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# DOCMAIL STANDARD USER GUIDE

v5.4



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# WELCOME TO DOCMAIL

Docmail is an established, effective and proven way to create and send your post. By simply logging on to our website you can create a mailing with just a few clicks of the mouse.

Docmail offers you great flexibility and ease - as you control what to print and 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. Once done, you will receive an activation link, via email, to activate your 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 you chose whilst signing 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 taken to the Docmail home page, where 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.

# OVERVIEW OF THE DOCMAIL MAIN PAGE

Now we will look at each of the functional areas in turn.

The screenshot shows the Docmail main page. At the top left is the Docmail logo, which consists of a stack of white envelopes with an orange arrow pointing to the right, followed by the text 'docmail®'. To the right of the logo is a navigation menu with links: 'Home', 'Create mailing', 'My mailings', 'Library', 'Admin', 'Help', and 'Log out'. Below the navigation menu, on the right side, it says 'Logged in as:'. The main content area is divided into three columns. The left column is titled 'Getting started' and contains text explaining the service. The middle column is titled 'CREATE MAILING' and features a blue circular icon with three horizontal lines. It contains two text blocks: 'You have incomplete mailings, please press the button below to select a mailing to continue...' with a 'Continue mailing' button, and 'If you want to create a new mailing then press the button below...' with a 'Create mailing' button. The right column is divided into two sections. The top section is titled 'LIBRARY' and features an orange icon of a document with a plus sign. It contains the text 'Upload documents and backgrounds to use on mailings plus configure merge tags and import mappings ...' and an 'Enter library' button. The bottom section is titled 'ADMIN' and features a green icon of three people. It contains the text 'View mailing history, run reports, administrate general settings and update user details ...' 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](#)

## CREATE A MAILING

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This is where you build and send your mailings, whether that's letters, texts, A3 folded sheets or postcards. Then select your other mailing requirements (such as whether you want your mailing in colour or black and white, first or second class), before seeing a final proof of your mailing in PDF format, which will show the exact document we will print.

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

As you work through each step of creating a mailing, 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

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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.

## LIBRARY

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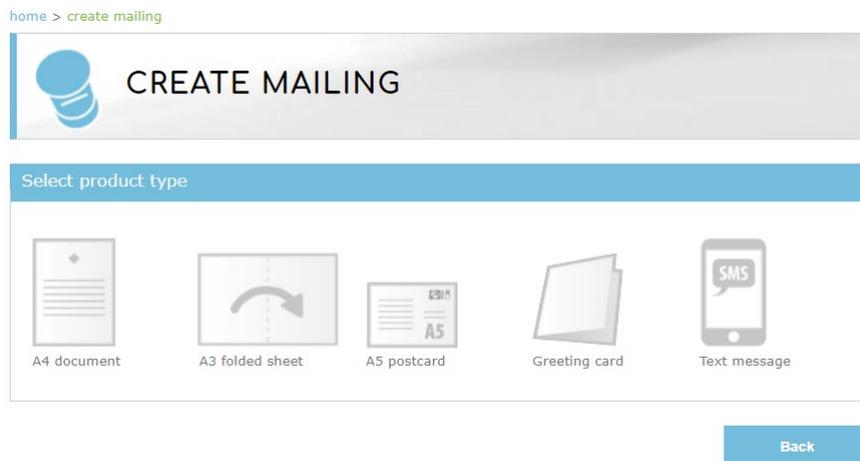
The library is where you can store files you use regularly in mailings within Docmail, saving you lots of time.

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.

# CREATE A MAILING

This is the area where you can create your mailing, by uploading your documents and choosing the output options.

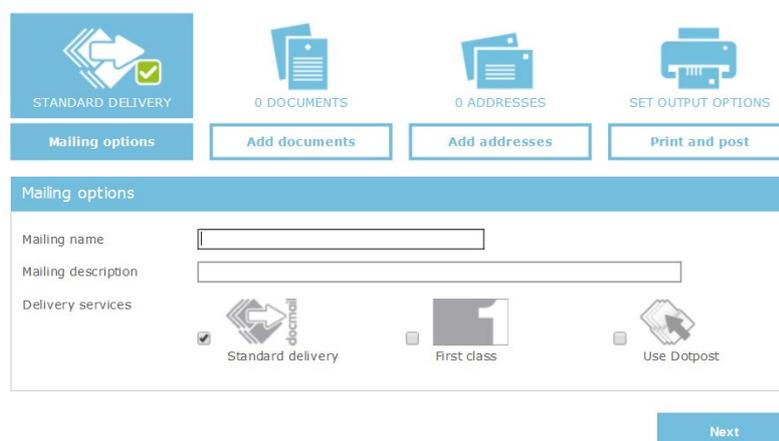
The first screen asks you to select the product type that you would like to use - A3 folded sheet, A4 letter, greetings card, A5 postcard or text message.



When you have decided which you want to use, select it by clicking on it and then press 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



## Mailing Name

Here you can give your mailing a name to identify it.

## Mailing Description

You can enter further information about your mailing.

## Delivery Services

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

## Dotpost

Dotpost is a secure online document hub where users can securely view and manage their documents. If you are registered to use Dotpost you can tick this box and your addressees who have signed up to Dotpost and are linked to your company will receive their documents electronically via Dotpost. For anyone who doesn't have a Dotpost account linked to your company, they will receive an additional sheet (free of charge) with their letter inviting them to sign up to receive their future mailings from you electronically.

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 sent to the Dotpost team at CFH.

Click 'Next' to continue.

## Add a Document (A4 letters and A3 folded sheets)

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

You can upload a new document stored on your computer. Or, you can use documents that you have stored in your library by selecting the 'Add from Library', where you can select any document, a mail pack or insert that you already have stored in your library.

## Documents

You do not need to include the recipients address as Docmail will add this for you.

You can apply any logos or signatures that you want to use on your mailing; either by embedding them into your documents or by using a 'Background' (Backgrounds can be selected under the Edit Document section).

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

Advanced options

Back    Add another    Next

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.

## Backgrounds

Different backgrounds can be stored so that you can choose the most relevant one for the mailing that you are creating. They can hold logos or letterheads, 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.

You can select your chosen background from your library using the 'Background' drop down box.

## 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.

## Advanced Options

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

Advanced options ⌵

**VIEW DOCUMENTS SCREEN**

Name	<input type="text" value="Document One PDF"/>
Description	<input type="text"/>
Address panel font	<input type="text" value="Arial 10pt"/> ⌵
Apply address panel when an additional document?	<input type="checkbox"/>
File contents	<input type="text" value="Document"/> ⌵
Clear merge tags on upload?	<input type="checkbox"/>
Can this document begin on the back of another document?	<input checked="" type="checkbox"/>
Can another document begin on the back of this document?	<input checked="" type="checkbox"/>
Password protected areas	<input type="checkbox"/>
Encryption password	<input type="checkbox"/>

### Name

You can give your mailing a name to identify it if you have not done so previously. Or if you did give your mailing a name at the start, you can edit it here.

### Description

You can enter the description of a mailing to help you to identify it if you have not done so previously. Again, if you did do so previously, you can edit it here.

## Address panel font

You can choose a font from the drop down list and Docmail will use this to print the name and address.

## Can this document begin on the back of another document? (A4 only)

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 that you've uploaded is only one side long, then document 2 starts printing on the back of document 1.

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.

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.

Remember, this option is only relevant if you are uploading several documents to your order, or using a mail pack.

## Can another document begin on the back of this document? (A4 only)

Similar to the above; if you are happy for all documents you've uploaded 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.

## 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, Postcards Envelopes

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

The screenshot shows the 'New document' section of a design tool. At the top, there are four main buttons: 'Mailing options', 'Add documents', 'Add addresses', and 'Print and post'. Below these are three sub-sections: 'New document', 'Add from library', and 'Add from previous mailing'. Each sub-section contains icons for different document types and actions. Callout boxes provide instructions for each key option.

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

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.

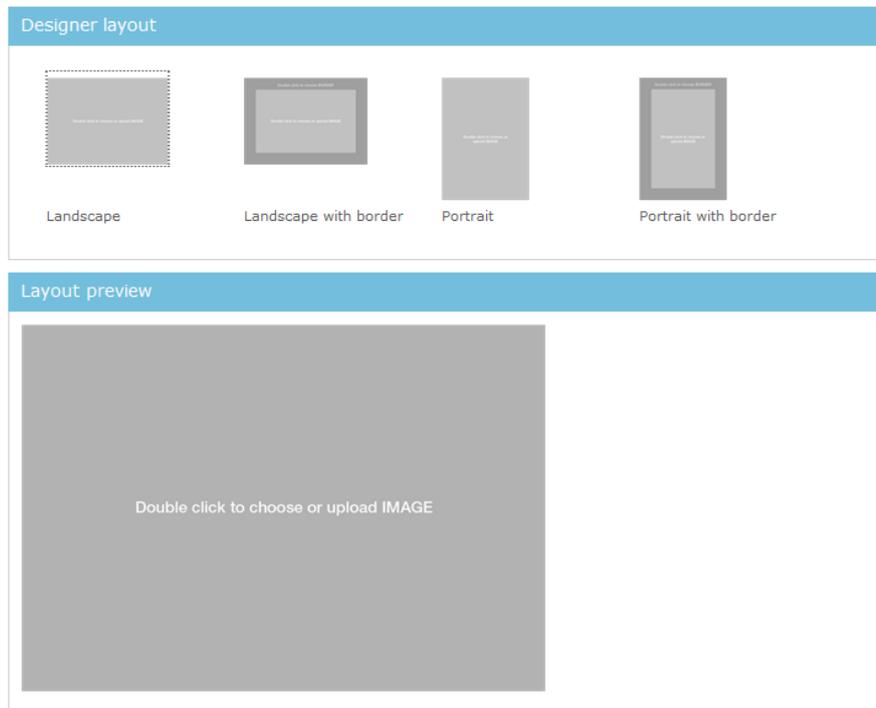
Click here to find a previous greeting card mailing.

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 can choose your layout - landscape or portrait; with or without a border.



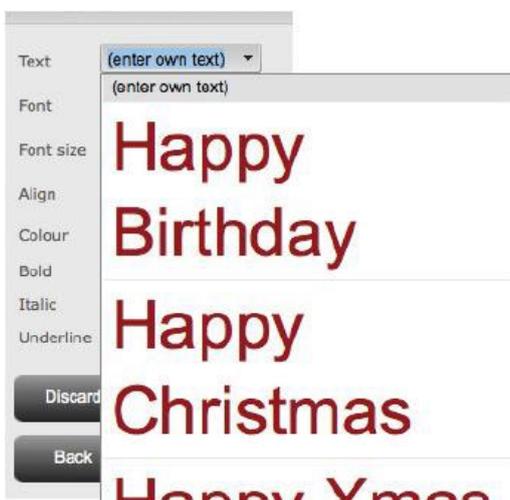
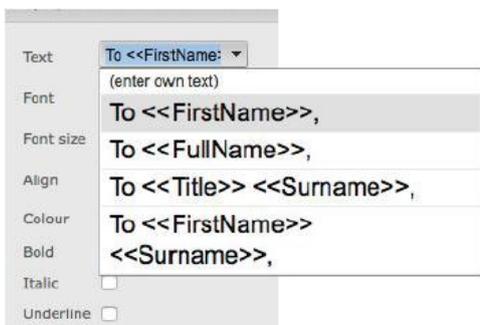
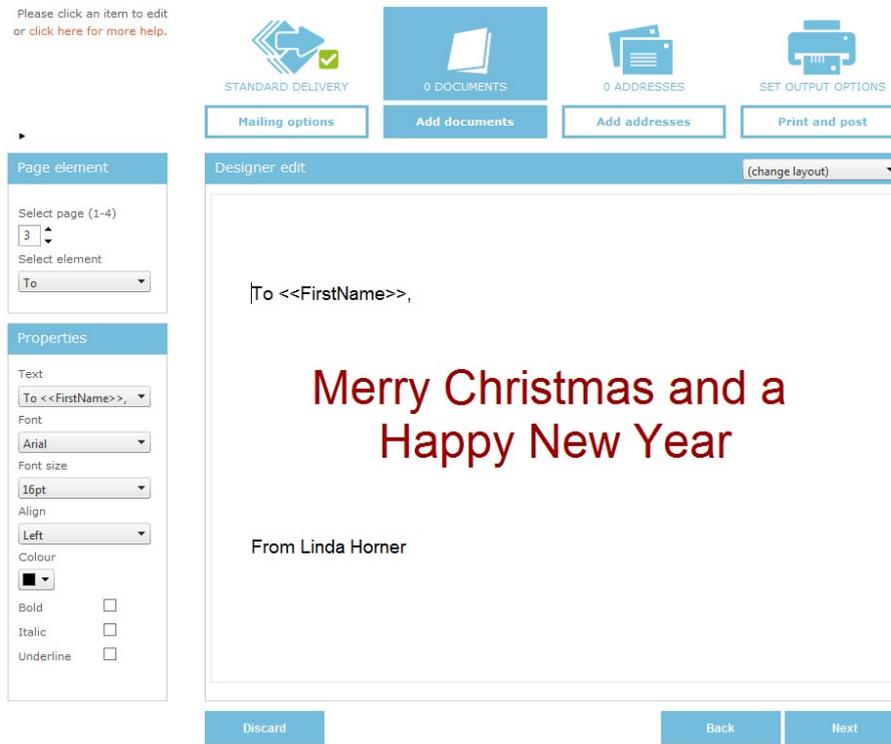
Click on the option that you want to use to see the next screen as shown below.

