Docmail Connect Sage 50 Edition

Quick Start Guide

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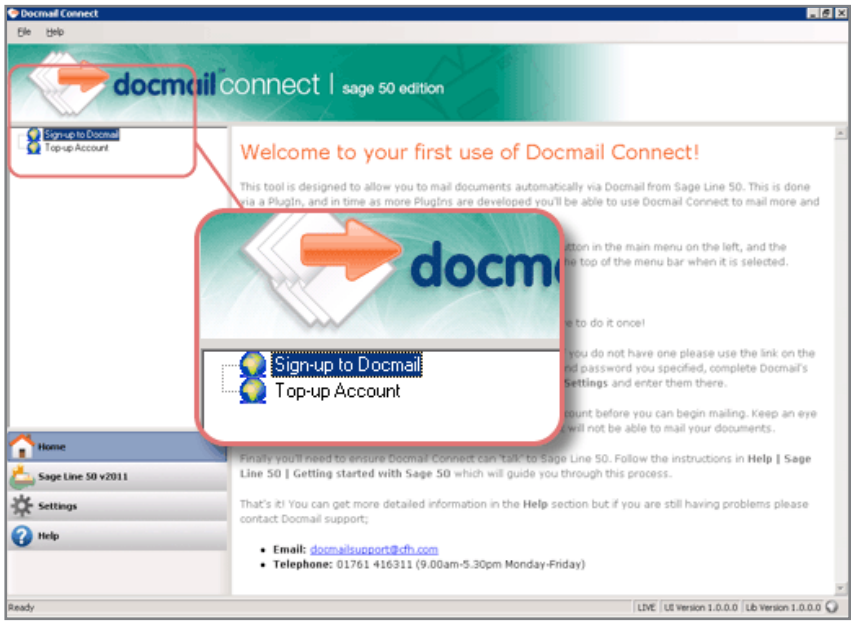
Getting started with Docmail Connect

Docmail Connect Sage 50 Edition is a plug in for Sage 50 to allow you to create Docmail-ready documents directly from Sage 50 output.

To get started, download the version of Docmail Connect that is suitable for your version of Sage 50. Currently, we support both the 2010 and 2011 versions.

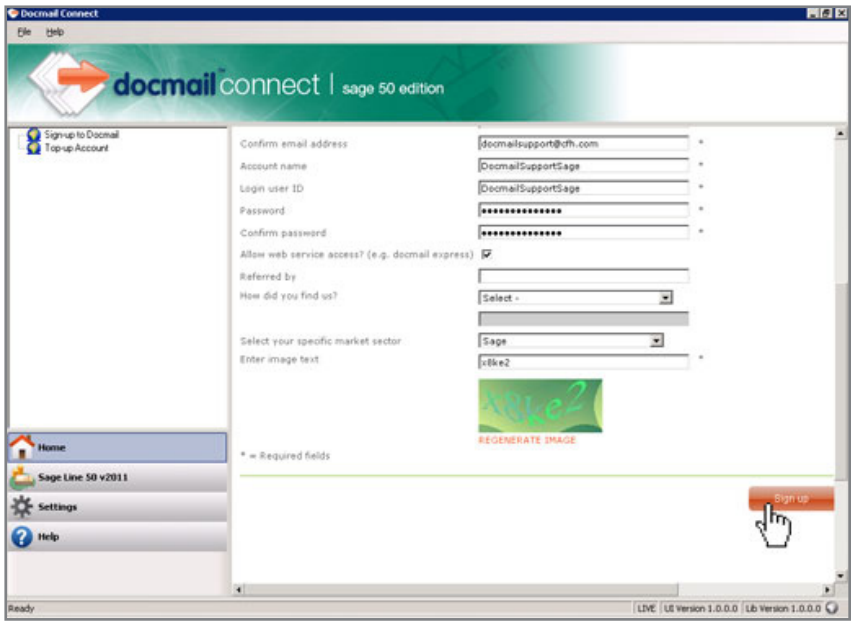
Setting up Docmail

Docmail Connect Sage 50 Edition is a plug in for Sage 50 to allow you to create Docmail-ready documents directly from Sage 50 output.



When you launch the application, the explorer window on the left shows two options, the most important being to create a Docmail account if you don't already have one. If you ALREADY have an account, click on the 'Settings' button below the explorer and add your Username and Password there. More on this later...

