

Setting up a CFH DocMail Webservice Account

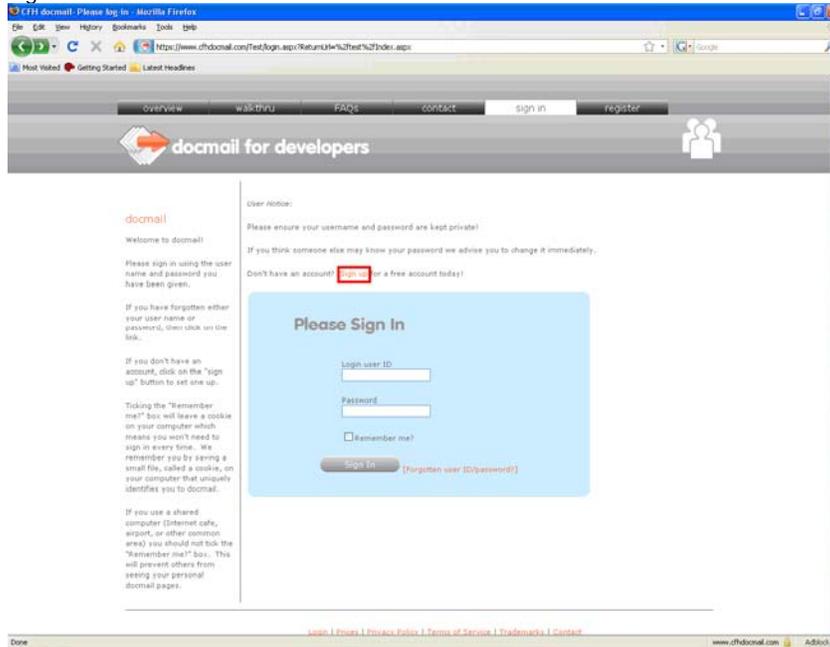
Overview

This guide is intended to show new or existing users of Docmail how to set up user accounts to allow permission to the API webservice in test mode (and subsequently live mode).

1. Creating a Main User/Account

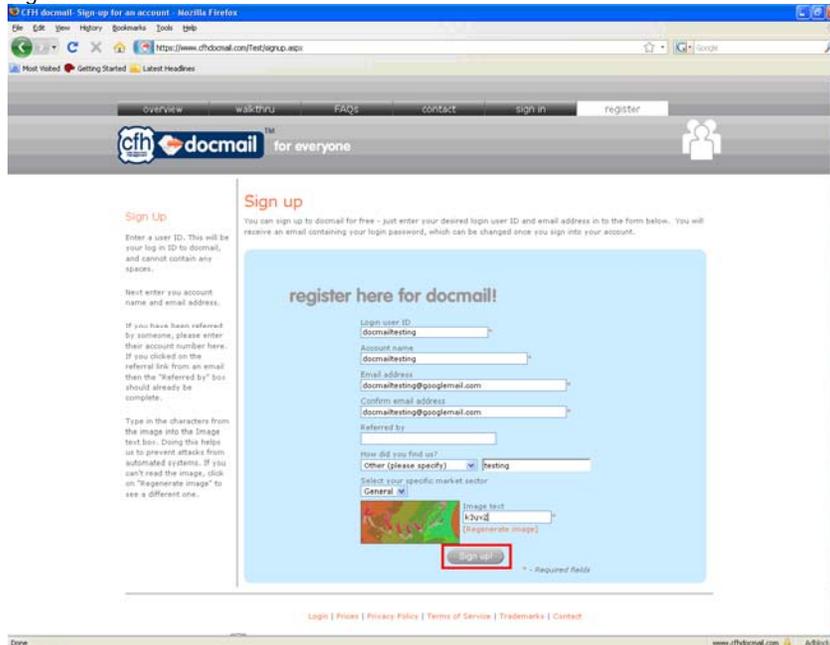
Visit the DocMail login page at <https://www.cfhdodmail.com/test> , and click on the sign up link.

Fig 1:



Complete the form on the following page (show below) with your details.

