
DOCMAIL

PRINT DRIVER

USER GUIDE

v3.5



To use the Docmail Print Driver you MUST have a current Docmail account up and running. For more information, go to www.docmail.co.uk

Install the Docmail Print Driver on your PC. You will find a link to this on the Docmail web site - www.docmail.co.uk/printdriver - simply follow the instructions.

You must have Webservice Access enabled on your Docmail account (to check this, go into your Docmail account and click on 'Enter admin' and then 'My Login details', the box next to 'Allow web service access' should be ticked).

Integrated Help

When creating your mailing through the print driver, Docmail will provide you with a help panel if required. By pressing the F1 key on your keyboard, a help panel will be displayed on the mailing creation screen.

By pressing your tab button, the information will change and be specific to the option available on the mailing creation screen.

DOCUMENT

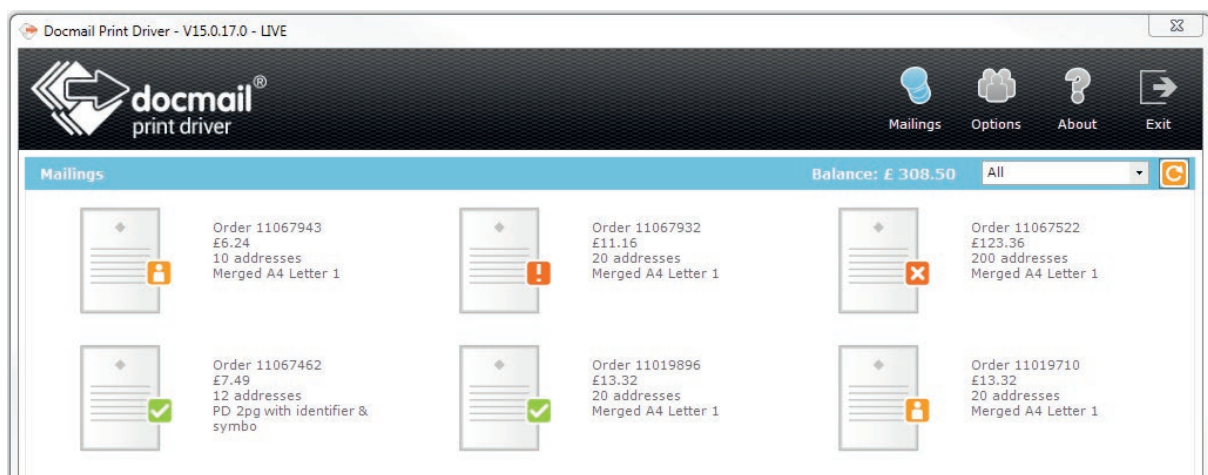
Create your letter document...

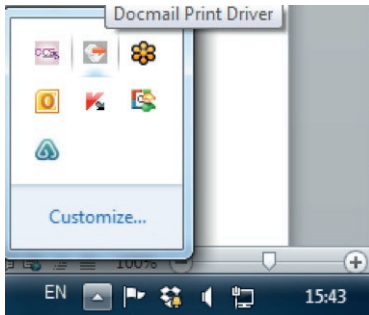
If your document is a PDF, to preserve font information, it is recommended that you drag and drop this straight into the **Print Driver** window. Log in to the Print Driver and you will see this screen. Drag your PDF document into the window and the Print Desktop steps described below will apply.

Please be aware that if a PDF is made up of images (e.g. a scanned document), the Print Driver may not be able to extract any text from it.

For any other documents simply select the Docmail option when you want to print your document and follow the instructions below.

Always remember to check your Docmail proof before submitting the order.





Please note: if you have already used your Print Driver it may be running in the system tray on the bottom right hand corner of your screen. To open the Print Driver double click on the icon as illustrated below.

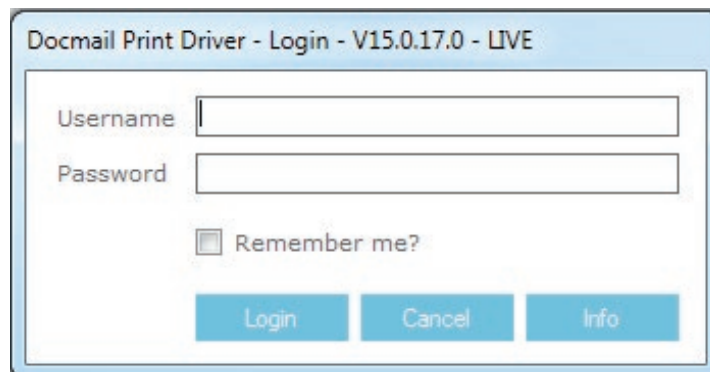
Please find the PDF you have saved on your PC and drag and drop it into the middle of the Print Driver main window. This can be done by picking the file up and dragging it into the middle of the screen as if you were moving it into a new folder.

Once you have dragged and dropped your PDF step one of the Print Driver will appear. Please see the above steps on how to create your order.

PRINT TO DOCMAIL

After installing the Docmail print driver you can print any document in the same way as you would to your local printer, except from the Windows Print dialog box select "Docmail" as the printer..

You will be presented with a login screen to log into Docmail.

A screenshot of the 'Docmail Print Driver - Login - V15.0.17.0 - LIVE' dialog box. It features two input fields for 'Username' and 'Password', a checkbox for 'Remember me?', and three buttons: 'Login', 'Cancel', and 'Info'.