Click on 'Sign-up to Docmail':



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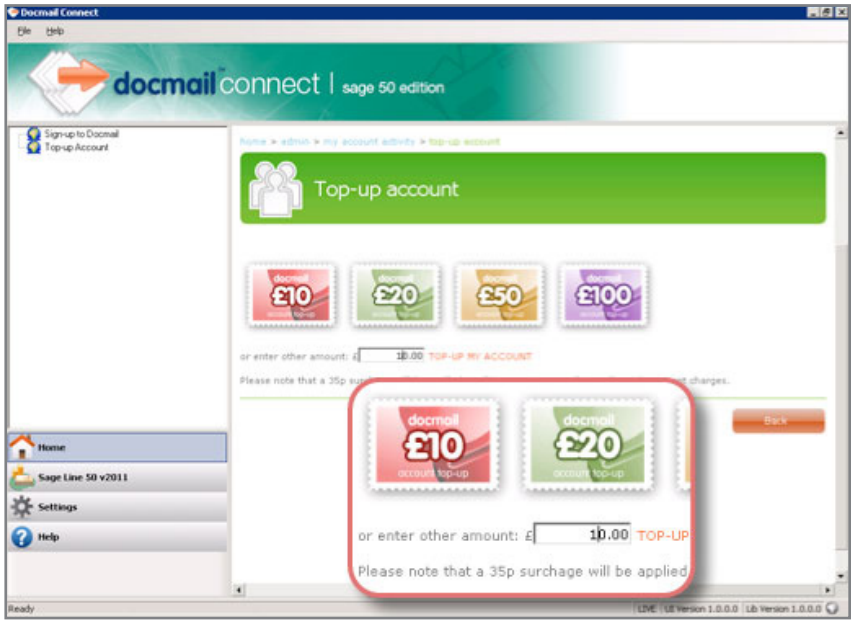
Complete the sign-up form in the right hand window and click 'Sign up'. Once done, a login page appears into which you should enter your newly created Username and Password. This completes the Docmail account creation stage.

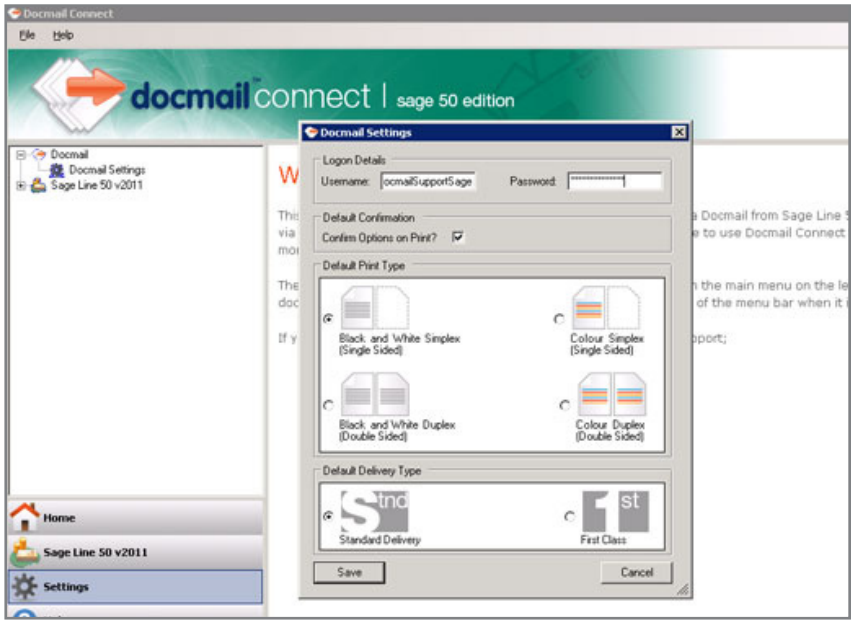
The next stage involves topping up your Docmail account to ensure you have funds to cover the mailing you will want to do. **It is important to do this now, as this initial release of Docmail Connect does not permit an account top-up during the mailing process and deletes the mailing if there's insufficient money in the account.**

Click 'Top-up Account' in the explorer window:



Add any of the stamp values or the amount you wish to load into your account and follow payment instructions.

There! Docmail is set up and ready to go. To be sure that Docmail has your details each time Docmail Connect is launched, click on 'Settings', enter your Username and Password there too, along with any changes you might want to make to document printing and postage defaults:



