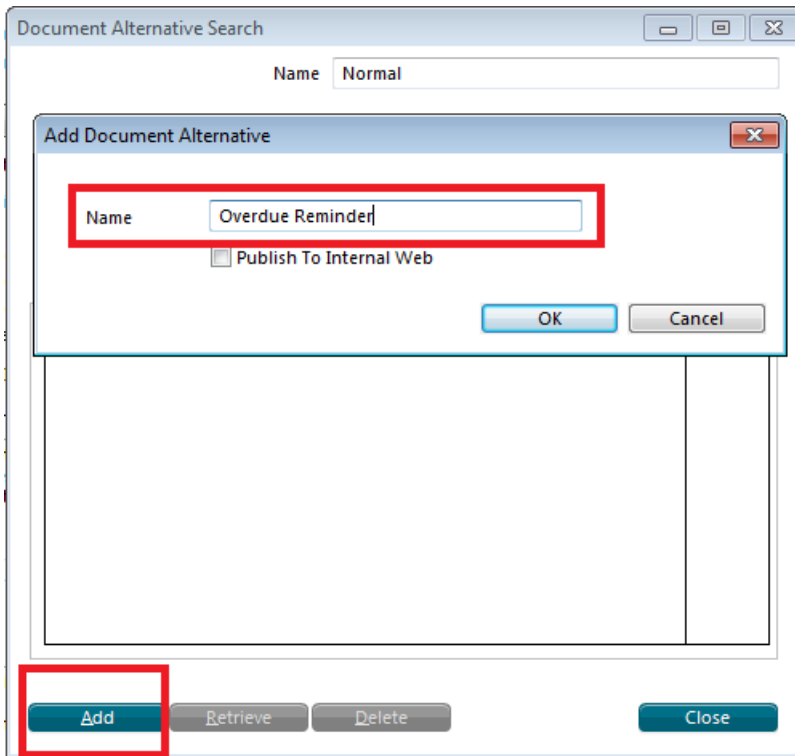
For example, you could use the Booking Confirmation document as a gentle reminder for overdue payments. You might even want to have another version of it, when the reminder becomes less gentle.

In order to produce these alternative document types, do the following:

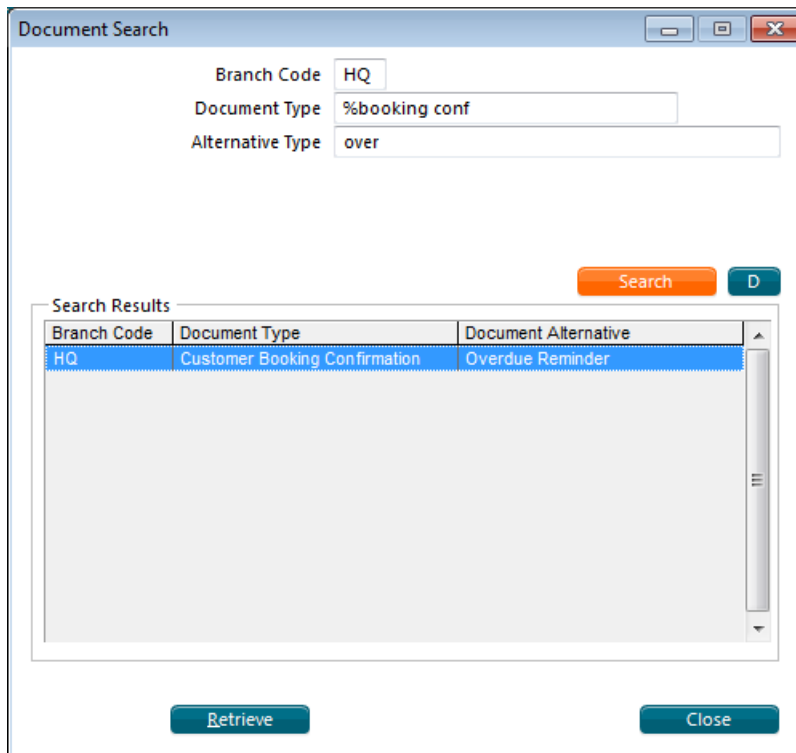
1. Go to **Options>Documents**.
2. The **Document Search** window for your branch opens. Type the document type name in the **Document Type** field and click **Search**.
3. In the **Search Results** grid, select the document you wish to copy and click **Retrieve**.



