
DOCMAIL ADVANCED USER GUIDE

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WELCOME TO DOCMAIL

Docmail is an established and proven way to create and send your post. By simply logging on to our website you can create what we call a 'mailing' with just a few clicks of the mouse. A mailing is your order to us, and tells us what to print, and who to send it to. Docmail offers you great flexibility - you control what to print, you control who to send it to; but we do all the work!

Registering and Logging in to Docmail

First of all you will need to register for a Docmail account on our website

<https://www.cfhdocmail.com/live/signup>

You will need to complete and submit a sign up form. You will receive an activation code by email to activate the account so that it is ready to use. You can then log in to Docmail at the website address <https://www.cfhdocmail.com/live/login> using the username and password given when you signed up.

If multiple users are required to access the account please see the additional user section of this guide to assign unique logins per user. CFH advises against the sharing of passwords for data protection purposes.

Navigating around Docmail

When you log in you will be on the Docmail home page and you can then navigate to the different areas of Docmail. There are three main functional areas which will all be explained in the following pages. The colours used in this guide represent the colours you will see when navigating around Docmail.

LIBRARY

There are two main sections within the Library – the Document Library and Address Library. The Document Library contains:

- Documents - You can save your letters and other document types to your Docmail account so that you can just use them again and again without having to upload them to Docmail each time
- Mail packs - You can save groups of documents that you often use together as a mail pack. Mail packs must contain at least one document but may have more. All the docs in a mail pack must be the same size but envelopes can be included
- Backgrounds - These are templates containing, for example, logos or letterheads, which are stored separately from your documents and used with them. You can store as many different ones as you like and choose the correct one for each mailing that you create

- Envelopes – You can save outer envelopes or reply envelopes of your own design.
- Account merge tags – Merge tags are different field settings that can be used across a document. They are described in more detail later.
- Import mappings - Import mappings map your data and are explained later in this guide.

CREATE A MAILING

This is where it all starts to come together!

Choose which product group you would like to use. Select some other options (such as whether you want your mailing in colour, whether you want to get a copy yourself) and then you will see a proof of your mailing in PDF format.

Once the proof is approved you simply pay by credit or debit card and then relax and leave all the hard work to us.

Take note of the help shown on the left side of the screen. This changes when you click into each box and will help you complete the screen correctly.

ADMIN

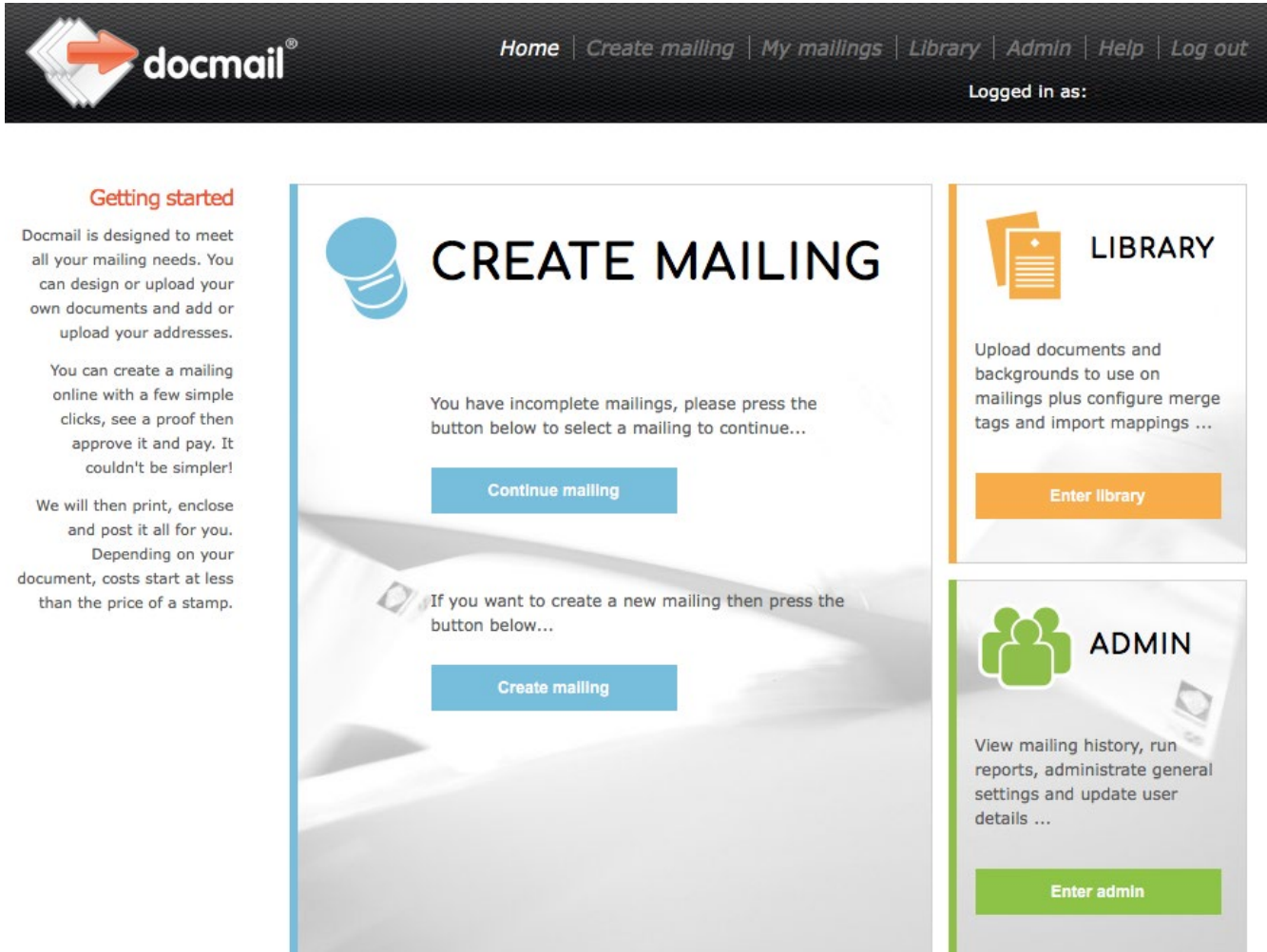
This is the section where you can change and update your Account details and settings.

You can also see previous mailings and invoices and check your account activity to see account tops ups etc.

MY MAILINGS

This is where you can see details of all your previous mailings, both complete and incomplete. The status of the order will be provided alongside the order reference, address count and cost of the mailing. You can go back into any incomplete orders at any time simply by clicking on the icon of the order.

OVERVIEW OF THE DOCMAIL MAIN PAGE



The screenshot shows the Docmail main page. At the top is a dark navigation bar with the Docmail logo on the left and a menu of links: Home, Create mailing, My mailings, Library, Admin, Help, and Log out. On the right of the bar, it says 'Logged in as:'. Below the navigation bar, the page is divided into three main sections. On the left is a 'Getting started' section with text explaining the service and a 'Create mailing' button. In the center is a large 'CREATE MAILING' section with a blue icon of a document and a button to 'Continue mailing'. On the right are two smaller sections: 'LIBRARY' with an orange icon and an 'Enter library' button, and 'ADMIN' with a green icon and an 'Enter admin' button.

Getting started

Docmail is designed to meet all your mailing needs. You can design or upload your own documents and add or upload your addresses.

You can create a mailing online with a few simple clicks, see a proof then approve it and pay. It couldn't be simpler!

We will then print, enclose and post it all for you. Depending on your document, costs start at less than the price of a stamp.

CREATE MAILING

You have incomplete mailings, please press the button below to select a mailing to continue...

Continue mailing

If you want to create a new mailing then press the button below...

Create mailing

LIBRARY

Upload documents and backgrounds to use on mailings plus configure merge tags and import mappings ...

Enter library

ADMIN

View mailing history, run reports, administrate general settings and update user details ...

Enter admin

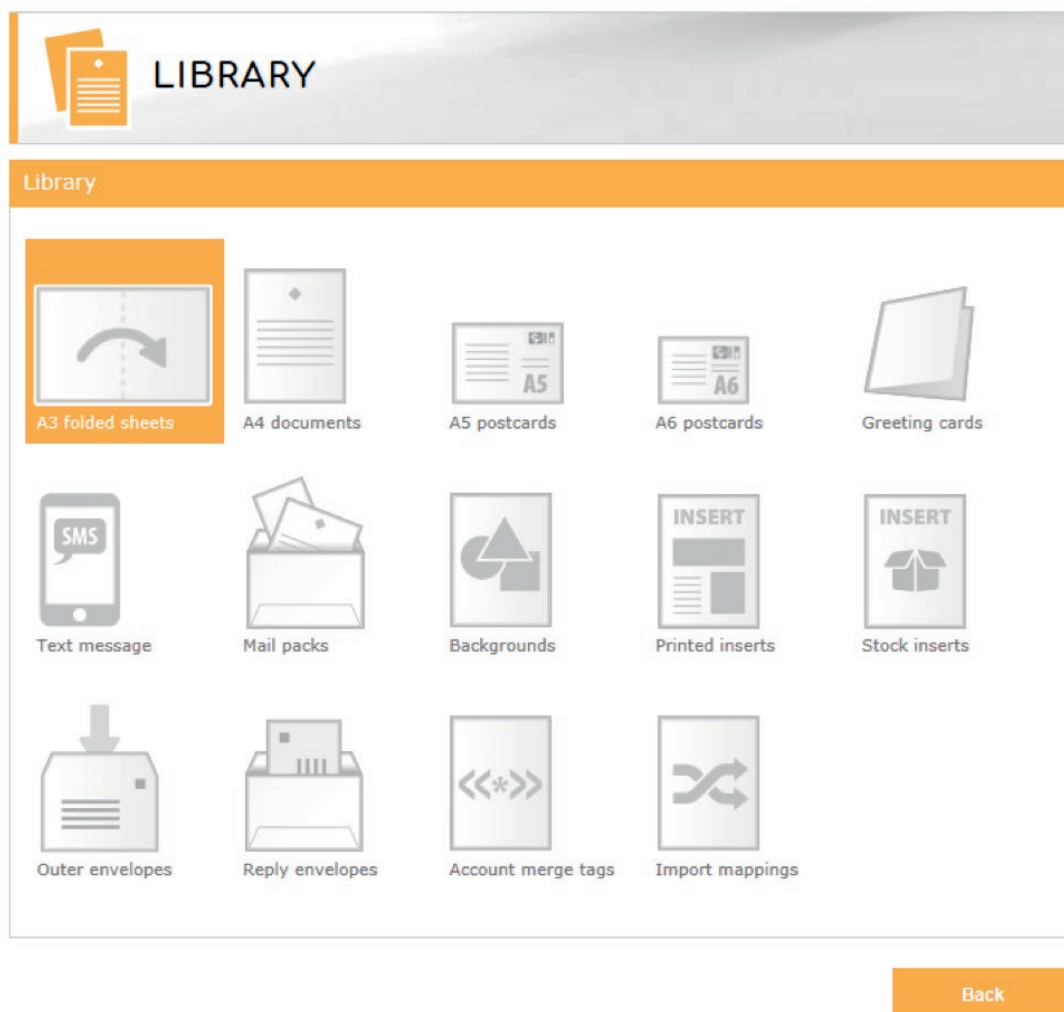
Now we will look at each of the functional areas in turn. Remember, all pages of the document are colour coded, so you can see which pages relate to different areas of Docmail.

LIBRARY

The documents that you save here are the ones that you want to save to your Docmail account, and mail packs are collections of one or more documents which you want to send together. If you have set up documents and mail packs previously you can find them here if you need to amend them.

Documents are created by uploading files that you have created on your computer using Word, Open Office etc. into Docmail. File formats that are recognised by Docmail are .doc, .docx, .odt, .pdf, rtf, .bmp, .jpg, .png, .tif or .xps format.

Click on these options to manage your different documents. Descriptions of the different options are given below.



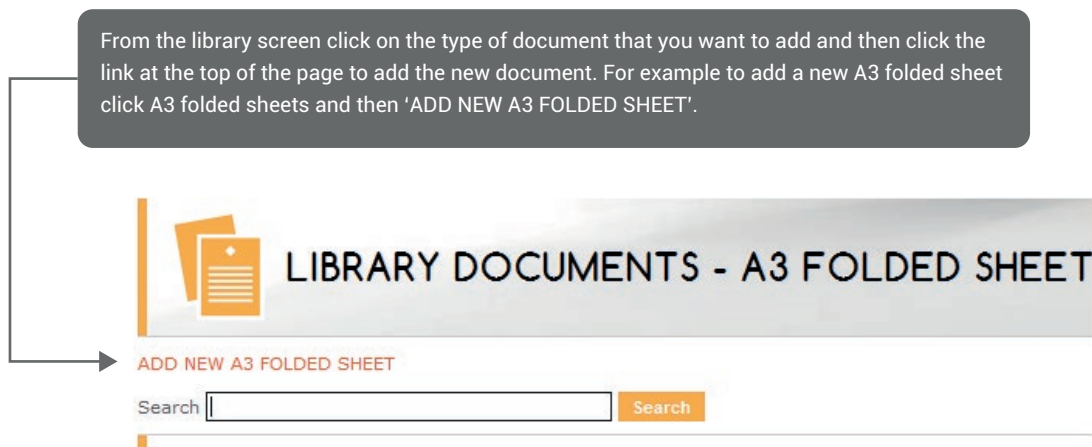
If this is your first visit to Docmail you probably do not have any documents saved into your library. If you have used Docmail before documents that you have set up previously will show on this page. If you already have documents set up you would come here to change them or add new ones if needed.

You can add documents for:


- A3 Folded Sheets
- A4 Documents
- Greeting Cards
- Text Message
- Postcards
- Mail packs
- Backgrounds
- Outer envelopes
- Reply envelopes
- Account merge tags

Create/edit document

The screen will look similar to the one shown below. You will give it a name, record some details and upload your file.



Additional fields can be found by clicking on 'Advanced options' which you will see at the bottom of the screen.



UPLOAD A3 FOLDED SHEET



Upload A3 folded sheet

Select new file Select Clear

Document type A4 4-Page Booklet

Background (No background selected)

Print margin (3mm)

☒  Shrink to fit
 ☐  Keep original size

Advanced options

Back Next

To create A3 folded sheets, A4 documents, greeting cards, postcards and backgrounds you need to complete the fields as shown below. Not all of the fields are applicable to all of the types of document that you can upload.

Advanced options

Name

Description

Address panel font Arial 10pt

File contents Document

Can this document begin on the back of another document? ☒

Can another document begin on the back of this document? ☒

Password protected areas ☐

Encryption password ☐

Restrict use of the document to the creator? ☐

Back Next

Select new file/Upload file (all document types)	<p>Click 'Select' to find the file that you want to upload from your computer.</p> <p>If your document is personalised in any way, (i.e. you want the name and address on it, or to add any data into it) it must be a Microsoft Word (.doc or .docx), Rich Text Format (.rtf) or Open Office (.odt) document. You can upload a PDF document only if it needs printing exactly as the PDF supplied.</p> <p>Setting up your document files is explained in Appendix 1. Some of the terms used in the following pages are explained there in greater detail.</p>
Document type (A3 folded sheet, A4 document, postcard, background and A3 insert only)	<p>This is already completed with the option that you clicked on and cannot be amended.</p>
Address panel position (postcard only)	<p>You can choose to have the address printed on the right or left side of your postcard.</p>
Name (all document types)	<p>Optional. This will help you to help identify the document.</p>
Description (all document types)	<p>Optional. To help you identify the document.</p>
Background (A3 folded sheet, A4 document, postcard, greetings cards)	<p>Backgrounds can contain company logos, letterheads etc. A background is a template which Docmail can apply behind your document. This can save you having to put logos or letterheads into each of your documents. Once set up they are available in the library and can be selected for use on your documents. They are covered in more detail in the next section.</p>

<p>Can this document begin on the back of another document?</p> <p>(A4 documents)</p>	<p>The cheapest option is to allow Docmail to print on both sides of the paper (duplex printing). If a mail pack contains more than one document Docmail will print all the documents in the mail pack 'back-to-back', for example, if document 1 in the mail pack is only one side long, then document 2 starts printing on the back of document 1.</p> <p>If you intend to use a document in a mail pack with other documents and use duplex printing ticking the 'Can this begin on the back of another document' option allows back-to-back printing.</p> <p>However, you might want to start on a new sheet of paper, for example for a reply form. If you always want this document to start on a new sheet of paper, then DO NOT tick this box.</p> <p>Remember, this option is only relevant if you intend using the document in a mail pack with other documents and you intend to use duplex printing.</p>
<p>Can another document begin on the back of this document?</p> <p>(A4 documents)</p>	<p>Similar to the above, if you are happy for all documents in a mail pack to be printed back-to-back then tick this box on every document. However, if you do not want another document to start on the back of this document then DO NOT tick this box.</p> <p>Remember, this option is only relevant if you intend to use this document in a mail pack with other documents and you also intend to use duplex printing.</p>
<p>Password protected areas</p> <p>(all document types except backgrounds)</p>	<p>If any part of the document(s) selected are password protected you can enter the password here so that the file can be uploaded successfully to Docmail, saving you needing to remove the password before uploading.</p>
<p>Encryption password</p> <p>(all document types)</p>	<p>If all the documents that you have selected to upload are password protected you can enter the password here so that the file can be uploaded successfully to Docmail, saving you needing to remove the password before uploading.</p>
<p>Restrict use of the document to the creator?</p> <p>(all document types)</p>	<p>You can restrict the use of documents so that any additional users on your account cannot use them. Tick here if you are the only person authorised to use the documents that you have uploaded.</p>

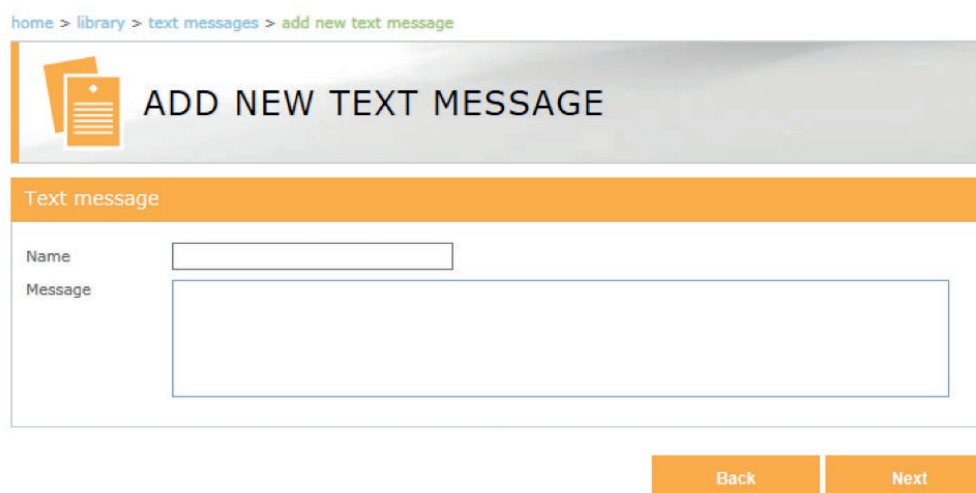
Address panel font (all document types except backgrounds)	You can choose a font and from the drop down list and Docmail will use this to print the names and addresses.
File contents (A3 folded sheet, A4 document, postcard, greeting card)	Select 'Document' if you are creating a document to be personalised from your data list. If you have selected a merged file that has already been personalised for more than one recipient, you need to select 'Multiple address stream' to tell Docmail that the file contains a stream of letters rather than a pre-merged letter file. Multiple address streams are explained further in Appendix 3.

