











Personalising PDF documents

Smart Guide

This Smart Guide shows you how to integrate PDF documents as external content in Inxmail Professional in order to send personalised attachments with your mailings. Use a word processing program to create the document to be personalised, which should consist of text and graphics. Depending on which program you are using, you can insert the form fields directly or at a later date in Adobe Acrobat.


Preparation: You can upload your completed PDF file to *Inxmail Professional*, where the form fields are linked and personalised with the data from the recipient database.

1. Open the  (*Global settings*) tab and select the  *Content* agent.
2. Click  (*New*).
3. Enter a descriptive name for the document (without any special characters) and select *PDF document* as the type of data source.
4. Click *OK*.
5. In the editor area, click the  (*Upload file attachment*) button.
6. Select the file and click *OK*. The file will now be uploaded.
7. In the editor area, complete the input fields. Use recipient and command placeholders from the multi-function field for this [1,2]. The respective placeholders must be displayed in the  *All recipients* agent.
8. Open the mailing in which you want to integrate the PDF document.
9. In the  *Editing* workflow step, click in a text element.
10. Then click the  (*Insert commands*) button and select the  *Integrate content* option [3].
11. Select the created PDF document and click *Ok*.
12. Enter, check and approve the mailing in the usual way and assign the recipients.
13. In the  *Dispatch* workflow step, click  *Activate dispatch*. As soon as you send the mailing, the document will be personalised automatically with the customer data.

[1] RELEASE FORM FIELDS

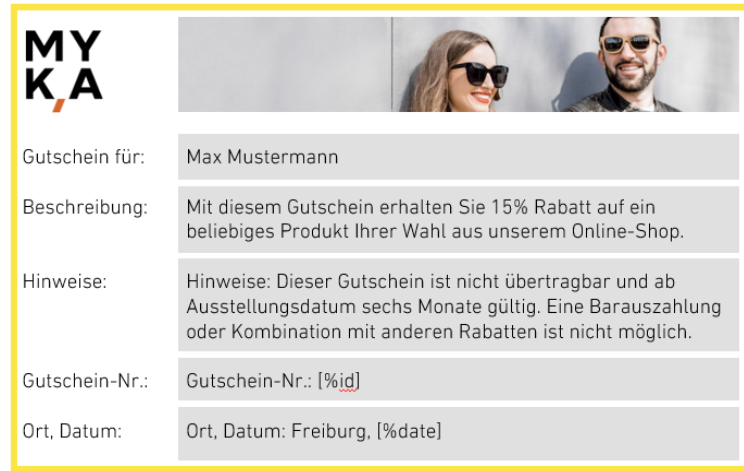
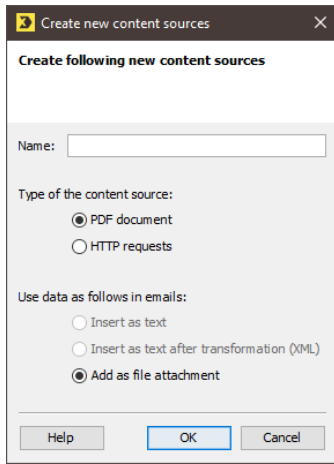
By default, voucher fields can no longer be edited after a mailing has been sent. If recipients should be allowed to fill in a form field themselves, select the *Editable?* check box that comes after the field in the editor. However, please do not do this for vouchers: Customers should not be allowed to change anything here.

[2] DEFINE SECURITY

Click the  (*Define PDF security settings*) button to open the *PDF document security* dialog box. You can assign passwords here or specify other security settings.

[3] INTEGRATE CONTENT

The *Integrate content* command can be inserted at any position in a mailing. This allows you to add a file attachment to your mailing while keeping the code hidden from your customers. If, for example, you only want to send a voucher to a particular group of recipients, you can insert the command into an article that will only be displayed to this specific target group.



Attract more attention with personalised PDF attachments

Inxmail Professional not only allows you to add PDF documents to your mailings as normal file attachments; it also allows you to integrate them as external content. Make use of this to send personalised attachments with your mailings. These could be personalised vouchers, invitations, tickets or offers, for example.

Personalisation is an important part of email marketing. A personalised newsletter allows you to address your readers directly and provide personalised content, which help to increase the attention of your readers. Furthermore, the performance values of a personalised mailing are twice as high as those of a non-personalised mailing.

In addition to using standard personalisation in a newsletter (such as personalised subject lines, salutations or complete content blocks), you can also personalise email attachments in the form of a PDF document. The personalisation features used here are the same as those contained in emails. This type of document provides an excellent way to support your current marketing campaigns.

The advantages of using a PDF document instead of conventional dispatch formats (text, HTML) are as follows:

- › Identical display irrespective of which email client is used: The recipients of text mailings can also enjoy the benefits of graphics and images.
- › High level of security: Security settings allow you to prevent the unauthorised transfer of information to third parties.
- › The document can be easily archived and output (printed).

Although this type of personalisation offers huge potential, it is hardly used by companies – concerns about production costs are too great. In reality, however, these documents cost nothing to produce and, with a bit of skill, are relatively easy to create on your own. In contrast to print mailings/actions, there are also no printing and mailing costs.