The screenshot shows the 'Designer edit' interface for Docmail. At the top, it displays 'Order ref 34211' and 'Top-up balance: £50,000.00'. Below this are icons for 'STANDARD DELIVERY', '0 DOCUMENTS', '0 ADDRESSES', and 'SET OUTPUT OPTIONS'. A 'Select image' section is visible, showing a search bar and a grid of image thumbnails. The thumbnails include 'A very merry Christmas', 'Anniversary', 'Birds', 'Cyprus reptile', and 'Dog in the snow'. A 'Page element' sidebar on the left contains options for 'Select page (1-4)', 'Select element', and 'Properties'. The 'Properties' section includes a 'Change image' area with 'Select' and 'Upload' buttons, and 'Rotation' and 'Size option' dropdowns. A callout box points to the 'Upload' button, stating 'Click one of these links to upload your own image.' Another callout points to the 'Image preview' area, stating 'Docmail will show you a preview of the image here.' A third callout points to the 'Rotation' dropdown, stating 'You can rotate and crop your image here.' A fourth callout points to the 'Background photo' dropdown, stating 'Click here to change the dropdown to border and see available borders.' A fifth callout points to the 'Select element' dropdown, stating 'This shows which page of the card you are working on.' A sixth callout points to the search bar, stating 'You can use the search box to find a particular image.' A seventh callout points to the image grid, stating 'Click through the pages here to see all the images available on Docmail.'

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 'Happy Anniversary' card design. The card features two blue birds on a tree branch and the text 'Happy Anniversary'. A callout box points to the 'Discard' button, stating 'You can click on 'Discard' and start again as many times as you like.' The interface also shows a 'Page element' sidebar with 'Select page (1-4)', 'Select element', and 'Properties' sections. The 'Properties' section includes a 'Change image' area with 'Select' and 'Upload' buttons, and 'Rotation' and 'Size option' dropdowns. The 'Designer edit' header includes a '(change layout)' dropdown. At the bottom, there are 'Discard', 'Back', and 'Next' buttons.

When you are satisfied click 'Next', where you will be taken to page 3, which is the page that you can place your text.



You can make changes here by clicking on to the text or using the drop down lists.

'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.

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.

Like the other boxes, 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

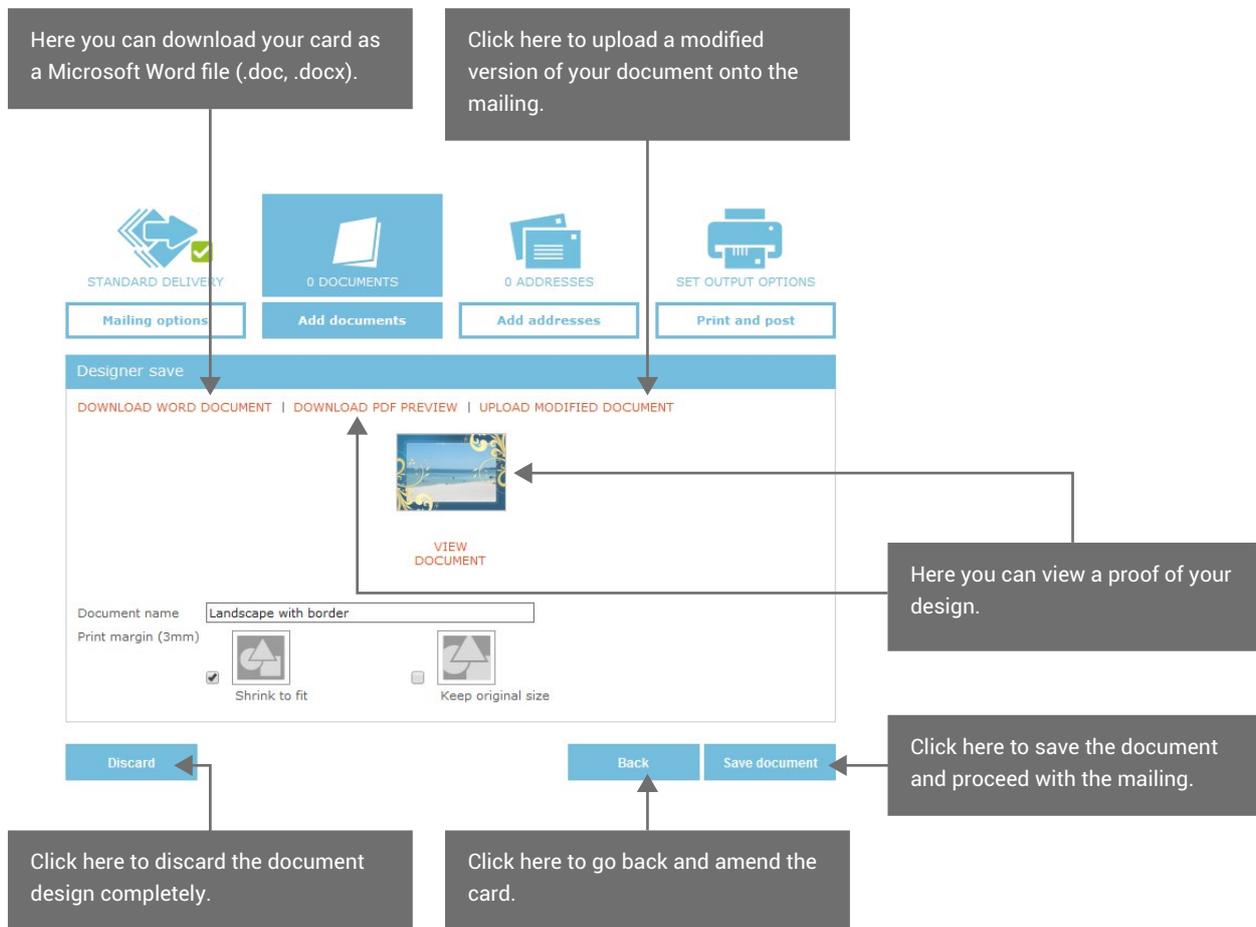
Select page (1-4)  
3

Select element  
To

You can use the next, 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.

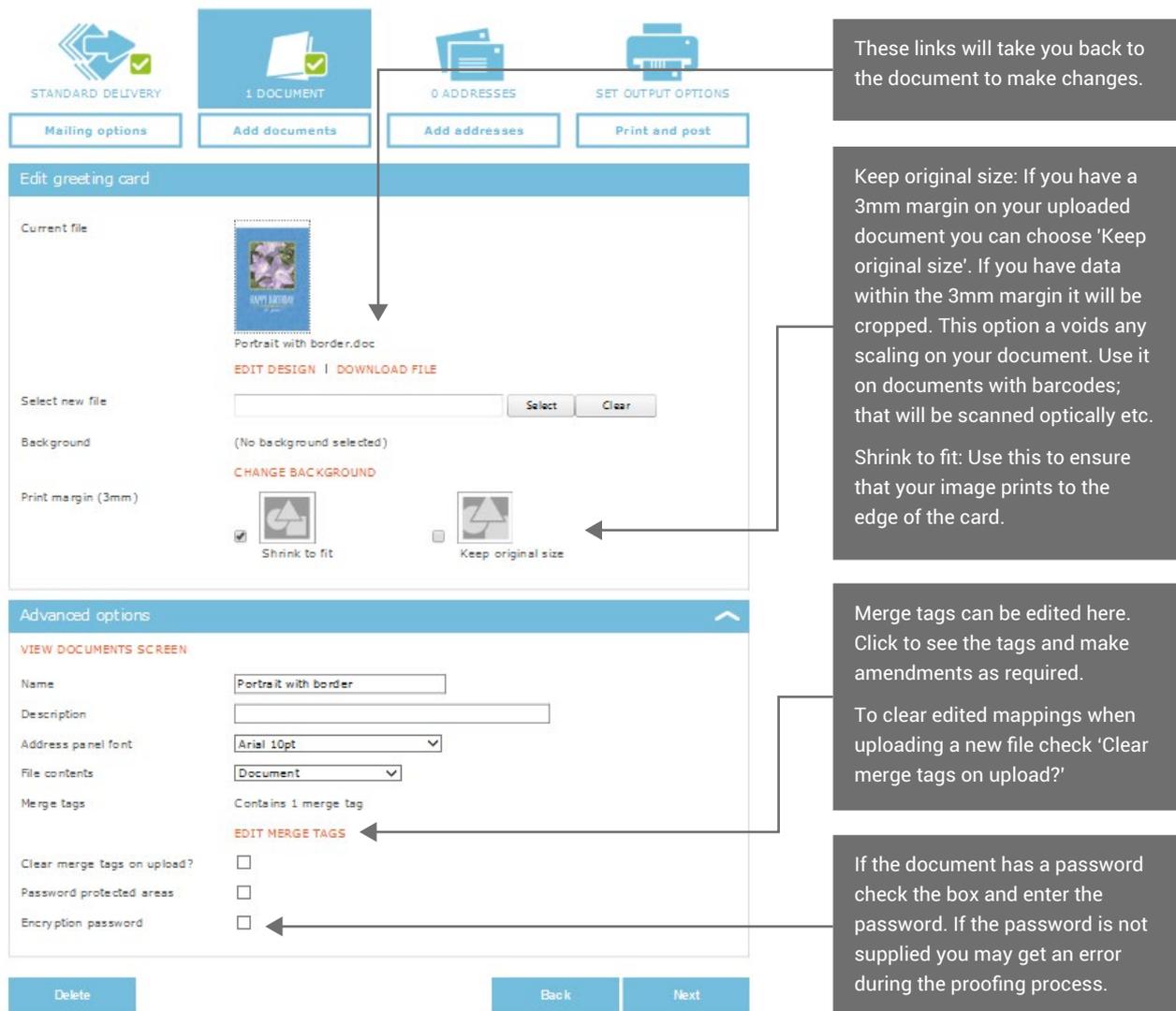
Note that pages 2 and 4 cannot be amended here, except for the address font.

Once you have made your changes click 'Next' and you will see the document preview screen.



You can click on 'save document' to continue. Or, 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 with the following sections and callouts:

- Navigation Bar:** Includes 'Mailing options', 'Add documents', 'Add addresses', and 'Print and post' buttons. Callout: 'These links will take you back to the document to make changes.'
- Current file:** Shows 'Portrait with border.doc' with 'EDIT DESIGN' and 'DOWNLOAD FILE' links. Callout: '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.'
- Print margin (3mm):** Features 'Shrink to fit' (checked) and 'Keep original size' options. Callout: 'Shrink to fit: Use this to ensure that your image prints to the edge of the card.'
- Advanced options:**
  - VIEW DOCUMENTS SCREEN:** Fields for Name, Description, Address panel font, and File contents.
  - Merge tags:** Shows 'Contains 1 merge tag' and an 'EDIT MERGE TAGS' link. Callout: 'Merge tags can be edited here. Click to see the tags and make amendments as required.'
  - Clear merge tags on upload?**
  - Password protected areas:**
  - Encryption password:** . Callout: 'To clear edited mappings when uploading a new file check 'Clear merge tags on upload?''
  - Callout:** '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.'

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

## Designing Postcards

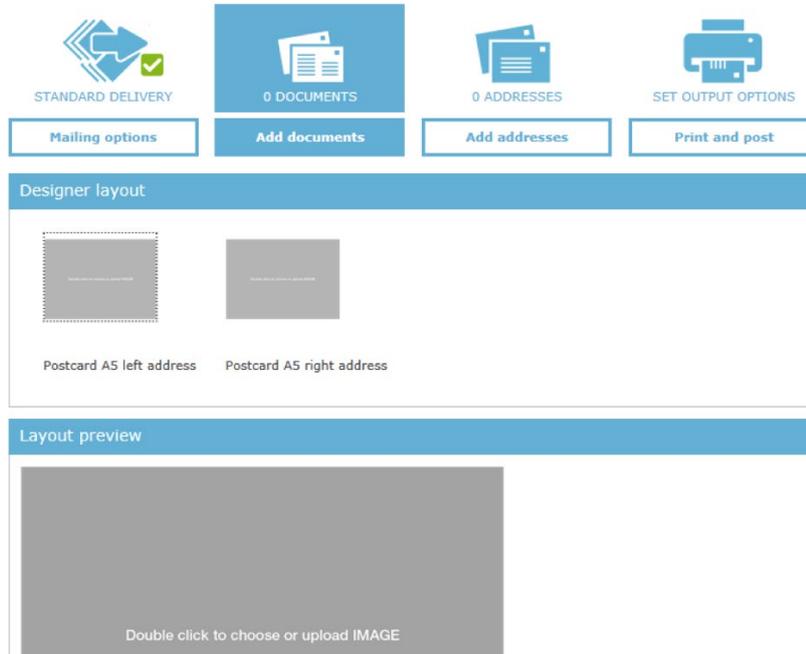
The screens for creating a postcard mailing are similar to those for a greetings card. You can use your own image from your computer or use the images available on Docmail.