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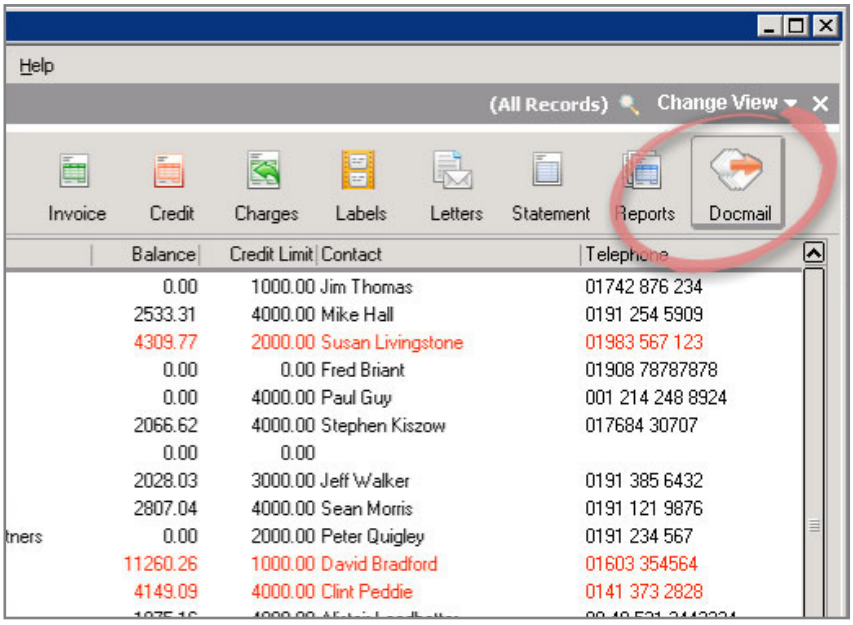
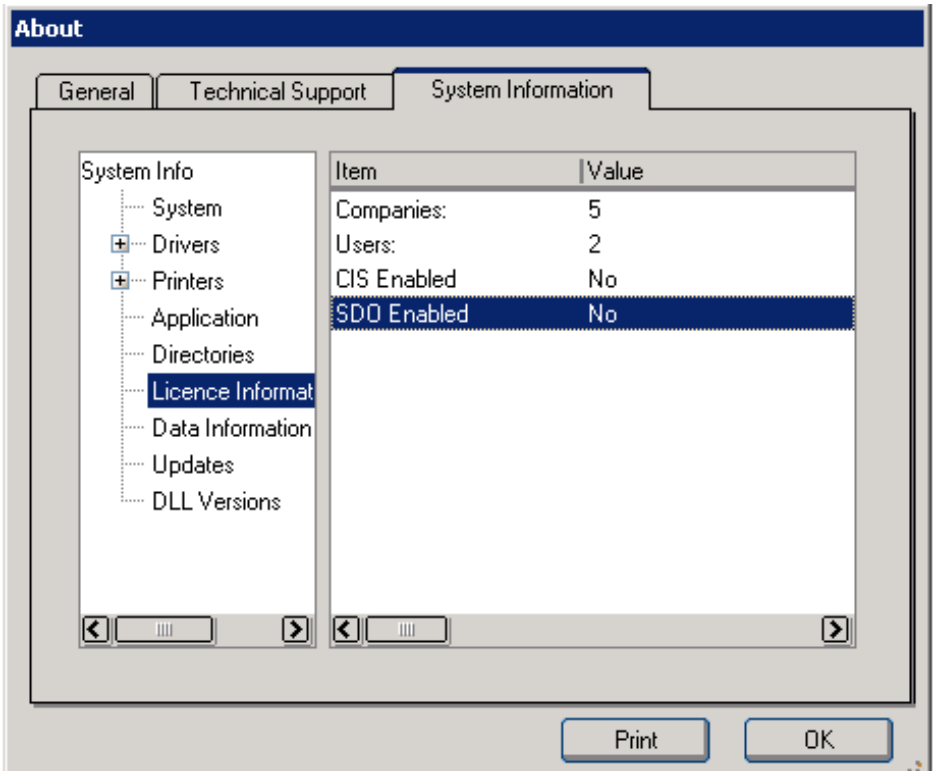
Setting up Sage 50

To proceed, we now have to make sure that Sage 50 is linked in to Docmail. To do this, open Sage 50. Once a Docmail account has been set up using Docmail Connect in the steps outlined above, you'll notice a new 'Docmail' button on the far right of Sage 50's button bar:



So far so good, but before we can use Docmail Connect to feed our Sage 50 output into printable documents, we must see if 3rd party integration is enabled. Click Help/About/System Information and look at the following box:



