DOCMAIL
TAG FORMATTING GUIDE

v1.0 May 2019

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Docmail Tag Formatting Guide

Overview

The following help is for the Docmail website and provides information on using tags and format strings to change the textual representation, formatting and tabular presentation of data within a document template based upon the address data within the mailing list.

If you are not familiar with the Docmail system then please refer to the Glossary of terms at the back of the help guide, or read the Docmail help guide on the website (http://www.cfhdocmail.com/live) to familiarise yourselves with Docmail terminology.

1 Tags

A tag is a space-holder within a document template that can be replaced by either data from the mailing addresses or from fix variables entered onto the mailing. The process of replacing tags is commonly referred to as “mail merge”.

1.1 Using tags

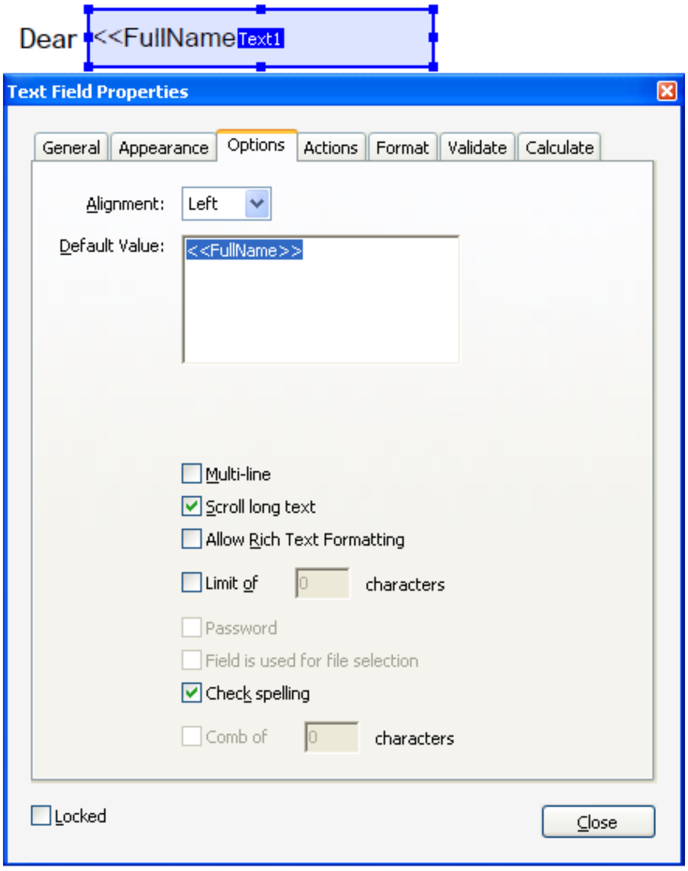
Tags used in a Word Document (.doc / .docx), Open Document (.odt) or Rich Text Format (.rtf) file are placed within two sets of anchors << and >>. For example the tag <<Full name>> can be used to merge the recipient’s name into the document, e.g.:

Dear <<Full name>>,

Thank you for your recent enquiry …

Please note that if you have an existing Word document containing Mail Merge tags then these can be imported directly into Docmail.

For PDF files tags must be placed within a Form Field, with the default value of the form field set to the required tag:



Dear <<FullName Text1

Alignment: Left

Default Value: <<FullName>>

□ Multi-line
☑ Scroll long text
□ Allow Rich Text Formatting
□ Limit of 0 characters
□ Password
□ Field is used for file selection
☑ Check spelling
□ Comb of 0 characters

□ Locked

The standard built-in Docmail tags are listed below:

Address field	Tag	Address field	Tag
Title	<<title>>	Facsimile	<<facsimile>>
First name	<<firstname>>	Address 1	<<address1>>
Initial	<<initial>>	Address 2	<<address2>>
Surname	<<surname>>	Address 3	<<address3>>
Full name	<<fullname>>	Address 4	<<address4>>
Company name	<<companyname>>	Address 5	<<address5>>
Job title	<<jobtitle>>	Address 6	<<address6>>
Telephone	<<telephone>>	Email address	<<emailaddress>>
Direct line	<<directline>>	Extra info	<<extrainfo>>
Mobile	<<mobile>>>	Notes	<<notes>>
Custom 1	<<custom1>>	Custom 6	<<custom6>>
Custom 2	<<custom2>>	Custom 7	<<custom7>>
Custom 3	<<custom3>>	Custom 8	<<custom8>>
Custom 4	<<custom4>>	Custom 9	<<custom9>>
Custom 5	<<custom5>>	Custom 10	<<custom10>>