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.

Merge tags 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 - either on the left or right hand side.



Select the layout by clicking on it and click Next.  
Then double click on the layout preview to see the screen shown below.

This screenshot shows the 'Select image' interface. At the top, it says 'Please click an item to edit or click here for more help.' Below are the same four buttons as in the previous screenshot. The main area is titled 'Select image' and includes a search bar and a 'Page size' dropdown set to '4'. It shows 'Showing images 1-4 of 21' with four thumbnails: 'A very merry Christmas', 'Anniversary Birds', 'Cyprus reptile', and 'Dog in the snow'. Below the thumbnails are navigation links '1 2 3 4 5 6'. An 'Image preview' window shows a large red Christmas-themed image. At the bottom are 'Cancel' and 'Upload image' buttons. Annotations on the left explain the workflow:

- 'This shows which page of the card you are working on.' points to the 'Page element' section, which includes 'Select page (1-2)' (set to 1) and 'Select element' (set to 'Background photo').
- 'Click through the pages here to see all the images available on Docmail.' points to the navigation links '1 2 3 4 5 6'.
- 'Click one of these links to upload your own image.' points to the 'Upload' button in the 'Change image' section.
- 'Docmail will show you a preview of the image here.' points to the 'Image preview' window.

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

This screenshot shows the 'Designer edit' interface with a dog image. The top navigation bar includes 'STANDARD DELIVERY', '0 DOCUMENTS', '0 ADDRESSES', and 'SET OUTPUT OPTIONS'. Below this are buttons for 'Mailing options', 'Add documents', 'Add addresses', and 'Print and post'. The main area is titled 'Designer edit' and contains a large image of a dog. To the left is a 'Page element' sidebar with 'Select page (1-2)' set to 1 and 'Select element' set to 'Background photo'. Below this is a 'Properties' section with a 'Change image' area containing 'Select' and 'Upload' buttons, a 'Rotation' dropdown set to 0°, and a 'Size option' dropdown set to 'Crop'. At the bottom are 'Discard', 'Back', and 'Next' buttons. Three callout boxes point to the 'Next' button, the 'Change image' area, and the 'Discard' button.

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.

This screenshot shows the 'Designer edit' interface with a text input area. The top navigation bar includes 'STANDARD DELIVERY', '0 DOCUMENTS', '0 ADDRESSES', and 'SET OUTPUT OPTIONS'. Below this are buttons for 'Mailing options', 'Add documents', 'Add addresses', and 'Print and post'. The main area is titled 'Designer edit' and contains a large text input area with the placeholder text 'Write your message here ...'. To the left is a 'Page element' sidebar with 'Select page (1-2)' set to 2 and 'Select element' set to 'Address'. Below this is a 'Properties' section with a 'Font' dropdown set to 'Arial 10pt'. At the bottom are 'Discard', 'Back', and 'Next' buttons. Four callout boxes point to the '(change layout)' button, the text input area, the 'Font' dropdown, and the 'Discard' button.

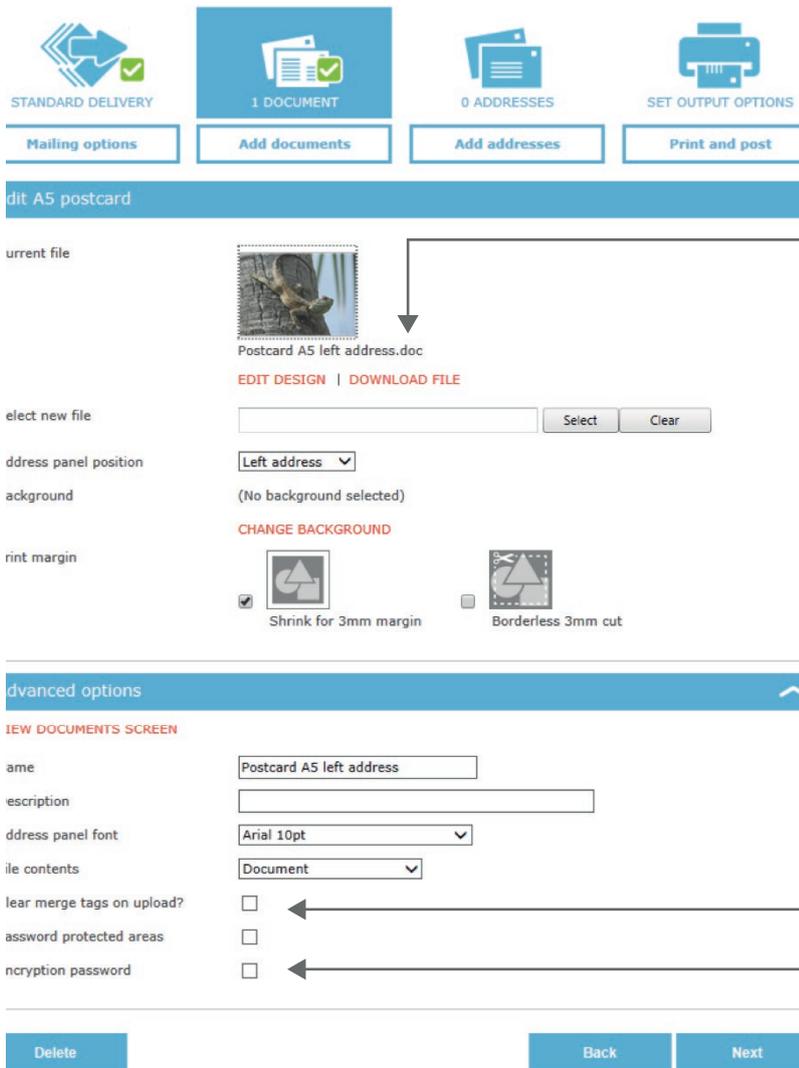
Please note that if the font selected is not installed on your computer you will only be able to see the correct text format in the preview images.

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 a postcard. At the top, there are four main sections: 'Mailing options' (with 'STANDARD DELIVERY' and a checkmark), 'Add documents' (with '0 DOCUMENTS'), 'Add addresses' (with '0 ADDRESSES'), and 'Print and post' (with 'SET OUTPUT OPTIONS'). Below these is a 'Designer save' bar containing 'DOWNLOAD WORD DOCUMENT', 'DOWNLOAD PDF PREVIEW', and 'UPLOAD MODIFIED DOCUMENT'. A central area shows a 'VIEW DOCUMENT' button with a preview image of a dog. Below the preview are 'Document name' (Postcard A5 left address) and 'Print margin' options: 'Shrink for 3mm margin' (checked) and 'Borderless 3mm cut'. At the bottom are 'Discard', 'Back', and 'Save document' buttons. Callout boxes provide instructions: '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.', and '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.

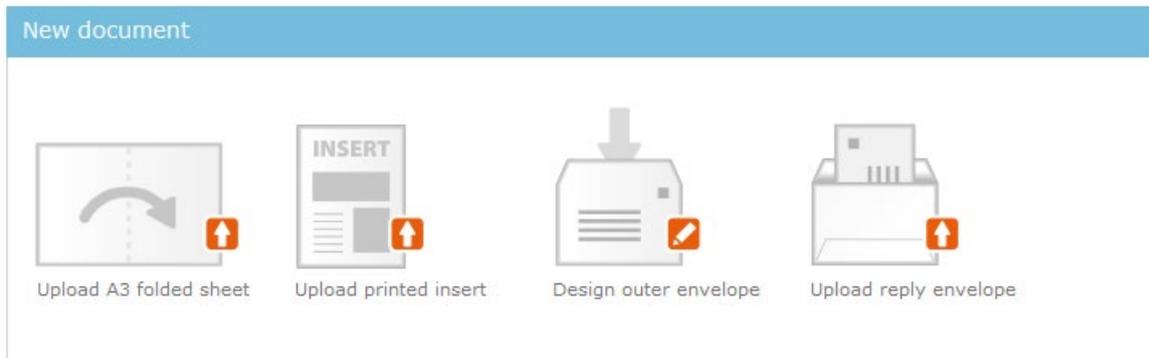
Merge tags can be edited here. Click to see the tags and make amendments as required.  
To clear edited mappings when uploading a new file check 'Clear merge tags on upload?'

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.

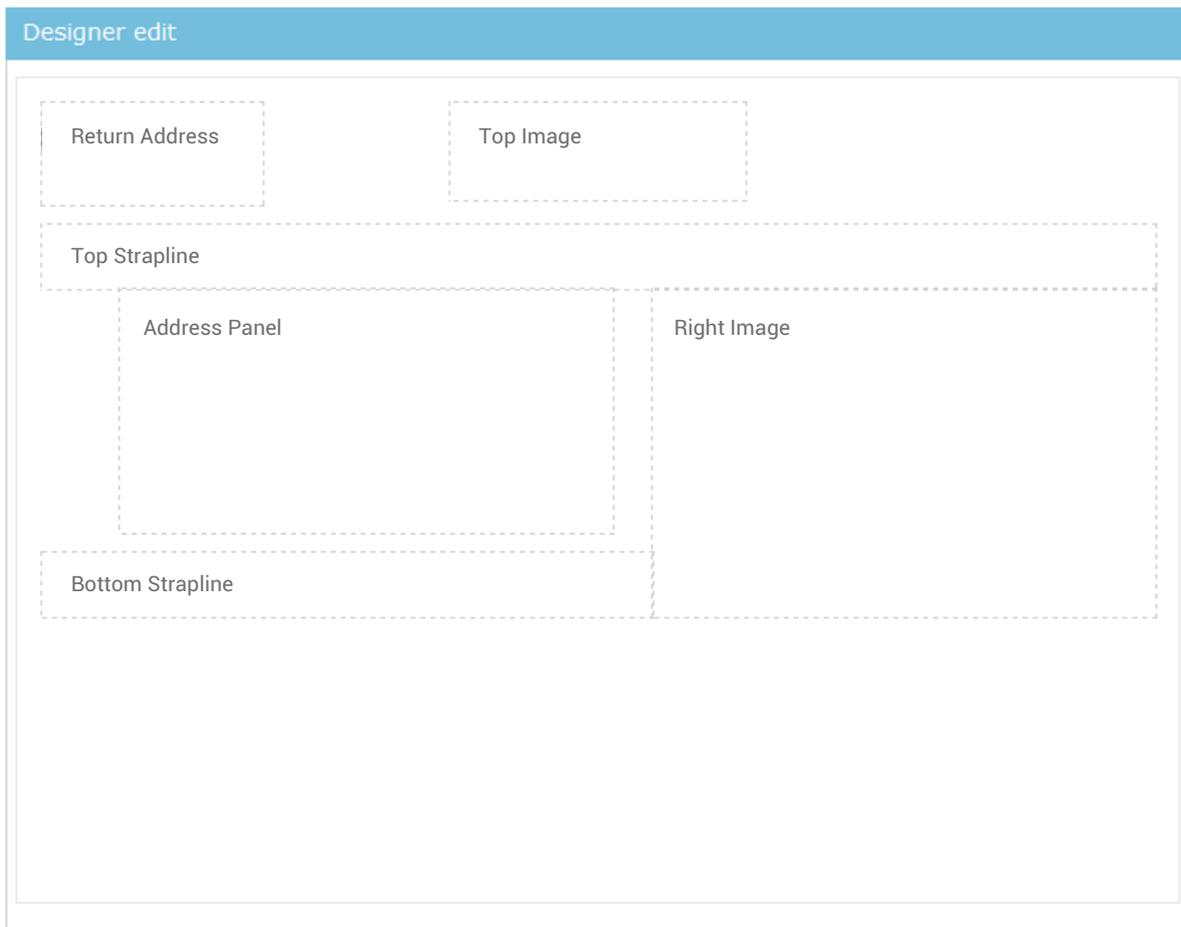
When you are satisfied with your document click 'Save' and you will be taken on to the 'Add Addresses' screen.

## Designing Envelopes

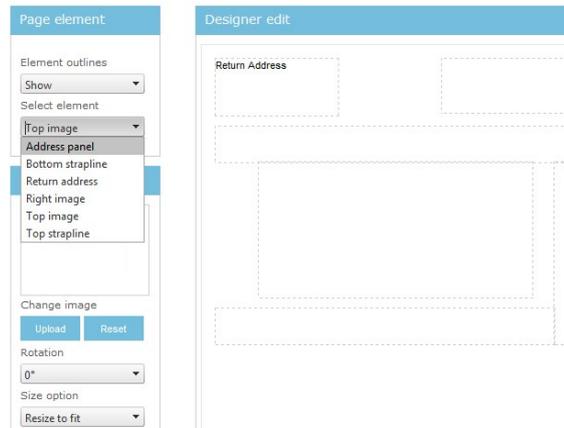
If you click on 'add documents', you can design your own outer envelope for your mailing to go into. You can also upload a reply envelope from your computer to be enclosed in your mailing. Currently reply envelopes can only be added to A4 mailings. Envelopes can also be stored in the library and added from there.



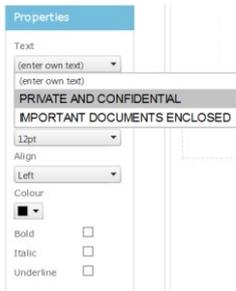
The 'Design outer envelope' screen is shown below with the areas of the template labelled.



