



# docmail™

Docmail Desktop

User Guide

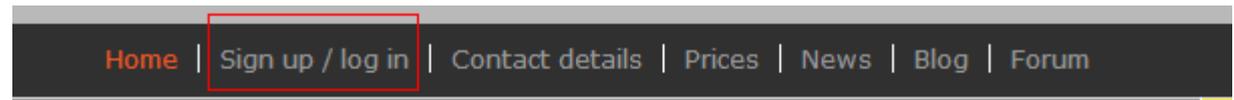
## Docmail Desktop

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

Please visit [www.docmail.co.uk](http://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.'



User notice:

Please ensure your username and password are kept private, if you th  
advise you to change it immediately.

Don't have an account? [Sign up](#) for a free account.

Alternatively try Docmail as a [Guest](#) before you sign up.

Login user ID

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.

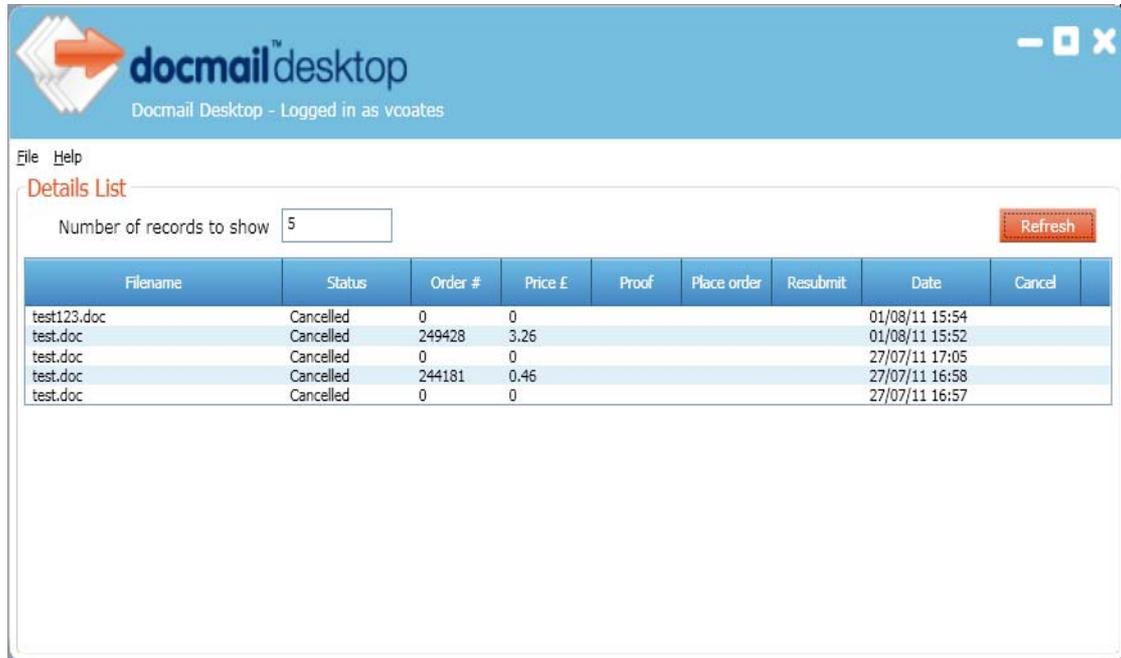
Once you have installed Docmail Desktop and launched the app you will arrive at the login screen.

Enter your docmail username and password:



The image shows a screenshot of the Docmail Desktop login window. The window has a blue header bar with the Docmail Desktop logo on the left and a close button (X) on the right. Below the header, the text 'Login - Live - (V1.0.0.0/01082011152548)' is displayed. The main area of the window is white and contains a login form. The form has two input fields: 'Username' and 'Password'. Below the 'Password' field is a checkbox labeled 'Remember me?'. At the bottom of the form are two orange buttons: 'Cancel' and 'Login'.