Clicking 'Remember me' will remember the username and password in the system and they will be completed automatically next time you use the system. The remembered credentials can be edited by choosing the 'Change Credentials' option on the system tray context menu, or by selecting Options on the Print Driver screen.

Clicking 'Info' will supply system information about your print driver.

Click Login and the Print Driver will appear. There are 4 steps to go through:

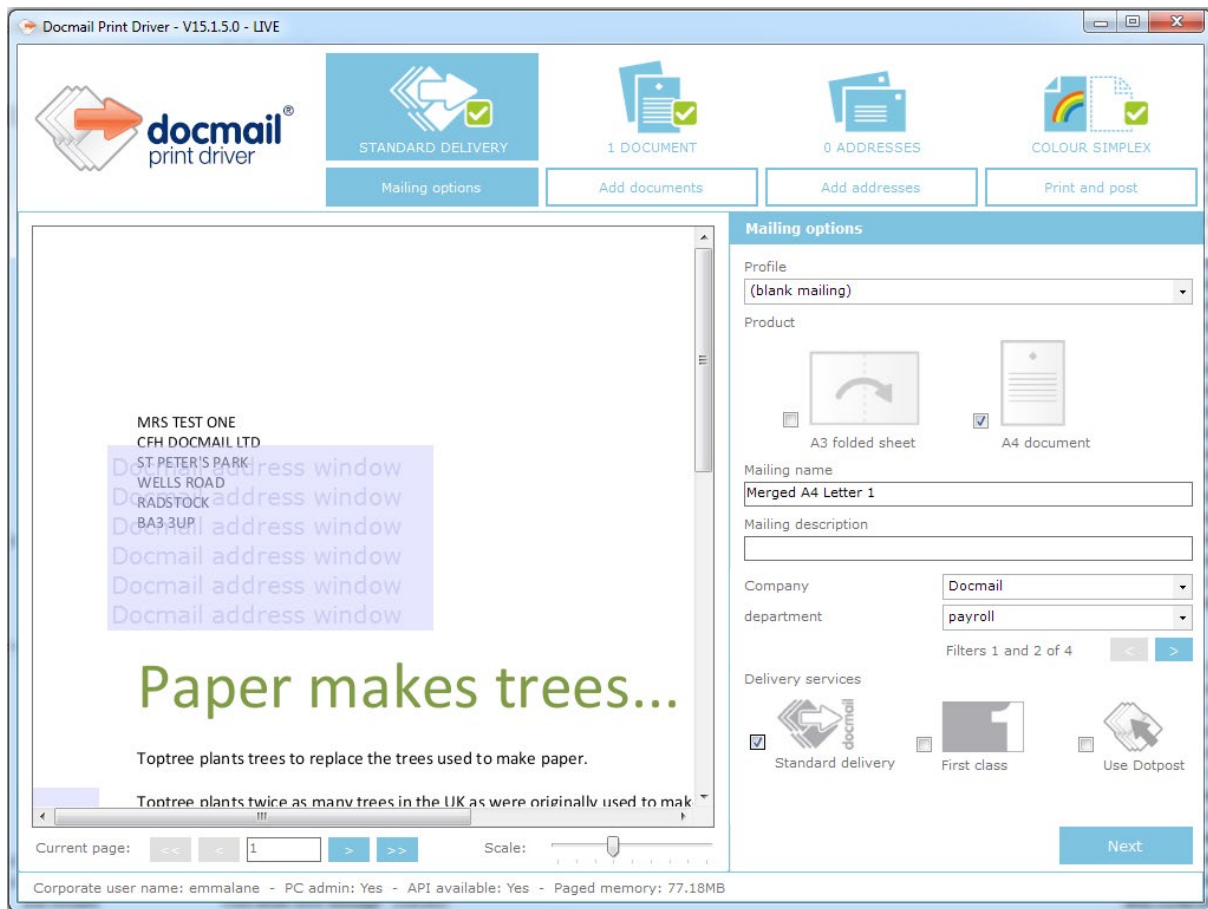
If you are using a Clinical System and/or sending multiple letters, we recommend turning on Merge mode. For more information on Merge Mode, please see Appendix 1.

MAILING OPTIONS

Select a Product - (This must be an A3 folded sheet or an A4 letter)

If selecting an A3 product, the file must be supplied as A4 individual sheets, in the correct order so that Docmail can paginate these for you.

Please note that if you select A3 as your product type this will only allow one A3 folded sheet for each mailing.



Profile

A profile is a selection of saved options that you have previously set. You may, for example, have one profile that you use for all your single-sided black and white 1st class letters and another for all your colour 2nd class multi-page letters.

Choosing 'blank mailing' will allow you to create a brand new profile. Choosing 'previous mailing' will use the options chosen on your previous mailing through the print driver.

If you have saved profiles you can choose to use one and all the settings for the next steps of the mailing will be pre-loaded for you, saving you time. You can save a profile to use on future mailings by clicking on 'Save Profiles' at the last step of your mailing, when you have viewed your proof, and before and after you have submitted your mailing. You will not be able to save a profile against an order that has been cancelled.

Re-selecting the same profile will reset all current settings back to the original profile's settings.

Mailing name

You can give your mailing a name to identify it. The Print Driver will add a default mailing name from your filename if you do not wish to add your own.

Mailing description

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

Corporate structure

If your account has an organisation structure additional options will appear to allow you to select your organisational link. Please select the relevant link from the drop down menu provided.

Delivery services

Choose standard delivery if you want the lowest prices or first class at an additional cost.