Create / edit text message

From the library screen click on text message, then click at the top of the page to add the new text message.



The below screen will appear to allow you to enter your message. You may also give your message a name to assist you in identifying the content. Custom tags may also be added to personalise your message. Once you have finished your message click next to save.



Backgrounds

Backgrounds are PDF files (.pdf), Microsoft Word files (.doc), or Rich Text Format files (.rtf). After adding the files you can select them to use with documents in your Library or documents that you upload from your computer. If you are new to Docmail you will not have any set up. They can be created using the instructions above.

When you choose to use a background Docmail will place it underneath your document, for example to look as if it has been printed on a letterhead. The background that you choose to use must correspond to the document you are creating, for example, you cannot use an A4 background on a postcard.

Using a background rather than embedding graphics into your document is worthwhile as it can speed up the production on your on screen proof.

You can view an existing background, or download it to change it, by selecting it from the library. Backgrounds can only be deleted if they are not in use on any documents.

Mail Packs

Once your documents are set up you can put them into mail packs. A mail pack is a group of documents that you want to send out together. Another way to think of a mail pack is as the contents of the envelope. Setting up mail packs means that you can organise your envelope content in advance, making it easier and quicker to create your mailings. It is particularly useful where your mail pack contains multiple documents.

Each mail pack must always contain at least one document, but can contain more. All the documents that you add must be the same type but you can add your own envelopes to the mail pack.

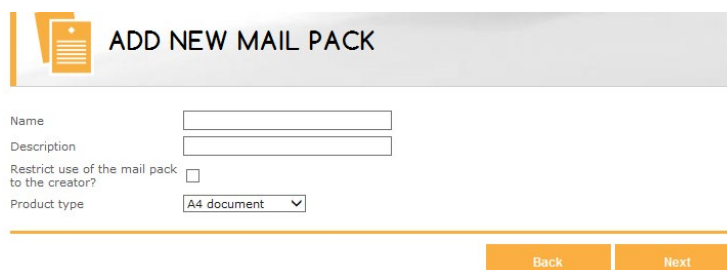
You do not need to have documents set up and stored in order to create a mail pack. You will be able to upload these from your PC at the time. Once you have set up mail packs each time you create a mailing you can choose to use them.

Create / Edit Mail Pack

If this is your first visit to Docmail you probably will not have any mail packs showing.

To set up mail packs click on the Mail packs option from the Document library and then click the link to 'ADD NEW MAIL PACK'.

This will take you to the 'ADD NEW MAIL PACK' page.



The screenshot shows a web form titled "ADD NEW MAIL PACK" with a document icon. The form contains the following fields and controls:

- Name:** A text input field.
- Description:** A text input field.
- Restrict use of the mail pack to the creator?:** A checkbox.
- Product type:** A dropdown menu with "A4 document" selected.
- Navigation:** Two orange buttons labeled "Back" and "Next" at the bottom right.

The mail pack must be given a name. Optionally you can also add a description and tick to 'Restrict use of the mail pack to the creator' meaning that if there are multiple users on the account only you will be able to use this document.

The Product type defaults to A4 document. Use the drop down options to select a different product type.

Click 'Next' to add documents to your mail pack.

ADD DOCUMENTS

New document

Upload A4 document Upload printed insert Design outer envelope Upload reply envelope

Add from library

A4 document Mail pack Outer envelope

Add from previous mailing

Mailing name or order ref **Find mailing**

☐ Search for mailings from other account users

Back

You can upload a new file to become a document within the pack, add a stored document from the library, add an existing mail pack, or add from a previous mailing.

Full instructions for uploading documents are given under the section of this guide that covers creating a mailing. Click 'Upload document' and follow those instructions.

Instructions for designing greetings cards, postcards and envelopes are also covered in the section covering 'CREATE A MAILING'.

Account Merge Tags

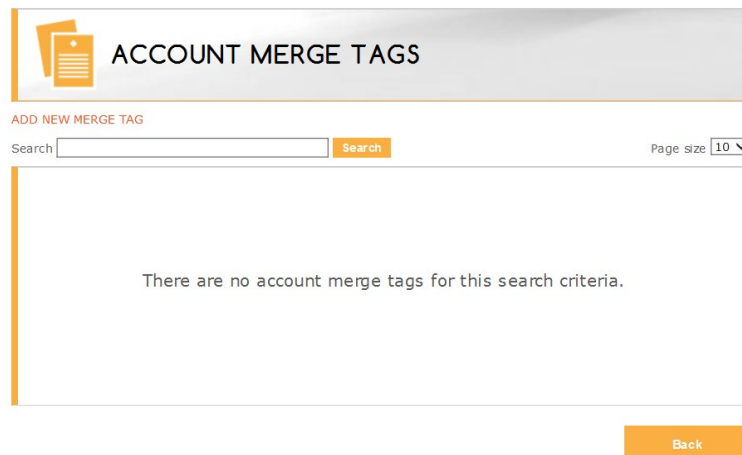
Merge Tags are different field settings that can be used across a document like field holders, but instead of using data from your database, they replace fields with data that you set at document level. Settings applied to merge tags are automatically applied when scanning documents for merge tags.

For example, you might have a document which is the same every time you use it, except that the date and time might need to be different, for instance if it is an appointment letter.

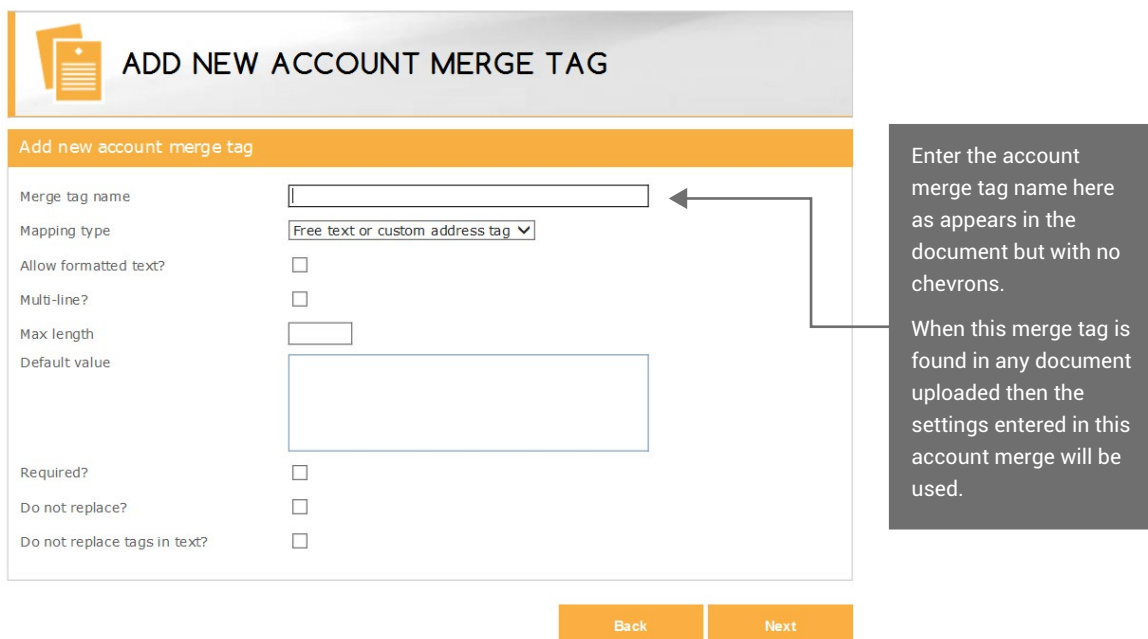


You could place field holders in your document for <<date>> and <<time>>. (See Appendix 1 – Document Set Up Guidelines.) These merge tags are then set on the document when you add it to Docmail.

Click 'ADD NEW MERGE TAG' from the 'Account Merge Tags' screen.

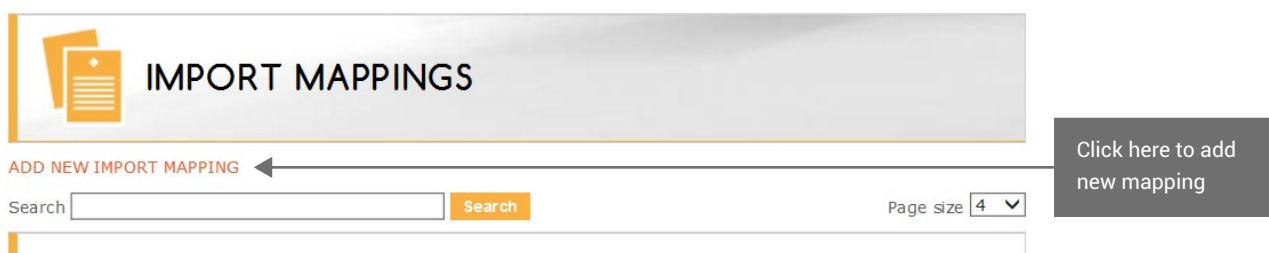


Complete the fields with the necessary details to tell Docmail what the fields are and how to use them.




Import Mapping

Import mappings define how your data files relate to Docmail address records; they can be added, edited or deleted from this screen.



Docmail will automatically recognise Spreadsheet, Comma Separated Values (.csv) files or tab delimited files (.txt). Alternatively you can manually select a custom delimiter or a fixed length file.

You must ensure that each line of the file contains at least one address column and ideally the first row should contain field headings. Alternatively click 'Download Spreadsheet CSV template' to download a template giving you all the fields you can use in Docmail.



ADD NEW IMPORT MAPPING

Add new import mapping

Name

Description

Ignore additional columns?

☒

You can optionally download an example template with the standard column headers in Spreadsheet CSV format:

DOWNLOAD SPREADSHEET CSV TEMPLATE

Select a Spreadsheet, CSV or Text file to upload containing your header row and/or sample data row:

Address file

Select

Clear

File contains column headers?

☒

File format

(automatic from file type)

Back

Next

You must give your mapping a name. The description field is optional.

Click here to download an example address list.

Click here to download a list from your computer.

Based on the names of the fields in your file, Docmail will determine what the fields are and try to map them to the correct target field in Docmail.

Assign fields

SET TO DEFAULT MAPPING

Column Header	Sample Data	Map To
name		Full Name
address		Address Line 1
postcode		Address Line 2

If you need to change any field, click on the Target (Map To) field drop down to choose the field you want assigned. Once you are happy, click 'Next'.






CREATE A MAILING


The first screen asks you to select the product that you would like to use - 3 folded sheet, A4 letter, greetings card, A5 postcard, A6 postcard or text message.

home > create mailing

CREATE MAILING

Select product type

 A4 document
  A3 folded sheet
  A5 postcard
  A6 postcard
  Greeting card


 Text message


When you have decided which option you want to use select it by clicking on it and then click Next.


If you are creating an A3 folded sheet mailing, your document must be supplied as individual sheets in the order which you would like them to appear in the folded sheet, i.e. page 1, page 2, page 3, page 4. Note that Docmail can only produce one A3 folded sheet per pack.


Mailing Options

If you are sending a printed document, the first thing you need to do on this screen is select your delivery service.

 STANDARD DELIVERY
Mailing options

 0 DOCUMENTS
Add documents

 0 ADDRESSES
Add addresses




 SET OUTPUT OPTIONS
Print and post

Mailing options

Mailing name

Mailing description

Delivery services

☒  Standard delivery
 ☐  First class
 ☐  Use Dotpost

Next

Mailing Name - You can give your mailing a name to identify it. This is optional.

Mailing Description - You can enter a description of a mailing to help you to identify it. This is optional.

Delivery Services - Tell us how to despatch your letters. Choose 'Standard delivery' if you want the lowest prices or 'First class' at additional cost.

Dotpost - Dotpost is a secure online document hub where users can securely view and manage their letters and documents. If you are registered to use Dotpost you can tick this box and your addressees who have signed up to Dotpost will either receive their documents electronically via Dotpost or will receive an additional sheet (free of charge) with their letter inviting them to sign up to receive their future mailings from you electronically. Your other recipients will also receive (free of charge) a letter inviting them to sign up to Dotpost.

You can select a Dotpost despatch date by going into to the Dotpost system. See the Dotpost guide for details.

If you tick this box and you are not a Dotpost user you will be directed to an online application form and your application will be considered by the Dotpost team at CFH.

Click 'Next' to continue.

Add a Document


Now you can tell Docmail which document you want to send. Click the option that you would like to use.

You can upload a new document stored on your computer. Your document will not need to include the recipient's address as Docmail will do this for you. You can apply any logos or signatures that you want to use on your mailing; either embed them in your documents or use a 'Background'.


Backgrounds can be selected under the Edit Document section.

Or


You can use documents that you have stored in your library by selecting an option from the 'Add from Library' section. You can select any document, a mail pack or insert that you already have stored in your library.




STANDARD DELIVERY



0 DOCUMENTS




0 ADDRESSES




SET OUTPUT OPTIONS

Mailing options
Add documents
Add addresses
Print and post


New document




Upload A4 document



Upload printed insert




Design outer envelope




Upload reply envelope


Add from library




A4 document



Mail pack



Outer envelope




Reply envelope


Click in this section to upload a document from your computer.

Click in this section to use a document from your Docmail library.


When you click to upload a new document this screen will be displayed.




STANDARD DELIVERY



0 DOCUMENTS



0 ADDRESSES



SET OUTPUT OPTIONS

Mailing options
Add documents
Add addresses
Print and post

Upload A4 document

Select new file

Document One PDF.pdf
Select
Clear

Background

(No background selected)

Print margin (3mm)

☒ Shrink to fit
☐ Keep original size

Click here and find the document on your computer.

Click here if you want to use a background from your library. (Optional)

Click here to see Advanced options.

Advanced options

Back
Add another
Next

Backgrounds

Backgrounds are templates that are stored separately from your documents and used with them. They can hold logos or letterheads etc. and can be applied behind your documents. Different backgrounds can be stored so that you can choose the right one for the mailing that you are creating. These can be PDF (.pdf), Microsoft Word (.doc), or Rich Text Format (.rtf) files. Click on the image to view an existing Background.

Print Margin

'Shrink to fit' is selected as this is generally the best option to use. This will shrink your document by a 3mm margin and apply a white border to your finished document. If you do not require a white 3mm border you can tick 'Keep original size'. This is most applicable when you are producing a postcard.

You can see advanced options by clicking to expand the section.

Advanced options

VIEW DOCUMENTS SCREEN

Name

Document One PDF

Description

Address panel font

Arial 10pt

Apply address panel when an additional document?

☐

File contents

Document

Clear merge tags on upload?

☐

Can this document begin on the back of another document?

☒

Can another document begin on the back of this document?

☒

Password protected areas

☐

Encryption password

☐

Delete

Back

Next

Name	You can give your mailing a name to identify it if you have not done so previously.
Description	You can enter the description of a mailing to help you to identify it if you have not done so previously.
Address panel font	You can choose a font from the drop down list and Docmail will use this to print the name and address.

<p>Apply address panel when an additional document?</p>	<p>An address panel will be automatically added to the first page of the output A4 document. If this document is added as an additional document you can check the box if you still want an address panel, but note that this will be overridden if you remove the address panel in the print and post options.</p>
<p>File contents</p>	<p>Select 'Document' if you are creating a document to be personalised from your data list. If you have selected a merged file that has already been personalised for more than one recipient, you need to select 'Multiple address stream' to tell Docmail that the file contains a stream of letters rather than a pre-merged letter file. Multiple address streams are explained further in Appendix 3.</p>
<p>Can this document begin on the back of another document?</p> <p>(A4 only)</p>	<p>The cheapest option is to allow Docmail to print on both sides of the paper (duplex printing). If a mailing contains more than one document and duplex is selected Docmail will print all the documents 'back-to-back', for example, if document 1 in the mail pack is only one side long, then document 2 starts printing on the back of document 1.</p> <p>If you want to use a document in a mailing with other documents and use duplex printing tick the 'Can this begin on the back of another document?' option to allow back-to-back printing.</p> <p>However you might want to start on a new sheet of paper, for example for a reply form. If you always want this document to start on a new sheet of paper, then DO NOT tick this box.</p> <p>Remember, this option is only relevant if you intend using the document in a mail pack with other documents and you intend to use duplex printing.</p>
<p>Can another document begin on the back of this document?</p> <p>(A4 only)</p>	<p>Similar to the above; if you are happy for all documents in a mail pack to be printed back-to-back then tick this box on every document, however, if you do not want another document to start on the back of this document then DO NOT tick this box.</p> <p>Remember, this option is only relevant if you intend to use this document in a mail pack with other documents and you also intend to use duplex printing.</p>

Password Protected areas (All document types except backgrounds)	If any part of the document(s) selected are password protected you can enter the password here so that the file can be uploaded successfully to Docmail, without you having to remove the password before uploading.
Encryption password (all document types)	If all the documents that you have selected to upload are encrypted you can enter the password here so that the file can be uploaded successfully to Docmail, without you having to remove the password before uploading.

When you have completed the fields that you want to use click 'Add another' to add another document or 'Next' to move to the next screen.

Creating Greetings Cards, Post cards Envelopes

When you select Greetings Card as your document you will see the options shown below.

Click here to design your own greetings card using the instructions below.

STANDARD DELIVERY

0 DOCUMENTS

0 ADDRESSES

SET OUTPUT OPTIONS

Mailing options Add documents Add addresses Print and post

New document

Design greeting card

Upload greeting card

Design outer envelope

Add from library

Greeting card

Add from previous mailing

Mailing name or order ref Find mailing

☐ Search for mailings from other account users

Click here to upload a greetings card from your computer.

Click here to design an envelope using the instructions given below.

Click here to use any of the documents that you have already stored in your library.

