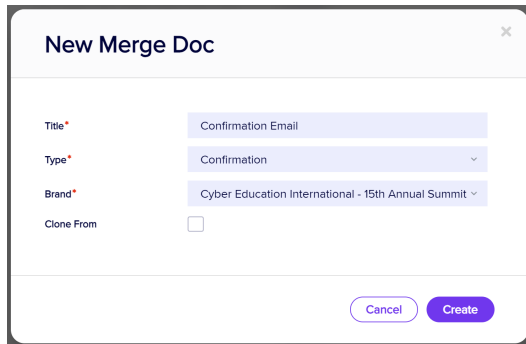


# Step-by-Step: Creating a Confirmation Merge Doc

Last Modified on 06/04/2024 12:45 am EDT

Here are the steps for creating a Confirmation Merge Document in EventsAir:

1. Select the **Communications Panel** from the EventsAir Navigation Bar.
2. Select **New** in the Merge Docs section.

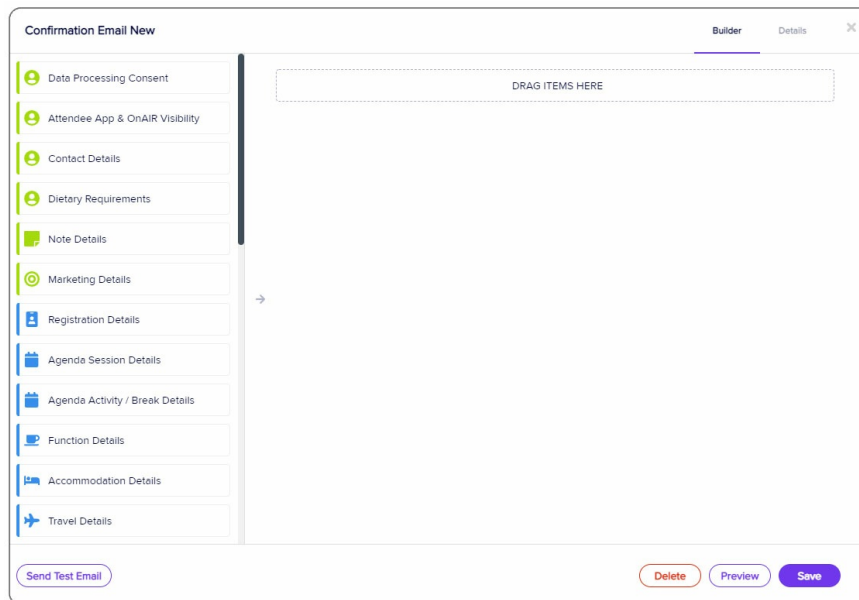


The screenshot shows a modal window titled "New Merge Doc" with a close button (X) in the top right corner. The form contains the following fields:

- Title\***: A text input field containing "Confirmation Email".
- Type\***: A dropdown menu with "Confirmation" selected.
- Brand\***: A dropdown menu with "Cyber Education International - 15th Annual Summit" selected.
- Clone From**: A checkbox that is currently unchecked.

At the bottom of the form, there are two buttons: "Cancel" and "Create".

3. In the Type dropdown, select **Confirmation**.
4. Enter the name of your new document and apply your brand.
5. You can also choose to clone a previously written Merge Doc from your current event, or any other event in your EventsAir system.
6. Select **Create**. You are now presented with the blank Merge Doc Builder.



The screenshot shows the "Confirmation Email New" Builder interface. It features a sidebar on the left with a list of Builder elements, each with a green plus icon and a right-pointing arrow:

- Data Processing Consent
- Attendee App & OnAIR Visibility
- Contact Details
- Dietary Requirements
- Note Details
- Marketing Details
- Registration Details
- Agenda Session Details
- Agenda Activity / Break Details
- Function Details
- Accommodation Details
- Travel Details

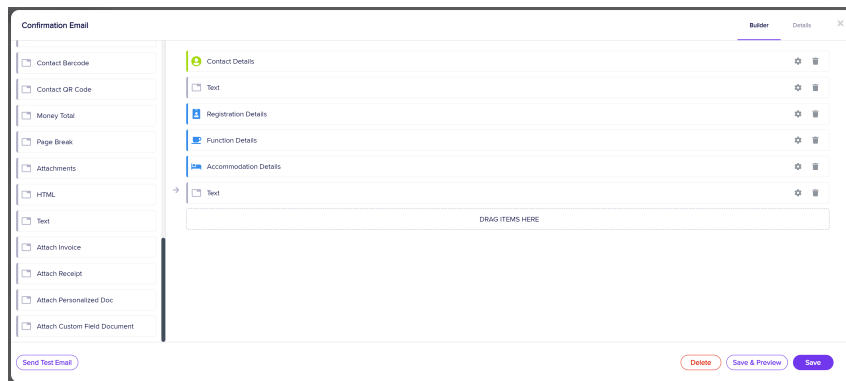
The main area on the right is a large dashed box labeled "DRAG ITEMS HERE". At the bottom of the interface, there are three buttons: "Send Test Email", "Delete", and "Save".

7. Just like the Builder in Interactive Sites, use the drag-and-drop method to quickly design and customize your content, including with text and images.
8. To create a typical Confirmation Merge Doc, you can drag the following Builder elements from the left side of the screen to the preview area on the right:

- **Contact Details** — use this section to show the attendee name, address, email, and salutation.

- **Text** — use this element to create an introductory paragraph, such as welcoming an attendee.
- **Registration Details** — this section shows the actual registration items the attendee has selected.
- **Function** – details in this section will show the actual function items the attendee has selected.
- **Accommodation** — you can include details of the attendee's hotel booking.
- **Text** — you can use this section to close the communication, and perhaps give details on how to get more information.

9. A Merge Doc with these sections will look like this:



**To edit sections:**

10. In the Text component, click on the **Setup Cog**:



11. Enter your preferred text in the Text tab, for example:

*Thank you for registering for our 2024 Conference. Please check the following details to ensure everything is correct with your registration.*

12. You can make other changes too. For example, in the Registration Component, you can try clicking the **Setup Cog**, and in the **Fields Tab**, and then de-selecting everything except for the **Show Registration Name** and **Show Name Badge** options. Tailor your document to suit your needs.

13. Similarly, you can edit the Functions Component by clicking on the **Setup Cog**. In the **Fields Tab**, try de-selecting everything except for the **Function Group Name**, **Function Date**, **Function Start Time** and **Function End Time** options. Again, tailor this as you wish.

14. You can add more text at the end, using the second Text Component. Click on the **Setup Cog** and enter your text, such as:

*We look forward to seeing you in Las Vegas!*

*Sincerely,*

*Your Conference Registration Team*

15. Select **Preview**. You can continue to fine-tune the formatting, content and structure until you're happy with your Merge Doc email.

16. When ready, set up when this email will be sent and the recipient(s), for example via the **Communications Panel** or by adding this to the **Submit Action** on your interactive site for Registrations (which you would build from the **Online Panel**).

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