The following tags can also be used to represent the current date:

Example date	Tag	Example date	Tag
23/06/2010	<<date1>>	23-Jun-10	<<date3>>
Monday 23rd June 2010	<<date2>>	23rd June 2010	<<date4>>

1.2 Custom data tags

In addition to the standard Docmail tags any additional data can be imported into a custom data field within the mailing list. The column title for the data can then be used to reference the tag, for example uploading a column title “My custom data” could then be referenced with a tag “<<My custom data>>” within your document.

Custom data tags have the advantage of supporting multi-line and styled data within the Docmail website.

2 - Format strings

Each tag within a template document can optionally include a formatting string that specifies how data supplied with your mailing list is formatted. The formatting string is indicated by using a forward slash in the tag, e.g. <<JobTitle/Lower>> would return the job title of the address in lower case. Non text formatting can also include additional format options, add an underscore after the format string and then enter the format option, examples are shown in each section below.

Please note that if you have an existing Word document containing Mail Merge tags then these can be imported directly into Docmail and any formatting applied will also be maintained.

2.1 Data type formatting

The following sections show formatting that can be applied to alter the textual representation of data uploaded in Text, Numeric, Date or Boolean format.

2.1.1 Text formatting

Format option	Aliases	Example Output
Upper	U	SENIOR EXECUTIVE
Lower	L	senior executive
Title	T, ProperCase, Caps	Senior Executive
Sentance	S, Scase, FirstCaps	Senior executive

Alias example: <<JobTitle/L>> would also return job title in lower case.

2.1.2 Numeric data formatting

Numeric formatting can be indicated by "/numeric" or "/#" in the format string, followed by the format option. For example <<Cost/#_c>> would format the data in the cost field in the spread-sheet in British currency format, "5.1" within the data would be formatted as "£5.10" in the document.

Common numeric formatting options:

Format option	Explanation
0	Zero placeholder
#	Digit placeholder
,	Thousand separator
c	British currency format

2.1.3 Boolean formatting

Data that can be evaluated as true or false can be formatted using the “/Boolean” or “/b” format string. Data that is evaluated as false includes blank data, 0, N, No, F, or False (all case insensitive). All other data is evaluated as true.

The format string will by default return “Yes” or “No”, but can also contain an optional comma separated format option to represent yes and no, e.g. <<ExampleBoolean/b_True,False>> would return “True” or “False”.

2.1.4 Date and time formatting

Date formatting can be indicated by “/date” or “/@” in the format string, followed by the format option, for example an enquiry date column from the address data with a value of the 16th December 2011 with the tag <<EnquiryDate/@_dd/MM/yyyy>> would evaluate to “16/12/2011”.

Common date and time formatting options:

Format option	Explanation
d	The day of the month, from 1 through 31.
dd	The day of the month, from 01 through 31.
ddd	The abbreviated name of the day of the week (Sun, Mon etc).
dddd	The full name of the day of the week (Sunday, Monday etc).
h	The hour, using a 12-hour clock from 1 to 12.
hh	The hour, using a 12-hour clock from 01 to 12.
H	The hour, using a 24-hour clock from 0 to 23.
HH	The hour, using a 24-hour clock from 00 to 23.
m	The minute, from 0 through 59.
mm	The minute, from 00 through 59.
M	The month, from 1 through 12.
MM	The month, from 01 through 12.
MMM	The abbreviated name of the month (Jan, Feb etc).
MMMM	The full name of the month (January, February etc).
s	The second, from 0 through 59.
ss	The second, from 00 through 59.
tt	The AM/PM designator.
x	Day suffix of “st”, “nd”, “rd”, or “th”
yy	The year, from 00 to 99.
yyyy	The year as a four-digit number.