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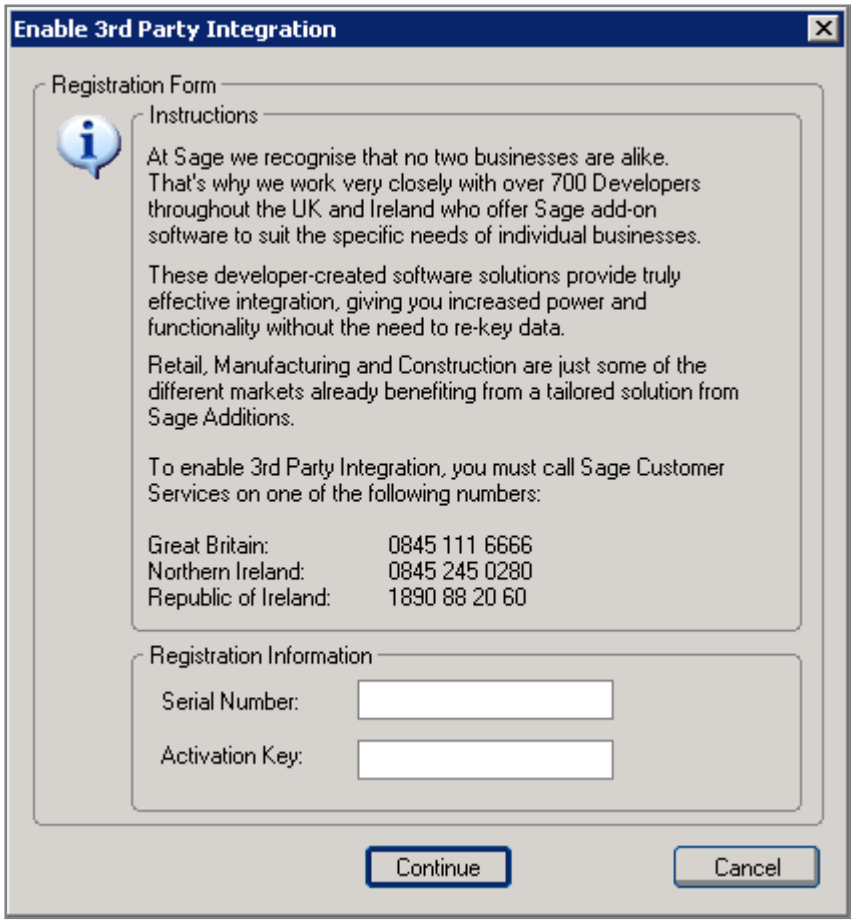
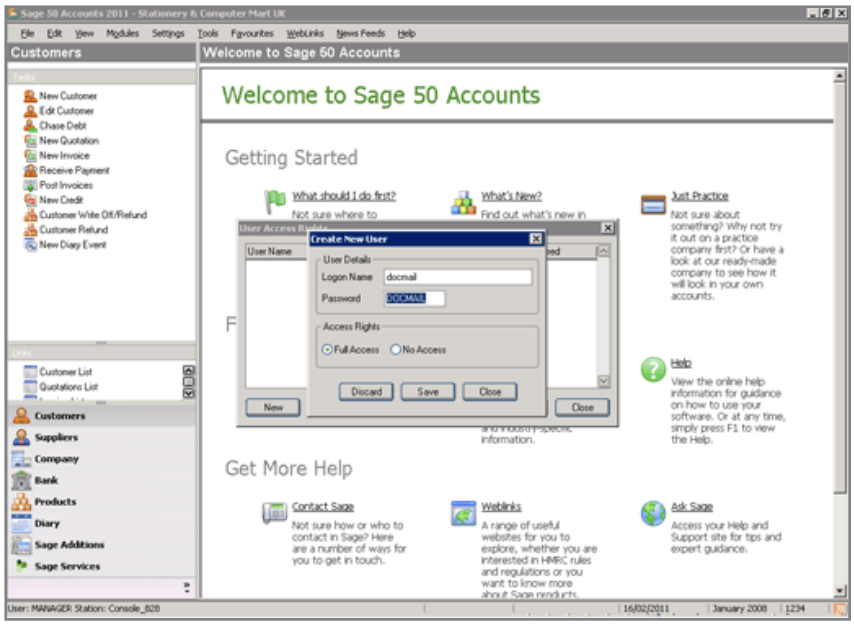
If ‘SDO Enabled’ reads ‘No’ or zero, click Tools/Activation/Enable 3rd Party Integration and call the appropriate number shown to get this feature activated by Sage (FREE service!):



Enter the Activation Key along with your Sage serial number into the boxes and now Sage output is ready for use.

The next step is to create a new user in Sage 50. Go to Settings/Access Rights/New and call the new user something. We suggest ‘Docmail’.



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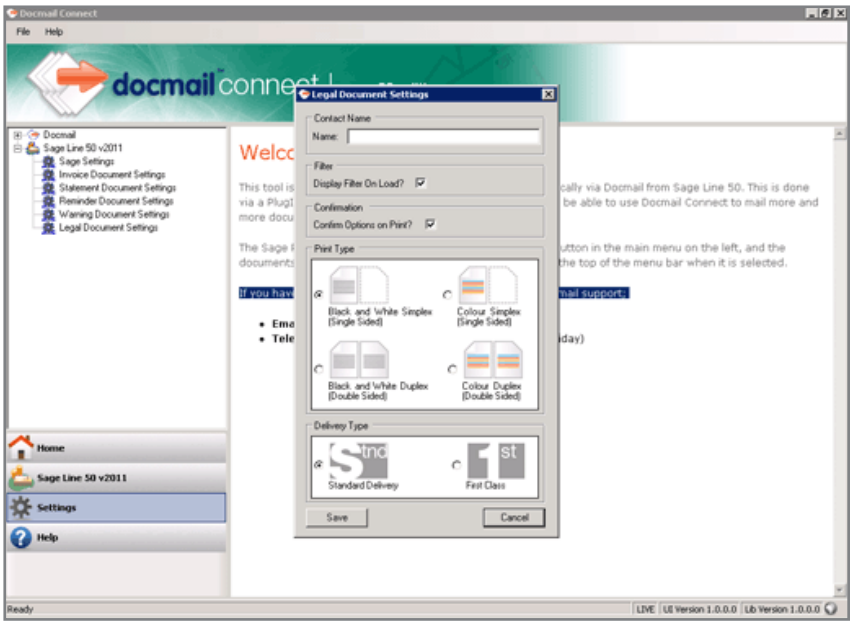
Once you have done this, you now need to tell Docmail Connect how to use the data output from Sage. To do this, start up Docmail Connect and click on the 'Settings' button. In the explorer window above expand the Sage 50 option and click on 'Sage Settings'. Enter the username and password you have just created in Sage 50.

