docmail™

Docmail Desktop

User Guide

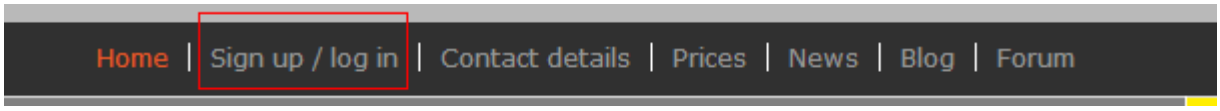
Docmail Desktop

Before you can use Docmail Desktop you will need to set up a docmail account:

Please visit www.docmail.co.uk

Here you will be able to read all about docmail and then register for a docmail account.

Please click on 'Sign up / log in'



Then click on 'Sign up.'

Once you have set up your docmail account you can install the Docmail Desktop application. Follow the instructions on the SETUP tool which will be supplied by the Docmail

team. In your docmail account you will need to allow access to the web service from your account to allow Docmail Desktop to run.

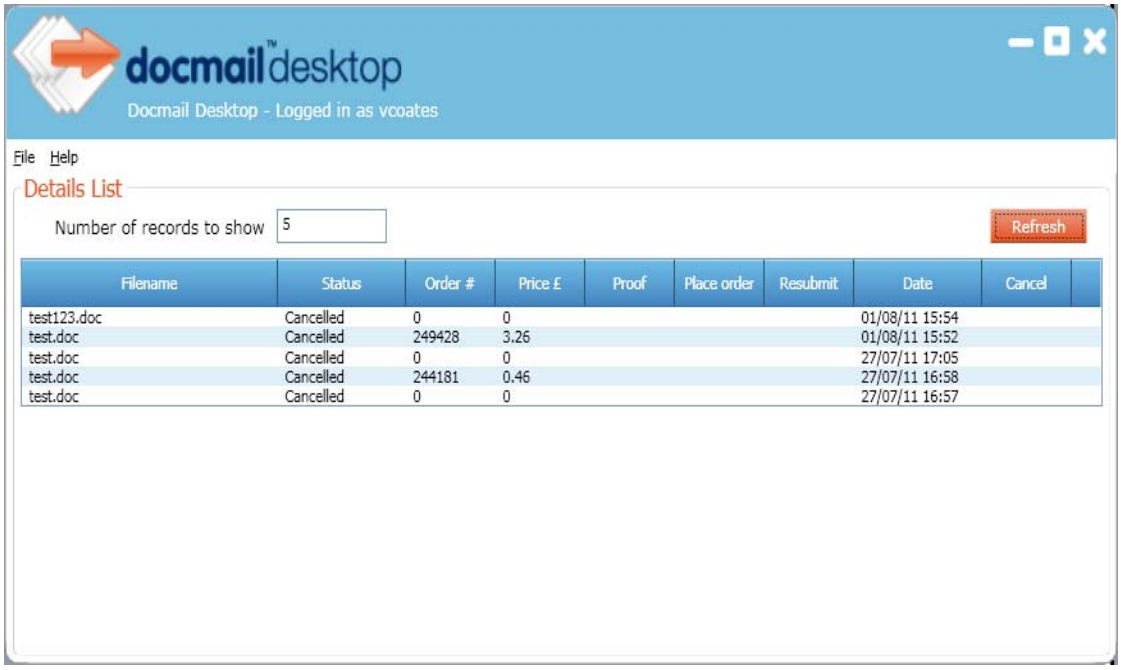
This is done by going into:

- Admin
- My Login Details
- ”Allow web service access?” the box will need to be ticked.

Once you have installed Docmail Desktop and launched the app you will arrive at the login screen.