Note: In order to format the day suffix in superscript you would require multiple tags with the day suffix tag in superscript, e.g. an enquiry date column from the address data with a value of 16/11/2012 with the tags: <<EnquiryDate/date_dddd d>><<EnquiryDate/date_x>> <<EnquiryDate/date_MMMM yyyy>> would evaluate to “Friday 16th November 2012”.

2.1.5 Combining formatting strings

Multiple data type formatting strings can be combined together by using a pipe separator, for example an enquiry date column from the address data with a value of the 16th November 2012 with the tag <<EnquiryDate/@_dx MMMM yyyy|Upper>> would return “16TH NOVEMBER 2012”.

2.2 Style formatting

Style formatting can be used to apply varying font styles per address.

An example use would include sending out statements and highlighting in red when someone is overdue on an action or payment.

Style formats can only be used in either a Word Document (.doc / .docx), Open Document (.odt) or Rich Text Format (.rtf) file.

An example style formatted tag:

<<CustomData/style>>

To apply styles the data must be included in an HTML span element, with the data HTML encoded and with line breaks replaced with BR tags ("<br />"). The style attribute can then be used to define the textual styles using the following standard HTML style attributes:

- Color – either defined as rgb (red, blue, green values between 0 and 255) or a # followed by a 6 digit hex number. For example to get the colour red it can be defined as either "rgb(255,0,0)" or "#FF0000".
- Font-family – e.g. "Arial", "Times New Roman" etc.
- Font-size – The font size in points.
- Font-weight – Specify as "Bold" or "Normal".
- Font-style – Specify as "Italic" or "Normal".
- Text-align – Specify as "Justify", "Center", "Left" or "Right", note that changing the text alignment will affect the whole paragraph.
- Text-decoration – Specify as "Underline" and/or "Line-through", use a space specify both.

If any of the above elements are not included the style applied in the document will remain unchanged. Only the above styles and formats can be used, no other HTML support is provided.

Please be careful when using the "Font-family" style to ensure all fonts referenced are embedded in your document, as if the font is not included in the proof it will not be picked up by missing embedded fonts warning.

If you are unsure of the formatting of the style tag you can upload some sample address data to an order and edit the styles using the editor on the "edit address" screen in the Docmail website. You can then download the mailing list to obtain the source formatting including the span element and HTML encoding on the data.

The example below shows data that can be included with the CustomData column of a spread-sheet:

<span style="color: rgb(255,0,0); font-family: arial; font-size: 16pt; font-weight: bold; font-style: italic; text-align: right; text-decoration: underline|line-through;”>Example style formatting &amp; encoding</span>

The tag:

<<CustomData/style>>

Would then produce the output:

~~Example style formatting & encoding~~

Examples of how to encode data into HTML can be found on the internet, but below is a simple Excel formula for basic HTML encoding on cell A2:

=SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(**A2**, "&", "&amp;"), "<", "&lt;"), ">", "&gt;")

2.3 Table formatting

Table formatting tags allow tabular data to be inserted or removed from within the template document.

Example uses of table formatting would include producing statements or invoices where the number of items varies per customer. Additionally the removal of tabular data can be useful for customising marketing within the document; therefore targeting the marketing based the individual data for each recipient.

To use table formatting the document must be supplied as either a Word Document (.doc / .docx), Open Document (.odt) or Rich Text Format (.rtf) file.

Please note that template proofs will not be available in the library for templates containing table tags.

2.3.1 Table format tags

Table data is contained within a single field cell of a spread-sheet or single field of a data file. The data can be either plain text or HTML encoded, the method of encoding is decided by the format option with the table format string, for example:

<<CustomData/table_,>>	Plain text, cells comma separated. The comma can be replaced by any other delimiter required.
<<CustomData/table_html>>	HTML encoded data
<<CustomData/table>>	Plain text, if no format option then cells assumed to be tab separated

The tag to identify the table format should be included within the first cell of the table to be repeated. Table columns will shrink to the size of the data unless a column width is specified within the table design, so don't worry if adding the table format tag affects the look of the table in the template document.