You can also select Dotpost against A4 orders. Dotpost is a secure online document hub where users can securely view and manage their letters and documents.

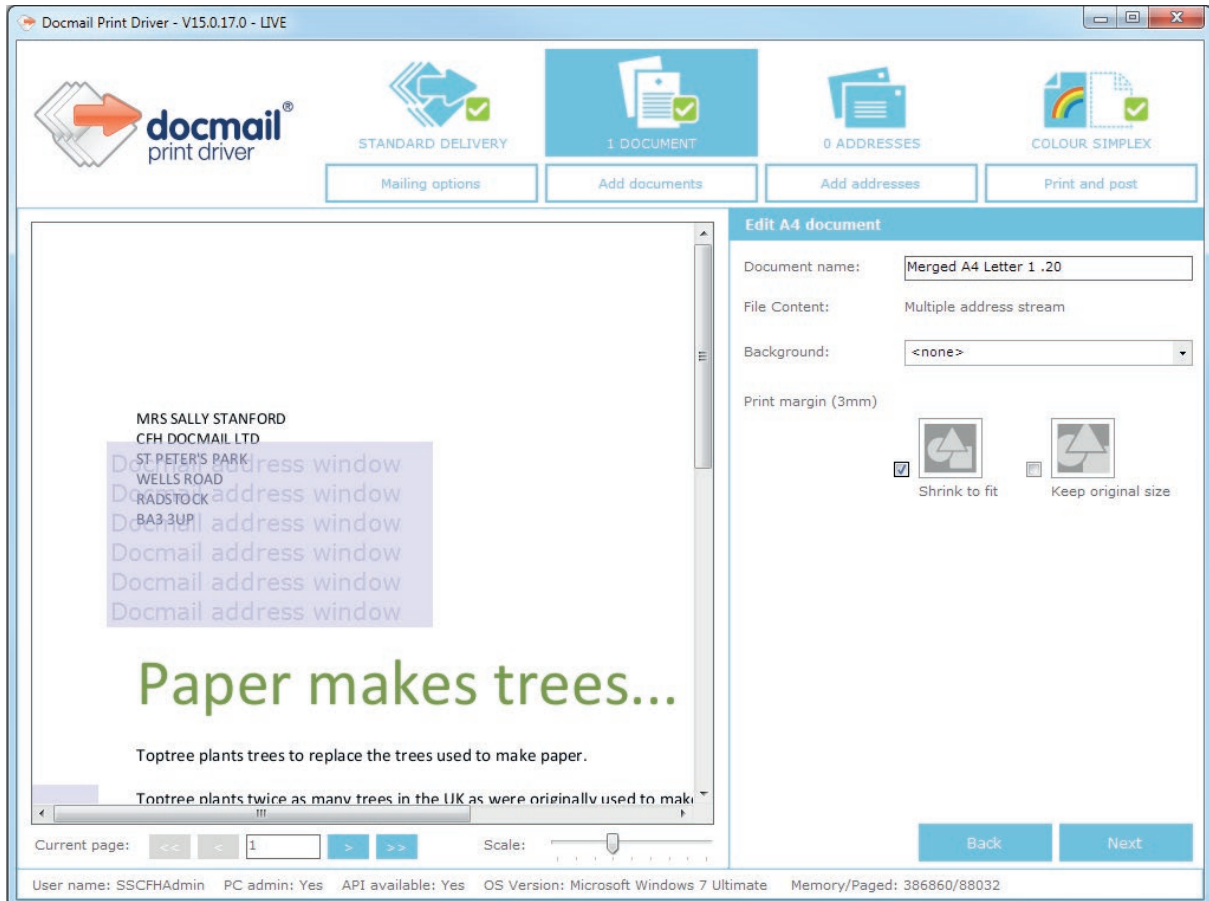
If you are registered to use Dotpost and you tick this box your addressees who are signed up to receive Dotpost documents from you will get their documents electronically via Dotpost; your other recipients who are not signed up to receive Dotpost letters from you will get an additional page in their letter (free of charge) inviting them to sign up.

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

Click 'Next' to continue.