Enter your docmail username and password:

You will then be taken to the HOME/ Details List:



This page details all of your current orders and includes the following detail and options:

- Filename
- Status
- Order number
- Order Price
- Proof
- Place Order instruction
- Resubmit
- Date of order
- Cancel

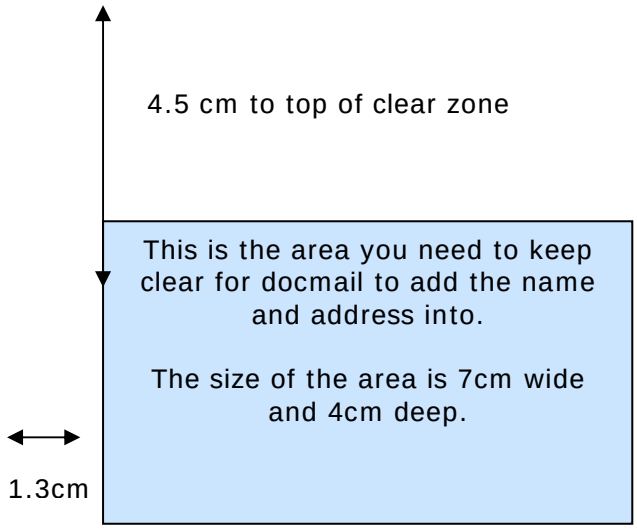
Docmail Desktop allows two options:

Option 1) Create a mailing with a letter and a list of names and address (csv or excel)

Option 2) Create a mailing with a letter with only one name and address

Personalising your letter:

All options can have personalised fields in the letter and will require a blank space at the top left hand side of your letter to have the name and address printed to go into the window of the envelope. The blank space needs to be as follows:



In addition any personalised fields required can have docmail merge tags for example:

23/06/11	<<date1>>
Monday 23rd June 2011	<<date2>>
23 Jun 2011	<<date3>>
23rd June 2011	<<date4>>
Mr Doc Mail	<<fullname>>

To create an order for Option 1

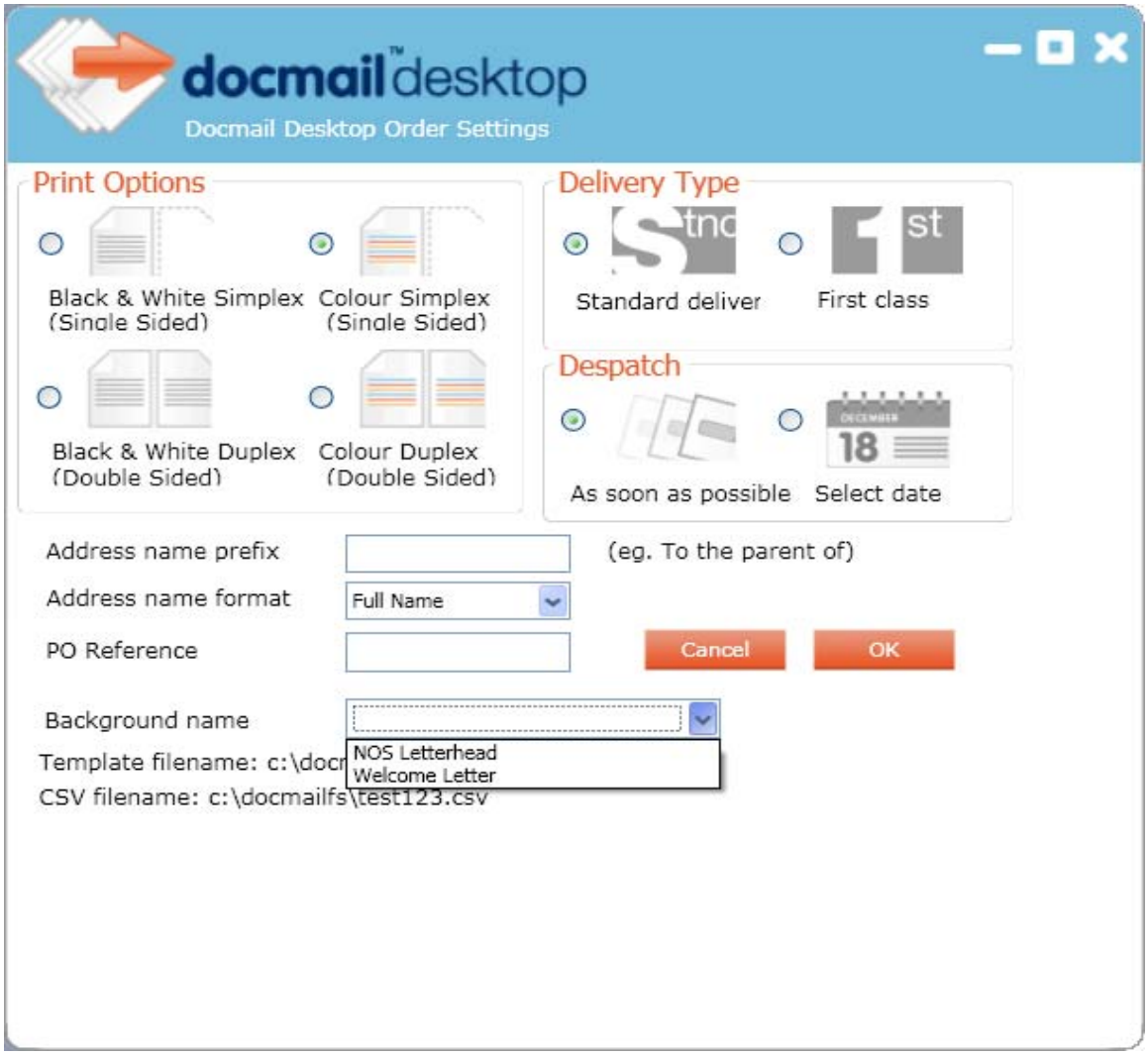
You will need a letter (.doc) and a spreadsheet (.csv or .xls) with the same title