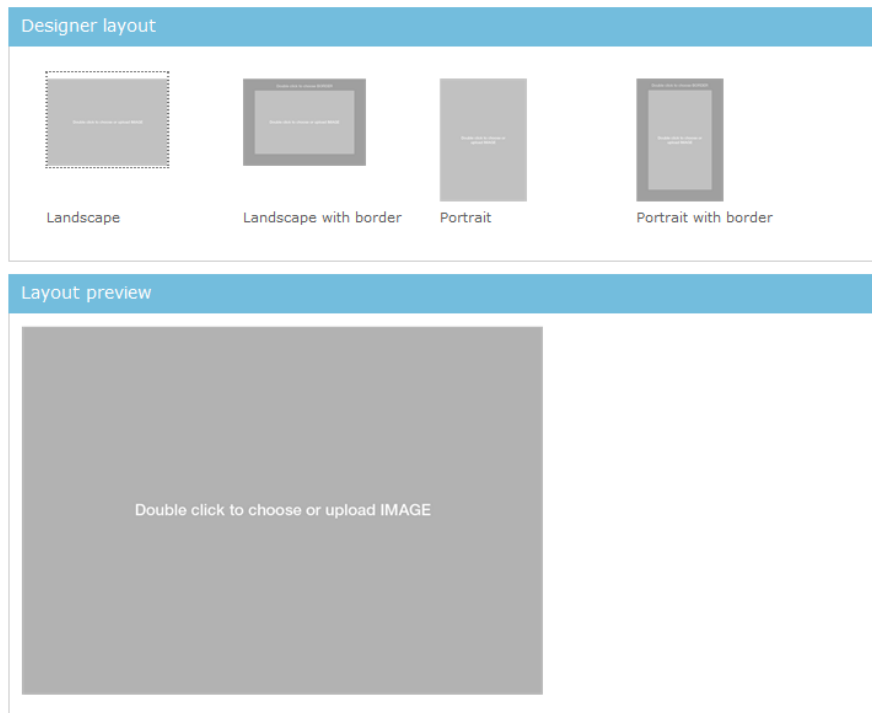
Click here to find a previous greeting card mailing.

When you select postcard you will see a similar screen but with no options for envelopes.

Designing a Postcard / Greeting card / Envelope

Greetings Card

When you click to 'Design a greeting card' the following screen is displayed where you will choose your layout - landscape or portrait; with or without a border.



Click on the option that you want to use to see the next screen as shown below.





The screenshot shows the 'Designer edit' interface for Docmail. At the top, it displays 'Order ref 34211' and a 'Top-up balance: £50,000.00'. Below this are four main sections: 'STANDARD DELIVERY' with a 'Mailing options' button, '0 DOCUMENTS' with an 'Add documents' button, '0 ADDRESSES' with an 'Add addresses' button, and 'SET OUTPUT OPTIONS' with a 'Print and post' button. A 'Select image' section features a search bar and a 'Search' button. Below this, it shows 'Showing images 1-4 of 21' with a grid of image thumbnails: 'A very merry Christmas', 'Anniversary Birds', 'Cyprus reptile', and 'Dog in the snow'. A navigation bar at the bottom of the grid shows numbers 1 through 6, with '4' highlighted. Below the grid is an 'Image preview' section showing a large image of a dog in the snow. To the left of the main interface is a 'Page element' sidebar with 'Select page (1-4)' set to '1', 'Select element' set to 'Background photo', and a 'Properties' section with 'Change image' buttons ('Select', 'Upload'), 'Rotation' set to '0°', and 'Size option' set to 'Crop'. Annotations with arrows point to various parts of the interface: 'You can use the search box to find a particular image.' points to the search bar; 'This shows which page of the card you are working on.' points to the 'Select page (1-4)' dropdown; 'Click here to change the dropdown to border and see available borders.' points to the 'Select element' dropdown; 'You can rotate and crop your image here.' points to the 'Rotation' and 'Size option' dropdowns; 'Docmail will show you a preview of the image here.' points to the 'Image preview' section; and 'Click one of these links to upload your own image.' points to the 'Upload' button in the 'Change image' section. A box at the top right says 'Click through the pages here to see all the images available on Docmail.' pointing to the image grid. At the bottom right are 'Cancel' and 'Upload image' buttons.

You can experiment as much as you like until you are completely happy with your design.

The screenshot shows the 'Designer edit' interface with a design titled 'Happy Anniversary'. The design features two blue birds on a brown branch with the text 'Happy Anniversary' in a cursive font. The interface includes a 'Page element' sidebar on the left with 'Select page (1-4)' set to '1', 'Select element' set to 'Background photo', and a 'Properties' section with 'Change image' buttons ('Select', 'Upload'), 'Rotation' set to '0°', and 'Size option' set to 'Crop'. A box on the left says 'You can click on 'Discard' and start again as many times as you like.' with an arrow pointing to the 'Discard' button at the bottom. The 'Designer edit' header has a '(change layout)' dropdown. At the bottom are 'Discard', 'Back', and 'Next' buttons.

When you are satisfied click 'Next'. You will be taken to page 3 where you will see the text.

Please click an item to edit
or click [here](#) for more help.

 STANDARD DELIVERY
  0 DOCUMENTS
  0 ADDRESSES
  SET OUTPUT OPTIONS

Mailing options
 Add documents
 Add addresses
 Print and post

Page element
 Select page (1-4)
3
 Select element
To

Properties
 Text
To <<FirstName>>,
 Font
Arial
 Font size
16pt
 Align
Left
 Colour
☐ Bold
 ☐ Italic
 ☐ Underline

Designer edit
 (change layout)
 To <<FirstName>>,

Merry Christmas and a Happy New Year

 From Linda Horner

Discard
 Back
 Next

Text
 To <<FirstName>>
 (enter own text)

Font
 To <<FirstName>>,
 To <<FullName>>,
 To <<Title>> <<Surname>>,
 To <<FirstName>>
 <<Surname>>,
☐ Italic

Font size

Align

Colour

☐ Bold

☐ Underline

Text
 (enter own text)

Font
 (enter own text)

Font size
 Happy
 Birthday
 Happy
 Christmas
 Happy Xmas

Align

Colour

☐ Bold

☐ Italic

☐ Underline

Discard
 Back

You can make changes here by clicking on to the text or using the drop down lists. Click on the area where 'To First Name' is shown and the options in the dropdown list use the fields from address data.

You can choose one of the options or enter your own text.

You can use the other boxes to change the appearance of your text.

Click on to the greeting area and you will be able to delete what is there and type your own text, or you could select a suitable message from the drop down list given. You can use the other boxes to change the appearance of your text.

You can click on the 'From' and use an option from the drop down list which uses the data from your account or you can enter your own text. You can use the other boxes to change the appearance of your text.

Please note that if the font selected is not installed on your computer you will only be able to see the correct text format in the preview images.

You need to make sure that all text that you type is shown on the screen. If you cannot see it on the screen then there is not enough room for the text and you will need to reduce the font size or shorten your message.

Page element

Select page (1-4)

3

Select element

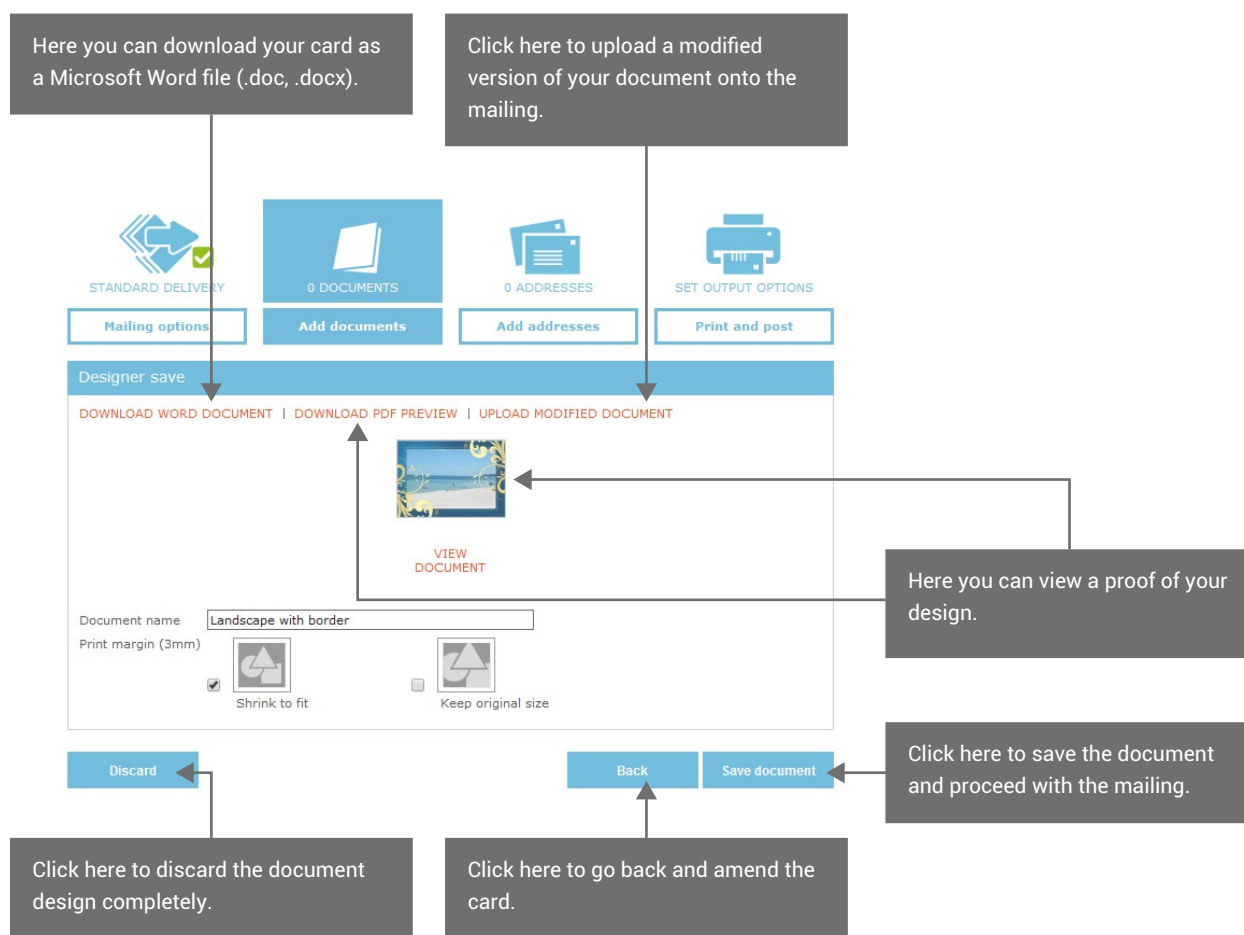
To

You can use the next and back and discard buttons to change your document, or you can go to the pages and elements using the navigation panel in the top left corner of the designer.

Note that pages 2 and 4 cannot be amended here, except for the address font.

Once you have made your changes click 'Next' and you will see the document preview screen. You can then use this document on your mailing or if you want to you can download it in Word format to make further changes.

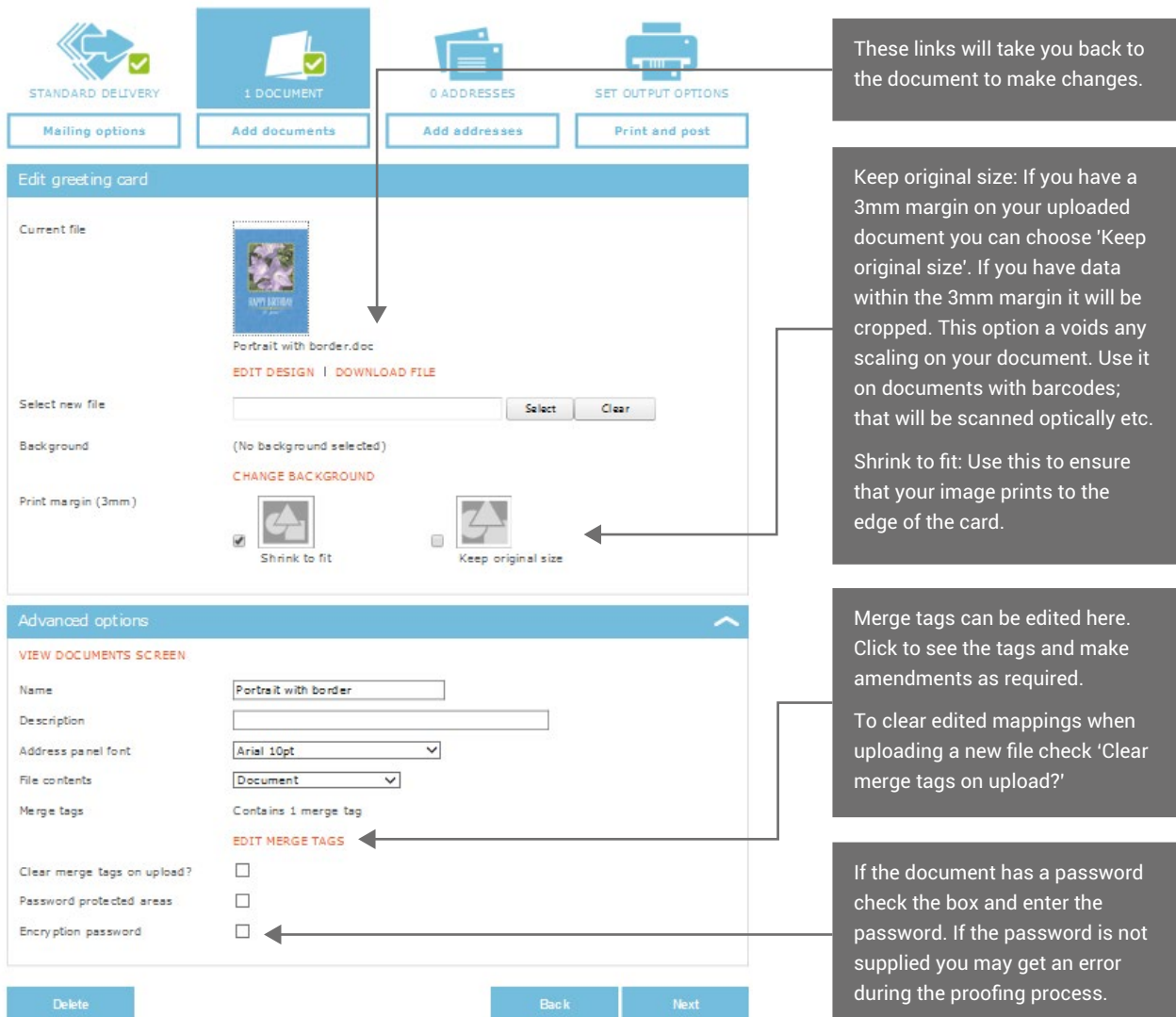
Click 'VIEW DOCUMENT' or 'DOWNLOAD PDF PREVIEW' to see your design. You can then amend pages 1 or 3 if you wish by clicking the 'Back' button and making the changes.



Clicking on 'DOWNLOAD WORD DOCUMENT' will let you open the document in Word on your computer where you can make additional changes.

When you have amended and saved your document in Word on your computer you can click on 'UPLOAD MODIFIED DOCUMENT'. Note that once you have downloaded, amended and re-uploaded you will not be able to use the Docmail designer to edit the document again.

When you are satisfied with your document click 'Save document' and you will be taken on to the 'Edit greeting card' screen which allows you to make some further changes.



The screenshot shows the 'Edit greeting card' interface. At the top, there are four main sections: 'STANDARD DELIVERY' (Mailing options), '1 DOCUMENT' (Add documents), '0 ADDRESSES' (Add addresses), and 'SET OUTPUT OPTIONS' (Print and post). Below these is the 'Edit greeting card' section, which includes a 'Current file' (Portrait with border.doc), a 'Select new file' field, a 'Background' section (No background selected), and a 'Print margin (3mm)' section with 'Shrink to fit' and 'Keep original size' options. Below this is the 'Advanced options' section, which includes fields for 'Name', 'Description', 'Address panel font', 'File contents', 'Merge tags', 'Clear merge tags on upload?', 'Password protected areas', and 'Encryption password'. Callout boxes provide additional information: 'These links will take you back to the document to make changes.' points to the 'EDIT DESIGN' and 'DOWNLOAD FILE' links; 'Keep original size: If you have a 3mm margin on your uploaded document you can choose 'Keep original size'. If you have data within the 3mm margin it will be cropped. This option voids any scaling on your document. Use it on documents with barcodes; that will be scanned optically etc.' points to the 'Keep original size' option; 'Shrink to fit: Use this to ensure that your image prints to the edge of the card.' points to the 'Shrink to fit' option; 'Merge tags can be edited here. Click to see the tags and make amendments as required.' points to the 'EDIT MERGE TAGS' link; 'To clear edited mappings when uploading a new file check 'Clear merge tags on upload?'' points to the 'Clear merge tags on upload?' checkbox; and 'If the document has a password check the box and enter the password. If the password is not supplied you may get an error during the proofing process.' points to the 'Encryption password' checkbox.

Click 'Next' to go to the Add addresses screen.

Select new postcard screen:

The screens for creating a postcard mailing are similar to those for a greetings card.

You can use your own image from your computer or use the images available on Docmail.

Please note that Docmail does not require crop marks on your artwork and these should be removed from your artwork before you upload it to Docmail.

Tags for field names can be included in the document so that we can merge fields for you. For PDF documents tags must be in a form field. Details of this are given in Appendix 1.

Postcard

When you click to Design a postcard the following screen is displayed where you will choose the layout of your address - on the left or right hand side.

STANDARD DELIVERY
Mailing options

0 DOCUMENTS
Add documents

0 ADDRESSES
Add addresses

SET OUTPUT OPTIONS
Print and post

Designer layout

Postcard A5 left address Postcard A5 right address

Layout preview

Double click to choose or upload IMAGE

Select the layout by clicking on it and then click Next.

Then double click on the layout preview to see the screen shown below.

Please click an item to edit
or click [here](#) for more help.