Finally, you should go through each of the Document settings and indicate your print and postage preferences.



Creating and sending an invoice via Docmail

We are now ready to output something from Sage 50 to a customer using Docmail! Firstly, let's create an invoice in Sage 50...

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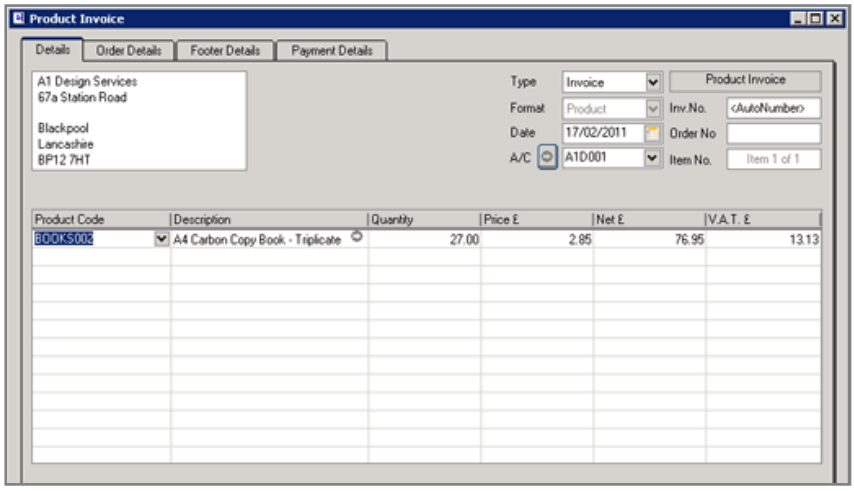
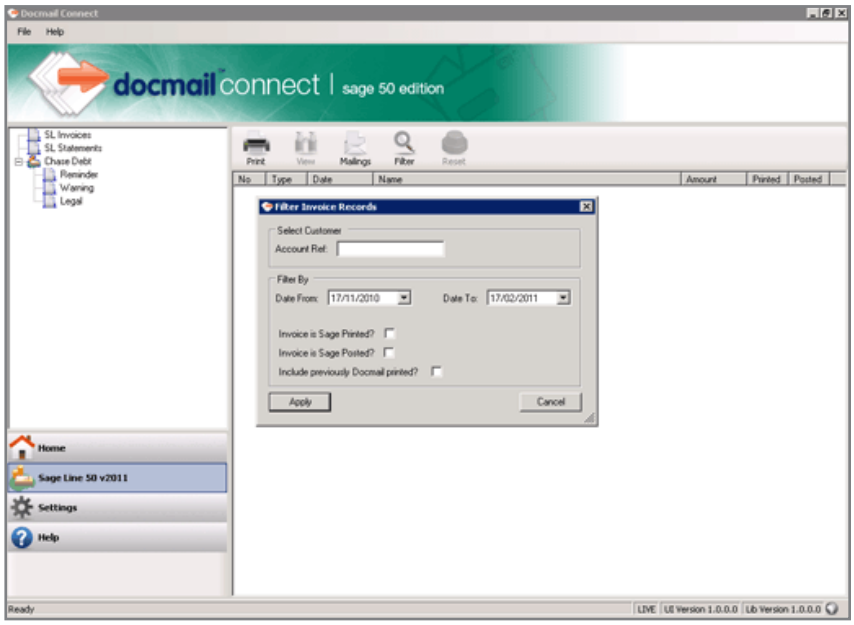
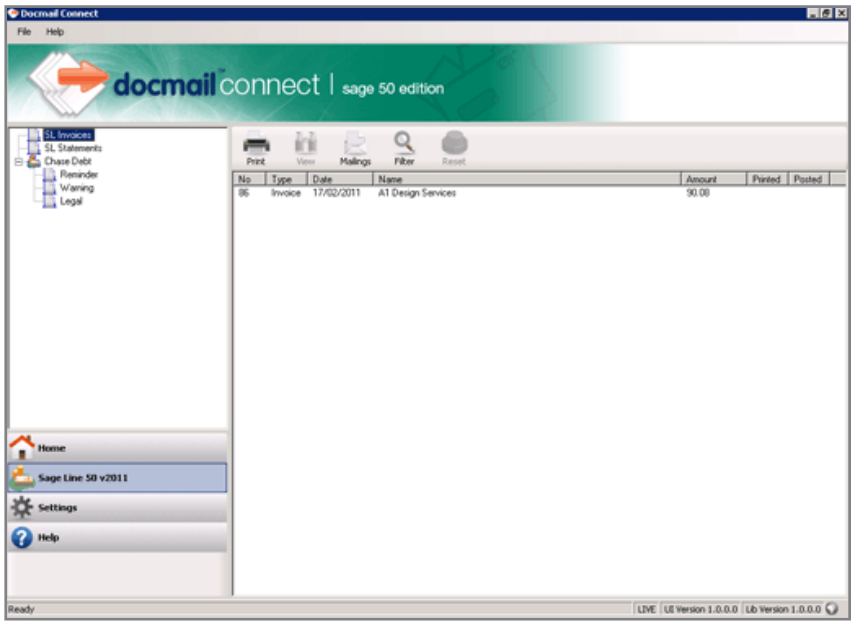


When you have done this, click Save and open Docmail Connect. Click the Sage button and select 'SL Invoices', then click Apply.