ADD DOCUMENTS

This screen shows details of the document that you are printing -



Document name

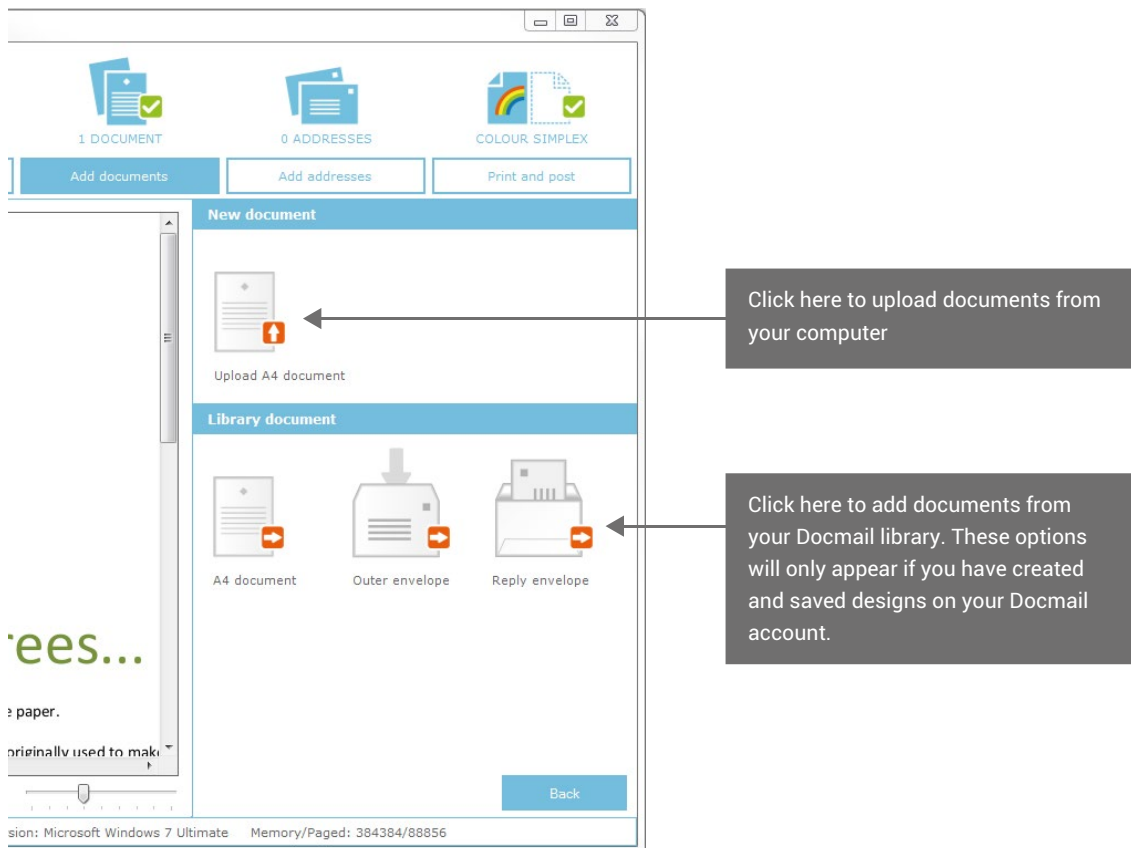
The name input by you, or the automatic reference allocated by Docmail.

Background

Backgrounds are used for graphics that require adding behind the first page of your document. Uses include letterheads or adding company information to each uploaded document.

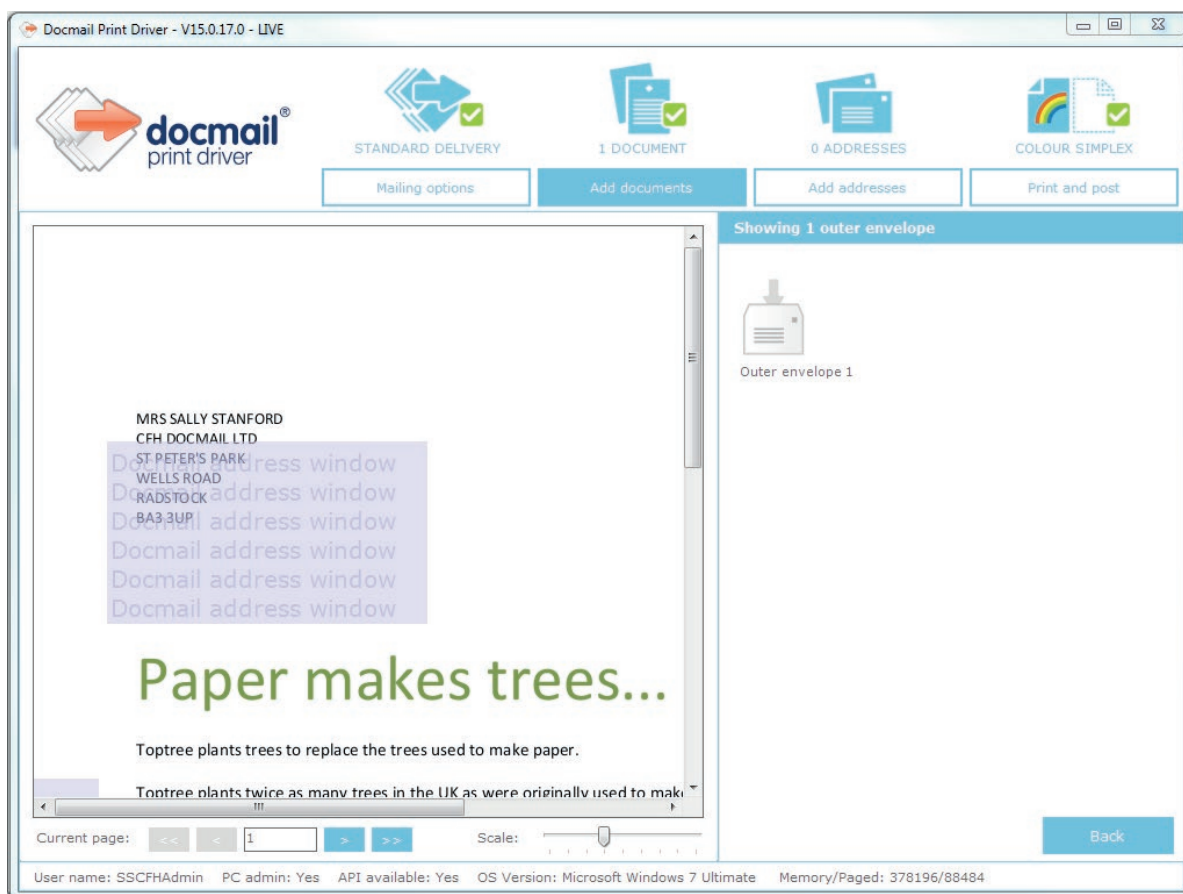
Print margin (3mm)

Docmail needs to add this border so you should ensure that you have no text in this area. If there is text it will be cropped off. Do not change this setting unless you need to avoid scaling on your document e.g. if it includes barcodes or if it will be used for optical scanning.