STANDARD DELIVERY
Mailing options

0 DOCUMENTS
Add documents

0 ADDRESSES
Add addresses

SET OUTPUT OPTIONS
Print and post

Select image

Search Search Page size 4

Showing images 1-4 of 21

A very merry Christmas Anniversary Birds Cyprus reptile Dog in the snow

1 2 3 4 5

Image preview:

Cancel Upload image

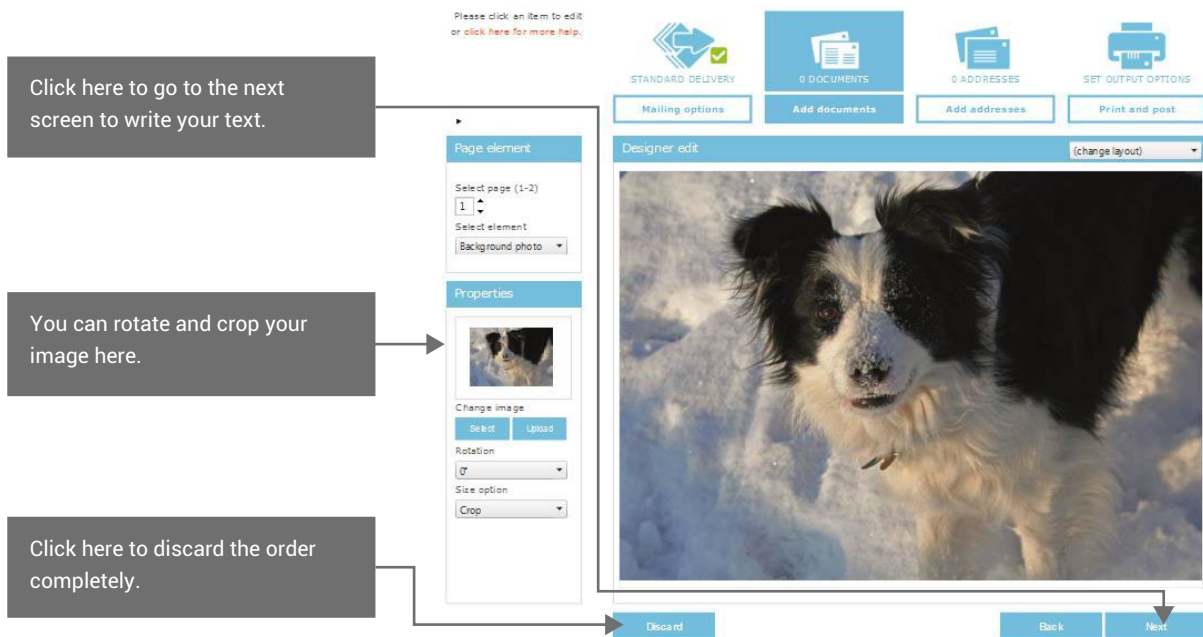
This shows which page of the card you are working on.

Click through the pages here to see all the images available on Docmail.

Click one of these links to upload your own image.

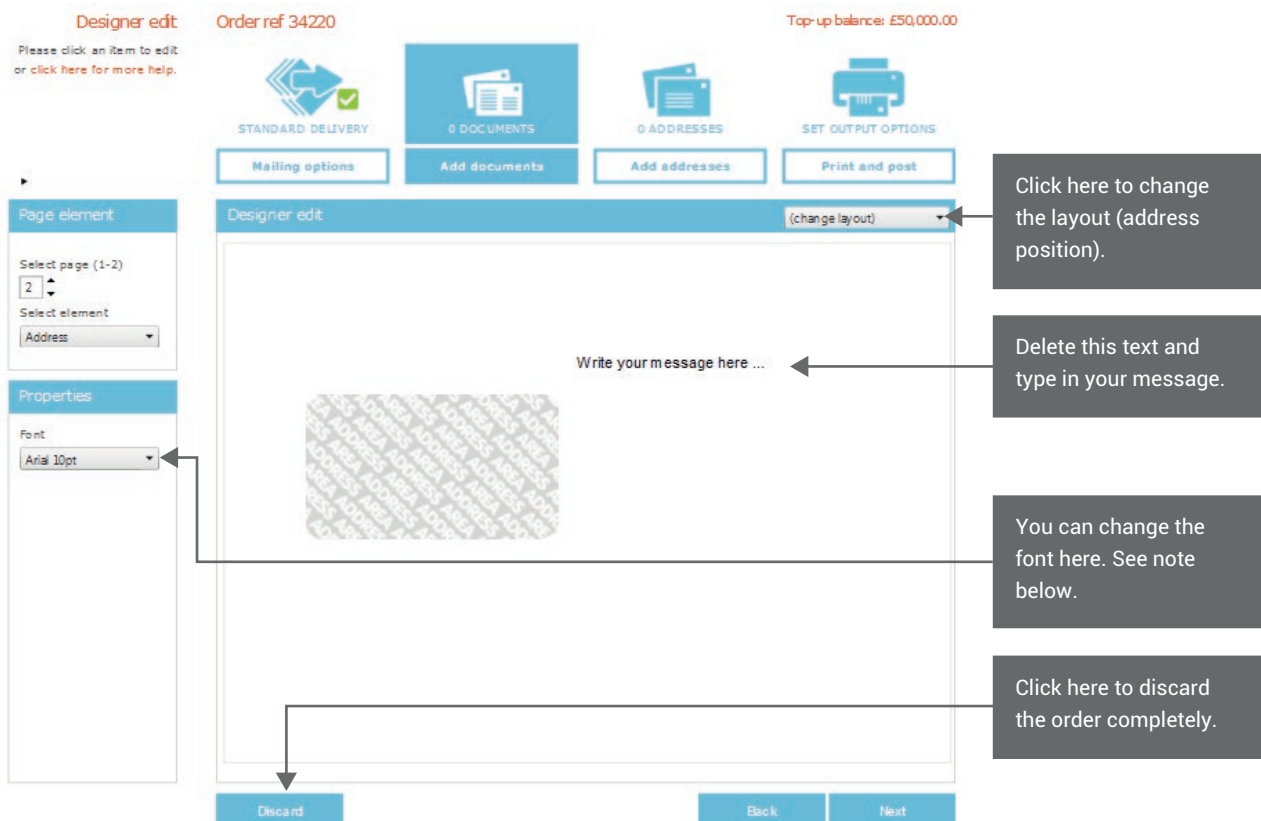
Docmail will show you a preview of the image here.

When you have chosen your image click 'Upload image' and you will be taken to the next screen as shown below.



You can experiment as much as you like until you are completely happy with your design.

You can click on 'Discard' and start again as many times as you like. When you are happy with your image click 'Next' to write your text.



Please note that if the font selected is not installed on your computer you will only be able to see the correct text format in the preview images.

You need to make sure that all text that you type is shown on the screen. If you cannot see it on the screen then there is not enough room for the text so you will need to reduce the font size or shorten your message.

Click 'Next' to go to the screen shown below.

The screenshot shows a web interface for designing postcards. At the top, there are four main sections: 'STANDARD DELIVERY' with a 'Mailing options' button, '0 DOCUMENTS' with an 'Add documents' button, '0 ADDRESSES' with an 'Add addresses' button, and 'SET OUTPUT OPTIONS' with a 'Print and post' button. Below these is a 'Designer save' bar containing 'DOWNLOAD WORD DOCUMENT', 'DOWNLOAD PDF PREVIEW', and 'UPLOAD MODIFIED DOCUMENT' links. A 'VIEW DOCUMENT' button is positioned below a preview image of a postcard. At the bottom, there is a 'Document name' field with the text 'Postcard A5 left address', a 'Print margin' section with two options: 'Shrink for 3mm margin' (checked) and 'Borderless 3mm cut' (unchecked), and three buttons: 'Discard', 'Back', and 'Save document'. Five callout boxes provide additional information: 1. 'Here you can download your card as a Microsoft Word file (.doc, .docx).' points to the 'DOWNLOAD WORD DOCUMENT' link. 2. 'Click here to upload a modified version of your document onto the mailing.' points to the 'UPLOAD MODIFIED DOCUMENT' link. 3. 'Here you can view a proof of your design.' points to the 'VIEW DOCUMENT' button. 4. 'Use 'Shrink for 3mm margin' and your document will be shrunk by 3mm and a white border applied to the finished document. If you do not require a white 3mm border around the edge of your postcard, tick to use 'borderless 3mm cut'. This will ensure that your postcard image is printed to the edge of the card.' points to the 'Borderless 3mm cut' option. 5. 'Click here to discard the order completely.' points to the 'Discard' button. 'Click here to go back and amend the card.' points to the 'Back' button. 'Click here to proceed with the order.' points to the 'Save document' button.

STANDARD DELIVERY
Mailing options

0 DOCUMENTS
Add documents

0 ADDRESSES
Add addresses

SET OUTPUT OPTIONS
Print and post

Designer save

DOWNLOAD WORD DOCUMENT | DOWNLOAD PDF PREVIEW | UPLOAD MODIFIED DOCUMENT

VIEW DOCUMENT

Document name: Postcard A5 left address

Print margin

☒ Shrink for 3mm margin

☐ Borderless 3mm cut

Discard

Back

Save document

Here you can download your card as a Microsoft Word file (.doc, .docx).

Click here to upload a modified version of your document onto the mailing.

Here you can view a proof of your design.

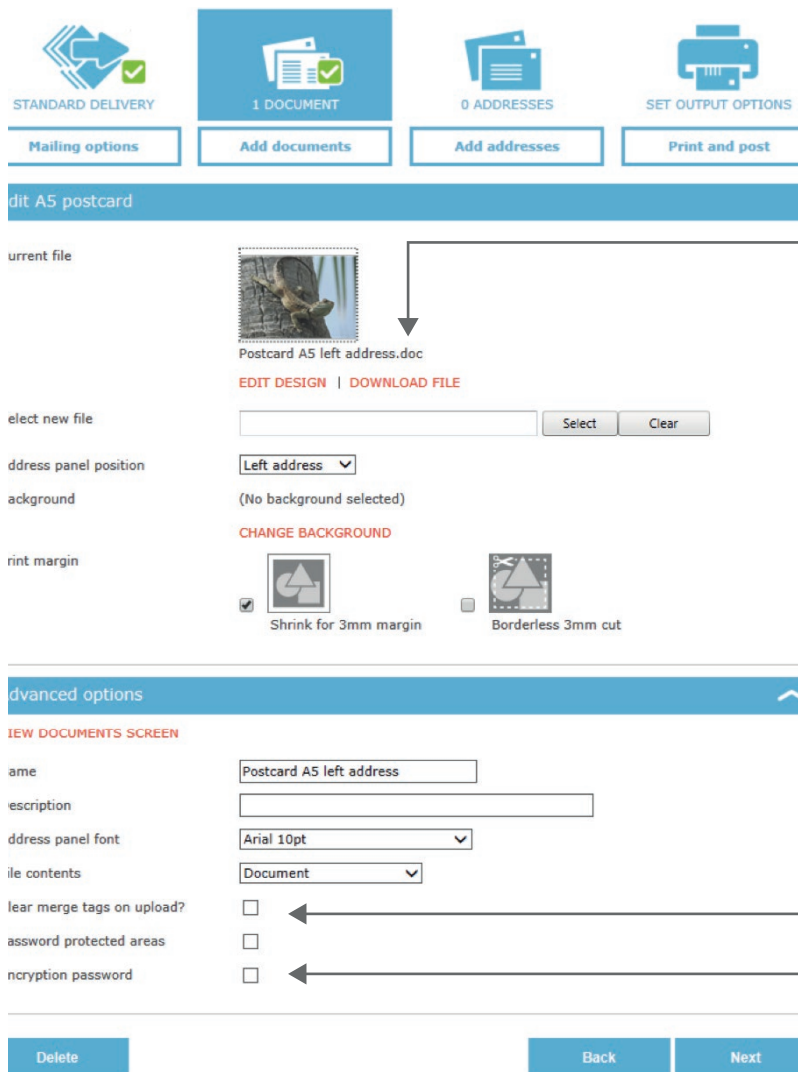
Use 'Shrink for 3mm margin' and your document will be shrunk by 3mm and a white border applied to the finished document. If you do not require a white 3mm border around the edge of your postcard, tick to use 'borderless 3mm cut'. This will ensure that your postcard image is printed to the edge of the card.

Click here to discard the order completely.

Click here to go back and amend the card.

Click here to proceed with the order.

When you have clicked 'Save document' you will be taken to the screen shown below.



These links will take you back to the document to make changes.

Merge tags can be edited here. Click to see the tags and make amendments as required.

To clear edited mappings when uploading a new file check 'Clear merge tags on upload?'

If the document has a password check the box and enter the password.

If the password is not supplied you may get an error during the proofing process.

When you are satisfied with your document click 'Save' and you will be taken on to the 'Add Addresses' screen.

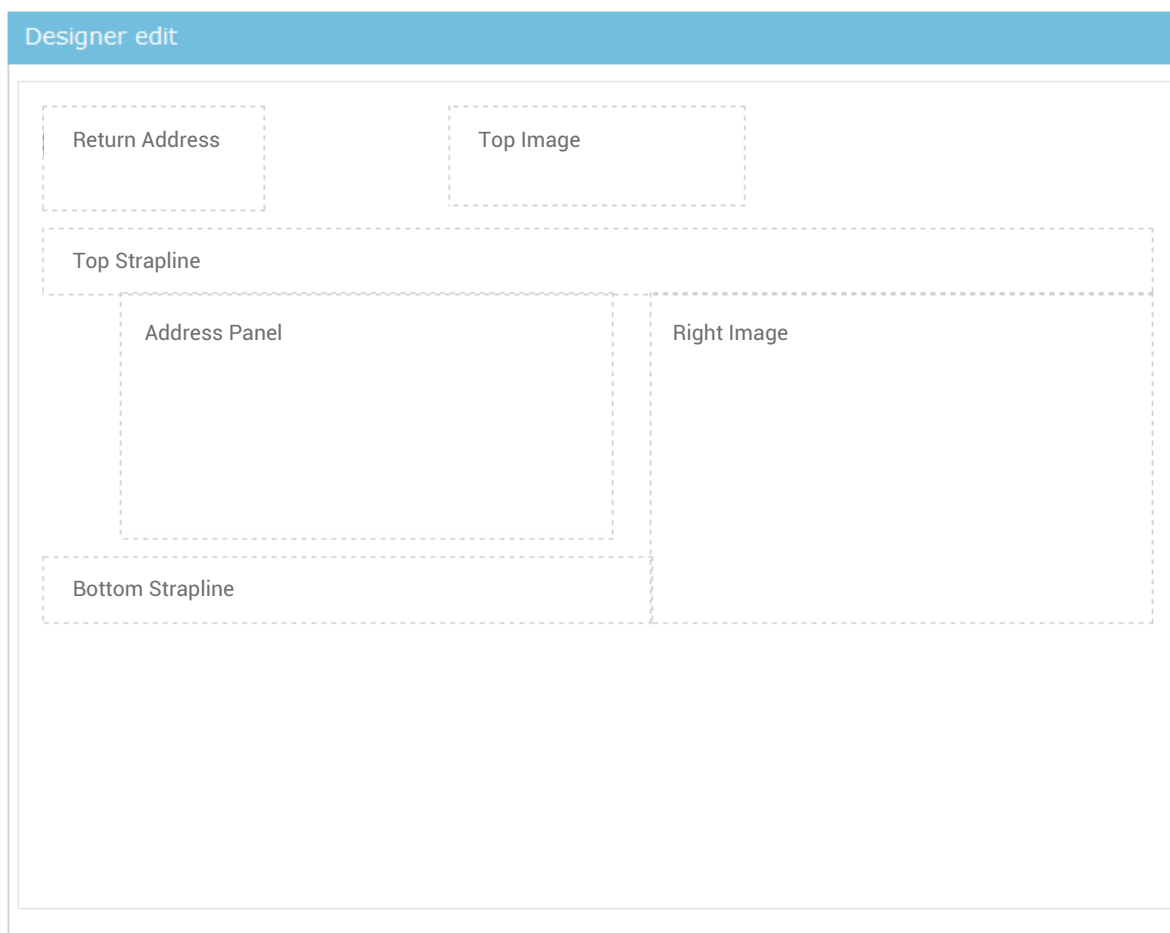
Designing Envelopes

You can design your own outer envelope for use on your mailings. You can also upload a reply envelope from your computer to be enclosed in your mailing. Currently reply envelopes can only be added to A4 mailings. Envelopes can also be stored in the library and added from there.

Select the correct option from the 'New document' section.



The 'Design outer envelope' screen is shown below with the areas of the template labelled.



Select the fields that you want to complete here and follow the instructions given below.

Page element

Element outlines

Show

Select element

Top image

Address panel

Bottom strapline

Return address

Right image

Top image

Top strapline

Change image

Upload

Reset

Rotation

0°

Size option

Resize to fit

Designer edit

Return Address

Address panel

Change image

Select

Reset

Address panel font

Arial

Arial

Helvetica

Verdana

Click on select or Reset to change the appearance of the address panel on the envelope.

You will be offered 3 options as shown below.

Showing 3 images



Address - border only

Address - no background

Address - window effect

Click the option that you wish to use. Click on the dropdown to select an 'Address panel font'.

Bottom strapline

Properties

Font

Arial

Font size

12pt

Align

Left

Colour

Bold

☐

Italic

☐

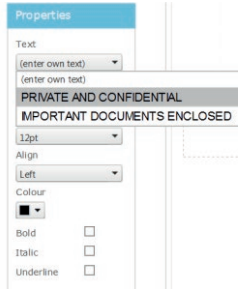
Underline

☐

Type your own text into the box and use the options in the properties box to change the appearance of your text as you wish.

Return address


Leave the return address blank if you don't want to manage your own returns or if you wish to use a return address defined for each account user or a return address defined in the account details. The return address will be picked up automatically if they are included in your account details. If you wish to process your own returns a valid UK address is required.

Right image	Double click in the area for the image or click on 'Upload' from the panel on the left of the screen. Find the image that you want to upload from your computer and click on the 'Upload' button.
Top image	Double click in the area for the image or click on 'Upload' from the panel on the left of the screen. Find the image that you want to upload from your computer and click on the 'Upload' button.
Top strapline	 <p>Select a strapline from the drop down or type your own text into the box. Use the options in the properties box to change the appearance of your text as you wish.</p>

If you have not added documents to go into your outer envelope you will be taken back to the 'Add documents' screen when you have input your 'Print and post' options.


Creating a Text Message

If you are sending a text message simply type the message into the message box as illustrated below, or select a text message from your library. You can personalise your message using custom tags or alternatively you can use the custom tag <<message>> to add unique messages for each recipient from your address upload.




STANDARD DELIVERY

Mailing options




0 DOCUMENTS

Add documents



0 ADDRESSES

Add addresses



SET OUTPUT OPTIONS

Print and post

Text message

Name

Message

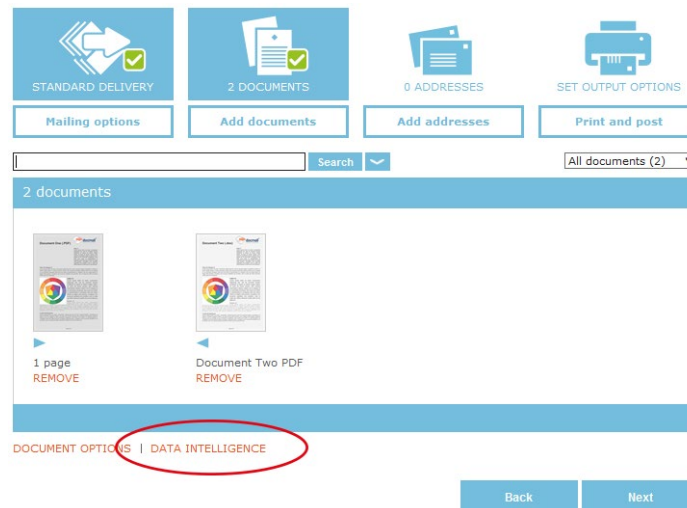
Back

Add another

Next

Data intelligence

The data intelligence feature lets you to target different sets of customers on the same mailing by adding a control field into the Address list to let you choose the right copy for each. The Data Intelligence option will appear at the bottom of the screen whenever it is available as an option. See the Data Intelligence Tutorial for further information.