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



<h3>Address panel</h3>	<div data-bbox="606 817 790 996"> <p>Change image</p> <p>Select Reset</p> <p>Address panel font</p> <p>Arial</p> <p>Arial</p> <p>Helvetica</p> <p>Verdana</p> </div> <div data-bbox="829 817 1388 896"> <p>Click on select or Reset to change the appearance of the address panel on the envelope.</p> </div> <div data-bbox="829 918 1340 963"> <p>You will be offered 3 options as shown below.</p> </div> <div data-bbox="606 1008 1069 1198"> <p>Showing 3 Images</p>  <p>Address - border only    Address - no background    Address - window effect</p> </div> <div data-bbox="1085 1041 1364 1198"> <p>Click the option that you wish to use. Click on the dropdown to select an 'Address panel font'.</p> </div>
<h3>Bottom strapline</h3>	<div data-bbox="606 1243 774 1545"> <p>Properties</p> <p>Font</p> <p>Arial</p> <p>Font size</p> <p>12pt</p> <p>Align</p> <p>Left</p> <p>Colour</p> <p>■</p> <p>Bold <input type="checkbox"/></p> <p>Italic <input type="checkbox"/></p> <p>Underline <input type="checkbox"/></p> </div> <div data-bbox="829 1243 1396 1355"> <p>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.</p> </div>
<h3>Return address</h3>	<p>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.</p>
<h3>Right image</h3>	<p>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.</p>
<h3>Top image</h3>	<p>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.</p>

<h3>Top strapline</h3>		<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.

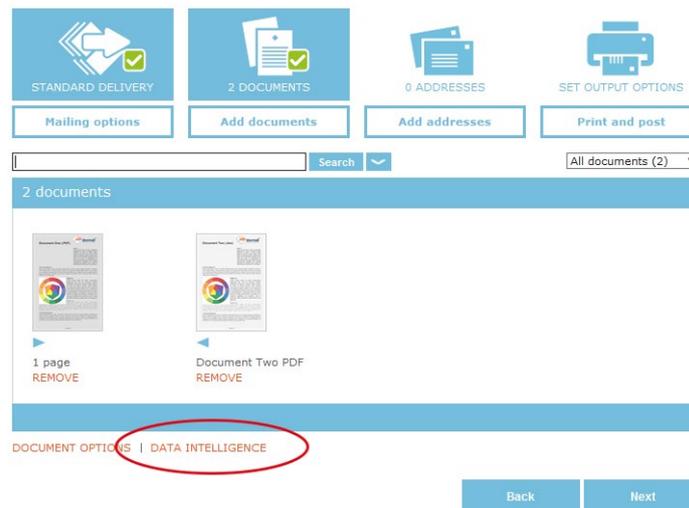
## Creating a Text Message

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 in it, or alternatively you can use the custom tag <<message>> to add unique messages for each recipient from your address list upload. For the latter, you would need to have a column named 'message' on your spreadsheet that has the address data on, and fill in the message for each recipient.

 STANDARD DELIVERY Mailing options	 0 DOCUMENTS Add documents	 0 ADDRESSES Add addresses	 SET OUTPUT OPTIONS Print and post				
<h4>Text message</h4> <table><tr><td>Name</td><td><input type="text" value="Text message"/></td></tr><tr><td>Message</td><td><input type="text" value="&lt;&lt;Message&gt;&gt;"/></td></tr></table>				Name	<input type="text" value="Text message"/>	Message	<input type="text" value="&lt;&lt;Message&gt;&gt;"/>
Name	<input type="text" value="Text message"/>						
Message	<input type="text" value="&lt;&lt;Message&gt;&gt;"/>						
<input type="button" value="Back"/>		<input type="button" value="Add another"/>	<input type="button" value="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 specific documents that each receives. 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.

The options for uploading addresses are as follows:

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

## 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' screen with the following elements and callouts:

- STANDARD DELIVERY** (checked) - Callout: Click here and find the address list on your computer.
- 1 DOCUMENT** (checked)
- 0 ADDRESSES**
- SET OUTPUT OPTIONS**
- Buttons: **Mailing options**, **Add documents**, **Add addresses**, **Print and post**
- Section: **Upload addresses**
- Text: You can optionally download an example template with the standard column headers in Spreadsheet CSV format: **DOWNLOAD SPREADSHEET CSV TEMPLATE**
- Text: Select a Spreadsheet, CSV or Text file to upload containing your address list:
- Form: **Address file** (input field), **Select** button, **Clear** button
- Form: **File contains column headers?**  - Callout: Remove the tick here if your file has only data and no headers.
- Form: **File format** dropdown: **(automatic from file type)** - Callout: Leave at automatic unless you need additional options such as a custom format.
- Form: **Mapping** dropdown: **(automatic)**
- Callout for Mapping: 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.
- Buttons: **Back**, **Next**

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.

Merge 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 '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 or 'add custom 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.

The screenshot shows the 'Enter address' form with the following sections and callouts:

- Progress bar:** STANDARD DELIVERY (checked), 1 DOCUMENT (checked), 0 ADDRESSES, SET OUTPUT OPTIONS.
- Navigation buttons:** Mailing options, Add documents, Add addresses, Print and post.
- Form fields:**
  - Title, First name, Surname, Full name \*, Address name prefix, Job title.
  - SWITCH TO LINE-BY-LINE ADDRESS BOXES (checkbox)
  - Company name, Address \*
  - Use this address for proof? No
- Callout boxes:**
  - Complete all the details of the name and address in these boxes. (points to name and address fields)
  - Tick this box if you would like to see a proof using this address. (points to 'Use this address for proof?')
  - Click here to see the options shown below to add fields not included in the address. (points to 'Add custom field' and 'Add standard fields')
- Footer buttons:** Back, Add another, Finish.
- Footnote:** The \* indicates tags used in the current mailing, an address is always required.

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

The 'Add custom field' form consists of two input boxes: a smaller one for the field name and a larger one for the data. Below the boxes are the buttons 'Add custom field' and 'Add standard fields'.

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

The 'Add standard fields' menu is displayed below the 'Add standard fields' button. It includes an 'Add all standard fields' button and a grid of field options:

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

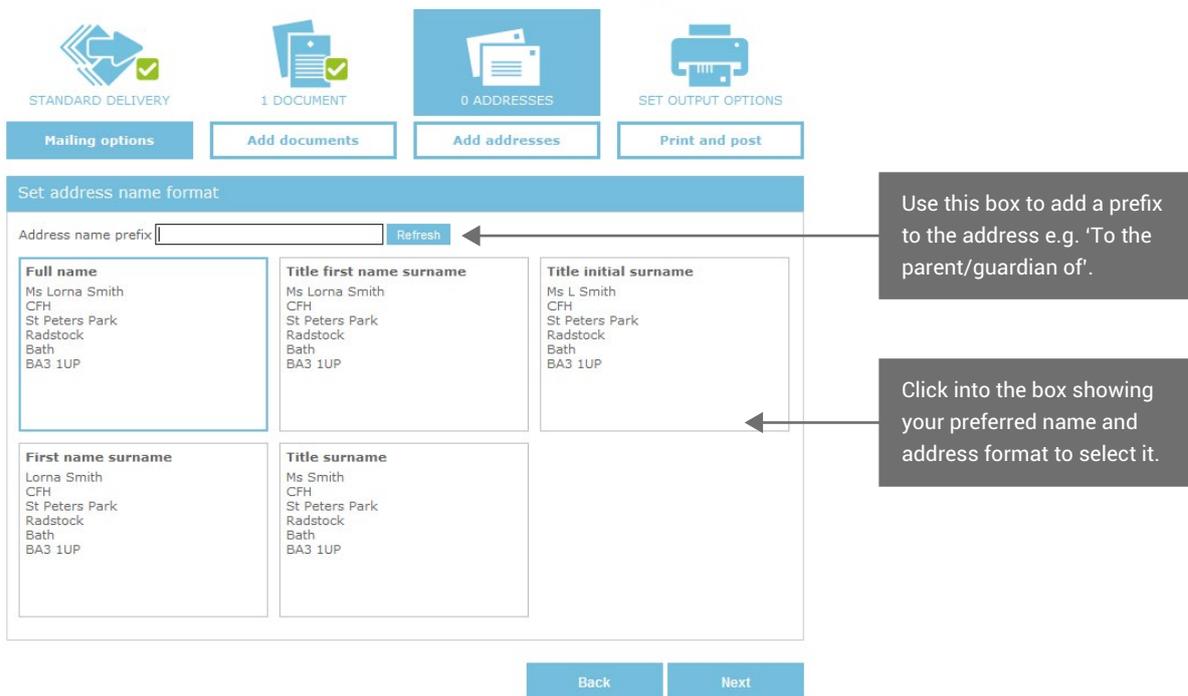
Click 'Next' to select the address name format as shown on the next page.

## 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.



The screenshot shows the 'Set address name format' screen. At the top, there are four navigation buttons: 'Mailing options' (with a 'STANDARD DELIVERY' icon), 'Add documents' (with '1 DOCUMENT' icon), 'Add addresses' (with '0 ADDRESSES' icon), and 'Print and post' (with a printer icon). Below these is a section titled 'Set address name format' containing an 'Address name prefix' input field with a 'Refresh' button. Below the input field are five address format options, each in a box:

- 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

At the bottom of the screen are 'Back' and 'Next' buttons. Two callout boxes provide instructions: one points to the 'Address name prefix' field with the text 'Use this box to add a prefix to the address e.g. 'To the parent/guardian of'.', and another points to the 'Title initial surname' box with the text 'Click into the box showing your preferred name and address format to select it.'

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' - with either a green tick, an orange question mark or a blue plane. 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	EDIT	REMOVE
Birmingham Hippodrome, Birmingham Hippodrome, Hurst Street, Southside, Birmingham	?	✓	EDIT	REMOVE
S Smith, Disney Land Paris, 77777 Marne-la-Valleé, France	✈	N/A	EDIT	REMOVE
CFH, CFH, St Peters Park, Wells Road, Radstock, BA3 3UP	✓	N/A	EDIT	REMOVE

✓ A green tick means the address matches Royal Mail's data base and qualifies for the best postage price.

? An orange question mark means that the address doesn't match Royal Mail's records - the postcode or some other part of the address may be incorrect or incomplete. We will still mail it for you, but a surcharge will be incurred.

You can check the addresses at [www.royalmail.com](http://www.royalmail.com), by clicking on 'Find Postcode'. The site allows you to check 15 postcodes/addresses a day at no cost, and will 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.

✈ A blue aeroplane 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 suggested correct address from the Royal Mail website.

Please note that sometimes the suggested correction may not be the exact address you were looking for, so always check this before choosing to use the correction.

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

The screenshot shows the 'Edit address' interface with the following elements and callouts:

- Navigation bar:** Includes 'Mailing options', 'Add documents', 'Add addresses' (highlighted), and 'Print and post'.
- Form fields:** Title, First name, Surname, Full name \* (filled with 'Birmingham Hippodrome'), Address name prefix, and Job title.
- Address correction section:**
  - 'SWITCH TO LINE-BY-LINE ADDRESS BOXES' link.
  - 'ENABLE AUTO CORRECT' link with a callout: "Click here to find out about enabling autocorrect."
  - 'Use correction?' checkbox with a callout: "Tick here to use the corrected address. The corrected address is shown here greyed out."
  - 'Corrected address:' field showing: "Birmingham Hippodrome Theatre Trust Ltd, Hurst Street, BIRMINGHAM, B5 4TB".
  - 'UK address - postal surcharge will apply' (greyed out) and 'UK address - suitable for cheapest postal rates' (checked).
  - 'Use this address for proof?' checkbox with a callout: "Click here to use this address when a proof is shown".
- Buttons:** 'Add custom field', 'Add standard fields', 'Back', 'Edit next' (highlighted with callout: "Click here to check the next addresses."), and 'Finish'.
- Footer note:** "The \* indicates tags used in the current mailing, an address is always required."

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.

**Correct addresses**

Please select a correction option:

[USE CORRECTIONS](#) | [USE ORIGINAL](#)

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.

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' option 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 are satisfied with your addresses, click 'Finish' to be taken to the 'Print and Post' screen.

## Print and Post

The screenshot shows the 'Print and Post' interface with the following sections and options:

- Navigation:** Mailing options, Add documents, Add addresses, Print and post.
- Print options:**
  - Black & White Simplex (Single sided)
  - Black & White Duplex (Double sided)
  - Colour Simplex (Single sided) - **Selected**
  - Colour Duplex (Double sided)
- Despatch:**
  - As soon as possible - **Selected**
  - Select date (Calendar icon)
- Despatch date:** 08/09/2016
- Envelope preference:** Standard - returns not managed

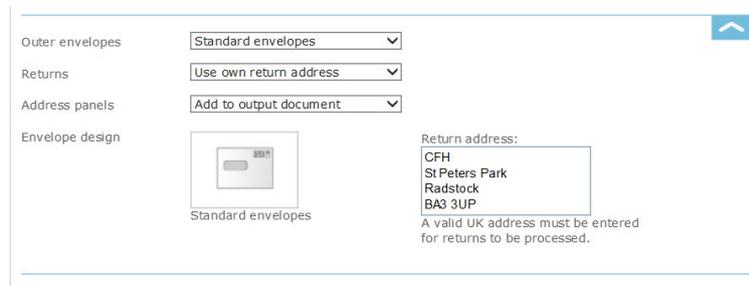
Callout boxes provide additional instructions:

- Print options:** Tick here to choose whether your letter is printed in black and white or colour, and on one or both sides of the paper.
- Despatch:** 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.
- Envelope preference:** Click on the envelope to see options for envelopes and returns. These are explained below.