Click on 'Add documents' to upload additional documents, either from your computer or from your library. The documents available in your library may include any envelopes that you have saved.

When selecting an outer envelope or reply envelope to add to your order, you will be shown all of your available designs on screen. If you do not have any saved designs for these in your Docmail account, the option will not be available.



When you have added all the documents that you want to use on your mailing click on Next or on 'Add addresses'.

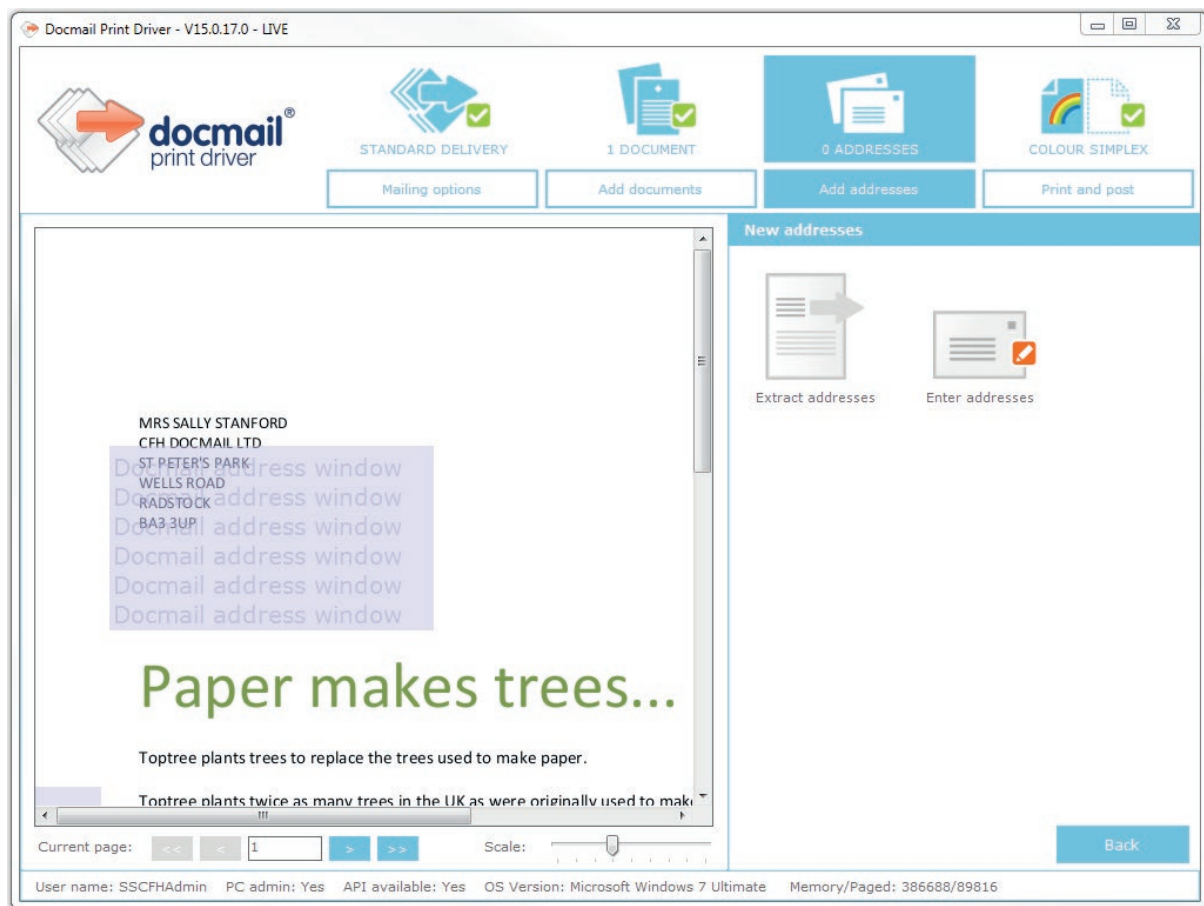
ADD ADDRESSES

Extract Addresses

The blue box shows where the address panel will be added, unless you choose not to add an address panel as part of your envelope preference on the print and post step.

On the example shown you will see that the address is not in the box that Docmail needs to use. This is not a problem as Docmail can move the address for you.

Click on 'Extract addresses'.



Select the area where the address shows on your document by clicking and dragging across your address. The extracted text will be shown in the box 'Extracted text using PDF'.