You should see your newly created invoice appear in the main window...



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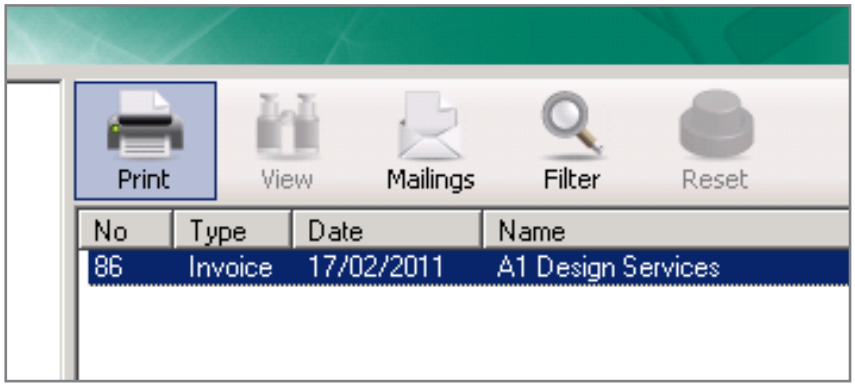
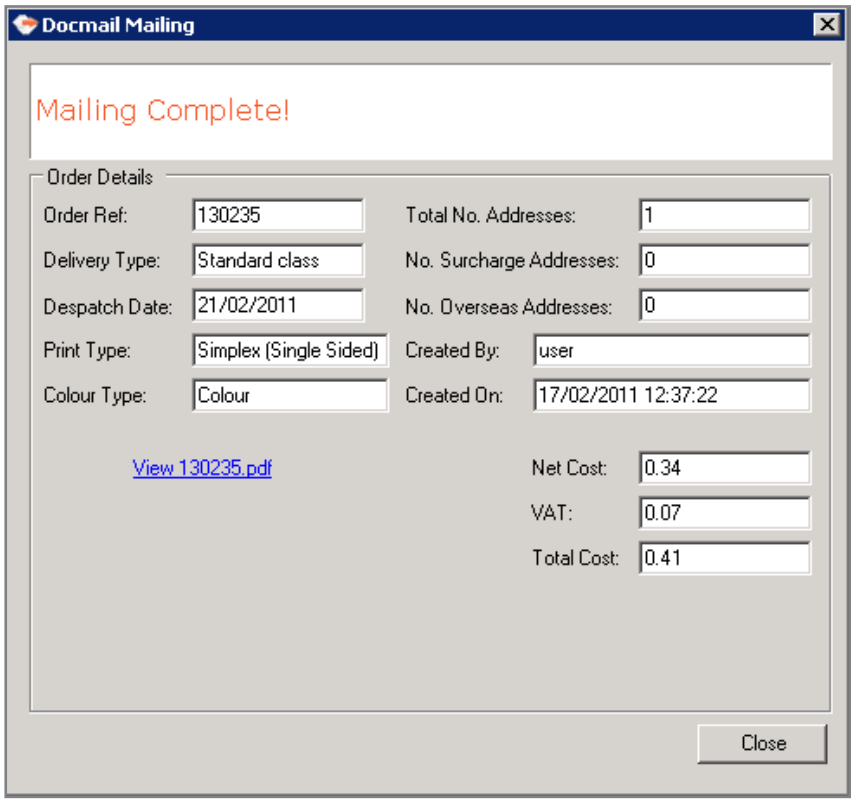
Highlight the entry(s) and hit the 'Print' button in the button bar.



You will be asked to Confirm Mailing Options, then Docmail Connect sends the invoice to Docmail for print and despatch.



Once processing is complete, you will see the report window, showing what you have just done, and the cost. You can also view a PDF of the invoice...

