

LDD Email

LDD applications now give you the added ability to email individual documents, multiple documents or document packages. You can attach the document(s) as a PDF or insert the text of the document(s) into the body of the email.

The very first time you send an email from an email address not yet used by the LDD Email system, there is a verification of your email. You will be sent an email and will need to click VERIFY from within the email to be able to proceed.

What you Need to Set Up in Order to Send an Email

To send an email, make sure your email address is entered into your Firm Contact or Paralegal record in the Firm contact database. You can access this under the Firm Contact or Paralegal dropdown. The first time you email, you will be asked to verify this address.

For ease of use, all contacts you wish to email should have email addresses entered in their records. Alternatively, you are able to add email addresses manually when emailing. (Note you can email to a maximum of 5 email addresses at a time.)

How to Initiate the Email Process

There are several different places from which to initiate an email:

- From the Docs screen – by right clicking on a document or package you wish to email you will see an **Email** selection (Note that for a package, if the cursor is positioned on an individual document, you will see both an **email package** and an **email document** selection)
- From a single merged document or package, after it has been produced – on the right click menu there is an **Email** selection, or via the **Email** button at the top of the screen
- From the Multiple Document Merging window at the right side of the screen. From the Docs screen, **Ctrl Click** on each document you wish to email and from the Multiple Document Merging window at the right side of the screen, click on **More** to access the **Email** selection.

Completing the LDD Email Screen

When you initiate an email, the following screen appears. The fields you need to complete are described below.

LDD Email System

From: "Suzi - sgayne@gmail.com" <sgayne@gmail.com>

To:

Subject: SUZI's MISC TESTING FILE

PDF Doc: Attach PDF

Body: [Insert Document into Email Body](#)

B *I* U Default [List Icons] [Color Icons] [Font Icons] [Table Icon] [Code Icon]

SEND

SEND

- The **From** box has already been completed with your verified email address.
- When you click the blue **To** link, you can select from any of the contacts in the file. In the **To** box, you can also type in any other email addresses, separated by commas or semi-colons.
- The **Subject** field automatically displays the reference line of the file. You can modify this if you like.
- Under the **PDF Doc** dropdown, you can select either: **Attach PDF** and/or **Insert Document into Email body**. If you choose the latter, you will see the document inserted into the body of the email and you can edit it as well as adding any other text.*
- Click the **SEND** button to send the email.

*Note that if you do this, an empty box is added after this clause so that you can add additional text. If you would like to insert introductory text which shows before the email in the body, you will need to first click out of that text box, then click back in. Then right click and choose the option **Move Text Box Up** to move it up so that it appears before the previous box as in the screen on the next page.