\*When selecting a future despatch date please consider whether any dates in your mailing (including dates added by merge fields) will still be accurate on the despatch date.

## Envelope Preference

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



## 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). Some of 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' section.

## Returns

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

<b>Not managed</b>	Any mail that is undeliverable by Royal Mail is returned to our site. Returns are disposed of securely at our site and you will not be notified- this is included in the price.
<b>Managed</b>	Any mail that is undeliverable by Royal Mail is returned to our site. 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.
<b>Use own return address</b>	Any mail that is undeliverable by Royal Mail is returned to the address that you specify, allowing you to process your own returns.

Additional charges are incurred for dealing with managed returns. Please see our price list for more information. The following return options and envelope combinations are available:

	Standard Envelope	Custom Design Envelope	C5 Window	C4 Window
Not managed	✓	✓	✓	✓
Managed	✓	✓	✓	✓
Use own return address	✓	✓	X	X

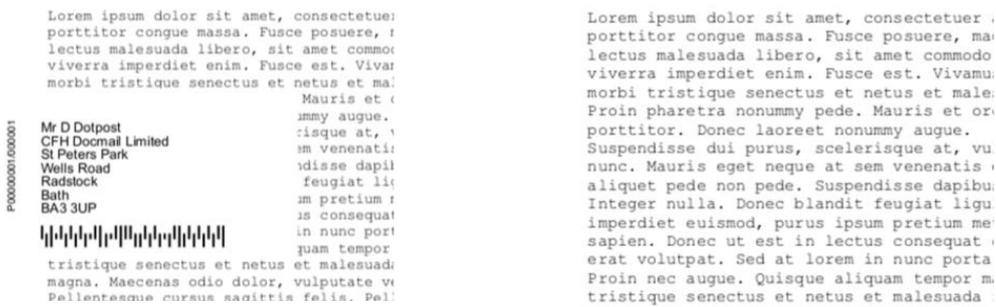
## Address panels

You can choose not to have an address panel added to your output document and placed on the outer envelope instead. You can choose this option if you are using a custom design envelope or a standard envelope and using your own return address.

The options are:

- Add to output document
- No address panels

If you select 'No address panels' no address will be shown on the letter, but instead on the envelope. If you select 'Add to output document' your document will have the address showing on your letter (as shown in the image below).



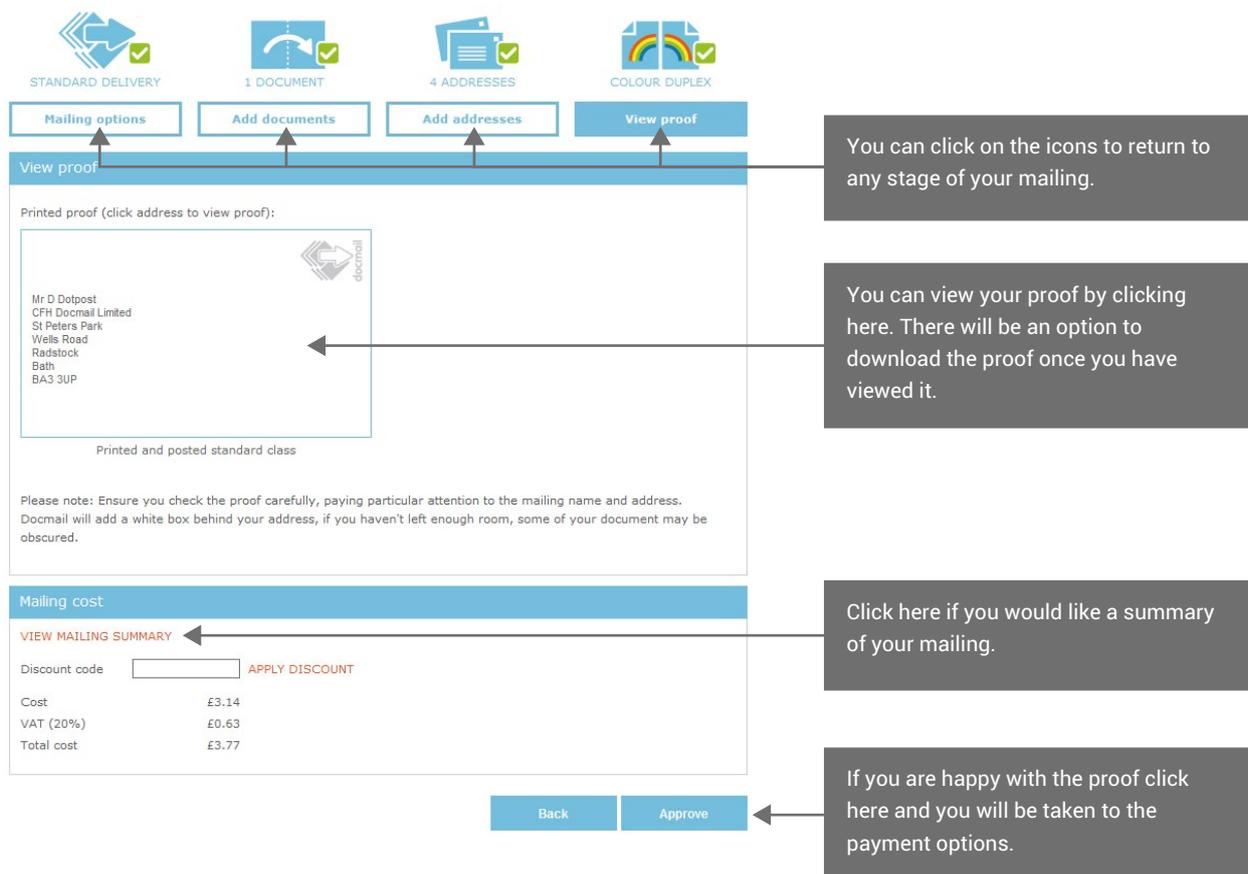
Click 'Next' when you have chosen the settings that you want to use, and you will be taken to the next screen where you can check your proof and go back to make any changes if necessary.

## View proof

At this stage you can see a proof showing how your letter will look when printed, by clicking on 'View Proof' - you may also want to download the PDF proof for your records. Please note that the proof may take a few moments to generate and you will need Adobe reader to view your proof. If you do not already have Adobe reader installed there will be a link which you can follow to install it.

If you are using non-standard fonts you must ensure that they are embedded in your document. See Appendix 1 for instructions.

You must check the proof, including the address and barcode position, before approving the mailing. If you are not happy with how your letter looks then you can make changes by amending your original document and using the buttons to go back into your order.



The screenshot shows the 'View proof' stage of the Docmail process. At the top, there are four navigation buttons: 'Mailing options' (with a 'STANDARD DELIVERY' icon), 'Add documents' (with a '1 DOCUMENT' icon), 'Add addresses' (with a '4 ADDRESSES' icon), and 'View proof' (with a 'COLOUR DUPLEX' icon). Below these is the 'View proof' section, which contains a 'Printed proof (click address to view proof):' area. This area displays a sample letter with the Docmail logo and the following address: Mr D Dotpost, CFH Docmail Limited, St Peters Park, Wells Road, Radstock, Bath, BA3 3UP. Below the address, it says 'Printed and posted standard class'. A note below the proof reads: 'Please note: Ensure you check the proof carefully, paying particular attention to the mailing name and address. Docmail will add a white box behind your address, if you haven't left enough room, some of your document may be obscured.' Below the proof is the 'Mailing cost' section, which includes a 'VIEW MAILING SUMMARY' link, a 'Discount code' input field with an 'APPLY DISCOUNT' button, and a cost breakdown table:

Cost	£3.14
VAT (20%)	£0.63
Total cost	£3.77

At the bottom of the page are 'Back' and 'Approve' buttons. Five callout boxes provide instructions: 1. 'You can click on the icons to return to any stage of your mailing.' (pointing to the navigation buttons). 2. 'You can view your proof by clicking here. There will be an option to download the proof once you have viewed it.' (pointing to the 'View proof' button). 3. 'Click here if you would like a summary of your mailing.' (pointing to the 'VIEW MAILING SUMMARY' link). 4. 'If you are happy with the proof click here and you will be taken to the payment options.' (pointing to the 'Approve' button). 5. An arrow points from the 'Printed proof' area to the 'VIEW MAILING SUMMARY' link.

## 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.

**PAYMENT**
Switch to standard mode

---

Pay now

If you pay for this mailing by card you will be transferred to our secure payment provider [SecureTrading.com](#). You will be charged £2.27, this includes a 35p surcharge to cover the debit/credit card payment charges. Please note that we do not store any card details ourselves and will never ask you to provide them.

Pay by card
£2.27

If you pay for this mailing from top-up credit it will cost £1.92. Your top-up balance is £1.00. There is not enough credit in your account to pay for this mailing, please select an amount to top-up. If you top-up enough to cover this mailing it will be automatically submitted.

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.

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.

[Click here if you would like to change your payment method](#)

### Billing Details

Billing		
Title	First name	Last name
House name/no.	Street	Country
Town	Email	Telephone
County	Telephone type	
Postcode		

### Your Order

Merchant name: CFH Docmail Ltd  
 Amount: £0.90

Card number *	
Expiry date *	
Security code *	
Where is my security code?	<div style="background-color: #333; color: white; padding: 5px 10px; border-radius: 3px;">Pay</div>

\* Indicates a required field

[Click here to change your payment method.](#)

[This information needs to be the address that is registered to the card holder.](#)

[Once you have completed the form, click here to complete the transaction.](#)

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.



Thank you for your order

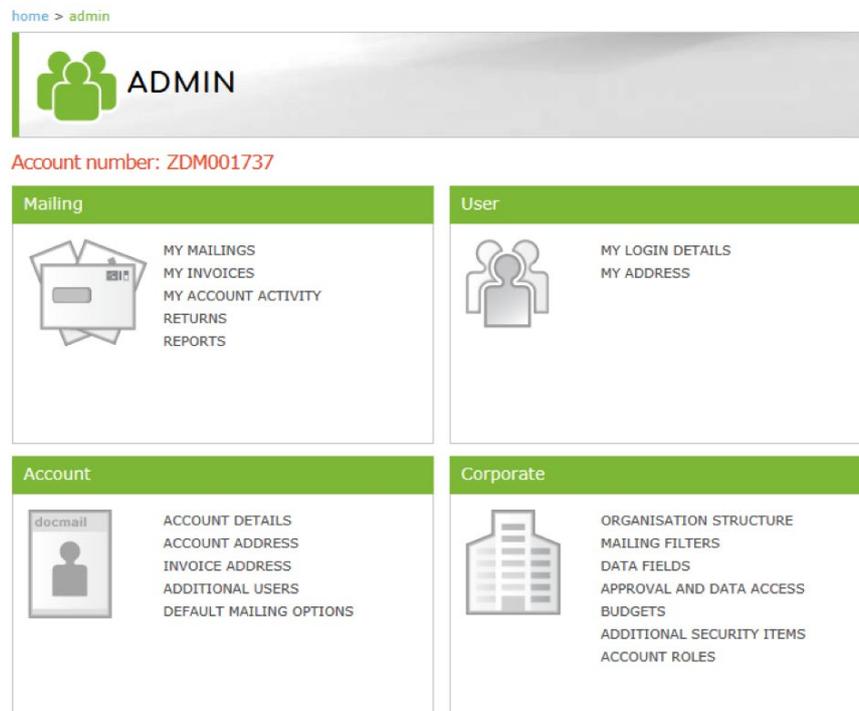
Your order reference is 1845681

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 (unless you have selected to receive no email communication from us).

Now sit back, relax and let Docmail do all the hard work. Your mailing will be printed, posted and delivered to you 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 do things like see your invoices, 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 option at the top of the screen to filter by product, select a date range or enter search text to look for specific order reference or mailing name. Due to GDPR purposes, you will only be able to see your orders you have created within the past 28 days.