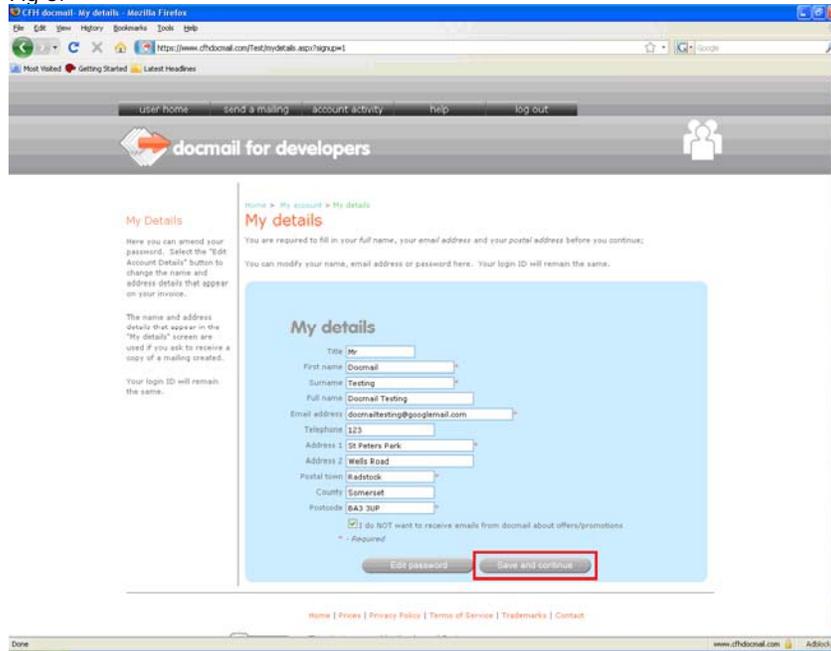
Fig 2:



You will receive confirmation of your account being set up. Check your email to find your username and password.

Log in to DocMail with your username and password at <https://www.cfhdocmail.com/test> , then fill in your address details on the following form.

Fig 3:

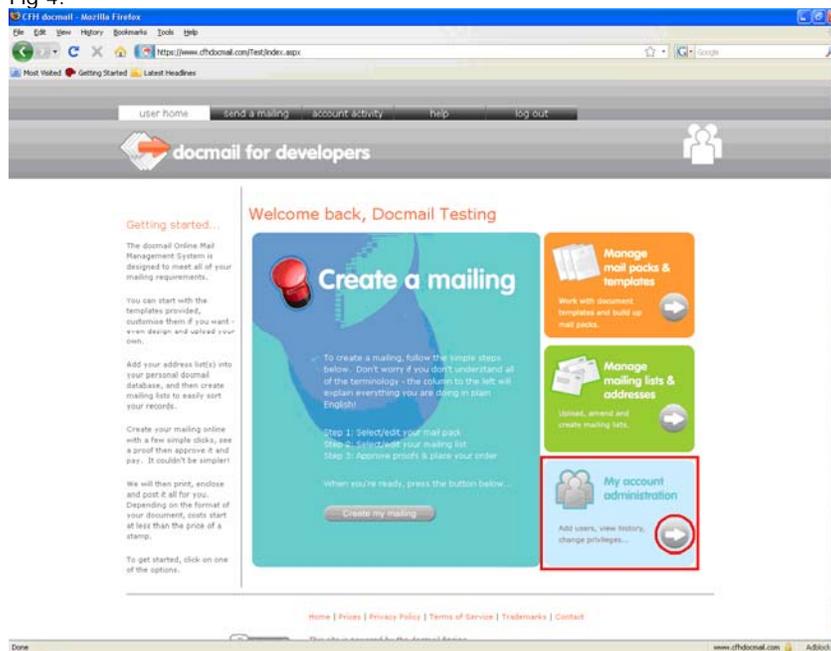


Click "Save and continue". This will lead you to the following welcome screen...

2. Configure the Account for Webservice Use

You will need to add an additional user onto your account and give that user webservice privileges.

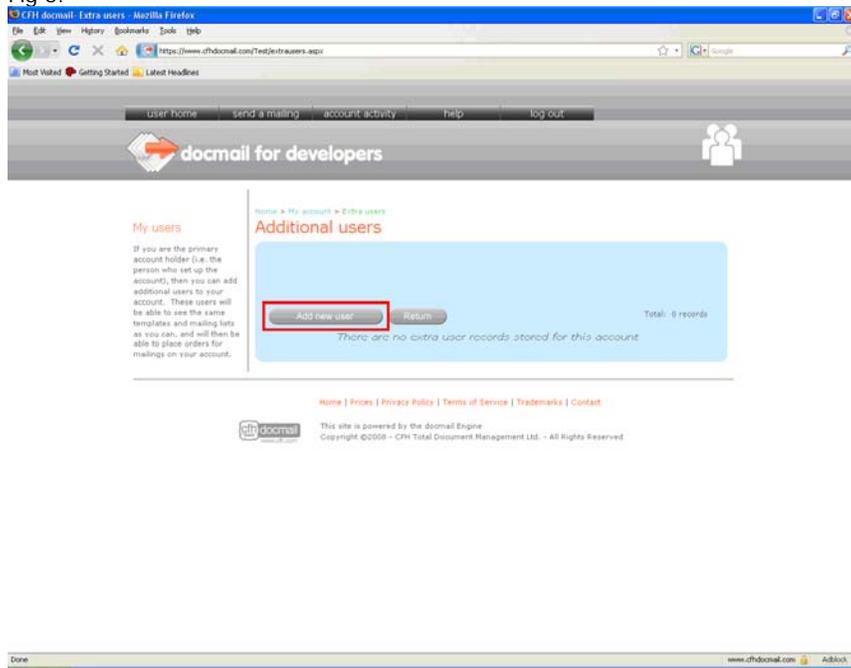
Fig 4:



Click the arrow next to "My account administration".

Click "Add new user" in the following screen.

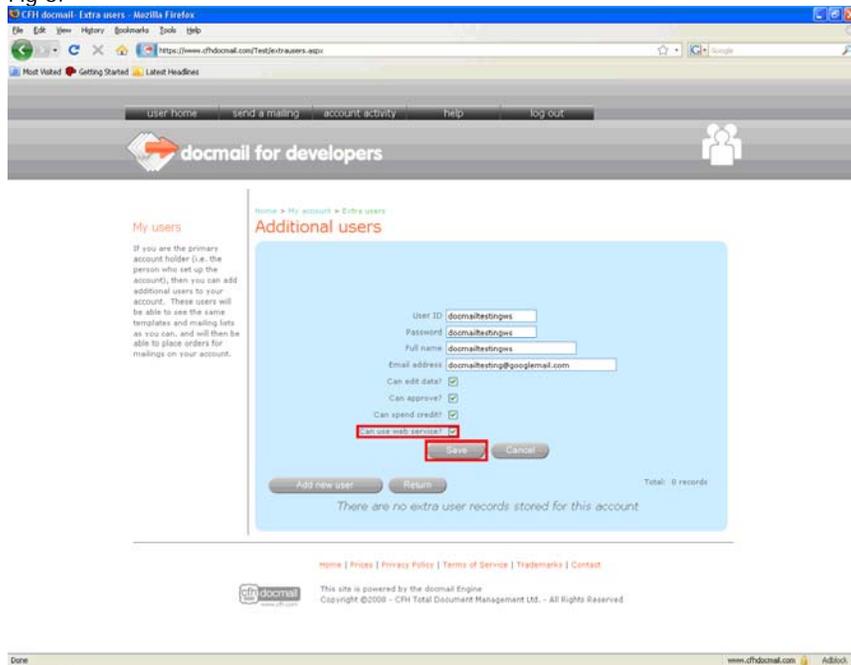
Fig 5:



Enter the login details you wish to use for the webservice, ensuring you select the option: "Can use webservice?"
This will enable the user for use with the webservice.

Click "Save".

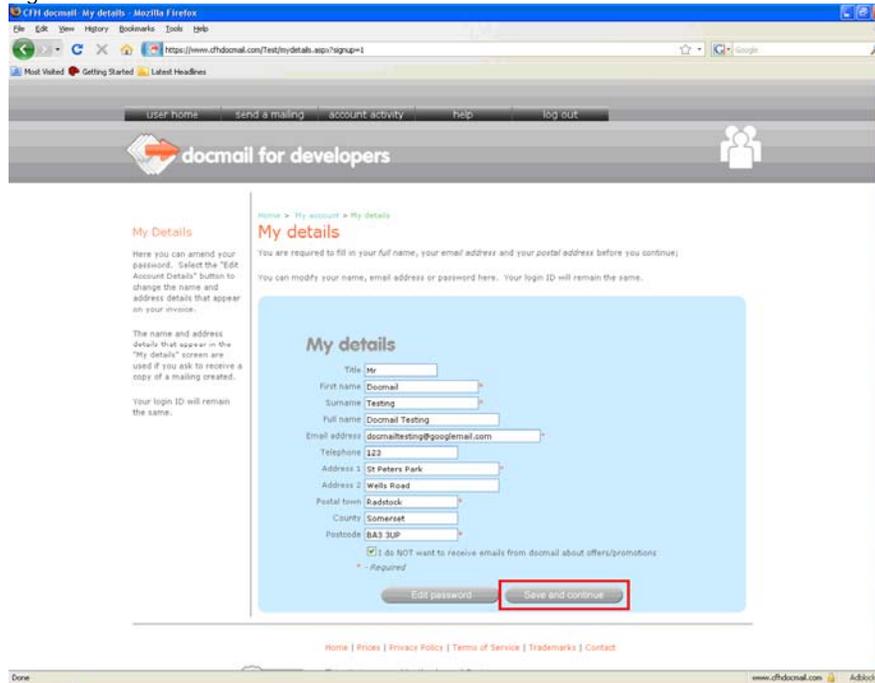
Fig 6:



Your new user will be listed on the screen that follows & is now ready for use with the webservice on the TEST DocMail system.