Page identifier logic

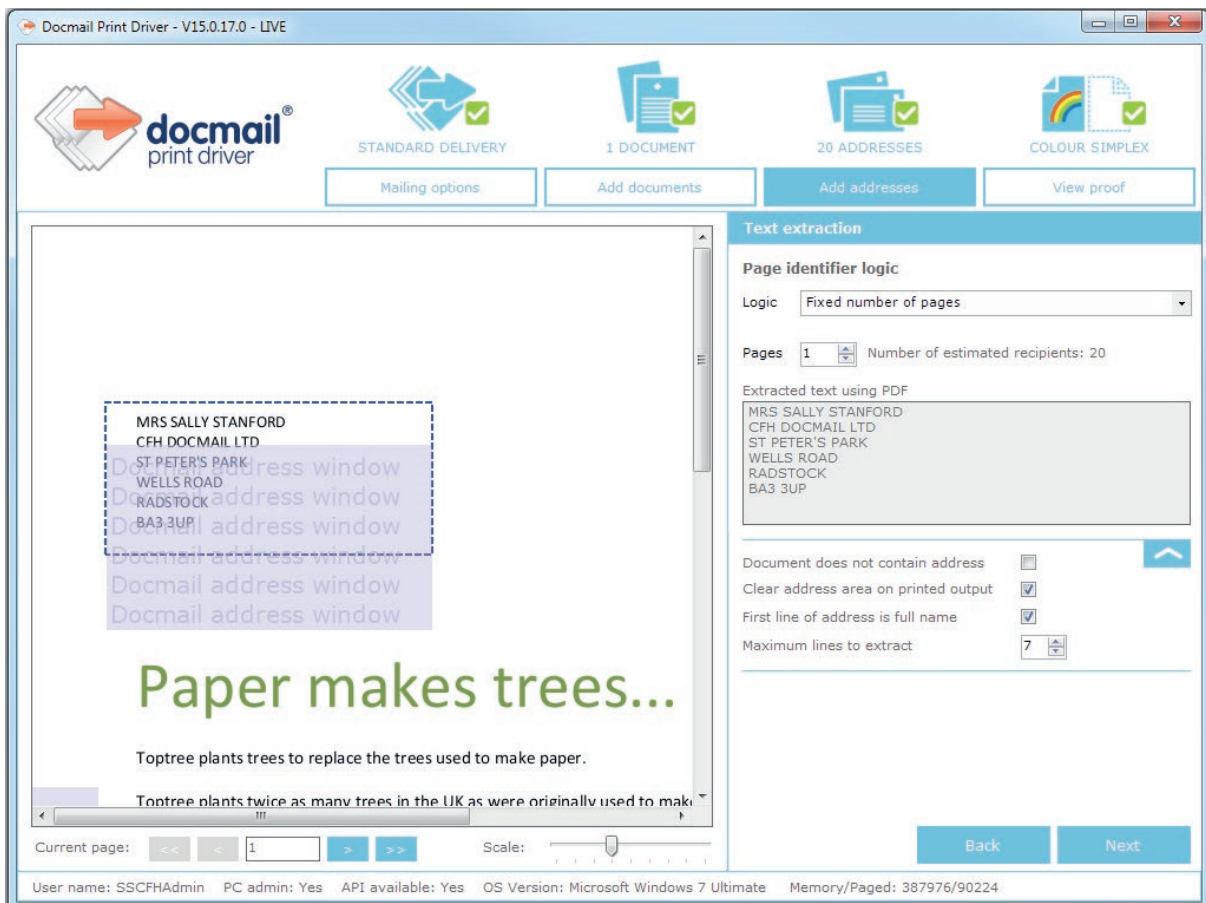
You can input logic to tell Docmail what the first page for each mailing will be.

Whole document to single address

This extraction method should be used when your document contains only one recipient address. This can be used by the extraction method or add address.

Fixed number of pages

You can specify the number of pages each recipient will have in their envelope. Your document will need to have two or more recipients in it when using this method for extracting addresses. Docmail will display how many pages are to be sent to the number of address identified.



For example -

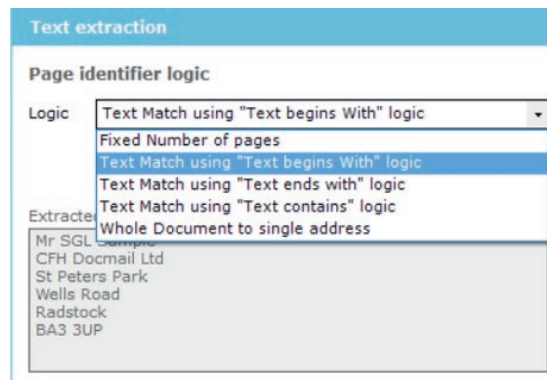
- If you had a 50 page document that contains 5 letters, each 10 pages long, then enter 10 as the number of pages.

The pages for an A3 document must be between 1 and 4. The total number of pages including any additional documents must be either 3 or 4 pages.

Text match logic options

The 'Text match' logic options work by identifying unique words/phrases that only appear in a place that you designate on the addressed page of a recipient's letter. This allows Docmail to identify the first page of each letter and split the file, even if different letters in your file have differing numbers of pages.

When using this logic, it is really important to ensure that the words or phrases only appear on the first page of each letter and will appear within the area that you designate.



Text match logic options available are:

- **Text Match using 'Text begins with logic'**

If the match text was "Welcome", Docmail will search for all of the text in the designated area of each page and look for pages where the first word is "Welcome". If "Welcome" is identified in this area, Docmail will class this as the first page of a recipient's letter.

- **Text Match using 'Text ends with logic'**

If the match text logic was "me" and logic option was 'Text ends with logic', Docmail will search through all the pages looking for this word to identify the first page of a recipient's letter.