e.g. Test.doc and Test.csv

1) Simply drag and drop the letter into the Docmail Desktop screen
2) You will then receive this message:

You can then select YES to ask Docmail Desktop to wait for the matching csv or xls file.

3) Then simply drag and drop the address list .xls or .csv into the Docmail Desktop Screen
You will then be taken to this screen:
You can select Black and White or Colour, Single or Double Side print and first or standard class delivery options and if you would like to mailing to go asap or a date in the future.



Additional options for your mailing include:

1) Address name prefix:

You can type in any additional text that you would like printed in the window of the envelope.
e.g. PRIVATE AND CONFIDENTIAL

2) Address name format:

You will need to select the format you would like the letter addressed in the window of the envelope, this must correspond with your data list i.e.:

Fullname	Mr Doc Mail
Firstname Surname	Doc Mail
Title Initial Surname	Mr D Mail
Title Firstname Surname	Mr Doc Mail
Title Surname	Mr Mail

3) PO reference

This is your own order number for your reference only.

4) Background name

This will give you options to use any background letterhead that is saved in your docmail account.

Once you have selected your requirements for your mailing click on OK.

This will take you back to the HOME page / Details list.

Your new order will be given an Order Number.

You can now **View Proof**

And if you wish to proceed with the mailing select: **Place Order**

If you do not wish to proceed with the mailing select: **Cancel**

To create an order for Option 2

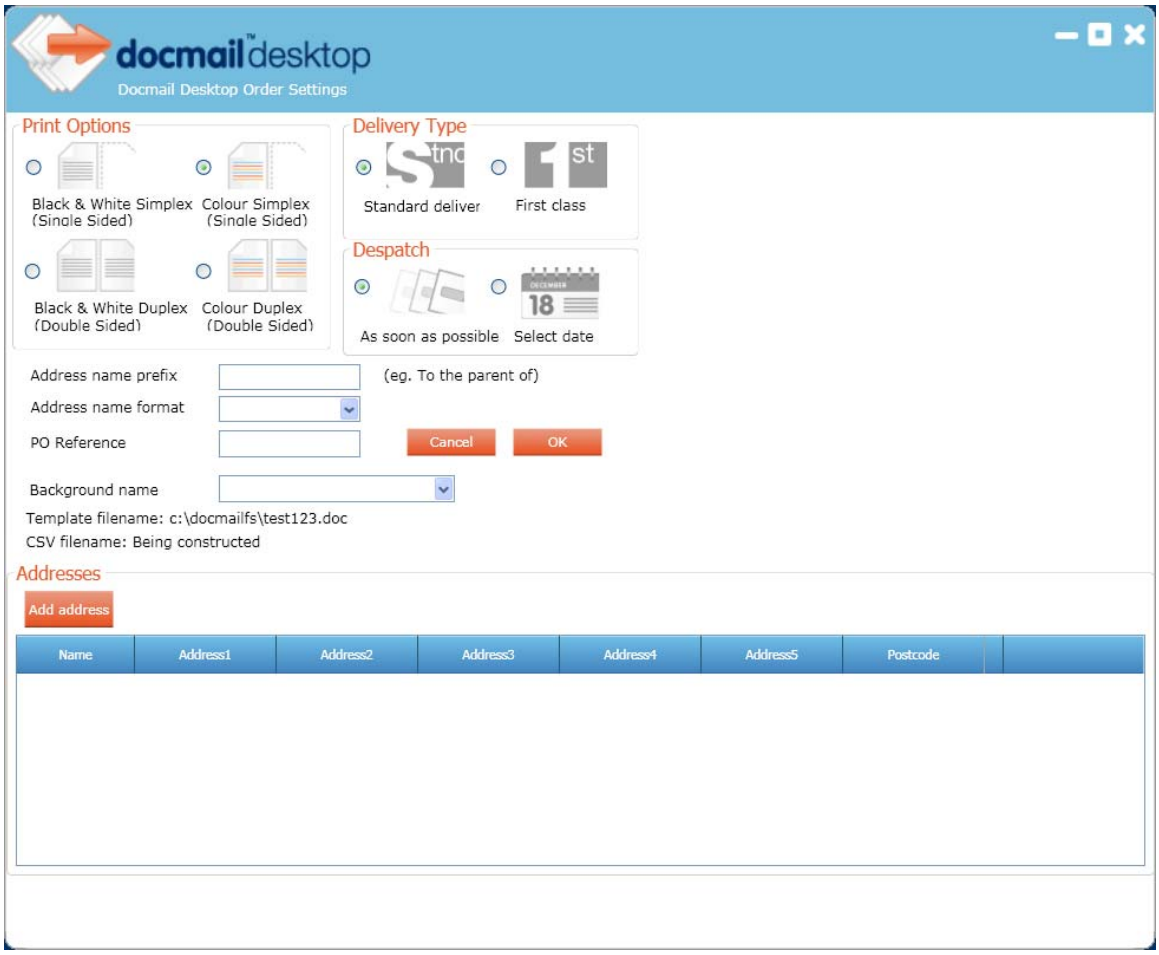
You will need a letter (.doc)

1) Simply drag and drop the letter into the Docmail Desktop screen

2) You will then receive this message:

You can then select NO.

3) The following screen will appear:
You can select Black and White or Colour, Single or Double Side print and first or standard class delivery options and if you would like to mailing to go asap or a date in the future.



Additional options for your mailing include:

1) Address name prefix:

You can type in any additional text that you would like printed in the window of the envelope.
e.g. PRIVATE AND CONFIDENTIAL

2) Address name format:

You will need to select the format you would like the letter addressed in the window of the envelope:

Fullname	Mr Doc Mail
Firstname Surname	Doc Mail
Title Initial Surname	Mr D Mail
Title Firstname Surname	Mr Doc Mail
Title Surname	Mr Mail

