

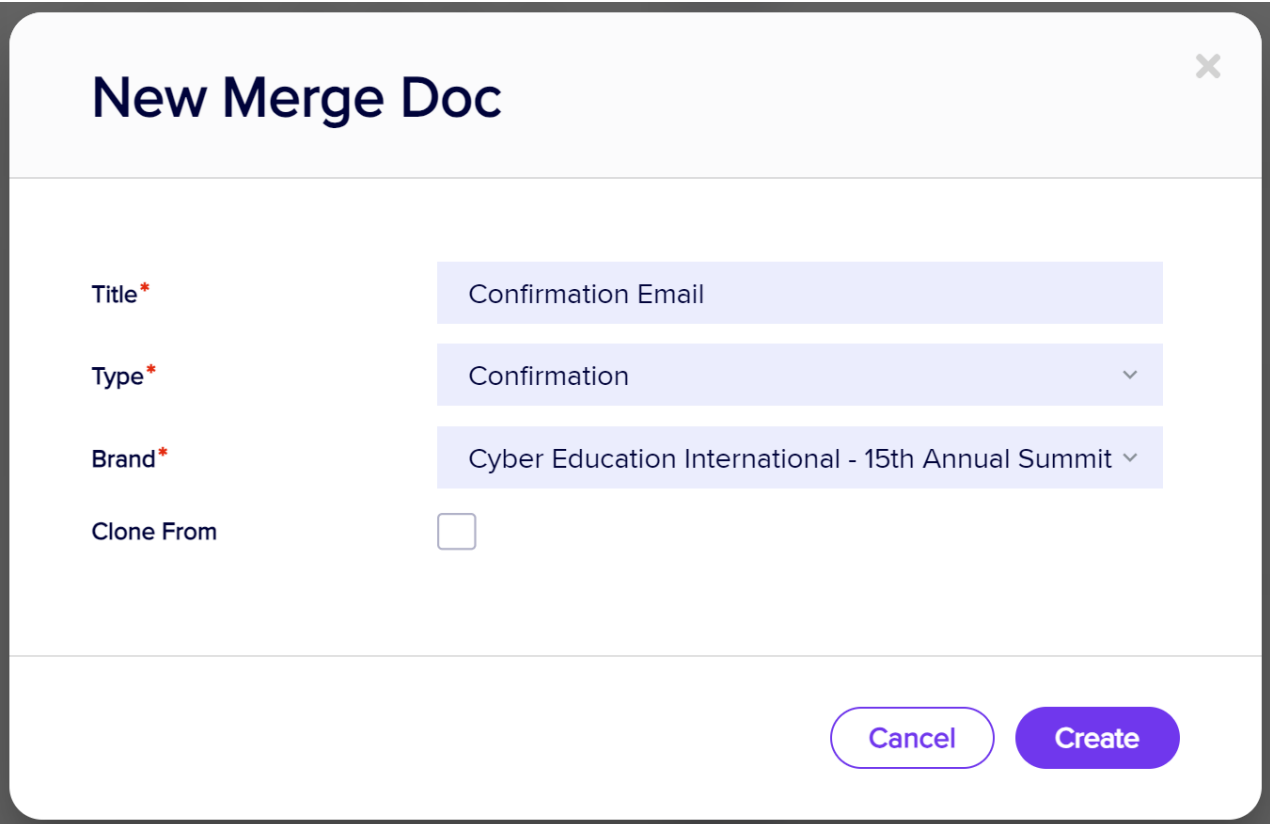
Create a Confirmation Merge Doc – Quickstart Guide

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A Confirmation Merge Document (Merge Doc) is an automated way to send an email to attendees, presenters, exhibitors etc, with details of their registration or booking.

To create one:

1. Go to the **Communications Panel**.
2. Select **New** in the Merge Docs section.



New Merge Doc ✕

Title* Confirmation Email

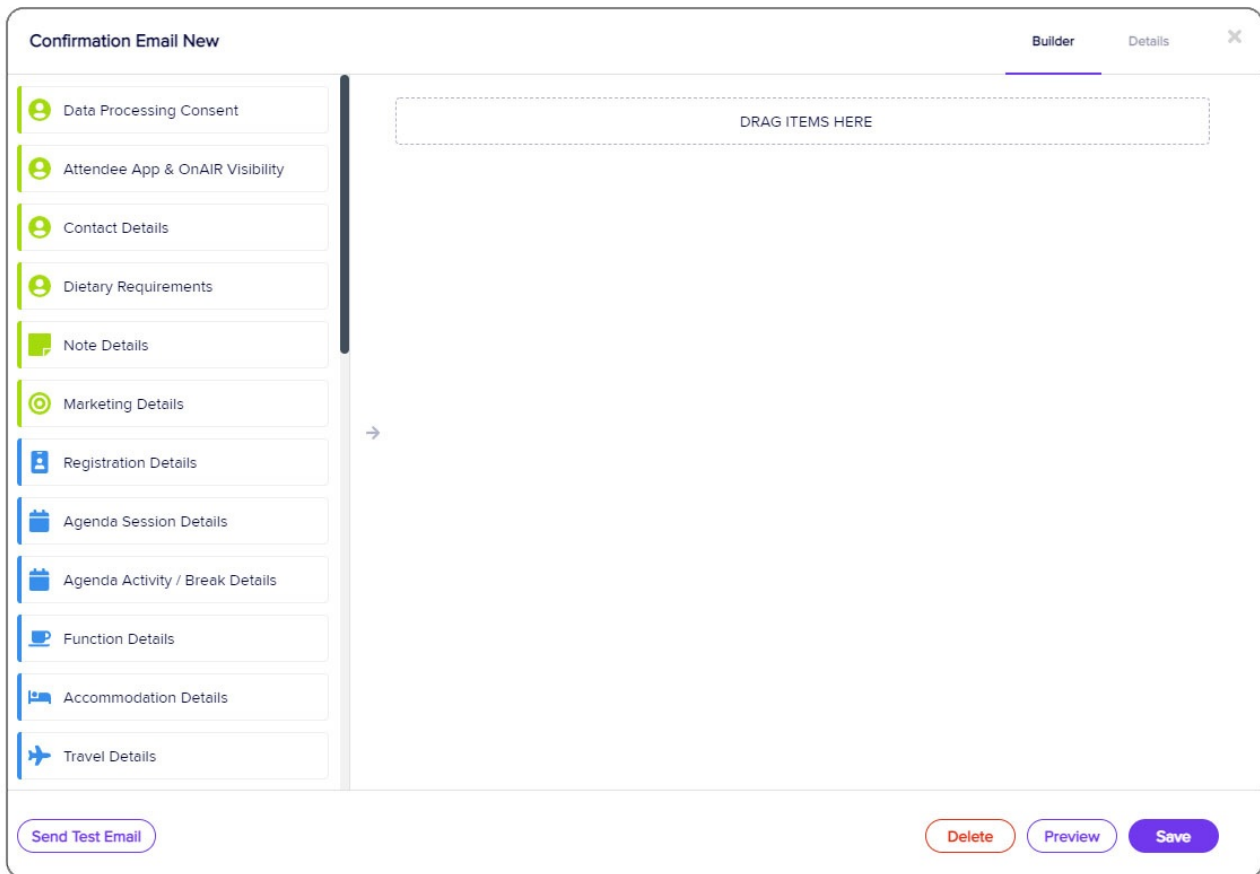
Type* Confirmation ▾

Brand* Cyber Education International - 15th Annual Summit ▾

Clone From

[Cancel](#) [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 another event.
6. Select **Create**. You'll then see the Merge Doc builder.



7. You can use the drag-and-drop method to quickly design and customize your content, including with text and images.

8. For a typical Confirmation Merge Doc, you'd drag these elements from the left side of the screen to the preview area on the right:

- **Contact Details** — to show the attendee name, address, email, etc.
- **Text** — to create an introductory paragraph.
- **Registration Details** — to show this attendee's actual registration items.
- **Function** – to show any functions they've booked.
- **Accommodation** — details of the attendee's hotel booking.
- **Text** — to give details and offer a closing salutation.

To edit sections:

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

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

Thank you for registering for our 2026 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, if you click the **Setup Cog**, in the **Fields Tab**, you can de-select everything except for the **Show Registration Name** options. You should tailor your document to suit your needs.

You could also edit the Functions Component, for example, by clicking on the **Setup Cog**, and then in **Fields Tab**, de-selecting everything except for the **Function Group Name**, **Function Date**, **Function Start Time** and **Function End Time**.

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**. This will show you a GENERIC version of the email (NOT with your event's details). 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** and/or by adding to the Confirmation Email section of your interactive (registration) site (which you would build from the **Online Panel**).

You can build multiple Confirmation Merge Docs to use in different places, such as the Presentation Portal, or add a separate Submit Action on your interactive (registration) site.

Planning ahead and having these send automatically, triggered by certain actions on sites and portals/apps, can cut your administration workload dramatically.