Using this logic, if the word "Welcome" was the last word within the designated area it would identify this as the first page, however the word "men" appeared Docmail would not class this as a first page

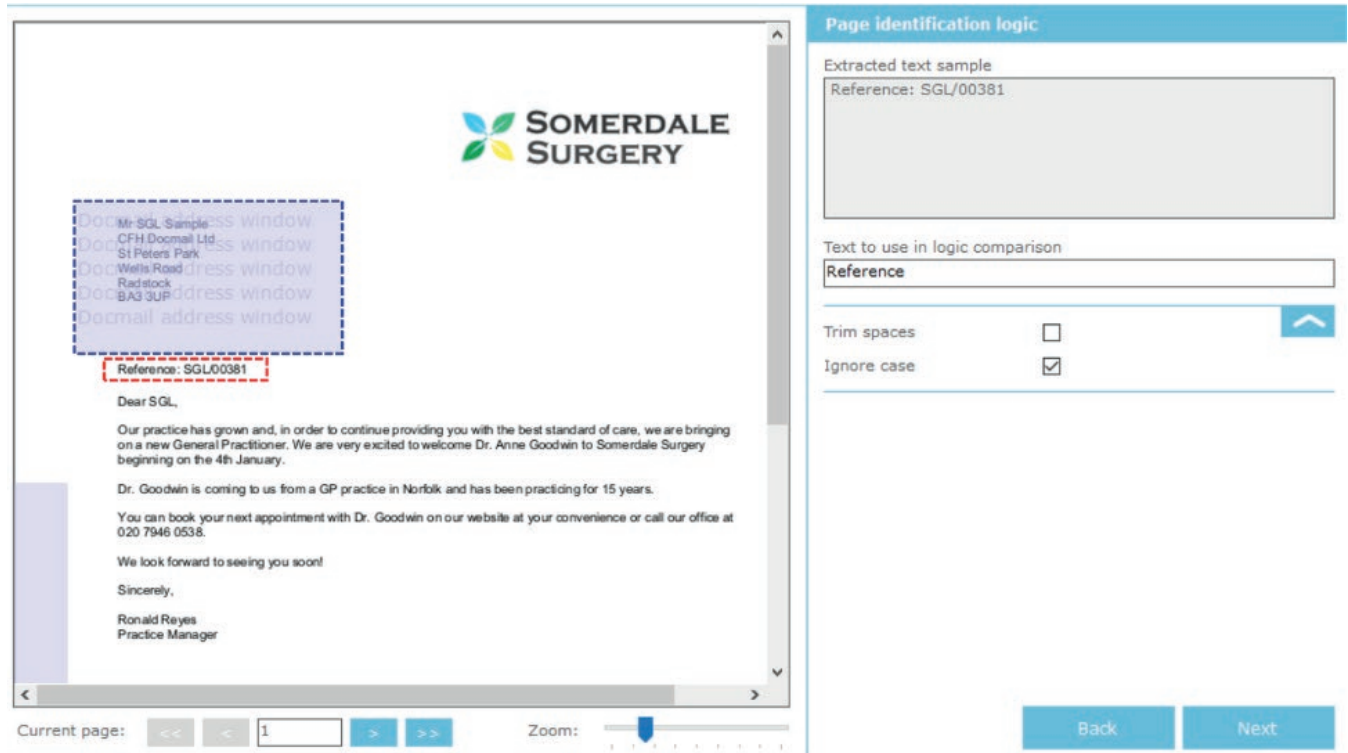
- **Text Match using 'Text contains logic'**

If the match text was 'lc' and logic option was 'Text match' using 'Text contains logic', Docmail will search for 'lc' in the area designated area. If it exists, this will tell Docmail that this sheet is the first page of the recipient's letter pack.

Using this logic, if the word "Welcome" was within the designated area it would identify this as the first page, as would other words such as "ulcer" and "velcro". Therefore, you always need to be very careful using this logic.

After selecting a text match logic, click Next to designate the area that you wish to search on each page.

Select the designated area for Docmail to search by clicking and dragging across it. A red box will show the area that Docmail will search within each page.



Be aware that in some cases the text you are looking for may move from page to page, for example if you look for some text below the address panel it may move slightly if most addresses have five lines but one of your recipients has six. Always make sure that your box is large enough to take this into account without accidentally picking up unwanted text.

If after drawing your search box you wish to amend the match text to look for, use the Text to use in logic comparison box to edit it.

After you click next you will see both the total number of addresses extracted by and the addresses themselves. It is very important to ensure that both are correct.

For a full worked example of using text match logic, please see Appendix 2.

Clicking on Advanced Options will offer additional fields. These options will not be needed very often.

| | |
|---|--|
| Document does not contain address | Check this box if your document does not have an address. You will have an opportunity to enter a recipient address if your document does not contain an address. |
| First line of address is full name | Tick here if the first line of the extracted address is the recipients full name. |
| Clear address area on printed output | This will draw a filled white box around the dragged area. This allows a customer address to be printed in a different area of the page, captured and put in the correct place for Docmail and for the original address to be removed. |
| Maximum lines to extract | This controls the number of lines of text that will be pulled from the dragged area. The maximum is 7. |

When the screen is completed as required click Next.

This screen will be displayed.

These boxes display the recipient full name and address that has been identified in the address area. This can be edited if required. To save your changes, click on 'Update'.

You can click here to use the Address name prefix. This will add text that precedes the address e.g. "To the parent / guardian of".