Each data item within the cell must be marked using a table cell tag, for example:

<!> or <!1>

The optional number 1 represents the logical column of the supplied table data to place in the cell, so for logical column 2 from the supplied data the tag would be <!2>. If a tag without a column number is entered, e.g. <!>, then the data from the next available logical column in the supplied data is used, e.g. column 1 for the first tag, then column 2 for the second tag found etc.

Table tags can be combined with standard Docmail formatting tags, for example <!5/#_#.00> returns the 5th logical column of data and formats the number in this column to 2 decimal places.

If the table data supplied is blank then the table will be removed from the document.

When using a table tag the following cell formatting is repeated for each row of data supplied:

- Fonts (including font family, colour, size, bold, italic and underline)
- Text direction
- Borders
- Cell background colour

The cell tags can be over multiple rows within the table; in this instance all the rows containing the table tags are repeated.

If a cell spans multiple columns then the column span must be included in the tag, this is indicated by a colon after the exclamation mark or column number, e.g. for data column 1 that spans two columns in the table supply:

<!:2> or <!1:2>

2.3.2 Table text format

A “TableText” tag can be used in place of “Table” tag to copy fonts and text direction only. This can be useful when using table styles defined within the document, e.g. for alternating row colours. The proofing time will also be slightly faster when using a “TableText” tag, so it is advisable to use this tag if the table contains no borders or background colours that require repeating.

An example TableText tag:

<<CustomData/tabletext_,>>

2.3.3 Table formatting - Example 1 comma separated data

In this example the data is supplied in plain text formatted, with commas to represent the cells within the data.

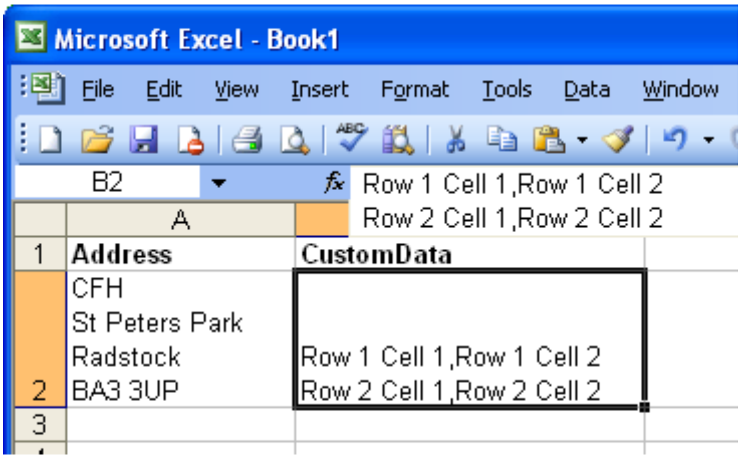
To create a table like this for each address:

Row 1 Cell 1	Row 1 Cell 2
Row 2 Cell 1	Row 2 Cell 2

Start by adding the table format tag and the table cell tag markers in the document; note the "_," after the "/table" to represent the commas separation format:

<<CustomData/table_,>><!1>	<!2>

In Excel comma separate each cell and use an Alt-Enter new line for each row:



Row 1 Cell 1,Row 1 Cell 2
Row 2 Cell 1,Row 2 Cell 2

	A	
1	Address	CustomData
2	CFH St Peters Park Radstock BA3 3UP	Row 1 Cell 1,Row 1 Cell 2 Row 2 Cell 1,Row 2 Cell 2
3		

2.3.4 Table formatting - Example 2 HTML encoded data

Table data can be HTML encoded as this gives the advantage of supporting new lines within the table cell.