3) PO reference

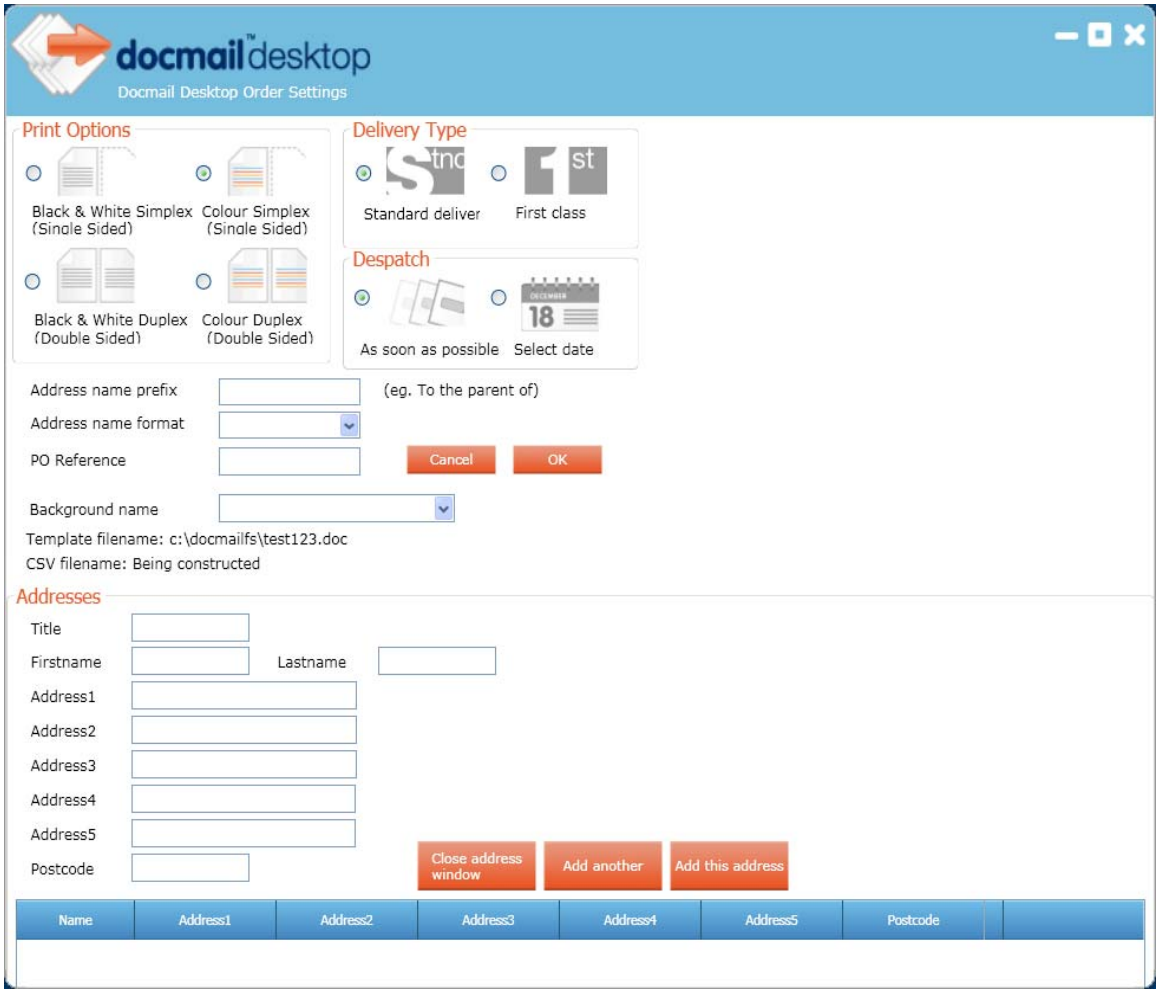
This is your own order number for your reference only.

4) Background name

This will give you options to use any background letterhead that is saved in your docmail account.

Adding an address

You can then select **Add Address**



You can simply type in the required name and address details.

To add this record select: Add this address
To add another address select: Add Another

Once you have selected your requirements for your mailing click on OK.

This will take you back to the HOME page / Details list.

Your new order will be given an Order Number.

You can now **View Proof**

And if you wish to proceed with the mailing select: **Place Order**

If you do not wish to proceed with the mailing select: **Cancel**

ADDITIONAL INFORMATION

At any time you can switch to your docmail main account and view your orders.

You will also need to use your main docmail account for topping up funds and adding letterhead backgrounds.

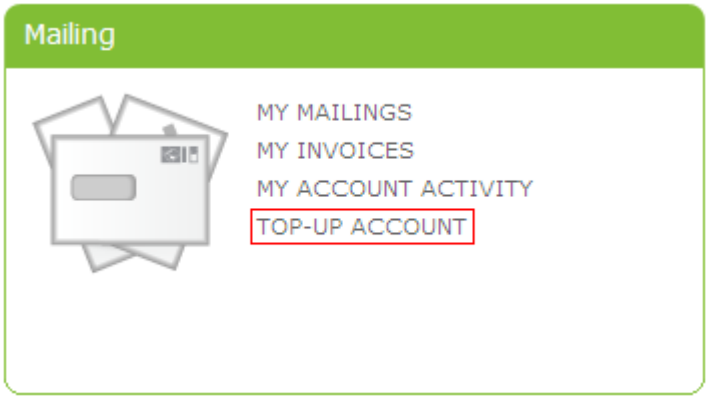
How to top up your docmail account

You can top up your docmail account with credit/debit card or by BACS transfer.