Add Addresses

Once you have added your documents you can upload your addresses and mobile numbers. The upload process for mobile numbers follows the same flow as the address process detailed below.

- upload them from your computer
- enter them manually
- add yourself as an addressee

New address

Upload addresses

Docmail will automatically recognise Spreadsheets (Spreadsheet, Open Documents and XML Spreadsheets), Comma Separated Values (.csv) or Tab Delimited (.txt) files. You can also use a custom delimiter or fixed length file.

When you click 'Upload addresses' you will be taken to the screen shown below.

The screenshot shows the 'Upload addresses' interface. At the top, there are four main sections: 'STANDARD DELIVERY' (Mailing options), '1 DOCUMENT' (Add documents), '0 ADDRESSES' (Add addresses), and 'SET OUTPUT OPTIONS' (Print and post). Below these is the 'Upload addresses' section. It includes a link to 'DOWNLOAD SPREADSHEET CSV TEMPLATE', a text input for 'Address file' with 'Select' and 'Clear' buttons, a checkbox for 'File contains column headers?' (checked), a dropdown for 'File format' (set to '(automatic from file type)'), and a dropdown for 'Mapping' (set to '(automatic)'). At the bottom are 'Back' and 'Next' buttons. Five callout boxes provide instructions: 1. 'Click here and find the address list on your computer.' points to the 'Address file' input. 2. 'Remove the tick here if your file has only data and no headers.' points to the 'File contains column headers?' checkbox. 3. 'Leave at automatic unless you need additional options such as a custom format.' points to the 'File format' dropdown. 4. 'Select a mapping from your library or leave at automatic and Docmail will apply the last one used or bring up the mapping screen as shown below.' points to the 'Mapping' dropdown. 5. 'Click here and find the address list on your computer.' also points to the 'Address file' input.

Click 'Next' to assign fields.

Fields are assigned to define how your data files relate to Docmail address records. The mapping applied by Docmail is shown but you should check that the fields are mapped correctly and amend them if necessary.

Tags can be included in your documents where you want us to merge fields. For PDF documents the tags must be in a form field. See Appendix 1.

Based on the names of the fields in your file, Docmail will map them to the correct target field. If you need to change any field, click on the target field (Map To) drop down on the 'Assign fields screen' to choose the field that you want assigned. If you have fields in your letter that are not standard Docmail fields, you will need to select a Custom Field for the required field by using the drop down options.

File uploaded Copy of Address scenarios (2).xlsx

[CHANGE FILE](#)

Your file will show as uploaded. If you want to change it click here.

Assign fields

[SET TO DEFAULT MAPPING](#)

Column Header	Sample Data	Map To
Title	Mr	Title
Firstname	D	First Name
Surname	Dotpost	Surname
Fullname	Mr D Dotpost	Full Name
Address 1	CFH Docmail Limited	Address Line 1
Address 2	St Peters Park	Address Line 2
Address 3	Wells Road	Address Line 3
Address 4	Radstock	Address Line 4
Address 5	Bath	Address Line 5
Address 6	BA3 3UP	Address Line 6
Custom1	Test1	Custom 1
Custom2	Test2	Custom 2
Custom3	Test3	Custom 3
Custom4	Test4	Custom 4
Custom5	Test5	Custom 5

Click the drop down to change the option if necessary.


Back


Next


Click 'Next' to select the address name format as shown on the next page.


Enter addresses manually

Click 'Enter addresses' to complete the addresses manually. You will be taken to the screen shown below to complete the address fields; other fields are optional and can be used if you have any other personalised information that you want to use in your letter. Click the options 'Add custom field' and 'Add standard fields' as necessary.


 STANDARD DELIVERY
[Mailing options](#)


 1 DOCUMENT
[Add documents](#)


 0 ADDRESSES
[Add addresses](#)


 SET OUTPUT OPTIONS
[Print and post](#)

Enter address

Title

First name

Surname

Full name *

Address name prefix

Job title

SWITCH TO LINE-BY-LINE ADDRESS BOXES

Company name

Address *

Use this address for proof? No ☐

[Add custom field](#)
[Add standard fields](#)

The * indicates tags used in the current mailing, an address is always required.

[Back](#)
[Add another](#)
[Finish](#)

Complete all the details of the name and address in these boxes.

Tick this box if you would like to see a proof using this address.

Click here to see the options shown below to add fields not included in the address.

This box allows you to add a custom field. Put the field name in the first box and your corresponding data into the second.

[Add custom field](#)
[Add standard fields](#)

All the standard options are displayed when you click on 'Add standard fields'. Click the field that you want to add and the box for you to use will show. Alternatively you can click 'Add all standard fields'.

Email

[Add custom field](#)
[Add standard fields](#)

Add all standard fields

^

Telephone	Direct line	Mobile	Facsimile	Extra info
Extra info	Customer address ID	Customer import ID	Stream pages 1	Stream pages 2
Stream pages 3	Dotpost title override	Custom 1	Custom 2	Custom 3
Custom 4	Custom 5	Custom 6	Custom 7	Custom 8
Custom 9	Custom 10			

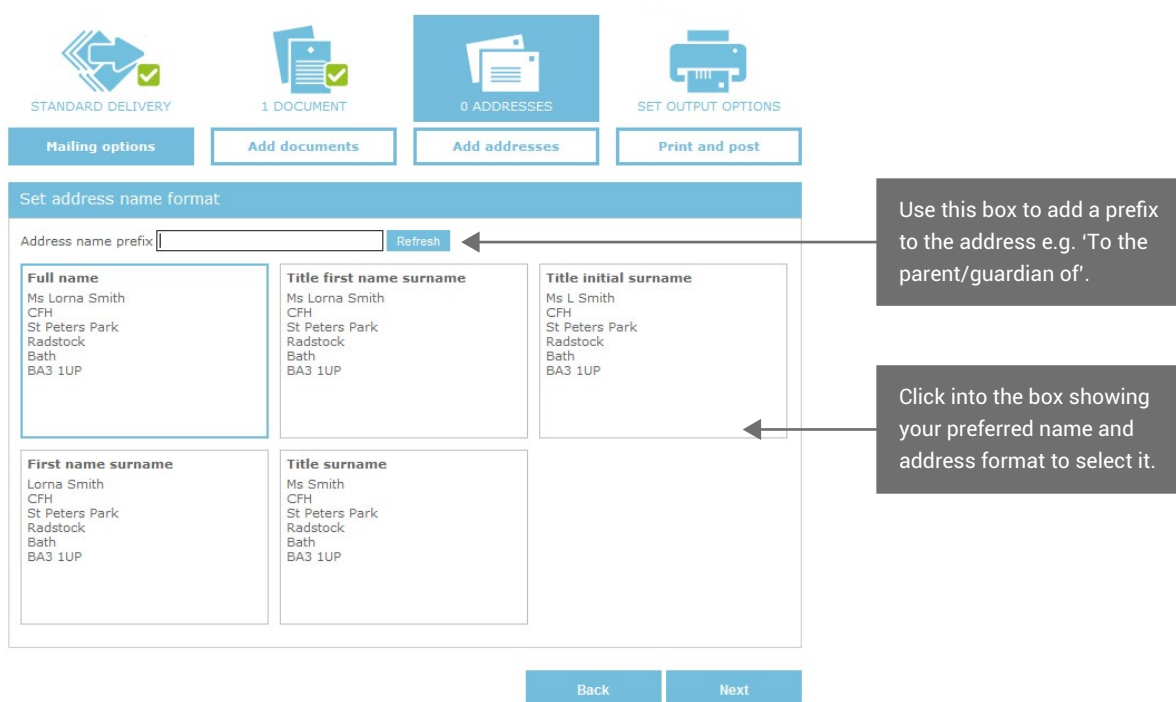
Click 'Next' to select the address name format as shown on the next page.

Add self

Click this option to receive a copy of your mailing at the address that is recorded on your Docmail account.

Select the address name format

You will then need to select the address name format for Docmail to use by clicking on the format on the screen shown below.



STANDARD DELIVERY

1 DOCUMENT

0 ADDRESSES

SET OUTPUT OPTIONS

Mailing options

Add documents

Add addresses

Print and post

Set address name format

Address name prefix Refresh

Full name
Ms Lorna Smith
CFH
St Peters Park
Radstock
Bath
BA3 1UP

Title first name surname
Ms Lorna Smith
CFH
St Peters Park
Radstock
Bath
BA3 1UP

Title initial surname
Ms L Smith
CFH
St Peters Park
Radstock
Bath
BA3 1UP

First name surname
Lorna Smith
CFH
St Peters Park
Radstock
Bath
BA3 1UP

Title surname
Ms Smith
CFH
St Peters Park
Radstock
Bath
BA3 1UP

Use this box to add a prefix to the address e.g. 'To the parent/guardian of'.

Click into the box showing your preferred name and address format to select it.

Back

Next

Click 'Next' to import and validate the addresses.

Import and validate addresses

When the addresses are added Docmail will mark each one with a 'Validation type' - a ✓ a ? or a ✈.

Mobile numbers are also validated to ensure they are a valid UK mobile number.

Recipient	Original	Correction
Ms Lorna Smith, CFH, St Peters Park, Radstock, Bath, BA3 1UP	?	N/A
Birmingham Hippodrome, Birmingham Hippodrome, Hurst Street, Southside, Birmingham	?	✓
S Smith, Disney Land Paris, 77777 Marne-la-Valleé, France	✈	N/A
CFH, CFH, St Peters Park, Wells Road, Radstock, BA3 3UP	✓	N/A

- ✓ means the address is good and qualifies for the best postage price.
- ? means there is something not quite right with the address. The postcode or some other part of the address may be incorrect or incomplete. We will still mail it for you but cannot offer the best price.

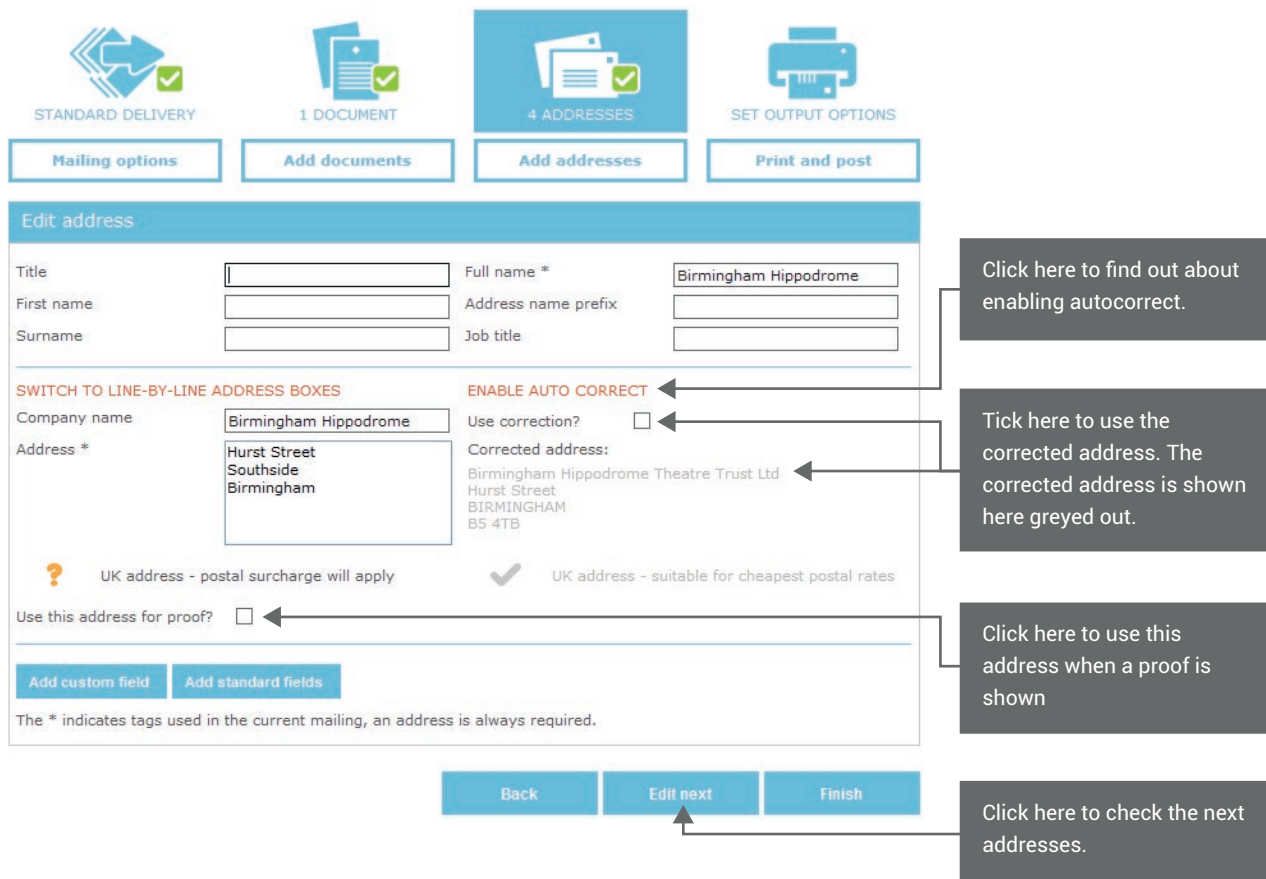
You can check the addresses at www.royalmail.com, by clicking on 'Find Postcode'. The site allows you to check 15 postcodes/addresses a day at no cost, and will also give you the recommended address format to use for any UK address. We recommend that you update your database to use the addresses as given here.

- ✈ means we have identified the address as being overseas. Again, we can still mail it, but there will be a surcharge to cover the extra postage costs for sending overseas.

Correcting Addresses

Postal surcharge addresses may sometimes have a greyed out tick next to the symbol. This means that Docmail can provide the correct address from the Royal Mail website.

Clicking on 'Edit' next to the address will display this screen.



The 'Edit address' screen includes the following elements and callouts:

- Top Navigation:** Four buttons with icons: 'Mailing options' (Standard Delivery), 'Add documents' (1 Document), 'Add addresses' (4 Addresses), and 'Print and post' (Set Output Options).
- Form Fields:**
 - Title, First name, Surname (input fields).
 - Full name * (input field with 'Birmingham Hippodrome').
 - Address name prefix (input field).
 - Job title (input field).
- Address Section:**
 - 'SWITCH TO LINE-BY-LINE ADDRESS BOXES' link.
 - Company name (input field with 'Birmingham Hippodrome').
 - Address * (input field with 'Hurst Street Southside Birmingham').
 - 'ENABLE AUTO CORRECT' link.
 - 'Use correction?' checkbox (unchecked).
 - 'Corrected address:' section showing the corrected address: 'Birmingham Hippodrome Theatre Trust Ltd, Hurst Street, BIRMINGHAM, B5 4TB'.
- UK Address Information:**
 - 'UK address - postal surcharge will apply' (with a question mark icon).
 - 'UK address - suitable for cheapest postal rates' (with a checkmark icon).
- Proof Option:** 'Use this address for proof?' checkbox (unchecked).
- Buttons:** 'Add custom field', 'Add standard fields', 'Back', 'Edit next', and 'Finish'.
- Footnote:** 'The * indicates tags used in the current mailing, an address is always required.'

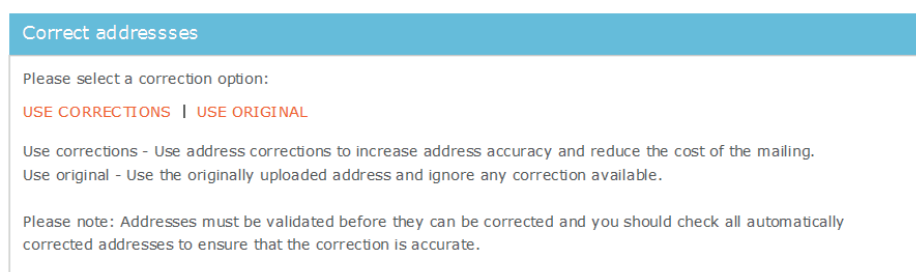
Callouts provide additional instructions:

- 'Click here to find out about enabling autocorrect.' (points to 'ENABLE AUTO CORRECT')
- 'Tick here to use the corrected address. The corrected address is shown here greyed out.' (points to 'Use correction?')
- 'Click here to use this address when a proof is shown' (points to 'Use this address for proof?')
- 'Click here to check the next addresses.' (points to 'Edit next')

Alternatively you can open the 'ADDRESS OPTIONS' by clicking on the link at the bottom of the screen.

[CORRECT ALL](#) | [SET PROOF ADDRESSES](#) | [SET ADDRESS NAME FORMAT](#) | [DOWNLOAD](#) | [REMOVE ALL ADDRESSES](#)

Clicking 'CORRECT ADDRESSES' brings up your correction options, as explained on the screen.



The 'Correct addresses' screen displays the following information:

- Header:** 'Correct addresses'.
- Instruction:** 'Please select a correction option:'.
- Options:** 'USE CORRECTIONS' (highlighted in red) and 'USE ORIGINAL'.
- Explanations:**
 - 'Use corrections - Use address corrections to increase address accuracy and reduce the cost of the mailing.'
 - 'Use original - Use the originally uploaded address and ignore any correction available.'
- Note:** 'Please note: Addresses must be validated before they can be corrected and you should check all automatically corrected addresses to ensure that the correction is accurate.'

The other options available on the 'ADDRESS OPTIONS' are –

The 'SET PROOF ADDRESSES' allows you to choose which addresses to use on the proofs that are shown before you complete your mailing.