To create a table like this:

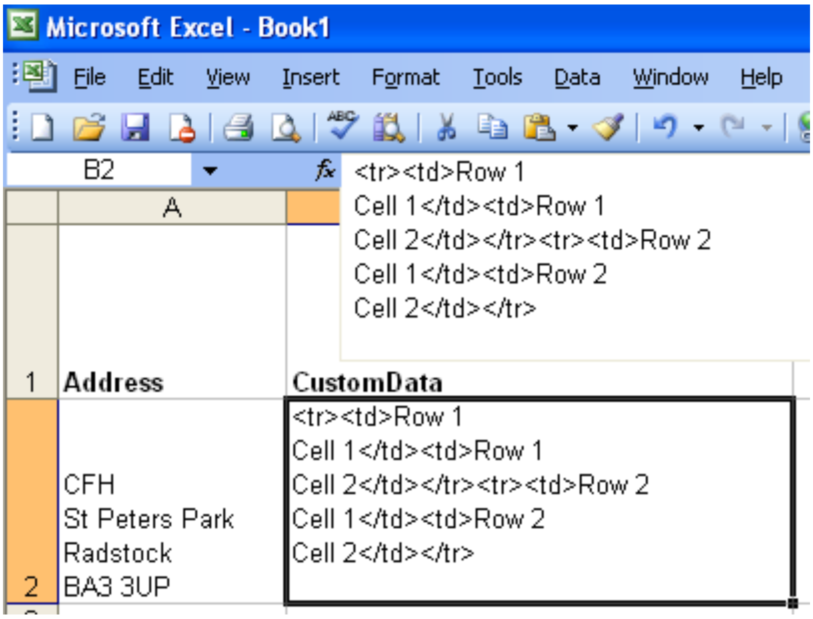
Row 1 Cell 1	Row 1 Cell 2
Row 2 Cell 1	Row 2 Cell 2

Start by adding the table format tag and the table cell tag markers in the document; note the "_html" after the "/table" to represent the HTML format:

<<CustomData/table_html>><!1>	<!2>

Example Excel spread-sheet, using the following standard HTML table elements:

<tr> = open a row
<td> = open a table cell
</td> = close a table cell
</tr> = close a table row



B2 fx <tr><td>Row 1
Cell 1</td><td>Row 1
Cell 2</td></tr><tr><td>Row 2
Cell 1</td><td>Row 2
Cell 2</td></tr>

	A	
1	Address	CustomData
2	CFH St Peters Park Radstock BA3 3UP	<tr><td>Row 1 Cell 1</td><td>Row 1 Cell 2</td></tr><tr><td>Row 2 Cell 1</td><td>Row 2 Cell 2</td></tr>

Line breaks can alternatively be specified using an HTML BR tag e.g.:

<tr><td>Row 1<br />Cell 1</td><td> …

Please note that no HTML formatting except tr, td, and br is supported within the table. All formatting must be applied to the table within the document.

If you wish to use the Style formatting then the entire span element within the data must have an additional layer of HTML encoding applied, e.g :

<<CustomData/table_html>><!1/style>

With custom data of:

<tr><td>&lt;span style="color: #FF0000; "&gt; Example data in red&lt;/span&gt;</td></tr>

Would produce the output:

Example data in red

2.3.5 Table row format

In additional to the Table format tag a single row can be repeated using the TableRow format tag:

<<CustomData/tablerow_,>><!1>

Or to repeat without copying borders and colours use the tablerowtext tag:

<<CustomData/tablerowtext_,>><!1>

This allows two different tables of data in a spread-sheet to be applied within a single Word table.

Unlike the table format the following rules are applied:

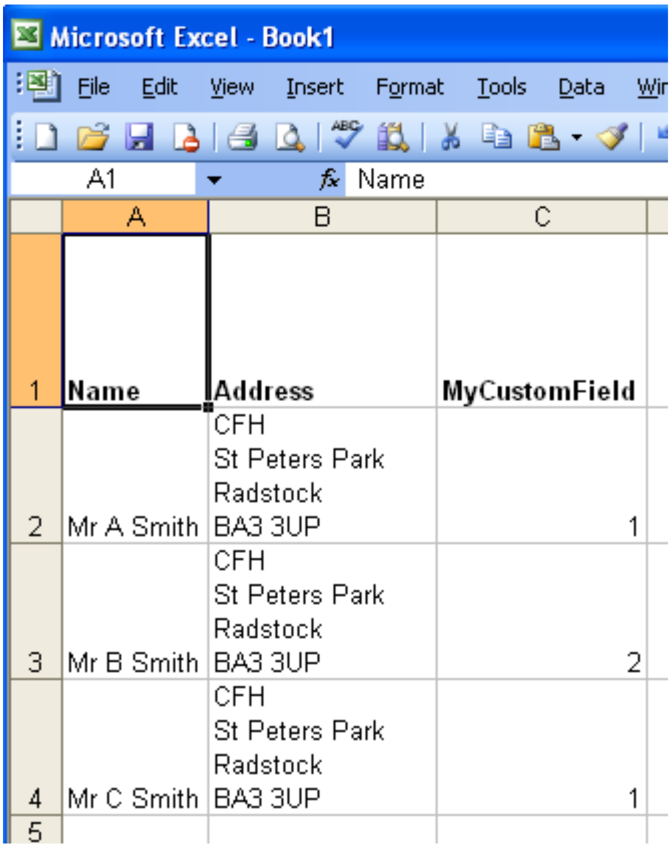
- All table cell tags must be within the same table row.
- The row will not be deleted if the data is blank.