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

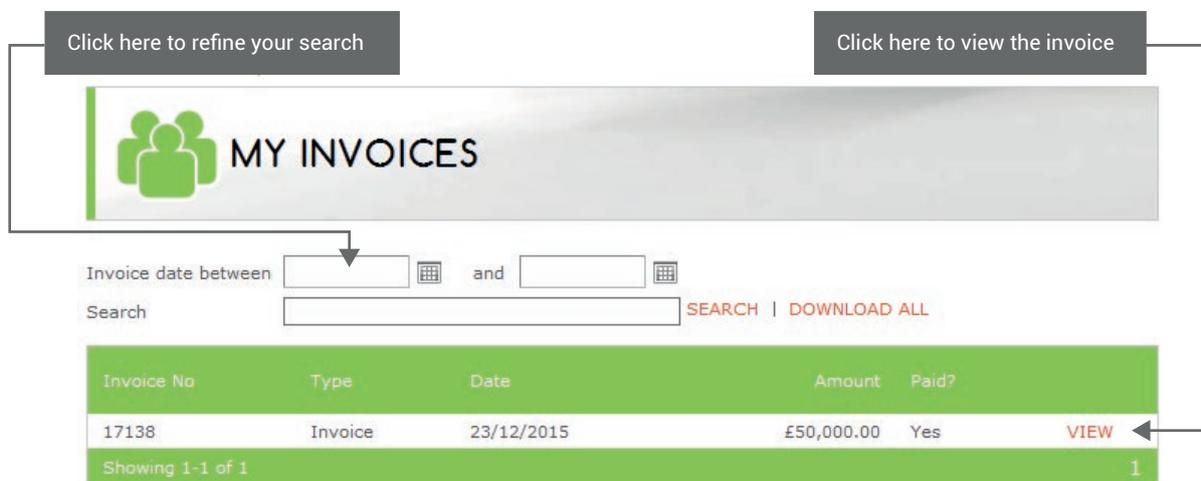
**Approved** - Approved but not yet paid

✗ A red 'x' 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 can download or print. You will only see invoices for orders that have been paid for, or top-up's you have made.



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	<a href="#">VIEW</a>

Showing 1-1 of 1

## 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 input dates to refine your search to see activity for a particular period.

**MY ACCOUNT ACTIVITY**

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

[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.

**TOP-UP ACCOUNT**






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

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

[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**

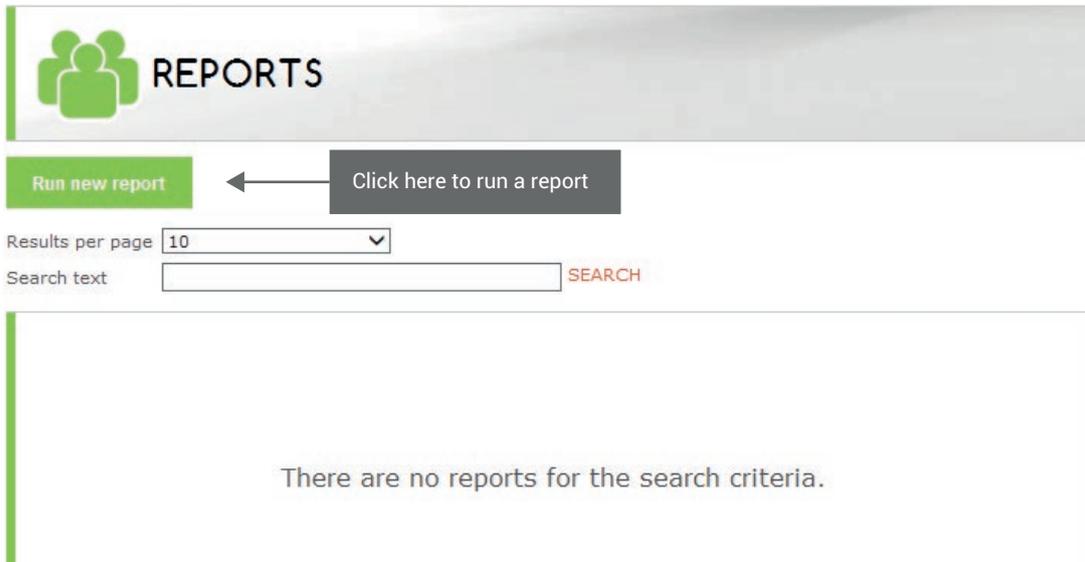
Show returns from other account users

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

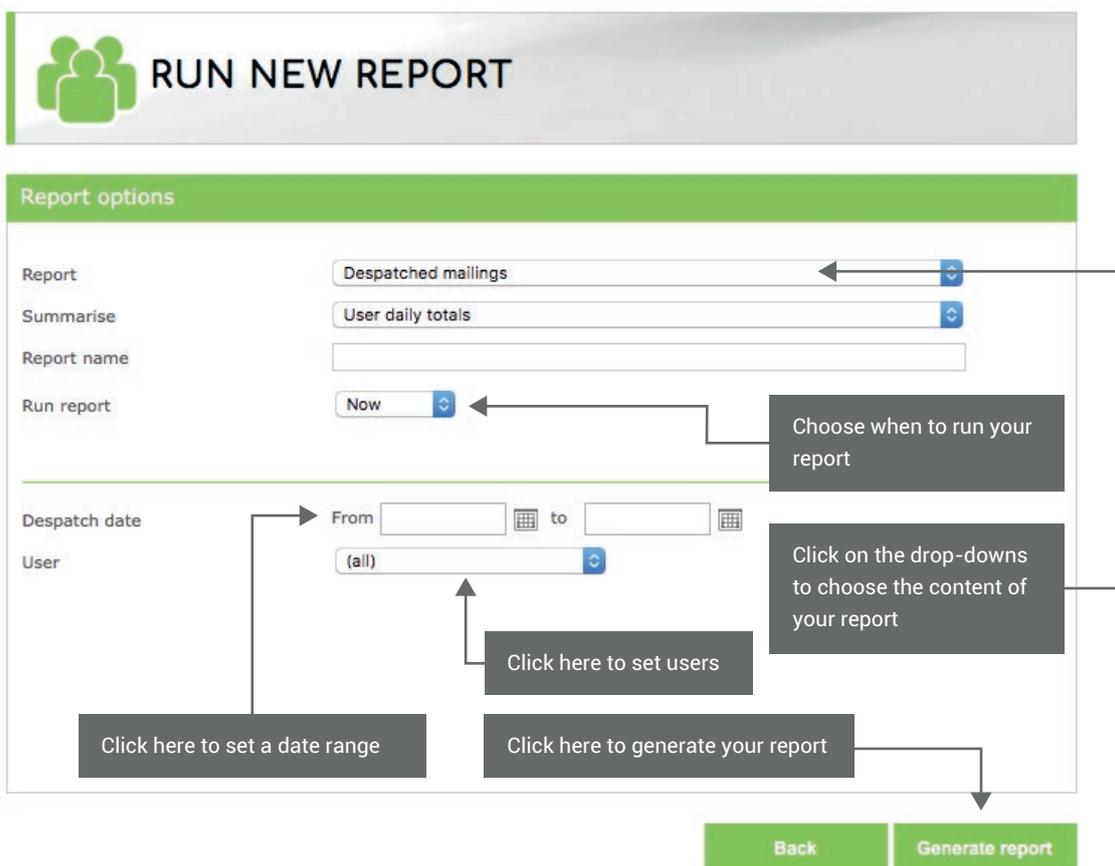
Showing 1-5 of 5
1

## Reports

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



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



You can also schedule a report to run on a regular basis which will be stored in the reports section of your account. Along with this option, you will receive a secure link via email to access the report directly. 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.



**Report options**

Report:

Summarise:

Report name:

Run report:  every   from  @

Additional email recipients:

---

Despatch date: From  to

User:

Click here to determine the frequency of the report

Enter the email address of any additional recipients here

[Back](#) [Schedule report](#)

## 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 the following elements and callouts:

- Callout 1:** "You can input a return address to be used on relevant mailings" points to the 'Return address' field.
- Callout 2:** "Select these options if you want to change your user login or password" points to the 'CHANGE LOGIN USER ID' and 'CHANGE PASSWORD' links.
- Callout 3:** "This option allows you to choose when you receive your confirmation" points to the 'Order confirmation email' dropdown menu.

The form content includes:

- Section header: **MY LOGIN DETAILS**
- Links: [CHANGE LOGIN USER ID](#) | [CHANGE PASSWORD](#)
- Fields: Login user ID (linda.horner), Order confirmation email (After every order), Returns email, Return address (CFH, St Peters Park, Radstock, BA3 3UP).
- Notes: "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."
- Footer note: "A valid UK address must be entered for returns to be processed."
- Checkboxes:  Allow web service access? (e.g. Docmail Print Driver),  Hide variable entry message?,  I do NOT want to receive emails about offers and promotions.

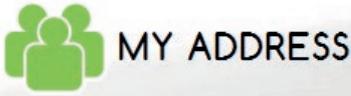
You can click the links and follow the instructions on the screen if you wish to change your User Login ID or Password.

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&lt;br/&gt;St Peters Park&lt;br/&gt;Wells Rd&lt;br/&gt;Radstock&lt;br/&gt;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, preferences and set default options to suit your mailing 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

## ACCOUNT DETAILS

Account name: LH

Account number: ZDM001732

Order confirmation email: (None)

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

Referral credit email: Monthly

Copy previous mailings: Copy documents only

Default product: A3 folded sheet

Default address font: Arial 10pt

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: Always hold for manual payment

Advanced printing options:

Show print margin?

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

Store order links on returns?

Returns email: (None)

Return address:

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

You can input some returns management information here

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

### 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

Please 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 details in the My Address section.

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

## Additional users

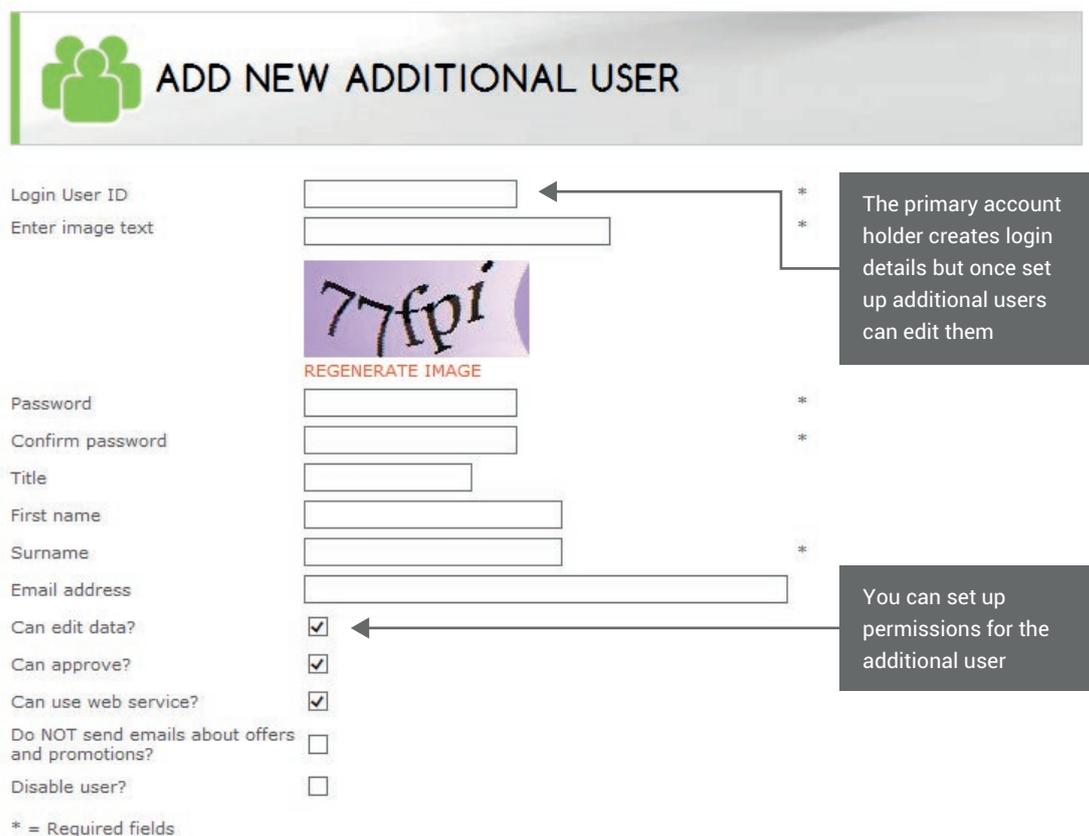
If you are the primary account holder (i.e. the person who set up the account) you can add additional users to your account. These users will be able to see the same documents and address lists as you, and will be able to place orders for mailings on your account, using the balance or by paying by card.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

Details can also be edited and deleted as necessary at any time.

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



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



## 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 yourself or additional users.

Then click on a product type.