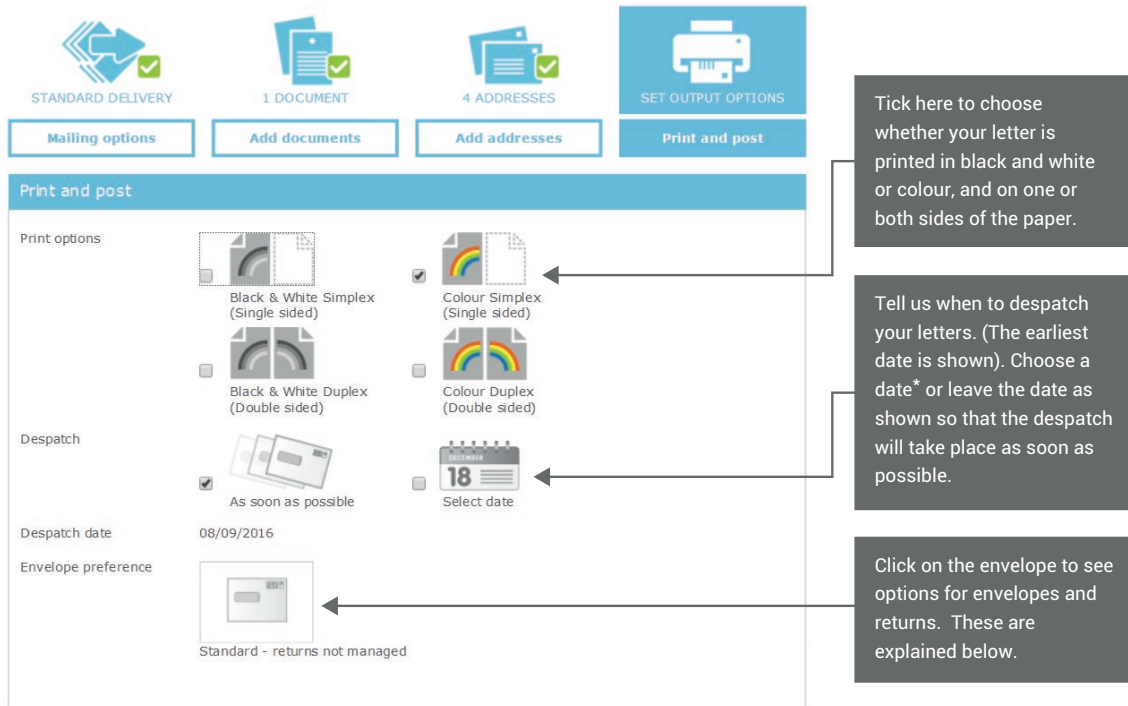
'SET ADDRESS NAME FORMAT' takes you to the screen where you choose the name format to use for your recipients' names on your printed document.

'DOWNLOAD ADDRESSES' allows you to download the address list that you have downloaded as a spreadsheet. You may want to use this option if you have made address changes.

'REMOVE ALL ADDRESSES' will remove every address that has been uploaded, leaving your address list empty. You will see 'REMOVE THESE ADDRESSES' if you have selected/filtered addresses from the list uploaded.

When you have changed all the addresses that you want to, click 'Finish' to go to the 'Print and Post' screen.

Print and Post



The 'Print and post' interface includes the following sections and options:

- Print options:**
 - ☐ Black & White Simplex (Single sided)
 - ☒ Colour Simplex (Single sided)
 - ☐ Black & White Duplex (Double sided)
 - ☐ Colour Duplex (Double sided)
- Despatch:**
 - ☒ As soon as possible
 - ☐ Select date (18)
- Despatch date:** 08/09/2016
- Envelope preference:**
 - ☒ Standard - returns not managed

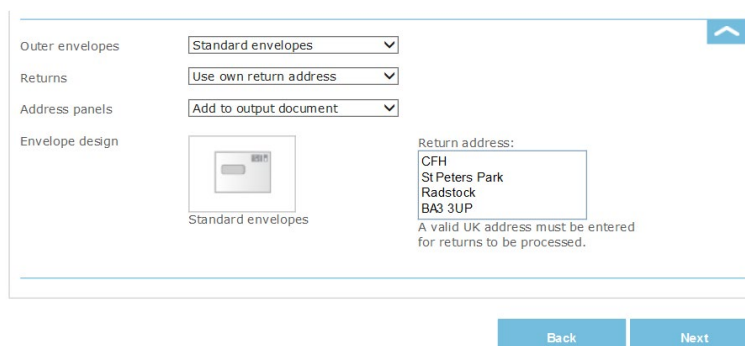
Callouts provide additional guidance:

- Tick here to choose whether your letter is printed in black and white or colour, and on one or both sides of the paper.
- Tell us when to despatch your letters. (The earliest date is shown). Choose a date* or leave the date as shown so that the despatch will take place as soon as possible.
- Click on the envelope to see options for envelopes and returns. These are explained below.

*When selecting a future despatch date please consider whether your date will still be accurate on the despatch date.

Envelope Preference

Clicking on the Envelope preference will expand the box and offer various options.



The 'Envelope Preference' form includes the following sections:

- Outer envelopes:** Standard envelopes (dropdown)
- Returns:** Use own return address (dropdown)
- Address panels:** Add to output document (dropdown)
- Envelope design:**
 - Standard envelopes (image)
 - Return address: CFH, St Peters Park, Radstock, BA3 3UP
 - A valid UK address must be entered for returns to be processed.

Buttons: Back, Next

Outer envelopes

You can select your outer envelope type using the drop down options. The options are:

- Standard envelopes
- Custom design envelopes
- Window envelopes only

If you choose standard envelopes Docmail will produce your documents at the most suitable location for your output - for example, Scottish output will be produced in Scotland. We will use either standard Docmail window or non-window envelopes as available at that location.

If you would like to use a window envelope you can specify this. If you would prefer your document not to be folded you can select a C4 window envelope. (The option of a C4 envelope is not currently available for non-window envelopes.) These options will incur an additional cost. Please see our price lists.

You can also choose to use a custom design envelope. These can be designed and uploaded on your mailing or chosen from your library. Instructions for creation of custom envelopes are given under 'Designing envelopes' in the 'Add a Document'.

Returns

You can also use this section to say how any of your mail that is undeliverable is dealt with. The options are:

- Not managed
- Managed
- Use own return address

If you have chosen standard or custom design envelopes you can select 'Use own return address' from the drop down options. This means that a non-window envelope will be used. A box displaying the return address will be shown. This will show the return address that is recorded against your account or log in; you can overwrite this with another address if required.

If 'Not managed' or 'Managed' is selected any mail that is undeliverable by Royal Mail is returned to our site.

'Not managed' returns are disposed of securely at our site. You have the option of having these returns managed.

'Managed' returns are recorded against your Docmail account with Royal Mail's reason for their return before they are disposed of securely. This allows you to see which addresses have mail that has come back and the reason so that you can update your data lists accordingly.

Additional charges are incurred for dealing with returns. Please see our price list.

Address panels

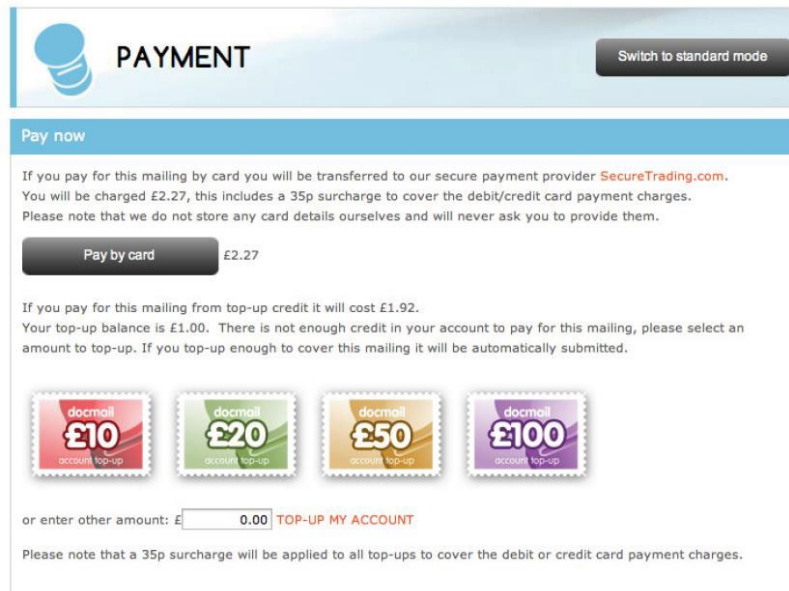
You can choose not to have an address panel added to your output document, if you are using a custom design envelope or a standard envelope and using your own return address. Other options will add an address panel to your document. If you are using a custom design envelope or using your own address for returns the options are:

- Add to output document
- No address panels

If you select 'Add to output document' your document will have the address showing. If you select 'No address panels' no address will be shown. If 'Add to output document' is selected a panel with the address will be applied on your document. An example is shown below.

Payment

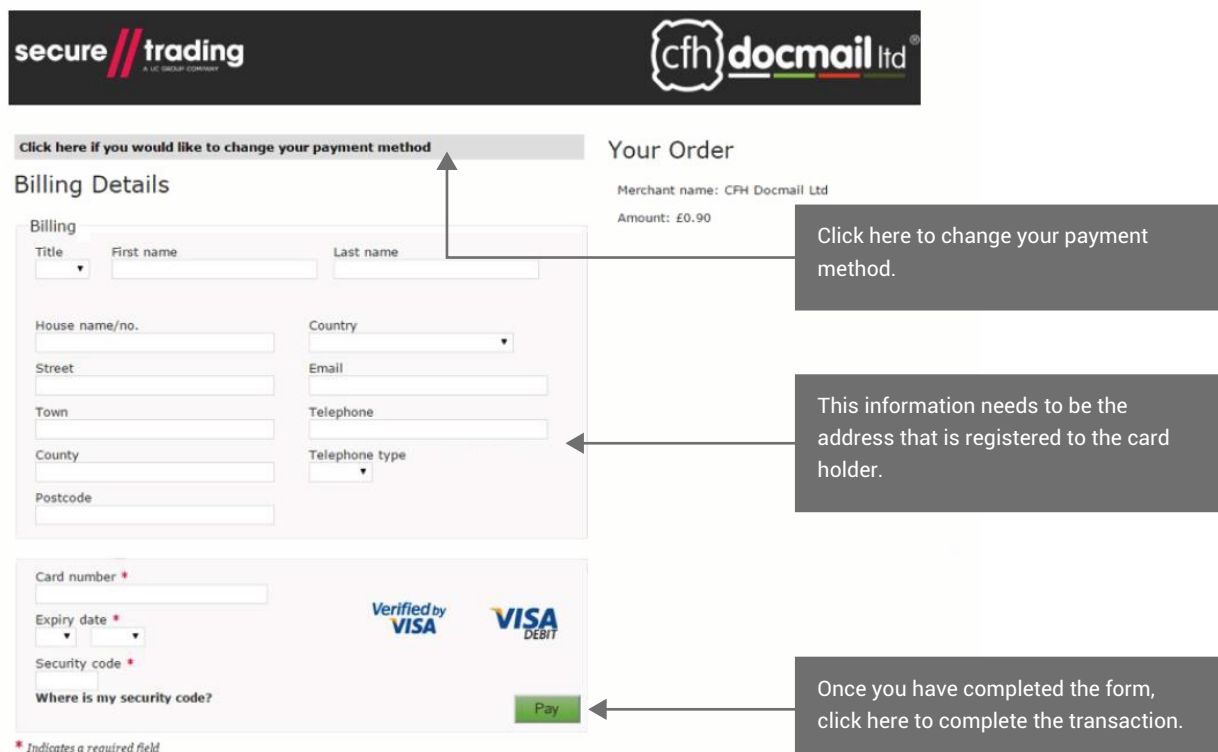
Your order can be paid for directly by credit /debit card, or you can pay from your account if there is sufficient credit balance.



The screenshot shows the 'PAYMENT' section of the Docmail website. It features a 'Pay now' button and a 'Switch to standard mode' button. The main text explains that payments by card are processed by SecureTrading.com and incur a £2.27 charge, while top-up credit payments cost £1.92. It also displays four Docmail top-up credit options: £10, £20, £50, and £100. A text input field allows for other amounts, currently showing '0.00' with a 'TOP-UP MY ACCOUNT' button. A note at the bottom states that a 35p surcharge will be applied to all top-ups.

If you choose 'Pay from account' the cost of the mailing will be removed from your Docmail top-up credit. Once the transaction has been completed you will go back to the Docmail home page.

If you choose to pay by credit card or top up, you will be directed to our payment partner SecureTrading.com to complete the debit/credit card transaction. SecureTrading is the UK's leading independent internet Payment Service Provider and you can be assured that your payment will be processed on secure servers, using the most up to date encryption software.



The screenshot shows the SecureTrading payment page for CFH Docmail Ltd. It includes a 'Billing Details' form with fields for Title, First name, Last name, House name/no., Street, Town, Country, Postcode, Email, Telephone, and Telephone type. A 'Your Order' summary shows the merchant name and amount (£0.90). A 'Card number' field is also present, along with 'Expiry date' and 'Security code' fields. A 'Pay' button is at the bottom right. Annotations with arrows point to specific elements: 'Click here if you would like to change your payment method' points to a link above the billing details; 'Click here to change your payment method.' points to a button on the right; 'This information needs to be the address that is registered to the card holder.' points to the address fields; and 'Once you have completed the form, click here to complete the transaction.' points to the 'Pay' button.

As with any online payment service you will need to enter name and address details as well as credit/debit card details. All fields that have an asterisk (*) are mandatory fields. Complete all the required information and then click on 'Submit Transaction'. Once your payment has been processed you should see the below payment result.

[home](#) > [mailing complete](#)



Thank you for your order

Your order reference is 1845681

You have now completed your Docmail mailing.

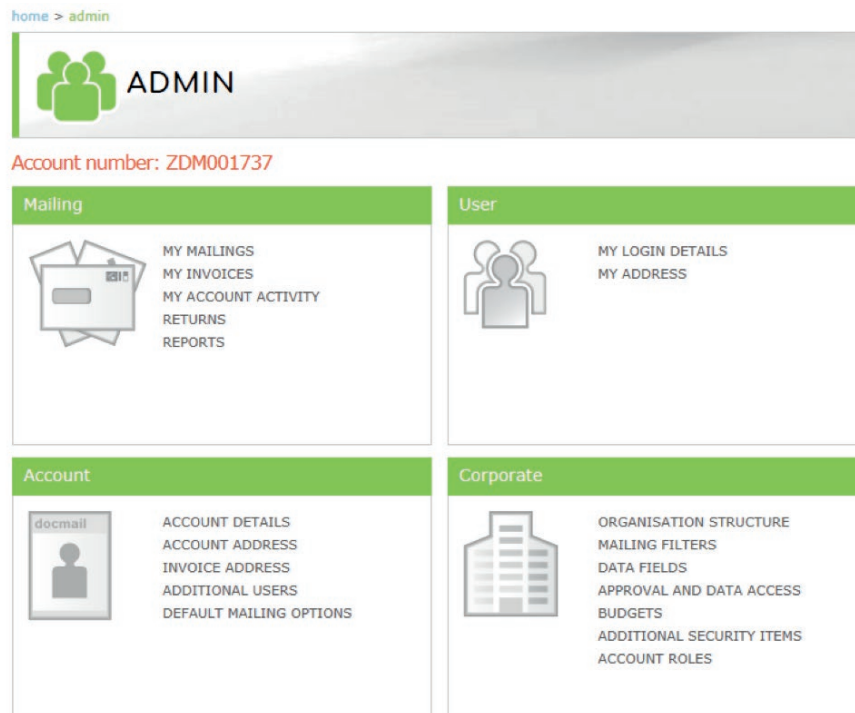
If you wish, a copy of your invoice can be downloaded from the Admin > My Invoices section of your Docmail account where your invoices are always available.

A confirmation message from Docmail detailing the mailing will be sent to the email address set up on your account.

Now sit back, relax and let Docmail do all the hard work. Your mailing will be printed, posted and delivered to your intended recipients without you having to lift a finger.

ADMIN

The Account Admin screens allow you to do everything that you need to manage your account successfully; you can see your invoices, see previous mailings, add additional users to your account and set up your account defaults.



This section is broken down into four sub sections; Mailing, User, Account, and Corporate. Each is explained below.

MAILING

The Mailing section has six selections:

- My Mailings
- My Invoices
- My Account Activity
- Top-up account
- Returns

My Mailings

Clicking here will show all the mailings at any stage of the process, you can use the filter options at the top of the screen to filter by product, select a date range or enter search text to look for a specific order reference or mailing name.

home > admin > my mailings

MY MAILINGS

Showing mailings 1-12 of 19 All

Product (all) Submitted between and Page size 12

Search

☒ Show mailings from other account users

 Order 44863 £0.65 1 address test Approved	 Order 44862 £0.66 1 address Approved	 Order 44861 £0.72 1 address sample Approved
 Order 44860 £0.65 1 address Submitted - awaiting...	 Order 44859 £0.65 1 address Submitted - awaiting...	 Order 44858 £0.65 1 address Submitted - awaiting...
 Order 44857 £0.65 1 address Submitted - awaiting...	 Order 44856 £1.30 2 addresses Cancelled	 Order 44855 0 addresses Mailing options
 Order 44388 1 address Edit documents	 Order 44374 2 addresses Edit addresses	 Order 44373 1 address Awaiting approval

1 2

Click on the mailing icon to continue editing an order or to view details of a mailing that has already been submitted.

The details you can see for each order are:

Order - this is the unique Docmail reference for your order. This is what you will need to quote to the Docmail Customer Service Team if you have a query about an order.

Price - this is the overall price of the mailing including VAT.

Address count - this is the number of recipients within the mailing.

Mailing name - this is the name you gave to the mailing. If you did not give your mailing a name it will default to the order reference.

Status - this tells you what the current status is for each of your mailings. A list of status codes and symbols are detailed below.



A green tick indicates an order that requires no further action. The order has been submitted and will be categorised using one of the following statuses:

Submitted awaiting production - Paid for and awaiting production

Mailing in production - Mailing processed and in production

Completed - Produced and despatched



This icon is to alert you that further action is required to complete an order. The status will reflect the last stage of the order you were working on. Please note that further steps may have been completed however the status will reflect the last screen viewed.

Mailing options - Product type selected but no further steps have been completed

Edit documents - Document selected or uploaded but addresses not yet added

Edit addresses - Addresses have not yet been added

Merge data entry - Account merge tags are not yet set

Edit data intelligence - Data intelligence rules have been input but the addresses have not been added or have gone back to this step

Print and Post - Print and post options have been input. Proofs have not been viewed

Awaiting Approval - Uploaded and awaiting approval

Approved - Approved but not yet paid



This icon indicates that the order has not been processed. This could be due to a user cancelling an order or due to an error.


You can filter orders based on their status using the drop-down list on the top right hand side of the page or enter a merge mode to cancel, delete or submit mailings using a single click.

My Invoices

In 'My Invoices' you can see all your invoices for payments made to your Docmail account. Invoices are generated automatically by Docmail when a payment is made to your account. Clicking on the link will let you view the invoice as a PDF, which you could download or print if required. You will only see invoices for orders that have been paid.