To prepare the webservice test user, log back into docmail via the URL <https://www.cfhdocmail.com/test/> but this time using the webservice user. You will be prompted to enter address details again as before. This is purely so that any "send to self" mailings get an address.

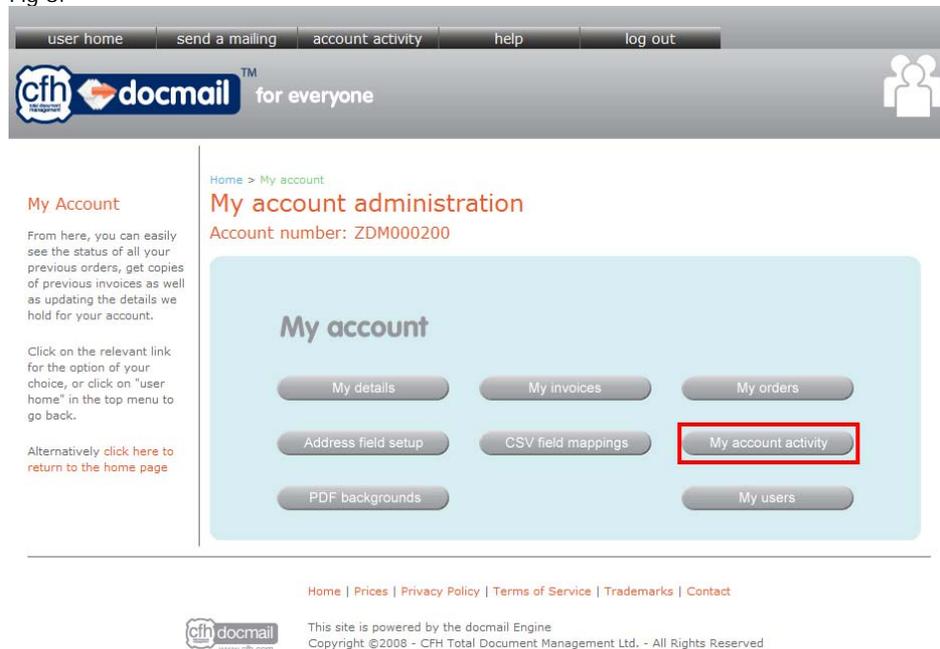
Fig 7:



You would need to use the username and password of the webservice user in any API calls to the Docmail webservice.

Credit for testing can be added from the "My account administration" section (see "Fig 4") and selecting "My account activity":

Fig 8:



Then select "Top-up account".

Fig 9:

user home send a mailing account activity help log out

cfh docmail™ for everyone

Home > My account > My account activity

My account activity

This screen shows the activity on your account.

CRD - Credit to your account via Top Up

REF - Credit earned via Referral Mailings

DBT - Payment for an order

Click on "user home" in the top menu to go back.

my docmail activity

Total top-up payments: £1.00
Total top-up earned: £0.00
Total spent: £0.86
Current top-up balance: £0.14

Top-up account

Search transactions

Since date: 16/06/2009 Before date:
Results per page: 10

Search Reset

Total: 0 records

Date	Ref no	Type	Order	Amount	Balance
					1

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You can top-up as much as you like for testing as there is no real money involved. It will not send you to the credit card payment screen & no actual funds will be taken.

Fig 10:

user home send a mailing account activity help log out

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Home > My account > My docmail credit > Credit top-up

Credit top-up

Add credit to your docmail account here.

Choose the amount you would like to top up and select proceed to payment.

top-up your docmail credit

Select an amount to top-up your credit balance;

£5
 £10
 £20
 £30
 £40
 £50
 Other

Proceed to payment

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Note: Orders placed in the Test system will not be produced.

The LIVE DocMail system is kept separate from the test environment, so to setup an account for the LIVE system, simply follow this process again, using the live address: <https://www.cfhdocmail.com/live>

If you have any questions, contact us at docmailsupport@cfh.com or visit the Docmail API forum at <http://forums.cfh.com>