[home](#) > [admin](#) > [default mailing options](#)



### DEFAULT MAILING OPTIONS

Select product type

 <p>A4 document</p>	 <p>A3 folded sheet</p>	 <p>A5 postcard</p>	 <p>Greeting card</p>	 <p>Text message</p>
--	--	--	--	---

[Back](#)

You can 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

---

### 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

Reset to default

Back

Next

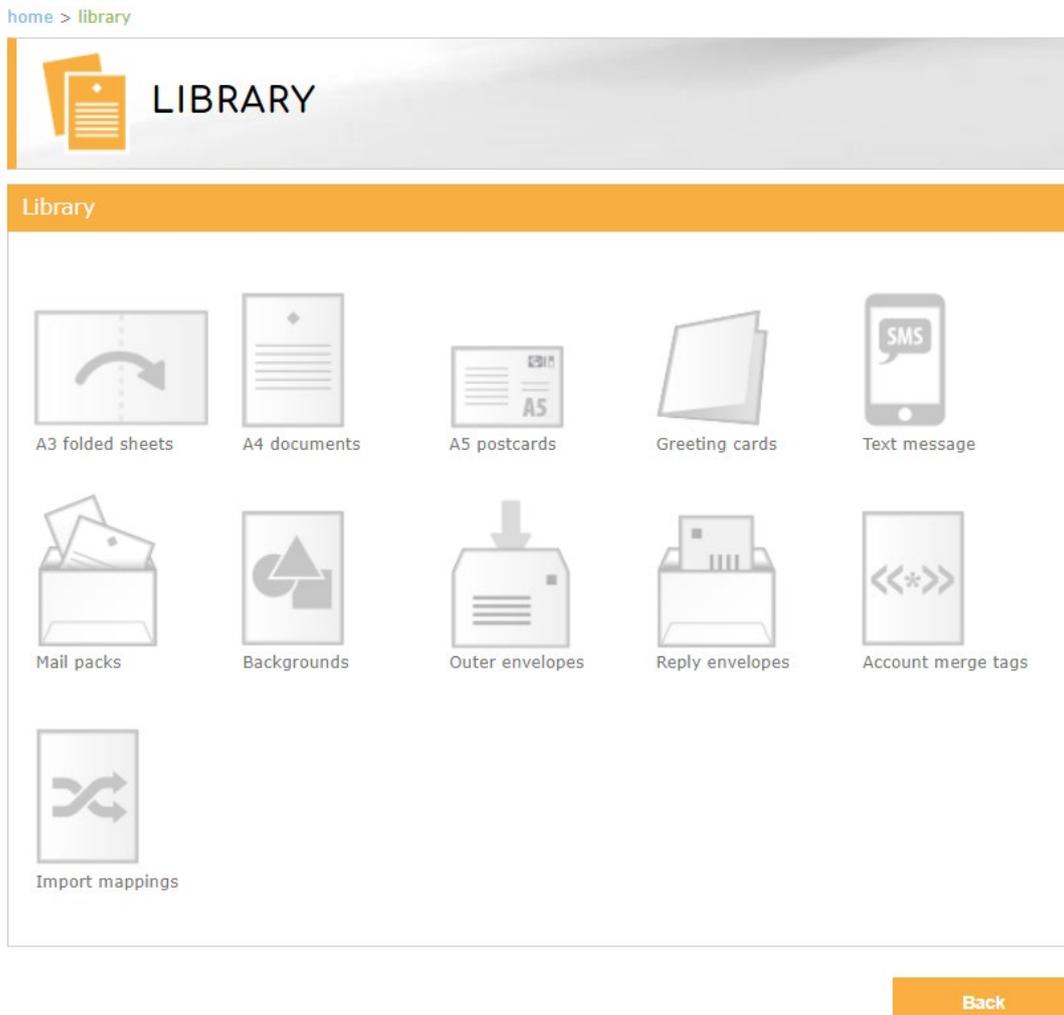
## Corporate

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.

LIBRARY

The Library is a place to store all of your documents.



It includes:

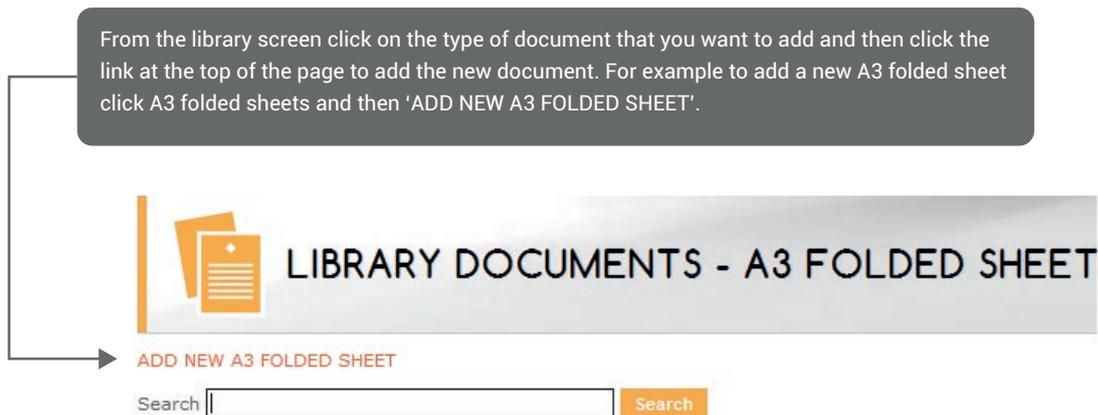
<p><b>Documents</b></p>	<p>You can save your letters and other document types to your Docmail account so that you can use them again and again without having to upload them to Docmail each time.</p>
<p><b>Mail packs</b></p>	<p>You can save groups of documents that you often use together as a mail pack. Mail packs must contain at least one document but may have more. All the documents in a mail pack must be the same size, but envelopes can be included.</p>
<p><b>Backgrounds</b></p>	<p>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 relevant one for each mailing that you create.</p>

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 / edit document

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 and .tif format.

Once you've clicked the type of document you'd like to upload to your library, the screen will look similar to the one shown below.



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

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

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

<p><b>Select new file/Upload file</b> (all document types)</p>	<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) for Open Office (.odt) document. You can upload a PDF document only if it needs printing exactly as the PDF supplied, and has form fields with merge tags in for any personalised information.</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>
<p><b>Document type</b> (A3 folded sheet, A4 document, postcard, background and A3 insert only)</p>	<p>This is already completed with the option that you clicked on and cannot be amended.</p>
<p><b>Address panel position</b> (postcard only)</p>	<p>You can choose to have the address printed on the right or left side of your postcard.</p>
<p><b>Name</b> (all document types)</p>	<p>This will help you to help identify the document, but is optional.</p>
<p><b>Description</b> (all document types)</p>	<p>You can enter some further information to help you identify the document-again, this is optional.</p>

<p><b>Background</b></p> <p>(A3 folded sheet, A4 document, postcard, greetings cards)</p>	<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><b>Can this document begin on the back of another document?</b></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, 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 with other documents, like in a mail pack, and you intend to use duplex printing.</p>
<p><b>Can another document begin on the back of this document?</b></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 with other documents, like in a mail pack, and you also intend to use duplex printing.</p>
<p><b>Password protected areas</b></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><b>Encryption password</b></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><b>Restrict use of the document to the creator?</b></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>

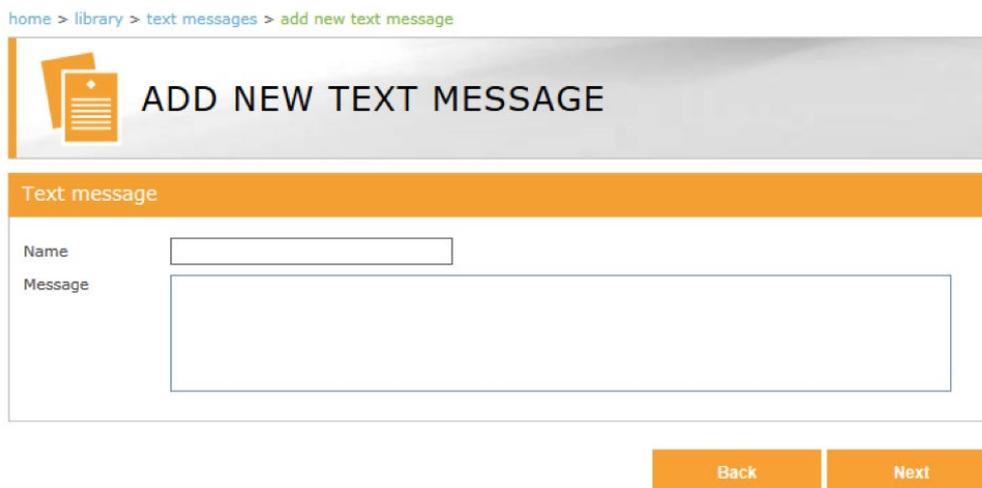
<p><b>Address panel font</b></p> <p>(all document types except backgrounds)</p>	<p>You can choose a font from the drop down list and Docmail will use this when printing the names and addresses.</p>
<p><b>File contents</b></p> <p>(A3 folded sheet, A4 document, postcard, greeting card)</p>	<p>Select 'Document' if you are creating a document to be personalised with information 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>

## 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 where you can enter your message, where you can also use merge tags for any personalised information. You may also give your message a name to assist you in identifying the content. 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 probably won't have any set up, but you can create them using the instructions above.

When you choose to use a background, Docmail will place it underneath your document. A common use of this feature is to make it look as if your document has been printed onto 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 loading of 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

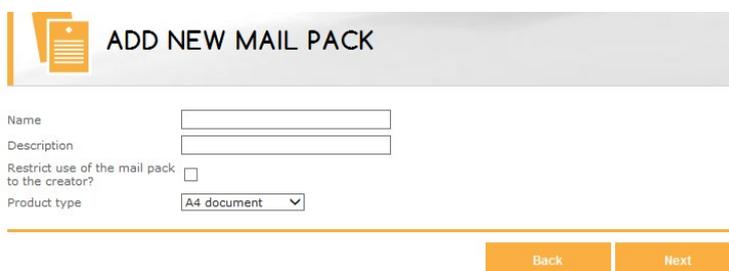
Once your documents are set up you can put them into mail packs. A mail pack is a group of documents that you want to send out together. Another way to think of a mail pack is as the contents of the envelope. Setting up mail packs means that you can organise your envelope content in advance, making it 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

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.



**ADD NEW MAIL PACK**

Name

Description

Restrict use of the mail pack to the creator?

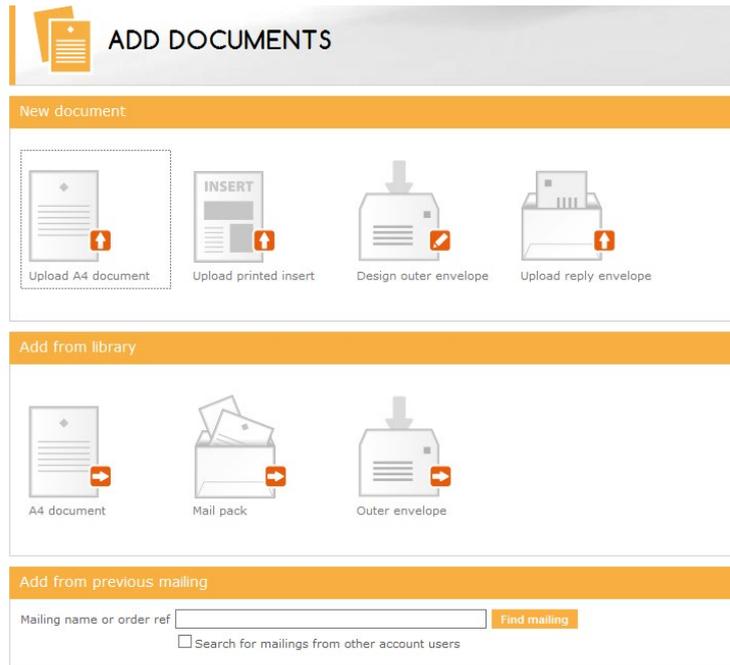
Product type

[Back](#) [Next](#)

The mail pack must be given a name, so that you can identify it. You can also add a description, where you can provide some more information about your mail pack. There is also a button named 'Restrict use of the mail pack to the creator', ticking this will mean 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, however you can 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

You have a few options for adding files to your mail pack. You can upload a file from your computer, add a stored document from the library or add an existing mail pack.

Full instructions for uploading documents are given under the section of this guide that covers creating a mailing.

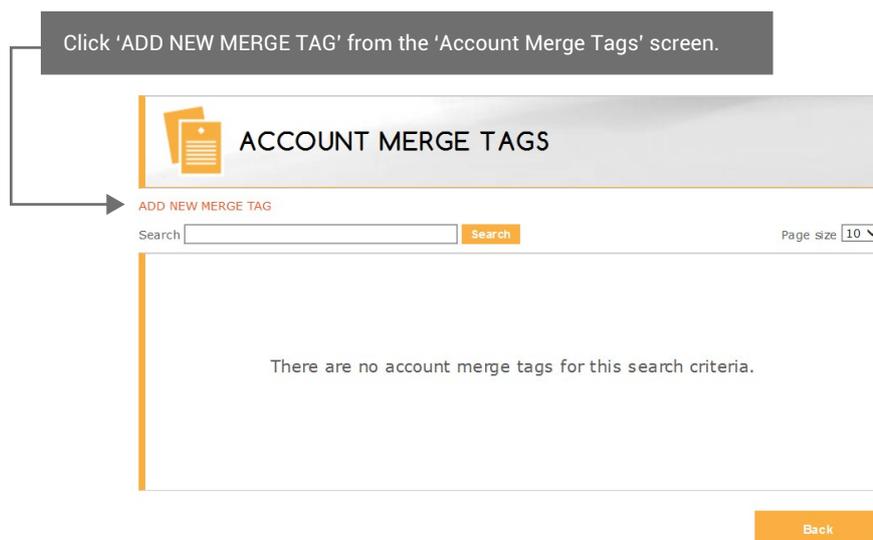
## Account Merge Tags

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 these 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- such as 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.