Click here to refine your search

Click here to view the invoice



MY INVOICES

Invoice date between

and

Search

[SEARCH](#) | [DOWNLOAD ALL](#)

Invoice No	Type	Date	Amount	Paid?	
17138	Invoice	23/12/2015	£50,000.00	Yes	VIEW

Showing 1-1 of 1
1

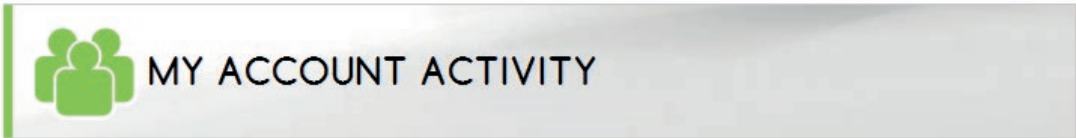
[Back](#)

My Account Activity

This section shows you all payment transactions that have taken place on your Docmail account. You can see your Account balance and click to top up your account if you wish. You can input dates to refine your search to see activity for a particular period.

Click here to top up your account

Here's your account balance



Total top-up earned: £0.00

Current top-up balance: £50,000.00

TOP-UP ACCOUNT

Search transactions

Results per page 10

Date between and [SEARCH](#)

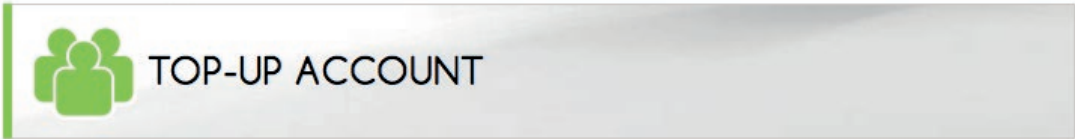
Date	Ref no	Type	Order Ref	Amount	Available spend after
23/12/2015 at 11:37	17138	Top-up		£50,000.00	£50,000.00
Showing 1-1 of 1					1





Click here to refine your search

Back

Top-up Account

You can add credit to your Docmail account here. Choose one of standard amounts by clicking on the stamp symbols or enter your own amount and click the 'Top-up my account' link. Please note that it is not possible to refund top up monies once added and top ups must be used within 24 months of the top up date. There is a 35p charge for using a card to top up.





Once you've entered the amount you wish to top-up, click on TOP-UP MY 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.

Back

Postal Returns

If you use standard envelopes, or if your mailing is a postcard, you can choose to have your own return address shown on your mailing. Any mail that is undeliverable by Royal Mail, and has not got your return address on it, is returned to our site.

You can choose to have these returns managed by us at an additional cost. Managed returns are recorded against your Docmail account with the reason for their return so that you can see which addresses have mail returned. When returned mail is recorded against your account you will receive a notification email.

This screen shows you any postal returns, undeliverable text messages and electronic Dotpost documents against your mailings.

home > admin > returns



RETURNS

DOWNLOAD

☐ Show returns from other account users

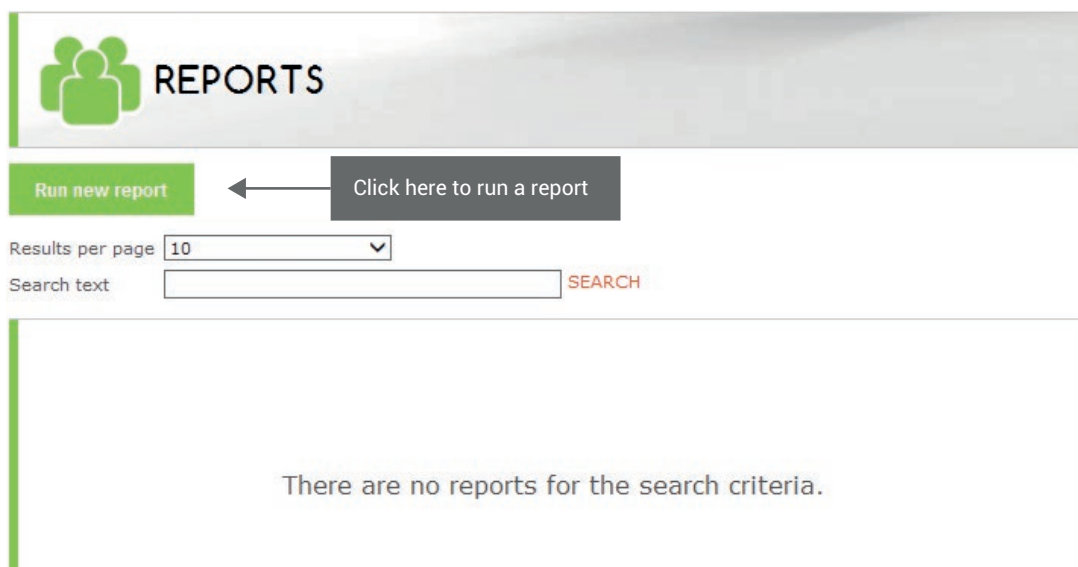
Recipient	Order ref	Reason	Recorded	
CFH Docmail Ltd St Peters Park Wells Road Radstock BA3 3UP	17023939	Gone away	20/07/2018	DELETE
CFH Docmail Ltd St Peters Park Wells Road Radstock BA3 3UP	16102568	Gone away	20/07/2018	DELETE
CFH Docmail Ltd St Peters Park Wells Road Radstock BA3 3UP	17023939	Gone away	20/07/2018	DELETE
CFH Docmail Ltd St Peters Park Wells Road Radstock	15782878	Gone away	20/07/2018	DELETE
CFH Docmail Ltd St Peters Park Wells Road Radstock	17023939	Gone away	20/07/2018	DELETE

Showing 1-5 of 5

1

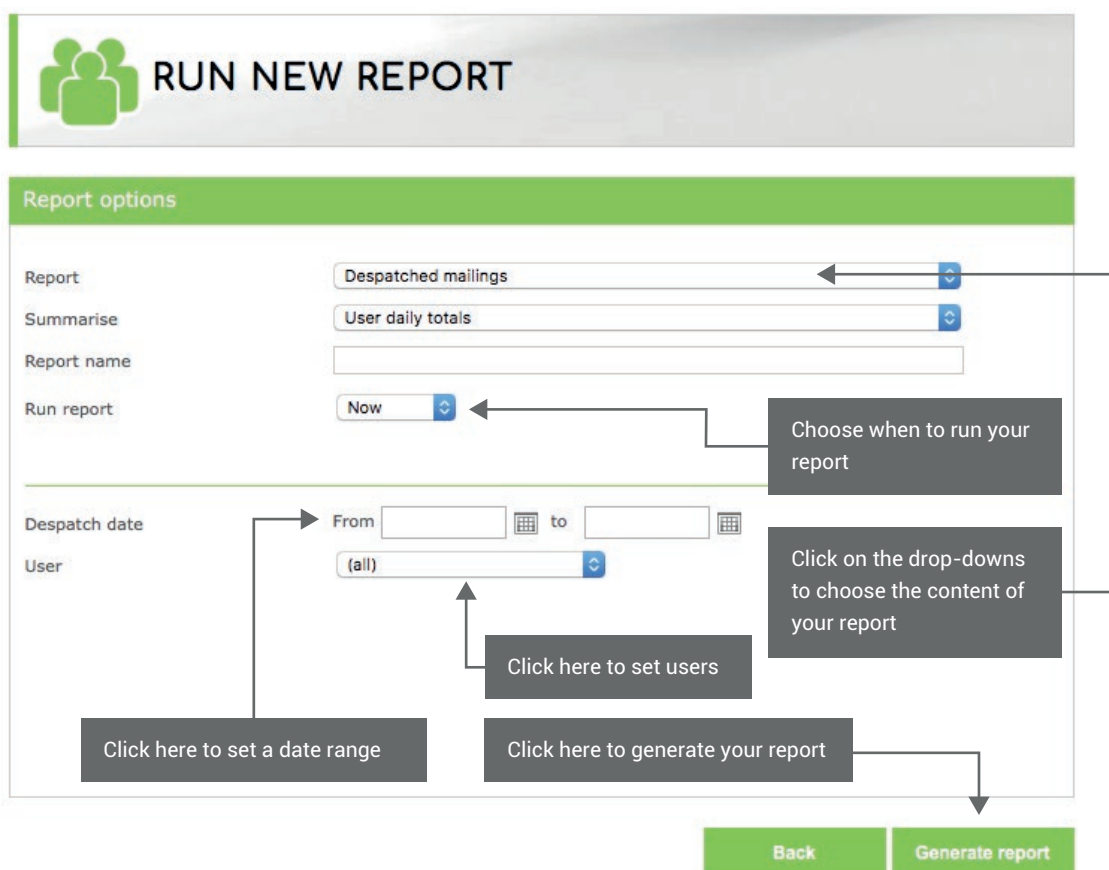
Reports

This section can be used to view reports on your use of Docmail. Any reports that you have run will show as history on this screen.



The screenshot shows the 'REPORTS' section of the Docmail interface. At the top, there is a header with a green icon of three people and the word 'REPORTS'. Below this, there is a green button labeled 'Run new report'. To the right of this button, a grey callout box contains the text 'Click here to run a report' with an arrow pointing to the 'Run new report' button. Below the button, there is a 'Results per page' dropdown menu set to '10' and a 'Search text' input field with a red 'SEARCH' button to its right. The main content area is a large white box with a green border on the left, containing the text 'There are no reports for the search criteria.'

To see a new report you can click on 'Run new report' and then use the drop down options to determine the information to be displayed.




The screenshot shows the 'RUN NEW REPORT' page. At the top, there is a header with a green icon of three people and the text 'RUN NEW REPORT'. Below this, there is a green bar labeled 'Report options'. The main form area contains several fields: 'Report' with a dropdown menu showing 'Despatched mailings', 'Summarise' with a dropdown menu showing 'User daily totals', 'Report name' with a text input field, and 'Run report' with a dropdown menu showing 'Now'. Below these fields, there is a 'Despatch date' section with 'From' and 'to' date pickers, and a 'User' dropdown menu showing '(all)'. Several grey callout boxes with arrows point to specific elements: 'Choose when to run your report' points to the 'Run report' dropdown; 'Click on the drop-downs to choose the content of your report' points to the 'Report' and 'Summarise' dropdowns; 'Click here to set users' points to the 'User' dropdown; 'Click here to set a date range' points to the 'Despatch date' section; and 'Click here to generate your report' points to the 'Generate report' button at the bottom right. At the bottom of the page, there are two green buttons: 'Back' and 'Generate report'.

You can also schedule a report to run on a regular basis which will be stored in the reports section of your account.

You will also receive a secure link via email to access the report directly and you can invite others to receive the report as well.

When adding additional email recipients please be sure to separate each new email address with a semi colon. For example adam.brown@cfh.com; charlotte.davies@cfh.com



RUN NEW REPORT

Report options

Report

Summarise

Report name

Run report

Additional email recipients

Despatched mailings

User daily totals

Schedule

every

1

days

from

11/08/2017

@

00:00

Despatch date

User

From

to

(all)

Click here to determine the frequency of the report

Enter the email address of any additional recipients here

Back

Schedule report

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User

The User section has just two selections:

- My Log In Details
- My Address

My login details

The screenshot shows the 'MY LOGIN DETAILS' form with several annotations:


- Top Left:** A grey box with the text "You can input a return address to be used on relevant mailings" with an arrow pointing to the 'Return address' field.
- Top Right:** A grey box with the text "Select these options if you want to change your user login or password" with an arrow pointing to the 'CHANGE LOGIN USER ID' and 'CHANGE PASSWORD' links.
- Form Header:** A green icon of three people next to the title 'MY LOGIN DETAILS'.
- Form Fields:**
 - CHANGE LOGIN USER ID | CHANGE PASSWORD:** Two links at the top.
 - Login user ID:** A text field containing 'linda.horner'.
 - Order confirmation email:** A dropdown menu set to 'After every order'.
 - Returns email:** A text field.
 - Return address:** A text area containing 'CFH', 'St Peters Park', 'Radstock', and 'BA3 3UP'.
- Notes:** Below the 'Returns email' field, there are two lines of text: "Please note: Order confirmation emails are also configurable for the account on the [account details](#) page." and "Please note: Return emails are also configurable for the account on the [account details](#) page."
- Checkboxes:** Three checkboxes at the bottom: ☒ "Allow web service access? (e.g. Docmail Print Driver)", ☐ "Hide variable entry message?", and ☐ "I do NOT want to receive emails about offers and promotions".
- Buttons:** Two green buttons at the bottom right: 'Back' and 'Next'.
- Right Side Annotation:** A grey box with the text "This option allows you to choose when you receive your confirmation" with an arrow pointing to the 'Order confirmation email' dropdown.

You can click the links and follow the instructions on the screen if you want to change your User Login or Password. You can also change other settings including some returns information which you can also update from the Account Details screen.

The box to allow web service access must be ticked if you are using the Print Driver option. See the Print Driver User Guide for information on this option.

My Address

Personal address details added here will be used for the Add Self option on mailings.


 **MY ADDRESS**

My address

Title	<input type="text" value="Ms"/>	Full name	<input type="text" value="Linda Horner"/>
First name	<input type="text" value="Linda"/>	Address name prefix	<input type="text"/>
Surname	<input type="text" value="Horner"/>	Job title	<input type="text"/>

SWITCH TO LINE-BY-LINE ADDRESS BOXES

Company name	<input type="text"/>
Address *	<input type="text" value="CFH
St Peters Park
Wells Rd
Radstock
BA3 1UP"/>

 UK address - not confirmed so check accuracy

Email	<input type="text" value="linda.horner@cfh.com"/>
Telephone	<input type="text" value="01225212525"/>

The * indicates tags used in the current mailing, an address is always required.

You can click here to add any additional fields that you require on your mailings

Account

The Account section has four selections:

- Account Details
- Account Address
- Additional Users
- Default Mailing Options

Account Details

On this screen you can change your account name and preferences and set default options to suit your needs.

These options allow you to set default options for your mailings

This option is for orders that have been created using Data Intelligence. You can choose the payment option depending on the price

You can input some returns management information here

You can input your own return address to be used on relevant mailings

ACCOUNT DETAILS

Account name

Account number

Order confirmation email

Please note: Order confirmation emails are also configurable for each user on the [my login details](#) page.

Referral credit email

Copy previous mailings

Default product

Default address font

Auto correct addresses? ☐

Please note: You should check all automatically corrected addresses to ensure that the address is correct.

Prompt if proof not viewed? ☒

Default estimated order automatic payment option

Advanced printing options:

Show print margin? ☒

Default print margin to shrink to fit for 3mm margin? ☒

Store order links on returns? ☐

Returns email

Return address

A valid UK address must be entered for returns to be processed.

Available spend warning

Email if available spend falls below £

Email addresses

(use semi-colons to separate multiple email addresses)

Last updated 19/09/2016 at 16:17

[Delete account](#) [Back](#) [Next](#)

Note that the selections that are available may vary if different account features have been enabled against your account by Docmail Admin Support.

Account address

This screen is the same as the screen for My Address in the User section, but the details input here are the details that will appear on Docmail invoices and this can be different to the detail in the My Address section.

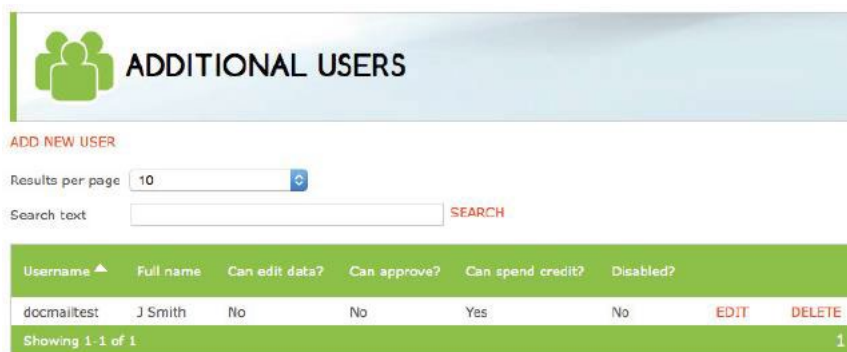
If there are additional users on your account only the primary account holder can edit these.

Additional users

If you are the primary account holder (i.e. the person who set up the account) you can add additional users to your account. These users will be able to see the same documents and address lists as you can and will be able to place orders for mailings on your account. Permissions for the additional user can be set to give the primary user control over how their account is used.

Details can also be edited and deleted as necessary.

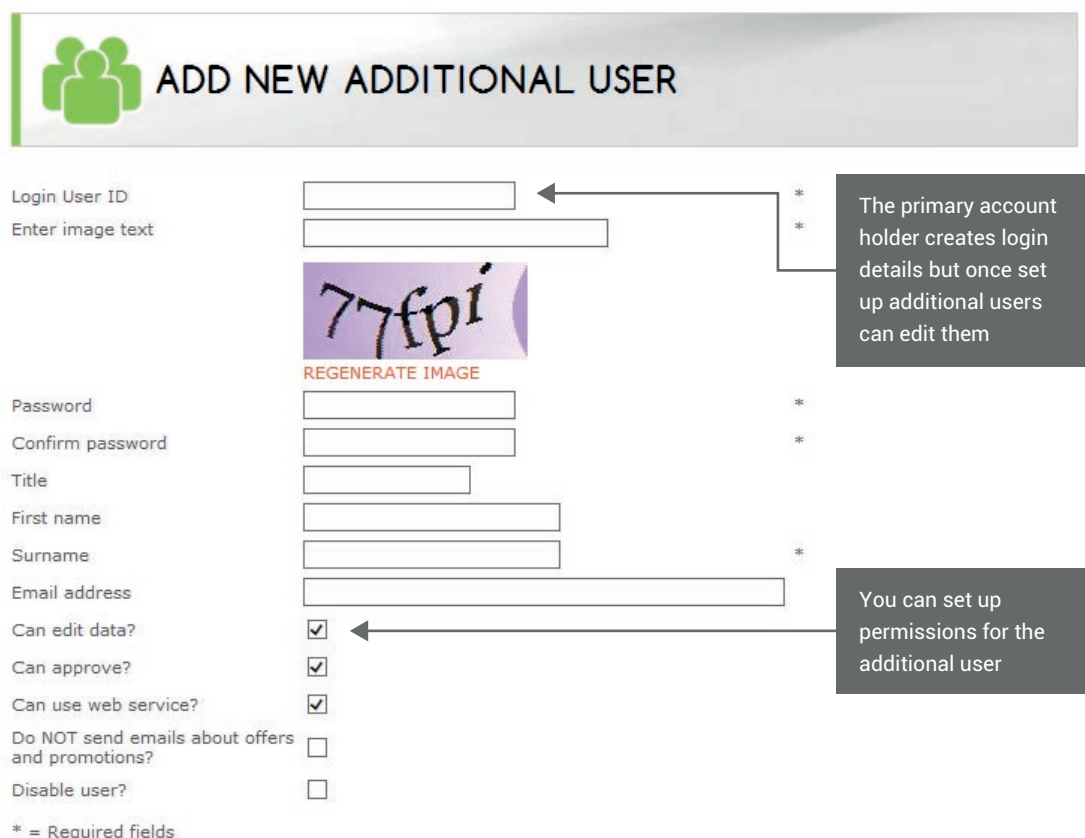
To add additional users to the account, click on ADD NEW USER from the screen below:



Username	Full name	Can edit data?	Can approve?	Can spend credit?	Disabled?
docmailtest	J Smith	No	No	Yes	No

Showing 1-1 of 1


This will bring up the screen below for you to complete. Click Next to save the details.



