

5. Order approval

At this stage you will be able to view a proof of how your letter will look when printed.

Please make sure that you check the proof including address and barcode position before approving the order.

If you are not happy with how your letter looks then you have an option to make changes to your order. Amend your original document (letter) and then follow steps 3, 4 & 5. You will not need to re-upload your data list as it is already saved to the order.


Once you are happy that the proof is correct, click on the red 'Approve' button and you will be directed to the secure payment screen.

Follow the payment options to complete the order.

Your order won't be submitted for production until it has been paid for.

Mailing proof

[DOWNLOAD PDF PROOF](#) | [VIEW MAILING SUMMARY](#)



[VIEW PROOF](#)

Please note: Ensure you check the proof carefully, paying particular attention to the Docmail will a white box behind your address, if you haven't left enough room, some obscured.

Don't like what you see in the proof? Here are some ways to change what you see:

[AMEND MAILING OPTIONS](#) | [AMEND TEMPLATE](#) | [AMEND MAILING LIST](#)

Mailing cost

Cost	£0.68
VAT (17.5%)	£0.12
Total Cost	£0.80

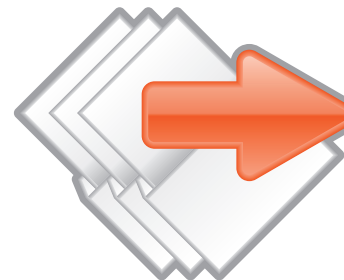
If you choose to pay by credit card a surcharge of 35p will be applied to cover the cost.

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Email: info@cfh.com Web: www.cfh.com



standard user guide

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docmail™

let us print and mail all your post



www.cfhdocmail.com

email: docmailsales@cfh.com
telephone: 01761 409701 / 409702

Before you start, you'll need:

Word document...

- You need to leave a blank area 7cm wide x 4cm deep (positioned 4.5cm from the top and 1.3cm from the left side of your document) for Docmail to insert the required name and address details.
- For extra personalised copy within your document you need to add tags. Docmail will recognise these tags and replace them with the correct piece of data in a similar way to a mail merge.

The format of a tag is <<field>>. So, if you have a data field for fullname, the tag to use would be <<fullname>>. This will then be replaced with the contents of the field 'fullname' from your spreadsheet.

Names and addresses...

- Your spreadsheet will need to be in either Microsoft Excel or CSV format and should contain named columns of data that correspond with the tags in your word document. You can have up to 6 address columns.

1. Create Mailing

Select 'Create Mailing' and choose either A4 letter, Greeting Card or Postcard.



2. Mailing option

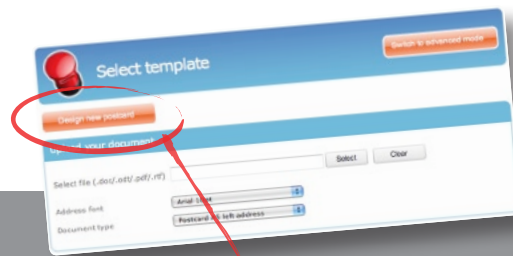
Give your mailing a name:

Choose your printing options (A4 letter only):

- Black and white or colour
- Printed single sided or double sided
- Choose your despatch date or leave as ASAP

Delivery type: The default selection is standard class (which is a second class service). You are able to upgrade to First Class if you prefer.

Address name format: Docmail automatically puts the address in the correct position to show through the envelope window. You therefore need to tell us what format you would like the name to appear. This must be available in your data.



TIP: Why not try our Postcard and Greeting Card online design option?

3. Select template

Either upload a Microsoft Word (.doc or .docx) file, a file in Rich Text format (.rtf), an Adobe (.pdf) file or use our Greeting card/Postcard designer.

Remember...

Docmail automatically adds the recipients address to your letter so you don't need to. If you are using an existing template that you have stored in your docmail library, you can search for the template name and then click on the image.

4. Edit mailing list

This is where you upload a Microsoft Excel file or CSV that contains all the addresses of the recipients you wish to send your letter to.

To add yourself to the mailing list you can select 'Add self'. Docmail will automatically upload your contact details from your account admin and add it to the mailing list for you.

Click on 'Upload' and browse for the file on your PC.

Select the uploaded file format (i.e. Excel or CSV). Docmail will map your data fields to your letter. Please check this is correct.

Once your file has been uploaded you have to validate the addresses to see if they are deliverable. Docmail then checks the Royal Mail database to see if they are complete and correct. Select 'Validate' to complete this check. If they are deliverable they will have a green tick.

Recipient	Validation type
Richard Stevenson, 4 Lynton Road, Westfield, Radstock, BA3 3BY	✓
Kara Harrison, 15 Blakes Drive, Oldfield Park, Bath, BA2 1JW	✓
Paul Williams, Unit 1, Bath Road Business Park, Weston, Bath	?
Sarah Mannings, 17 High Street, Keynsham, Bristol, BS39 5SR	✓

If you have an orange question mark, then your address may be incomplete or incorrect and will incur a 10p surcharge. You have an option to 'Edit' these. For overseas mail you will be shown a blue aeroplane.

Need help?
Call: 01761 409701 / 409702