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



## ADD NEW ACCOUNT MERGE TAG

Add new account merge tag

Merge tag name	<input style="width: 95%;" type="text"/>	
Mapping type	<span style="border: 1px solid #ccc; padding: 2px;">Free text or custom address tag</span> ▼	
Allow formatted text?	<input type="checkbox"/>	
Multi-line?	<input type="checkbox"/>	
Max length	<input style="width: 40%;" type="text"/>	
Default value		
Required?	<input type="checkbox"/>	
Do not replace?	<input type="checkbox"/>	
Do not replace tags in text?	<input type="checkbox"/>	

Back
Next

Enter the account merge tag name here as appears in the document but with no chevrons.

When this merge tag is found in any document uploaded then the settings entered in this account merge will be used.

## Import Mapping

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



## IMPORT MAPPINGS

[ADD NEW IMPORT MAPPING](#)

Search

Page size 4 ▼

Click here to add new mapping

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 column headers. You can 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

File contains column headers?

File format

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		<input type="text" value="Full Name"/> <input type="button" value="v"/>
address		<input type="text" value="Address Line 1"/> <input type="button" value="v"/>
postcode		<input type="text" value="Address Line 2"/> <input type="button" value="v"/>

If you need to change any field, click on the 'Map To' drop down to choose the field you would like assigned.

Once you are ready to proceed, click 'Next'.

# APPENDICES

## Appendix 1 - Document set up guidelines

Templates for Docmail can be accessed in the following location: <https://www.cfhdocmail.com/live/help.aspx>

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. With all other documents, you can type the merge tags into your document before uploading to Docmail.

Personalised means that Docmail will put the name and address on the document (unless you choose to select no address panels), and wherever you have used a merge tag in a document, Docmail will replace that field with the data provided in your spreadsheet.

### 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 recipient 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 more professional.

We recommend that you start your letter at least 9cm down from the top of the page, allowing room for the name and address to be printed. The address will be imputed into your document 4.5cm down from the top of the page. If you are including the name and address on the letter you are uploading and not relying on Docmail to input these details, we recommend using these margins to get the best print output for your document.

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 include personalised pieces of data from your spreadsheet into your document by using 'merge tags'. Merge tags tell Docmail where to add particular pieces of data. You can use any of the fields from your data spreadsheet in your documents, by using the format <<fieldname>> in the document itself. 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. Please make sure that your column headers in your spreadsheet match the name of the merge tag.

For example, in your letter you might want to say "Dear Fred", where Fred is someone's first name. Then you would display this on your letter as "Dear <<Firstname>>".

If your spreadsheet column header is '**Firstname**' then please enter your merge tag matches and is entered as '<<Firstname>>'. It will automatically use the content of the field "Firstname" from your name and address data and place it in the space where the merge tag is. This is called "merging". These merge tags can be used anywhere in your document. The full list of standard Docmail merge tags you can use is shown in the table below.

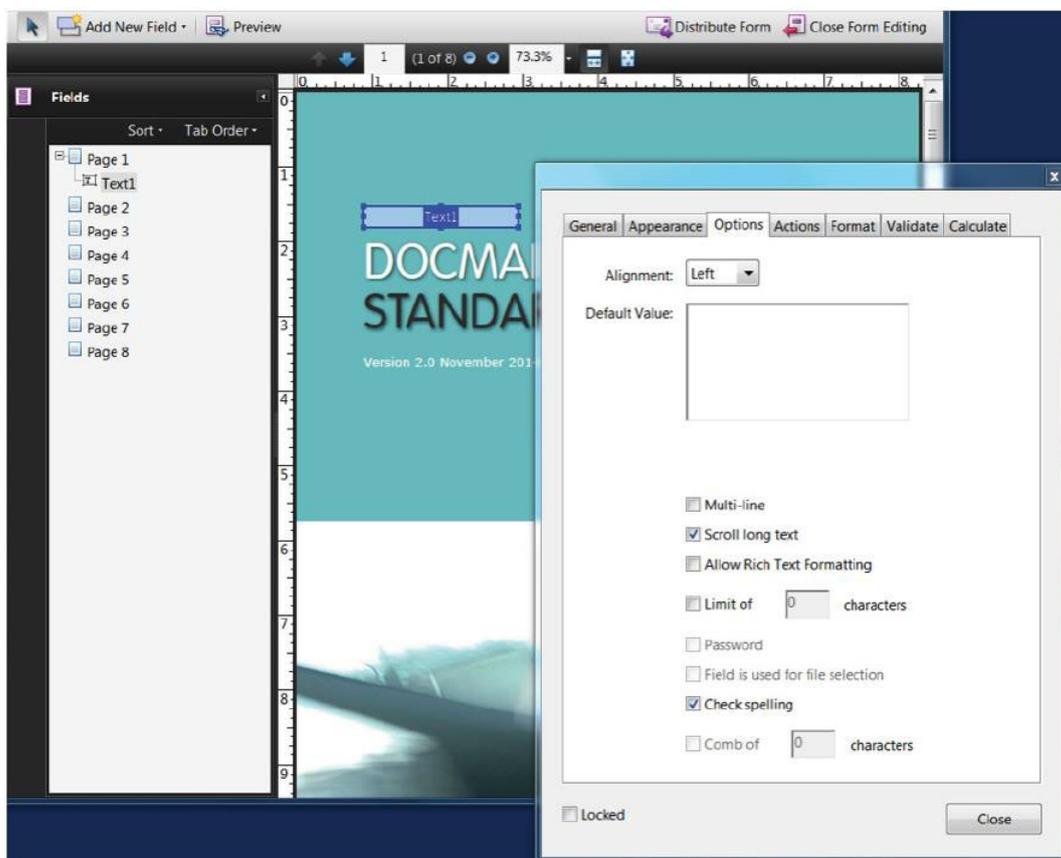
Docmail Field Name	Tag to use	Docmail Field Name	Tag to use
Title	<<Title>>	email	<<email>>
Firstname	<<Firstname>>	extrainfo	<<extrainfo>>
Surname	<<Surname>>	notes	<<notes>>
fullname	<<fullname>>	Custom1	<<Custom1>>
companyname	<<companyname>>	Custom2	<<Custom2>>
Telephone	<<Telephone>>	Custom3	<<Custom3>>
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 tags in your document that are not standard Docmail fields then, as long as the column headers in your data match the merge tags, these can be used by Docmail by using the 'add custom field' mapping option. Or you can name the merge tag and column header 'Custom 1' (through to 10) and map it to the correct one.

## 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 the process is the same as for a Word file - Docmail will extract the form fields from the document as merge tags.

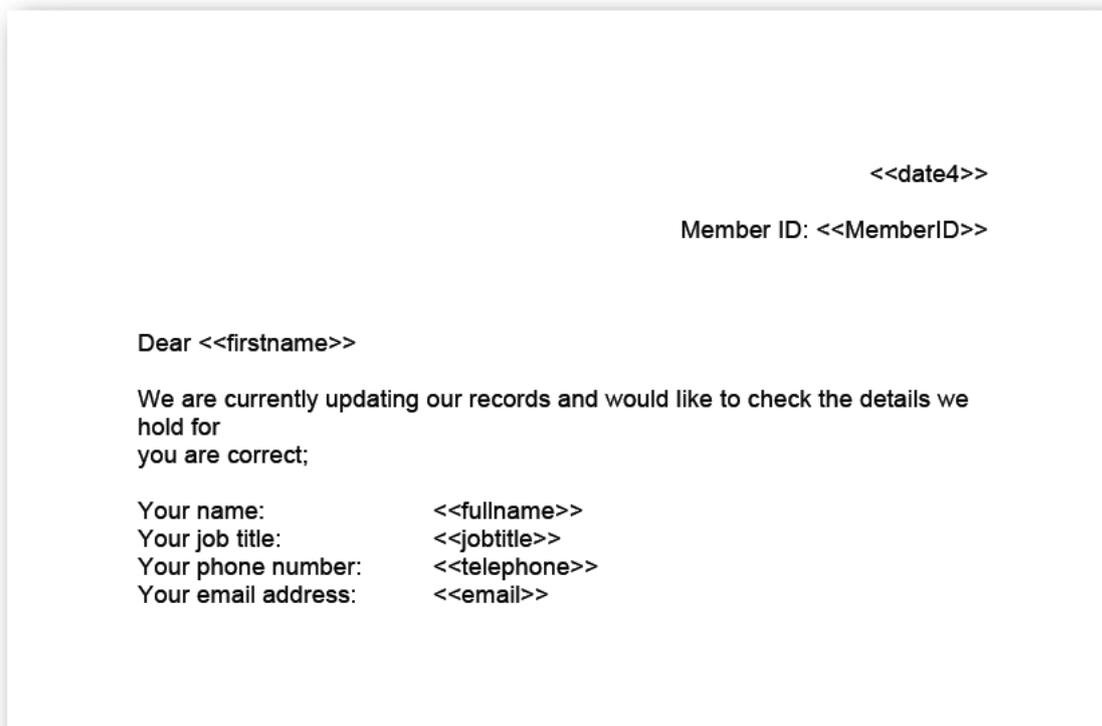
## Using the date in your documents

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:



Docmail will then apply the name and address in the correct position and merge all the right details from your spreadsheet into the merge tags 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.



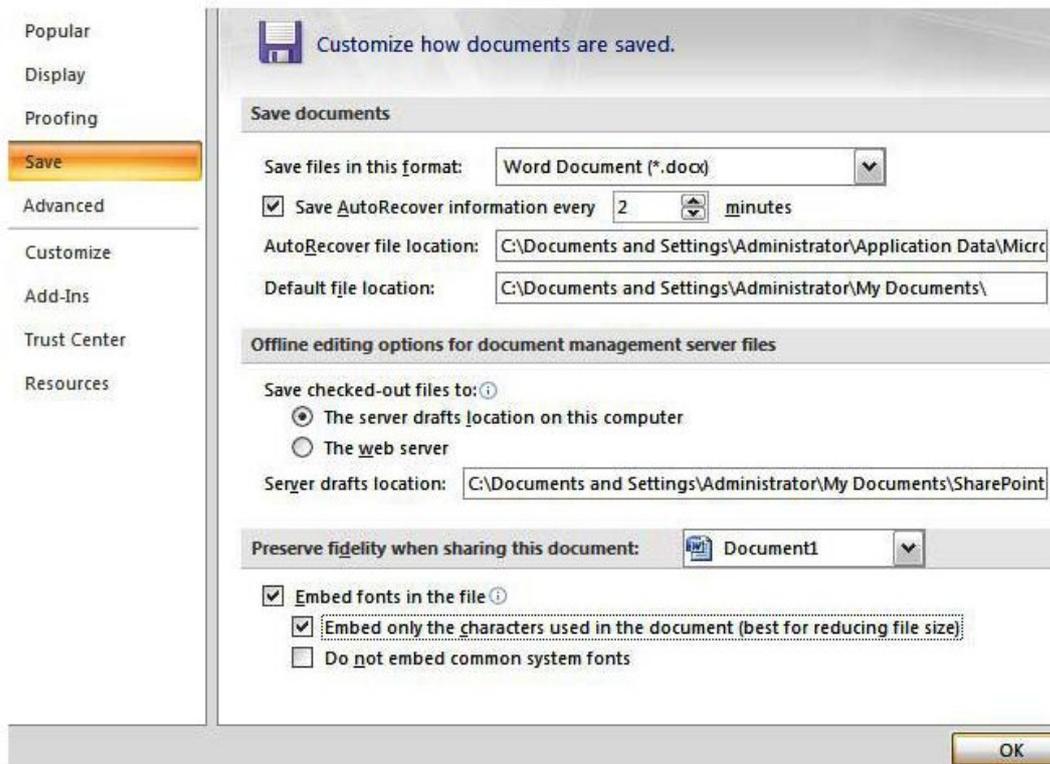
## Merge tags with no data in your spreadsheet

Sometimes your merge tag information can be the same for every recipient in a certain mailing, but can vary depending on the mailing itself. 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 tag in your document for <<location>> and <<time>> in exactly the same way as described, but not have a column with this information in on your spreadsheet (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' just before the proof stage. You will then need to either click 'change to free text entry', where you will be taken to a page to allow you to enter the text, or you can click 'allow blank data', which will keep the area blank on the letter where the merge tag is.

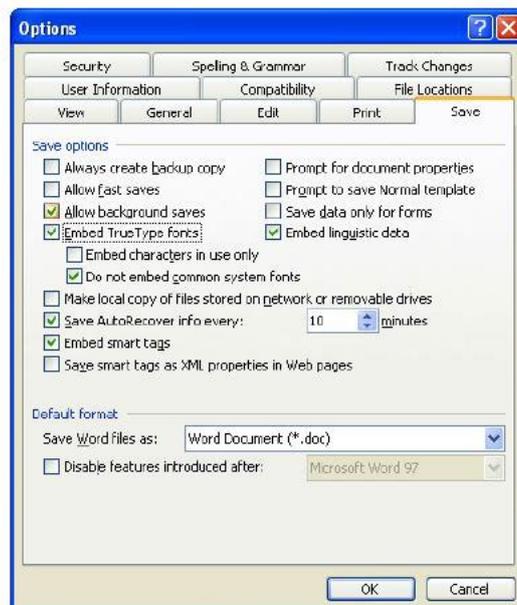
## Embedding fonts within a Microsoft Word file Word 2007 & later versions

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.



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'.

Click Select to find the document from your computer

Once you have uploaded your multiple address stream document 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

Check the mapping and make any necessary amendments. If you need to change any field, click on the '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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