ADD NEW ADDITIONAL USER

Login User ID

Enter image text



REGENERATE IMAGE

Password

Confirm password

Title

First name

Surname

Email address

Can edit data? ☒

Can approve? ☒

Can use web service? ☒

Do NOT send emails about offers and promotions? ☐

Disable user? ☐

* = Required fields

The primary account holder creates login details but once set up additional users can edit them

You can set up permissions for the additional user


Default mailing options

You can create default settings against each product type from this screen. This is particularly useful if you want to control the type of mailings that can be created by your or by additional users.

Click on a product type and complete the screen to select or hide the options that will show when you are creating a mailing.




You can then select the default mailing options required for this type of document from the next screen.





A4 DOCUMENT DEFAULT MAILING OPTIONS

Mailing options

Delivery services

☒

 Standard delivery

☐

 First class

☐

 Use Dotpost


Addresses


Address name prefix (eg. To the parent of)


Address name format Full Name


Print and post

Print options


☐

 Black & White Simplex
(Single sided)


☐

 Colour Simplex
(Single sided)

☐

 Black & White Duplex
(Double sided)


☒

 Colour Duplex
(Double sided)

Despatch

☒

 As soon as possible

☐

 Select date

Envelope preference

☐

 Standard - own return address

You can hide these options if you do not want them to be used on your account

Hide options

☐ Hide description

☐ Hide delivery service

☐ Hide dotpost

☐ Hide black and white

☐ Hide colour

☐ Hide simplex

☐ Hide duplex

☐ Hide despatch

☐ Hide envelope preference

Corporate

Additional features are available for Corporate users, such as the facility to incorporate organisational structures and set devolved budgets.

This is a feature that can only be enabled by Docmail Support Admin.

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APPENDIX 1 - DOCUMENT SET UP GUIDELINES

It is recommended that before adding documents into Docmail you read through the following guidelines to help you to set them up correctly.

Documents can be added into Docmail as Microsoft Word (.doc or .docx), Rich Text Format (.rtf), Open Office (.odt) or Portable Document Format (.pdf). You can only use PDF files if the document is to be printed exactly as supplied, with any personalised fields in it being set up as Form Fields.

Personalised means that Docmail will put the name and address on the document (if it is marked as an addressed letter and used as the first document in a mailing) and wherever you have used a merge field in a document Docmail will replace that field with a piece of data. Any document that is personalised or is to be an addressed letter must be in Microsoft Word (.doc or .docx), Open Office (.odt) or Rich Text format (.rtf).

Documents

The document should be size A4 (29.7cm x 21.0 cm).

Margins

Docmail will apply a barcode to the left hand margin on the front of each sheet of paper for all documents so that we can put them into an envelope. We therefore recommend that your documents have a left hand margin of at least a 1.5 cm; using a margin less than this may mean that some of your content gets overprinted with a barcode. You will be able to see the barcodes on your final proof.

For any addressed letter, Docmail will apply the mailing name and address in the required position. The left margin that Docmail uses when it applies the name and address will be 2.54 cm. We recommend you use a margin of 2.54 cm on all documents which you intend to use as addressed letters to ensure that your text lines up with the name and addresses. This makes your finished letter look much better and more professional. We also recommend that you start your letter at least 9 cm down from the top of the page to allow room for the name and address to be printed.

If you do not want the address to be printed on your document you can select the option 'No address panels' at the Print and Post stage of your input. (This is only available with standard envelopes where you use your own return address or with custom design envelopes).

To set the margins in Microsoft Word (2007 and later versions), open the document in Microsoft Word, and go to the Page Layout tab, click on margins and adjust the margins as required using a setting that has a 2.54 cm margin or using the Custom Margins settings. Use the help section in Microsoft Word for more help on how to set margins.

Logos

Logos can be applied in two ways. You can either embed any logos and signatures you require in your individual document or you can use a 'Background'. Backgrounds are templates set up and held in your Library which can be applied to documents as required. You could, for example, have a PDF background of your company logo and use this with each document requiring the logo. See the section 'Backgrounds' under Library for further information.

Using merge fields in your documents

You can tell Docmail to add items of data from your name and address data into your document by using 'merge fields'. Merge fields tell Docmail where to add particular pieces of data. As well as the name and address fields that are applied by Docmail for the mailing, you can use any of the fields from your data in your documents. Wherever you want to use a field from your database in your document use the format <<fieldname>> in the document, where **fieldname** is the name of the database field you want Docmail to use. The opening and closing bracket characters are also important. "<" is usually found on the same key as the comma, and ">" is usually found on the same key as the full stop.

For example, in your letter you might want to say "Dear Fred", where Fred is someone's first name, and you have this field in your Docmail database under the field "firstname". If you put "Dear <<firstname>>" in your document Docmail knows you want the first name to be put there and will automatically print it for you using the content of the field "firstname" from your

name and address data. This is called "merging". These "merge fields" can be used anywhere in your documents to tell us where to merge a field from your database into your document. The full list of standard Docmail merge fields you can use is shown in the table below. Using one of these merge fields will tell Docmail to merge the data from that field in your database into your document.

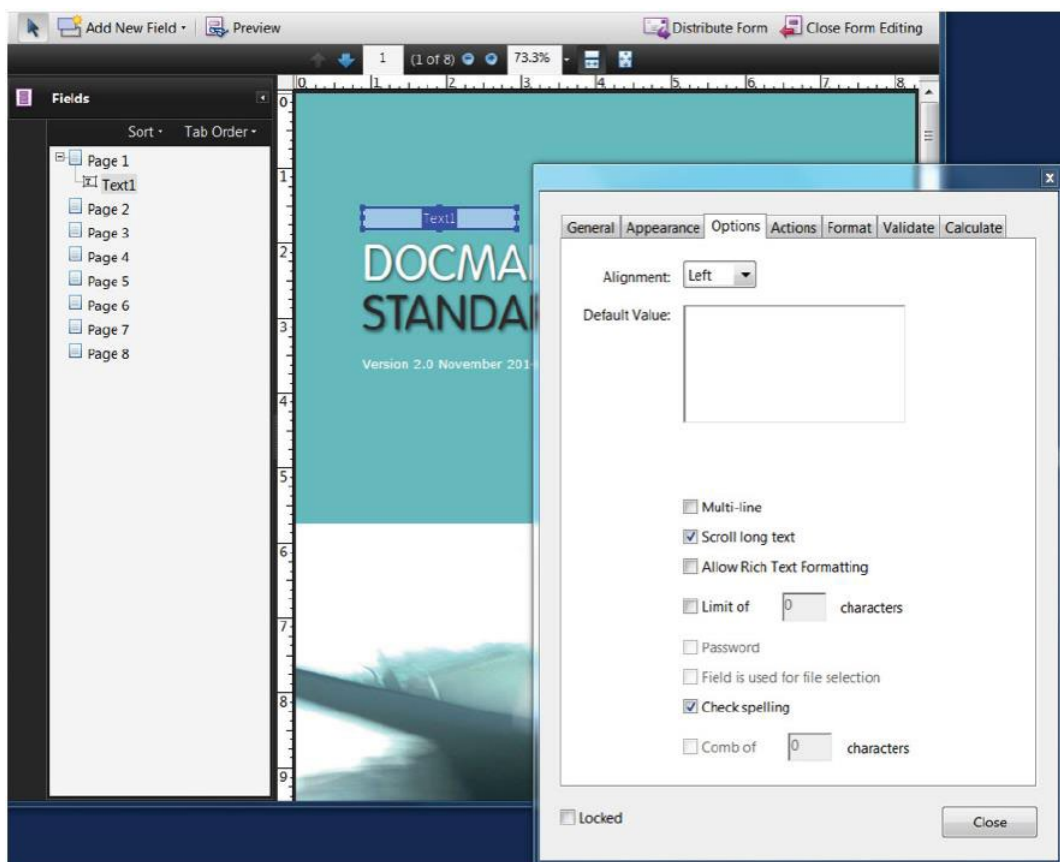
Docmail Field Name	Tag to use	Docmail Field Name	Tag to use
Title	<<Title>>	email	<<email>>
Firstname	<<Firstname>>	extrainfo	<<extrainfo>>
Surname	<<Surname>>	notes	<<notes>>
fullname	<<fullname>>	Custom1	<<Custom1>>
companyname	<<companyname>>	Custom2	<<Custom2>>
Telephone	<<Telephone>>	Custom3	<<Custom3>>
mobile	<<mobile>>	Custom4	<<Custom4>>
Facsimile	<<Facsimile>>	Custom5	<<Custom5>>
Address 1	<<Address1>>	Custom6	<<Custom6>>
Address 2	<<Address2>>	Custom7	<<Custom7>>
Address 3	<<Address3>>	Custom8	<<Custom8>>
Address 4	<<Address4>>	Custom9	<<Custom9>>
Address 5	<<Address5>>	Custom10	<<Custom10>>

If you have merge fields in your document that are not standard Docmail fields then, as long as the column headers in your data match the merge fields, these can be used by Docmail by using the Custom fields.

Creating Form Fields within a pdf file

To put Form Fields into an existing PDF:

- Select 'Forms' from the menu bar
- Select 'Add or Edit Fields' from the menu. (Choose 'No' when asked if the programme should detect the fields for you.)
- Select 'Add New Field'
- Select 'Text Field' from the list shown
- Draw the text box where you want it to go
- Give it a unique name (e.g. Field1)
- Click the 'Show All Properties' link
- Go to the 'Options' tab and enter text with a tag exactly as you would in Word (e.g. <<Date>>) in the 'Default Value' box. You can change the alignment and any other properties within the dialogue box if require



The text in the default value is what gets processed for replacement tags. Add other fields as required and save the PDF. Upload it to Docmail and everything else is the same as for a Word file - Docmail will extract the form fields from the document as merge tags.

Using the date in your documents

Docmail can automatically insert the date into your documents. This will be the date we print your mailing. If you want the date put into your letter, using the following field holders depending on the format of date you want.

Format of date	Description of format	Field to use
23/06/16	dd/mm/yy	<<date1>>
Thursday 23rd June 2016	full day and date (including correct date suffix st, th, nd or rd)	<<date2>>
23 Jun 2016	no suffix, three letter month	<<date3>>
23rd June 2016	full date (including suffix)	<<date4>>

Example

If you were creating a letter to check you hold the right contact details for someone, the document might look something like this:

<<date4>>

Member ID: <<MemberID>>

Dear <<firstname>>

We are currently updating our records and would like to check the details we hold for you are correct;

Your name:

<<fullname>>

Your job title:

<<jobtitle>>

Your phone number:

<<telephone>>

Your email address:

<<email>>

Docmail will then apply the name and address in the correct position and merge all the right details from your database into the field holders that you have used in your document. The printed letter would look as shown below, with all the field holders replaced by the correct data.



Account Merge Tags

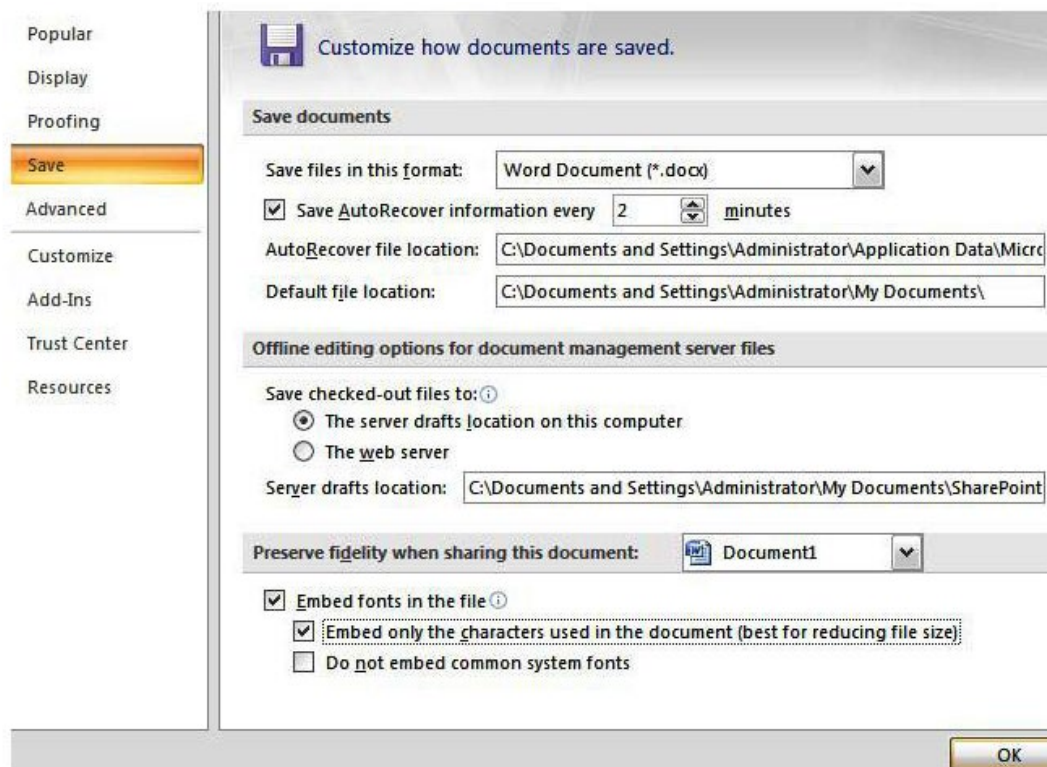
Account merge tags work like merge fields, but instead of using data from your database, they are replaced with data that you set at document level. For example, you might have a document which is the same every time you use it, except you need to change one or two things, like the location and time if it was an appointment letter.

You can place merge fields in your document for <<location>> and <<time>> in exactly the same way as described above. These merge tags are then set on the document when you add it to Docmail.

See 'Add new account merge tag' under the Library section for instructions on input. Every time you use that document in a mailing, you will be prompted to enter the value you want for 'location' and 'time' as shown below.

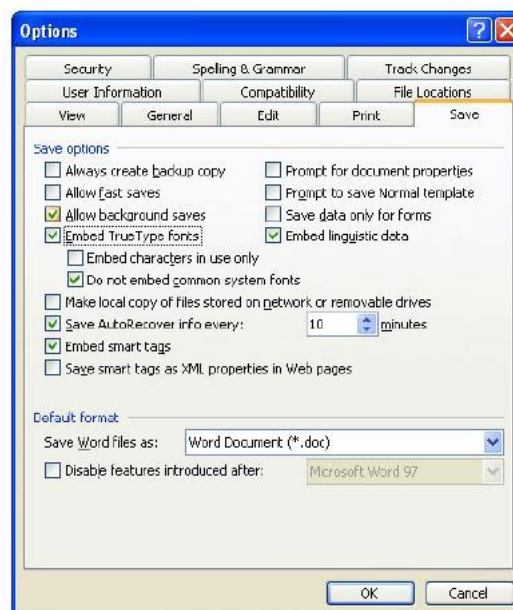
Embedding Fonts within a Microsoft Word file Word 2007 & later versions

First click on the Microsoft Office button or on the 'File' tab in the upper left hand corner and choose Word options. Select the 'Save' tab on the left. Tick 'Embed fonts in the file'.



Word 2003

On your tool bar, click on 'Tools' and then select 'Options'. Select the 'Save' tab (shown below) and tick the box where it says 'Embed True Type Fonts'. Click 'OK' and then save the file to save the changes.



APPENDIX 2 - MULTIPLE ADDRESS STREAMS

A multiple address stream means a group of documents that already have the name and address of the recipients on them. Each recipient could have a letter with a different number of pages, for example, Mr Smith's letter may be one page whereas Mr Jones' letter may have three pages. These can all be on the same file.

Although the address is already on the letter Docmail still needs an address file to validate addresses against the Royal Mail database for postage. On the address file you will need your standard columns of information, such as the recipient's name and full address, but you will also need an additional column in the spreadsheet called 'StreamPages1' where you must put the number of pages that each person has on their letter. This will ensure that each recipient receives the correct number of pages to their letter. All the addresses must to be in the same order as they are on your multiple address stream.

	A	B	C	D	E	F
1	Fullname	Address 1	Address 2	Address 3	Address 4	Stream Pages
2	Derek Gregory	15 Alandale Road	Garforth	LS25 1BC		1
3	Cheryl Farmer	13 Devonshire Close	Kippax	LS25 5RS		3
4	John Chamberlain	12, Winthrop Hill	Castleford	WF10 8LA		3
5	Geoff Wellings	12 Archibald Rd	Cullompton	EX15 6TR		2
6	Emily Brown	The Old Mill, Cove Hill	Bampton	EX16 9EE		3
7						

Multiple address stream - Add documents

When uploading a merged file (multiple address stream) to Docmail you will need to access the advanced options by clicking to expand these.

Advanced options

The multiple address stream document is uploaded as normal on the 'Add documents' screen and you must select the File contents as 'Multiple address stream'.

STANDARD DELIVERY

0 DOCUMENTS

0 ADDRESSES

SET OUTPUT OPTIONS

Mailing options

Add documents

Add addresses

Print and post

Upload A4 document

Select new file

Document One PDF.pdf

Select

Clear

Background

(No background selected)

Print margin (3mm)

☒ Shrink to fit
 ☐ Keep original size

Advanced options

Click Select to find the document from your computer

Once you have uploaded your multiple address stream click on 'Next'. This will take you through to 'Add addresses' where the address file can be uploaded.

Multiple address stream - Add Addresses

Click on 'Upload addresses' to browse for the address file on your computer. Once you have selected the file click on 'Next'; you will be taken to the 'Assign fields' screen where Docmail will show you how it has mapped the fields in Docmail.

Your 'StreamPages' column should automatically map to StreamPages1 as below.

Assign fields SET TO DEFAULT MAPPING

Column Header	Sample Data	Map To
Title	Ms	Title
First	S	First Name
Surname	Jones	Surname
Address1	St Peters Park	Address Line 1
Address2	Wells Road	Address Line 2
Address3	Radstock	Address Line 3
Address4	BA3 3UP	Address Line 4
weekday	Monday	- Add Custom Field -
Stream Pages	2	Stream Pages 1

Back Next

Check the mapping and make any necessary amendments. If you need to change any field, click on the Target (Map To) field drop down to choose the field you want assigned.

Docmail will apply the address from your file onto your document unless you choose 'No address panels' from the 'Envelope preference' on the Print and Post screen.

You can choose 'No address panels' only if you are using a custom design envelope or a standard envelope with your own return address. Other options will add an address panel to your document.



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