Example using the table row format tag:

Header Row 1	
<<CustomData/tablerow_,>><!1>	<!2>
Header Row 2	
<<CustomData2/tablerow_,>><!1>	<!2>

2.3.6 Table If formatting

The follow examples show ways that to remove either table a whole table from the document or to remove a column or row from a table:



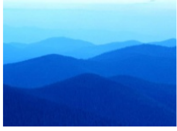
	A	B	C
1	Name	Address	MyCustomField
2	Mr A Smith	CFH St Peters Park Radstock BA3 3UP	1
3	Mr B Smith	CFH St Peters Park Radstock BA3 3UP	2
4	Mr C Smith	CFH St Peters Park Radstock BA3 3UP	1
5			

<<MyCustomField/TableIf_1>>
Delete the table if data in the MyCustomField column does not equal 1

<<MyCustomField/TableRowIf_1>>
Delete the row if data in the MyCustomField column does not equal 1

<<MyCustomField/TableColumnIf_1>>
Delete the column if data in the MyCustomField column does not equal 1

Below is an example to select an image based upon data in the spread-sheet. Once evaluated each address in the example above would be left with one of the two images:

<<MyCustomField/TableRowIf_1>>
<<MyCustomField/TableRowIf_2>>

Reason that IF statements will fail:

- You cannot remove a row if it contains a cell that is merged with a cell in another row.
- You cannot remove a column if it contains a cell that is merged with a cell in another column.
- You cannot remove a column if the width of the cells varies by row.

These failures will be reported back to the user if they occur during proofing. If the failure is only encountered when processing the entire order then the order will be automatically cancelled.

2.3.7 Table formatting tips

Table cells can contain any data, e.g. just a single cell with no border containing an image can be used to allow variation of images. Equally a whole page of a document can be included within a single table cell to change the entire page based upon the data.

For ease of laying out complex tables with IF rules consider placing the table within a text frame and size the frame to the largest possible table area that shows. This way the optional table items that will be removed in the final output will not affect the layout of your template document.

If a more complex IF rule is required then you can add an additional column in the spread-sheet to calculate the data required. For example use image 1 if column D in the spread-sheet is greater than 5 else use image 2; add an additional formula “=IF(D2>5,1,2)” to a new column and give that column a title and apply the TableRowIf or TableColumnIf tag against this new column.

For corporate users the organizational structure information can be used to determine which table rows to use, e.g. <<User.Company/TableRowIf_CFH>> would only show the table row if the user was within the “CFH” company.

Glossary of terms

Address

The data relating to an individual person in the mailing. This includes their name, address and any additional information to be merged in a Template.

Mailing

One of more templates that require sending to one or more addresses. Mailings may also be referred to as orders.

Mailing List

The list of addresses that will receive the Mail Pack. A mailing list can be saved via the Docmail website to be used over and over again.

Template

A document file that will be sent to the mailing list. The document may contain tags, e.g. <<FirstName>>, that can be replaced with either address data or fixed variable data to produce the final output document.

Variable

A customisable tag in the template document that can be replaced with either address data or fixed data. Fixed data will be the same text for all recipients, for example <<SpecialOffers>>, could become “Spring Special Offers”, or “Summer Special Offers”. Variables can be used for single words or whole paragraphs of text.

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