

PDF Merge Doc

Last Modified on 06/03/2024 4:16 am EDT

This Express Action lets you select a Merge Doc, then create a PDF document comprised of multiple merge docs, i.e. that Merge Doc for each of your selected attendees, collated into one master document.

- **Merge Doc** – choose one of your Confirmation Merge Docs, or Marketing Merge Docs here.
- **Target Group** – press the Filter button to select the attendees to include in this PDF.
- **Order By** – choose how you want these merge docs for each attendee record to be presented (in what order).

Selected Records tab

After filtering, you can look under the Selected Records tab to see a complete list of the attendees this Express Action will be applied to.

Details		Selected Records	
<input checked="" type="checkbox"/>	ID	NAME	ORGANIZATION
<input checked="" type="checkbox"/>	1	Santos, Aditya	Aurora Foundation
<input checked="" type="checkbox"/>	2	Lee, Aditya	Global Horizons Initiative
<input checked="" type="checkbox"/>	3	Khair, Ahmed	Momentum Ventures
<input checked="" type="checkbox"/>	5	Tanaka, Aaliyah	Pinnacle Ventures
<input checked="" type="checkbox"/>	7	Ma, Aditya	Blossom Innovations
<input checked="" type="checkbox"/>	9	Silva, Aditya	Rising Sun Technologies
<input checked="" type="checkbox"/>	10	Takahashi, Aditya	Evergreen Alliance
<input checked="" type="checkbox"/>	11	Gonzalez, Aaliyah	Spectrum Solutions
<input checked="" type="checkbox"/>	12	Bianco, Aditya	Harmony Enterprises
<input checked="" type="checkbox"/>	13	Ma, Aaliyah	Phoenix Foundation
<input checked="" type="checkbox"/>	14	Costa, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	16	Wu, Aditya	Bright Future Foundation
<input checked="" type="checkbox"/>	18	Ma, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	19	Yamada, Aaliyah	Evergreen Alliance

Total Records: 435

[Save As Data Snapshot](#) [Export To Excel](#) [Cancel](#) [Change](#)

You may see slightly different buttons underneath the list as those that appear in the image above, depending on the Express Action you're using.

- You can use all the Selected Records, or just pick out some from within that list.
- To exclude individual records, manually deselect them. You can select them again to include them if you change your mind.

When you're happy with the list, press the "Start" button to start the Express Action (you can also do this from the Details tab).

Save as Data Snapshot

You'll see this option under the Selected Records tab.

A Data Snapshot captures, or “remembers” the results of a search or report filter so you can re-use the data later. (If you want to save the filter itself, to search on it again later, use the save filter function.)

Read more about using Data Snapshots [in this article](#).

Note: **Save As Data Snapshot** saves the results, not the selection criteria. Any Attendees added *after* you made this selection are NOT included, even if they match your original filter criteria. If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button inside the Filter screen.

Create Data Snapshot ✕

Create New

Name

Remove After ▼

Append to existing ▼

Replace existing ▼