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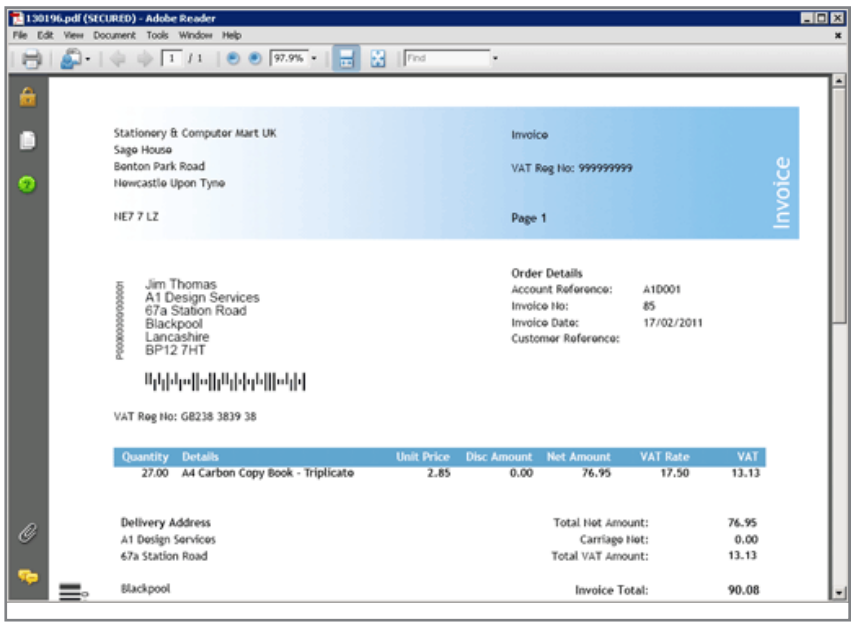
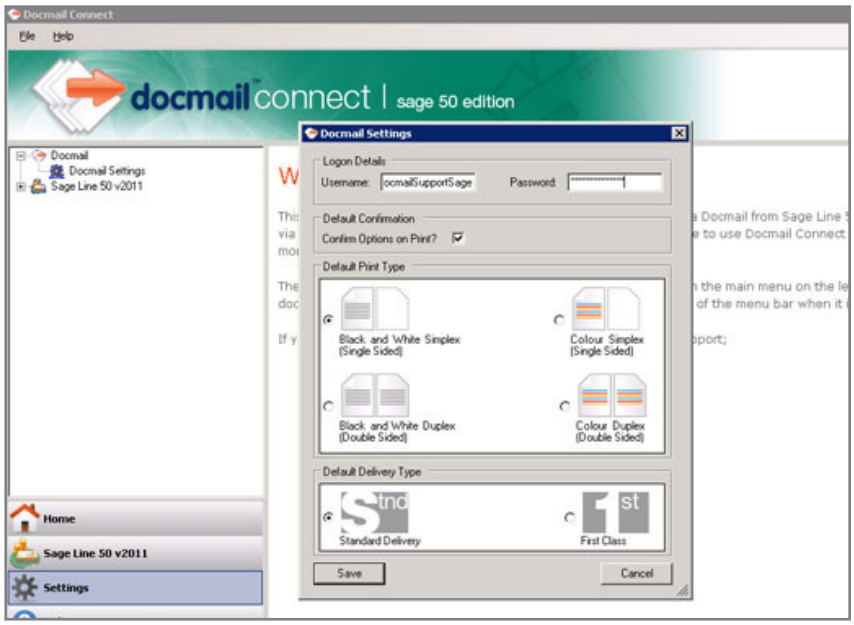


Add any of the stamp values or the amount you wish to load into your account and follow payment instructions.

There! Docmail is set up and ready to go. To be sure that Docmail has your details each time Docmail Connect is launched, click on 'Settings', enter your Username and Password there too, along with any changes you might want to make to document printing and postage defaults:



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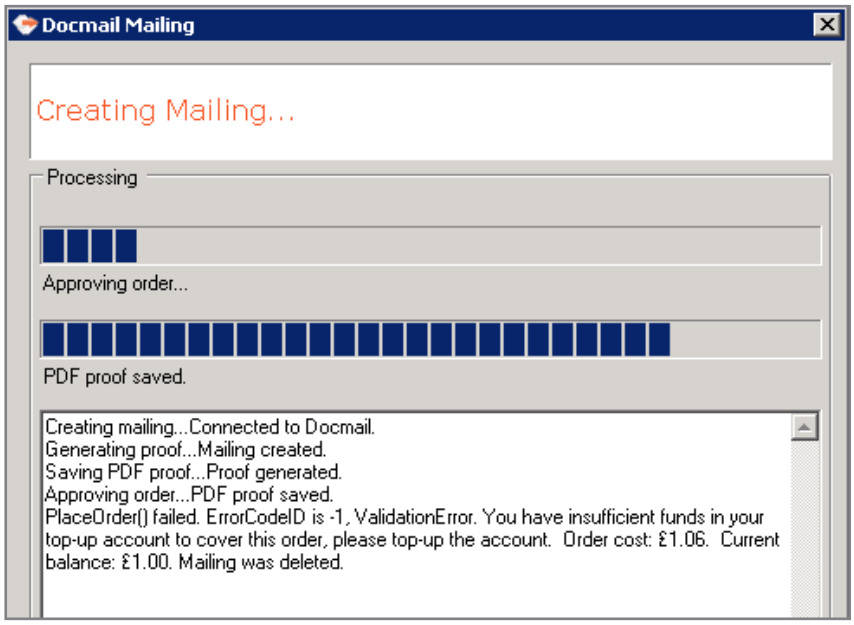
Possible problems