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



Docmail Desktop - Logged in as vcoates

File Help

Details List

Number of records to show  [Refresh](#)

Filename	Status	Order #	Price £	Proof	Place order	Resubmit	Date	Cancel
test123.doc	Cancelled	0	0				01/08/11 15:54	
test.doc	Cancelled	249428	3.26				01/08/11 15:52	
test.doc	Cancelled	0	0				27/07/11 17:05	
test.doc	Cancelled	244181	0.46				27/07/11 16:58	
test.doc	Cancelled	0	0				27/07/11 16:57	

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

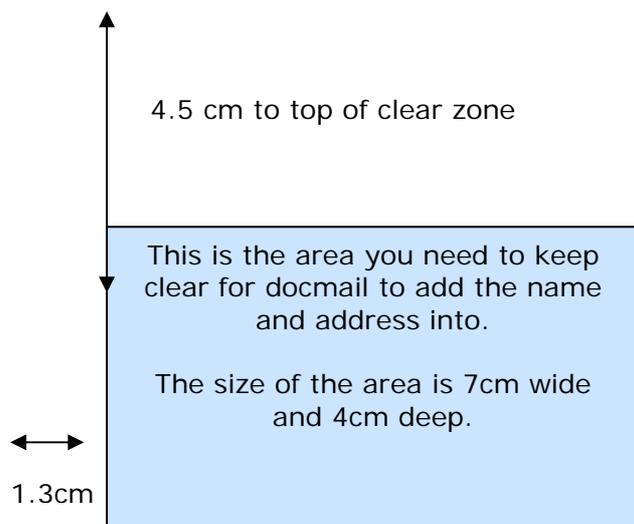
**Docmail Desktop allows two options:**

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:

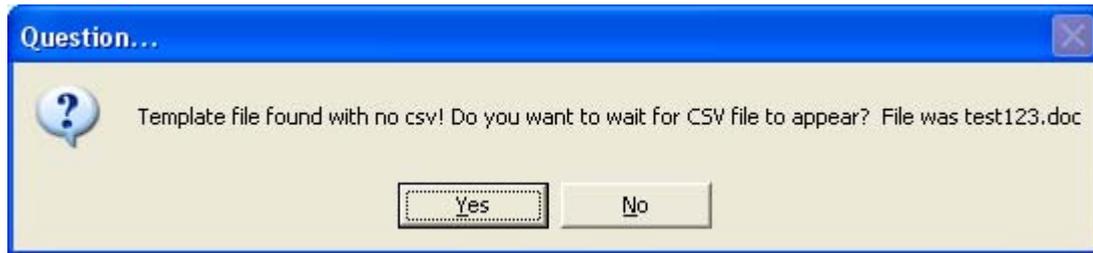
23/06/11	<<date1>>
Monday 23 <sup>rd</sup> June 2011	<<date2>>
23 Jun 2011	<<date3>>
23 <sup>rd</sup> June 2011	<<date4>>
Mr Doc Mail	<<fullname>>

### 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

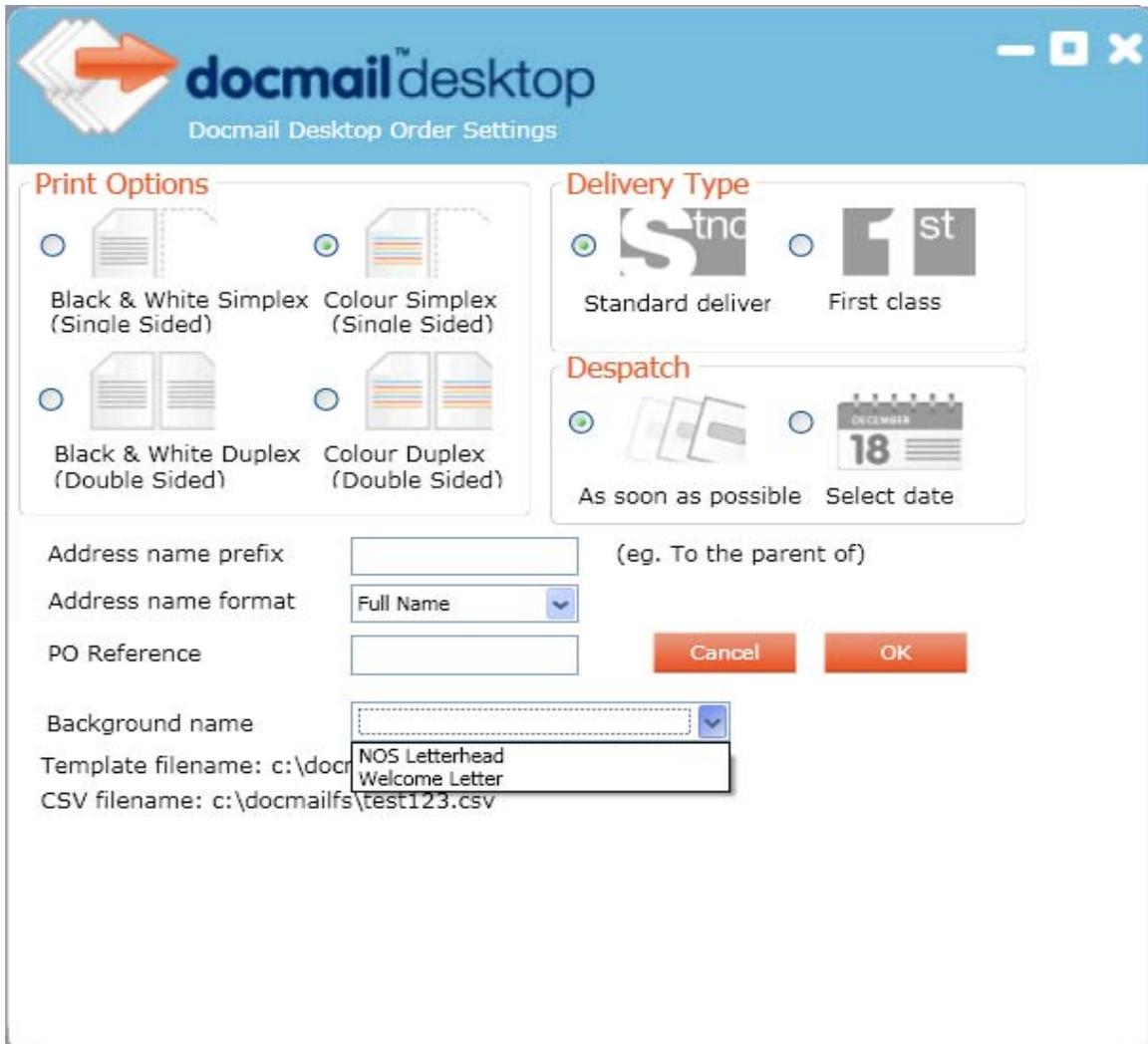
- 1) Simply drag and drop the letter into the Docmail Desktop screen
- 2) You will then receive this message:



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.



**docmail desktop**  
Docmail Desktop Order Settings

**Print Options**

Black & White Simplex (Single Sided)  Colour Simplex (Single Sided)

Black & White Duplex (Double Sided)  Colour Duplex (Double Sided)

**Delivery Type**

Standard deliver  First class

**Despatch**

As soon as possible  Select date

Address name prefix:  (eg. To the parent of)

Address name format:

PO Reference:

Background name:

Template filename: c:\docmailfs\test123.doc  
NOS Letterhead  
Welcome Letter

CSV filename: c:\docmailfs\test123.csv

Cancel OK

**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

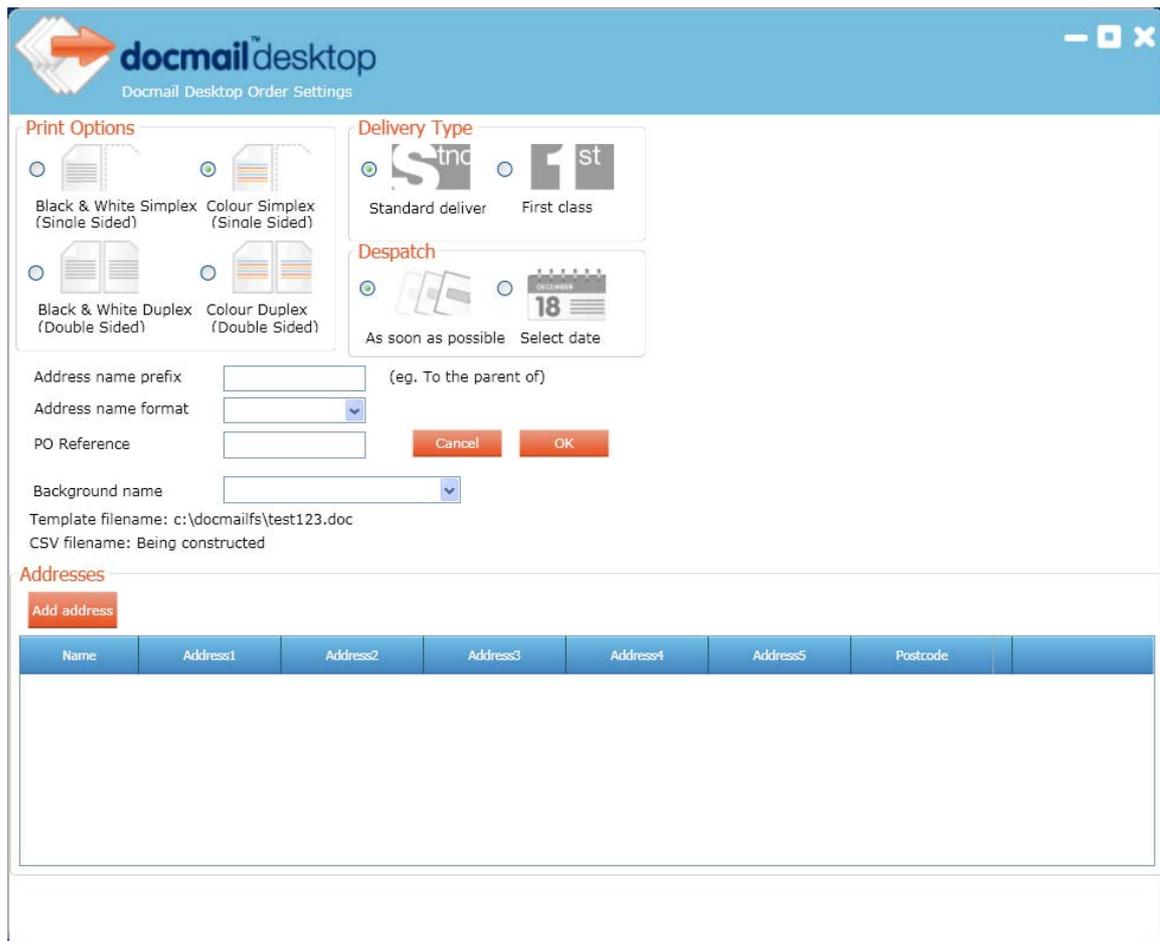
2) You will then receive this message:



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.



**Print Options**

Black & White Simplex (Single Sided)  Colour Simplex (Single Sided)

Black & White Duplex (Double Sided)  Colour Duplex (Double Sided)

**Delivery Type**

Standard deliver  First class

**Despatch**

As soon as possible  Select date

Address name prefix:  (eg. To the parent of)

Address name format:

PO Reference:

Background name:

Template filename: c:\docmailfs\test123.doc  
CSV filename: Being constructed

**Addresses**

Name	Address1	Address2	Address3	Address4	Address5	Postcode

**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**

**Print Options**

Black & White Simplex (Single Sided)  Colour Simplex (Single Sided)

Black & White Duplex (Double Sided)  Colour Duplex (Double Sided)

**Delivery Type**

Standard deliver  First class

**Despatch**

As soon as possible  Select date

Address name prefix  (eg. To the parent of)

Address name format

PO Reference

Background name

Template filename: c:\docmailfs\test123.doc

CSV filename: Being constructed

**Addresses**

Title

Firstname  Lastname

Address1

Address2

Address3

Address4

Address5

Postcode

Name	Address1	Address2	Address3	Address4	Address5	Postcode
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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.

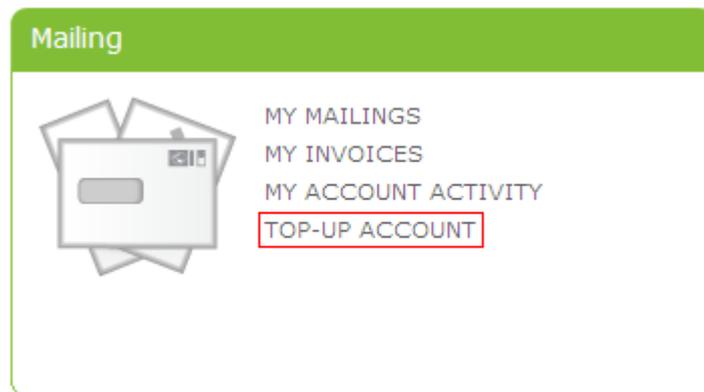
### How to top up your docmail account

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.

[home](#) > [admin](#) > [top-up account](#)



or enter other amount: £  [TOP-UP MY ACCOUNT](#)

Please note that a 35p surcharge will be applied to all top-ups to cover the debit or credit card payment charges.

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.



**docmail**<sup>TM</sup>

let us print and mail all your post



CFH Total Document Management Ltd

St Peter's Park, Wells Road, Radstock, Bath, BA3 3UP, UK :: Tel: 01761 416311 :: Web: [www.cfhdocmail.com](http://www.cfhdocmail.com)