4. Click the **Edit** button to open the **Document Alternative Search** window.
5. Click **Add** to add the alternative doc and enter the name of your new document in the **Name** field. For example Overdue-1st Reminder, and click on the **OK** button to save the details. This will add the new document type into the list.



6. Close the **Document Alternative Search** window.
7. Copy the **File** path with the aid of the mouse and click **OK**.
8. Now you are back to the **Document Search** window. Search and retrieve the document alternative you just created.



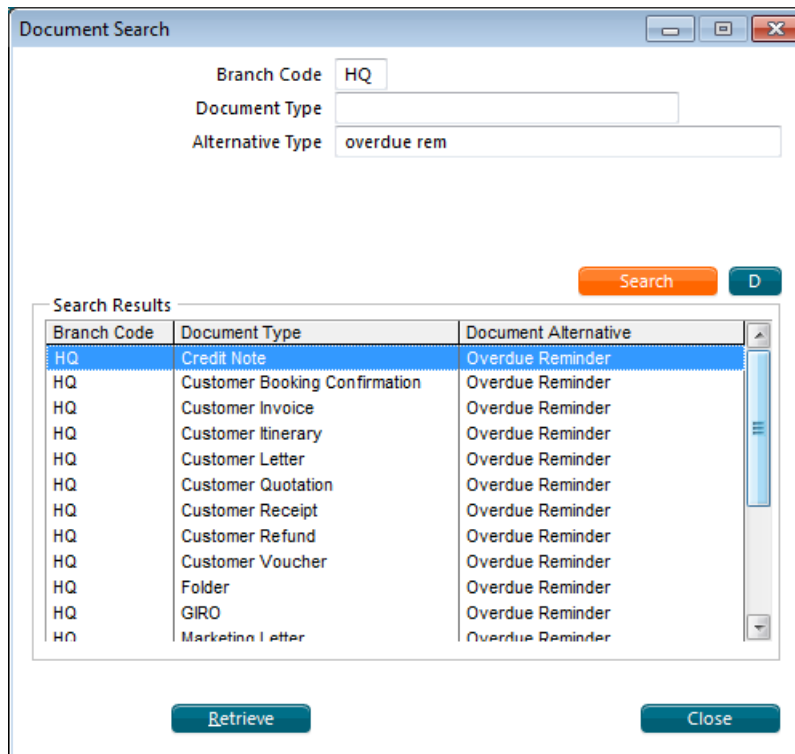
9. Paste the file path in the **File** field and select any required setting. You can now configure your footer text, email subject, body and default attachment name as per the instructions outlined in this document.

10. Click **OK** to save the changes made to this document.

You now have an Overdue-1st Reminder document pointing to the correct file path and you can create a 2nd Reminder document following the same steps.

Note: When printing the document in question from travel folders, you must remember to select the correct type of document from the drop down menu at the top of the print dialogue box and indicate the number of copies you wish to print. For example, if you only wish the alternative document type to print, you should set Normal to 0 and the alternative to 1.

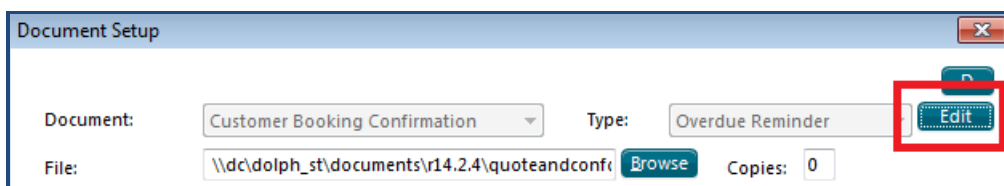
Note: Please note that by creating an alternative type of a document you are creating an alternative type for all document types.