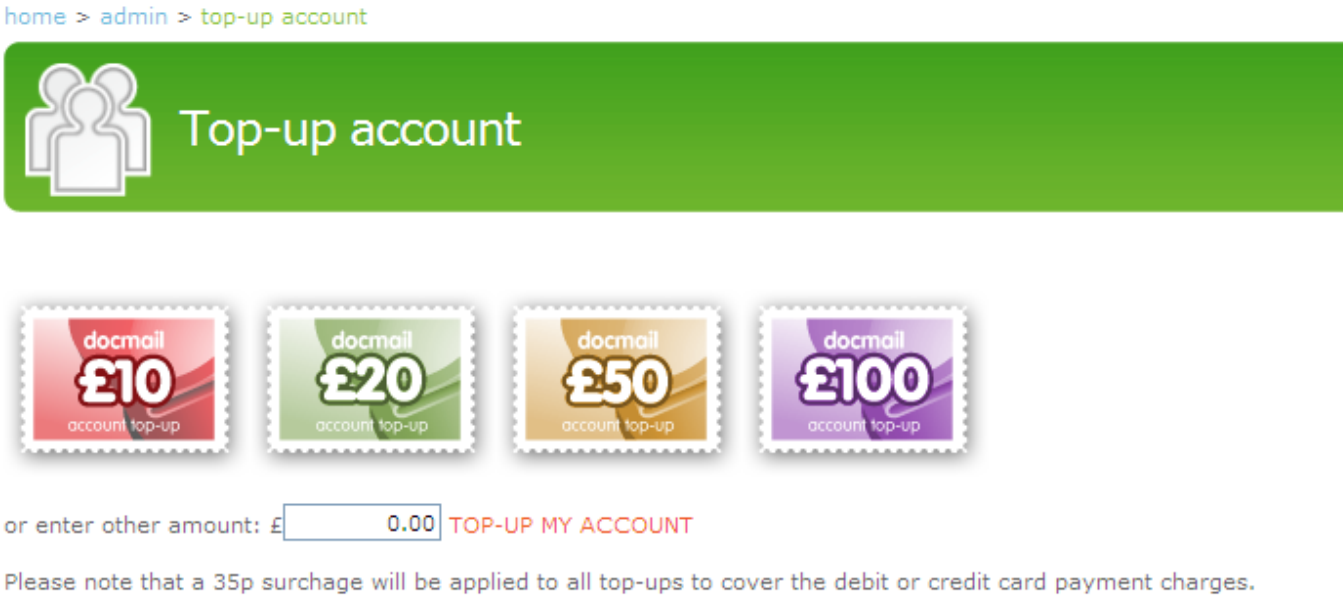
Credit/debit card

To top up your account by credit/debit card please sign into your docmail account, then go to 'admin.'

Click on 'Top-up account'.



Select the amount that you wish to top up.



When topping up your account by debit/credit card, a 35p surcharge will be applied. This covers the debit or credit card payment charges.

BACS Transfer

Please see below our BACS details to make payment for docmail orders:

Account Name:	CFH Total Document Management Ltd
Account Number:	10017308
Sort Code:	82-65-12

BACs transfers will take up to three working days to clear in the account.

To allow us to track your payment and credit your account correctly, please can you notify the Support Team (docmailsupport@cfh.com) when you make a BACS transfer.

The below details are required by the Support Team:

- The amount paid
- The date payment was made
- Your docmail account number (this can be found in the Admin homepage in your docmail account and will begin with *ZDMXXXXXX).*
- Your docmail account name

Once the payment has been received this will be added to your docmail account and you will receive an email from the support team.

CFH Total Document Management Ltd
St Peter's Park, Wells Road, Radstock, Bath, BA3 3UP, UK :: Tel: 01761 416311 :: Web: www.cfhdocmail.com