1) If you do not have enough money in your Docmail account, you will see a message similar to this:

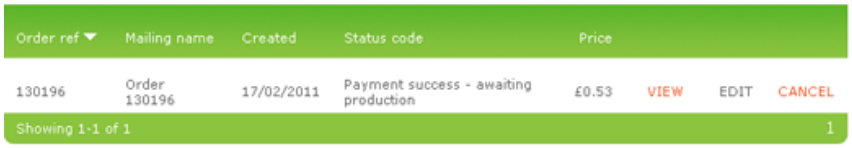


To correct this, you must click on 'Home' and go to 'Top-up Account'. Once the funds are in place, highlight the entry or entries and click the 'Print' button again.

2) You are not happy with the PDF proof, or you've spotted an error in the Invoice and you want to cancel the job.

Currently, this can only be done by accessing your Docmail acount via a web browser.

Log in to your Docmail account (https://www.docmail.co.uk/live/login.aspx), click on 'Administrate Data' and under 'Mailings', select 'MY MAILINGS'. You will see a list of mailings and their current status. The mailing you just sent via Docmail Connect will be there. Identify it by Order Ref or Mailing Name and select 'CANCEL'.



Your mailing will be deleted and your Docmail account credited with the full cost.

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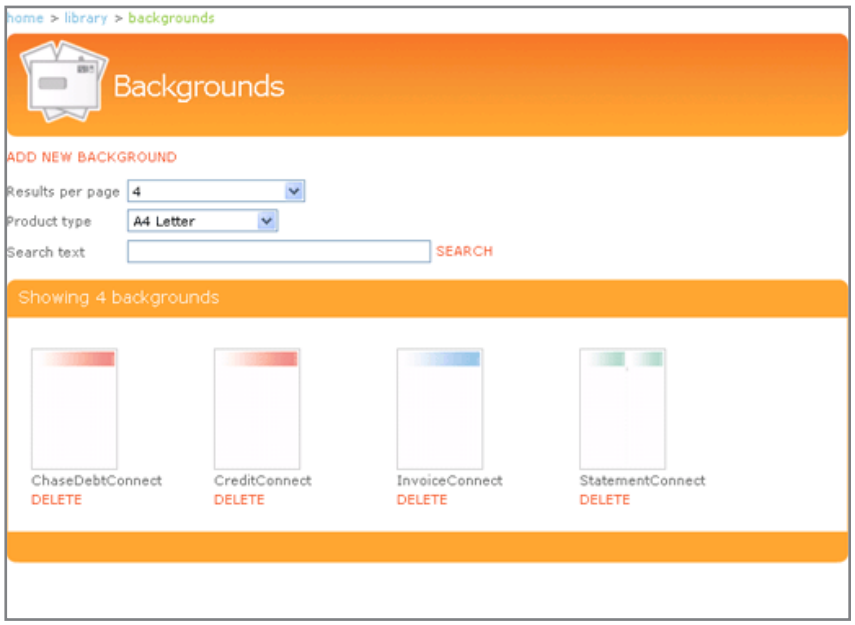
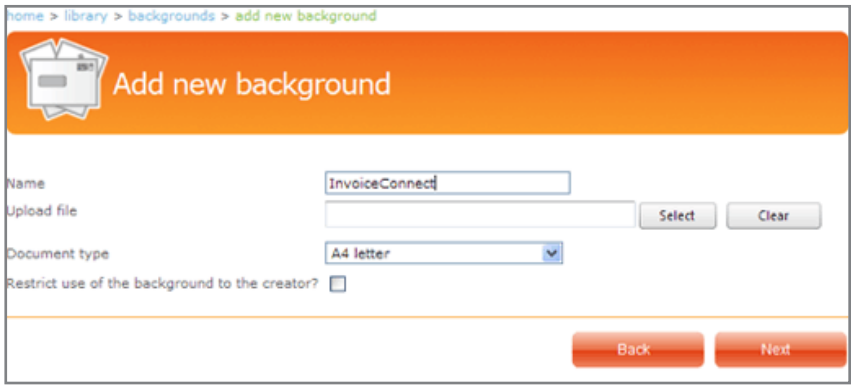
Adding backgrounds



If you are new to Docmail the Docmail Connect backgrounds for Sage output will have been added for you when you created your account. Existing Docmail users will have to add the Backgrounds. Download these here http://www.docmail.co.uk/Downloads/Sage50_backgrounds.zip and unZip the package.

At this point, whilst they are on your system, you can customise them to your business. Why not add your company logo? Just remember that Docmail Connect places all the data in pre-determined positions, so it is best to try a few test outputs first.

Next, upload the backgrounds to Docmail. MAKE SURE THE NAMES ARE EXACTLY AS SHOWN ABOVE.



Each time you output Sage 50 via Docmail, the correct background will be automatically selected.

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