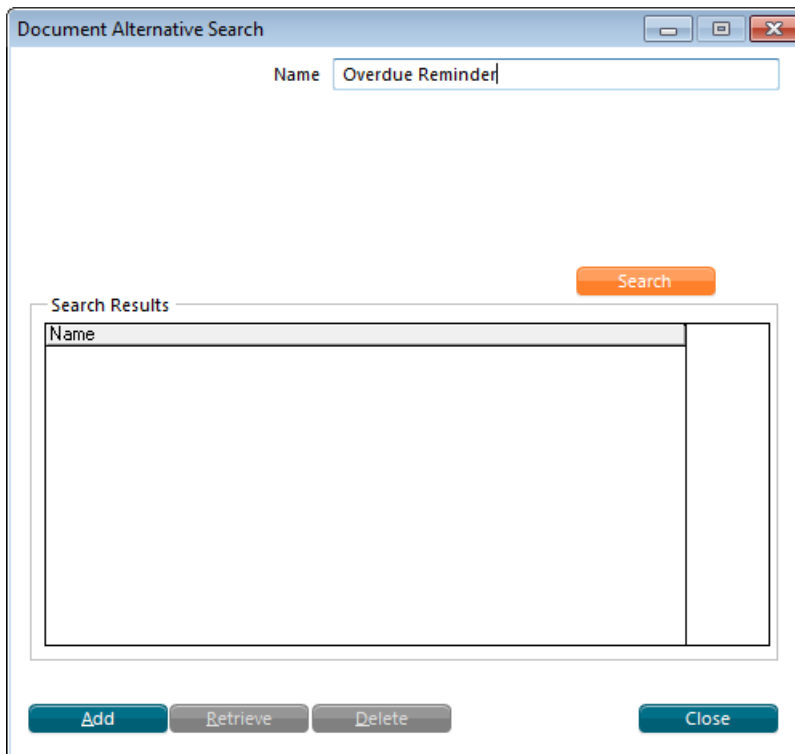
Deleting a Document Type

In order to delete an alternative type of a document, please follow the steps outlined below:

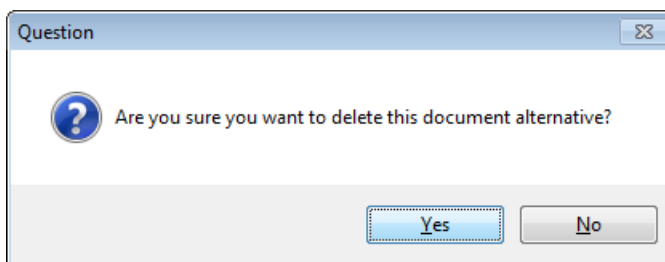
1. Go to **Options > Documents**.
2. The **Document Search** window for your branch opens. Type the document type and alternative type name in the **Document Type** field and click **Search**.
3. In the **Search Results** grid, select the document you wish to delete and click **Retrieve**.



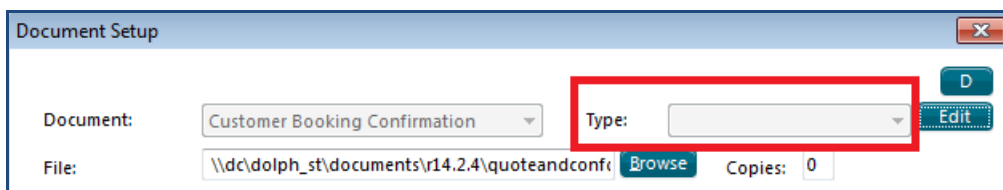
4. Click the **Edit** button to open the **Document Alternative Search** window.



5. Click **Search** to find the alternative doc type. Delete button will be active.
6. Click the delete button and the following message will be presented to you to confirm whether you want to delete the document or not.



7. Select yes to proceed. And Close to close the window.
8. The document you originally opened with have no alternative type assigned to it



9. Click on **Cancel button to close the window.**
10. All documents with the alternative type you have just deleted will no longer be removed.