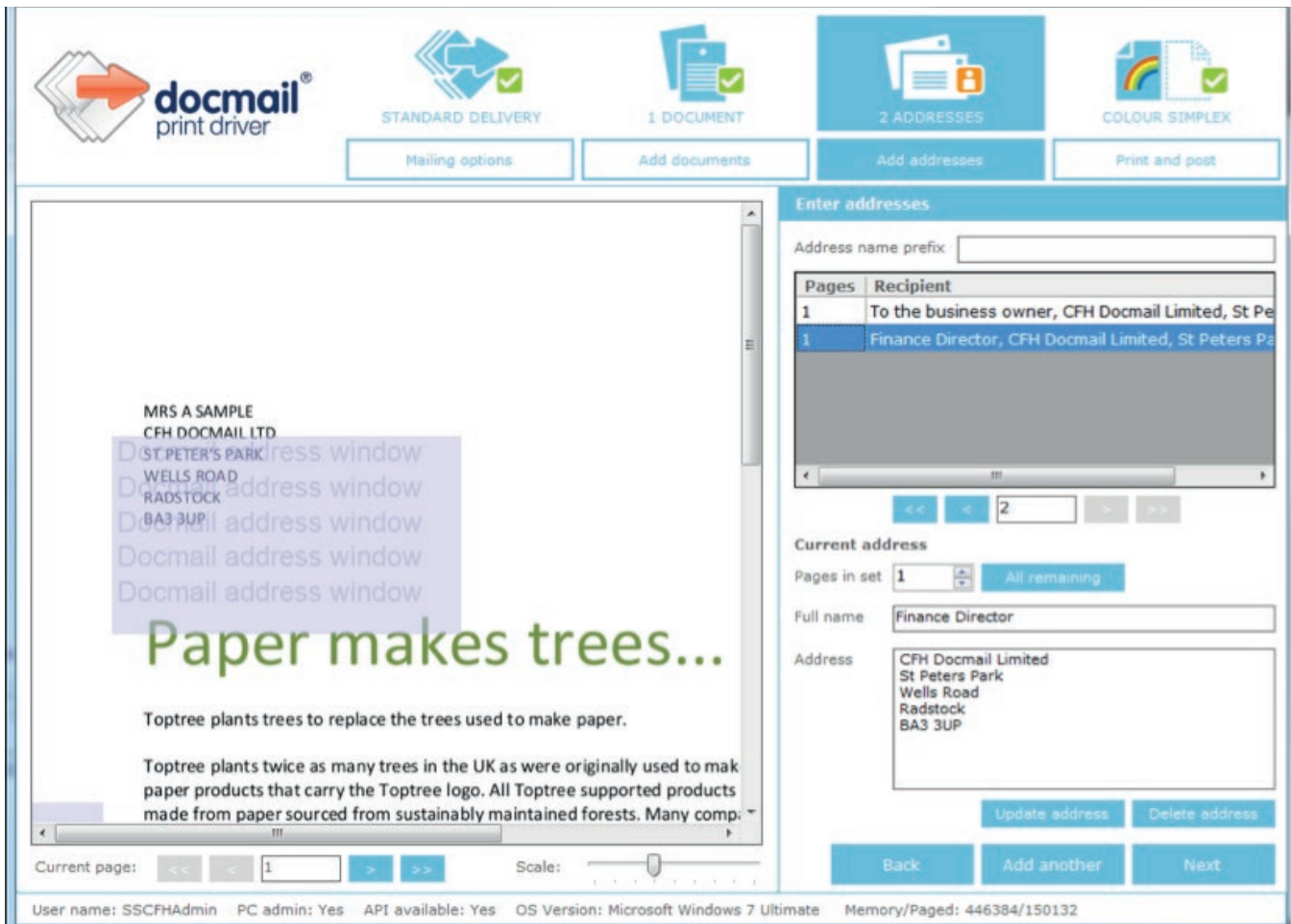
You can click here to change any extraction option.

The screenshot shows the Docmail Print Driver interface. The main window displays a document with a dashed box around the address area. The address is: MRS SALLY STANFORD, CFH DOCMAIL LTD, ST PETER'S PARK, WELLS ROAD, RADSTOCK, BA3 3UP. The document text includes "Paper makes trees..." and "Toptree plants trees to replace the trees used to make paper." The interface includes a top navigation bar with icons for STANDARD DELIVERY, 1 DOCUMENT, 20 ADDRESSES, and COLOUR SIMPLEX. The right-hand panel shows the "Extract addresses" section with a list of 20 recipients. The "Current address" section shows the full name "Mrs S Sandam" and the address "CFH DOCMAIL LTD, ST PETER'S PARK, WELLS ROAD, RADSTOCK, BA3 3UP". The interface also includes a status bar at the bottom with system information.

Click Next to be taken to the next stage.

Enter addresses

Click Enter addresses to input addresses manually. Use this option if your letter does not have an address at the top.



The screenshot shows the docmail print driver interface. At the top, there are navigation buttons: 'Mailing options', 'Add documents', 'Add addresses', and 'Print and post'. The 'Add addresses' button is highlighted. Below this, the 'Enter addresses' panel is visible. It includes a table for managing recipients:

| Pages | Recipient |
|-------|---|
| 1 | To the business owner, CFH Docmail Limited, St Pe |
| 1 | Finance Director, CFH Docmail Limited, St Peters Pa |

Below the table, there are navigation buttons: '<<', '<', '2', '>', '>>'. The 'Current address' section shows 'Pages in set' set to 1, 'Full name' as 'Finance Director', and 'Address' as 'CFH Docmail Limited, St Peters Park, Wells Road, Radstock, BA3 3UP'. There are 'Update address' and 'Delete address' buttons. At the bottom, there are 'Back', 'Add another', and 'Next' buttons. The status bar at the very bottom shows: 'User name: SSCFHAdmin PC admin: Yes API available: Yes OS Version: Microsoft Windows 7 Ultimate Memory/Paged: 446384/150132'.

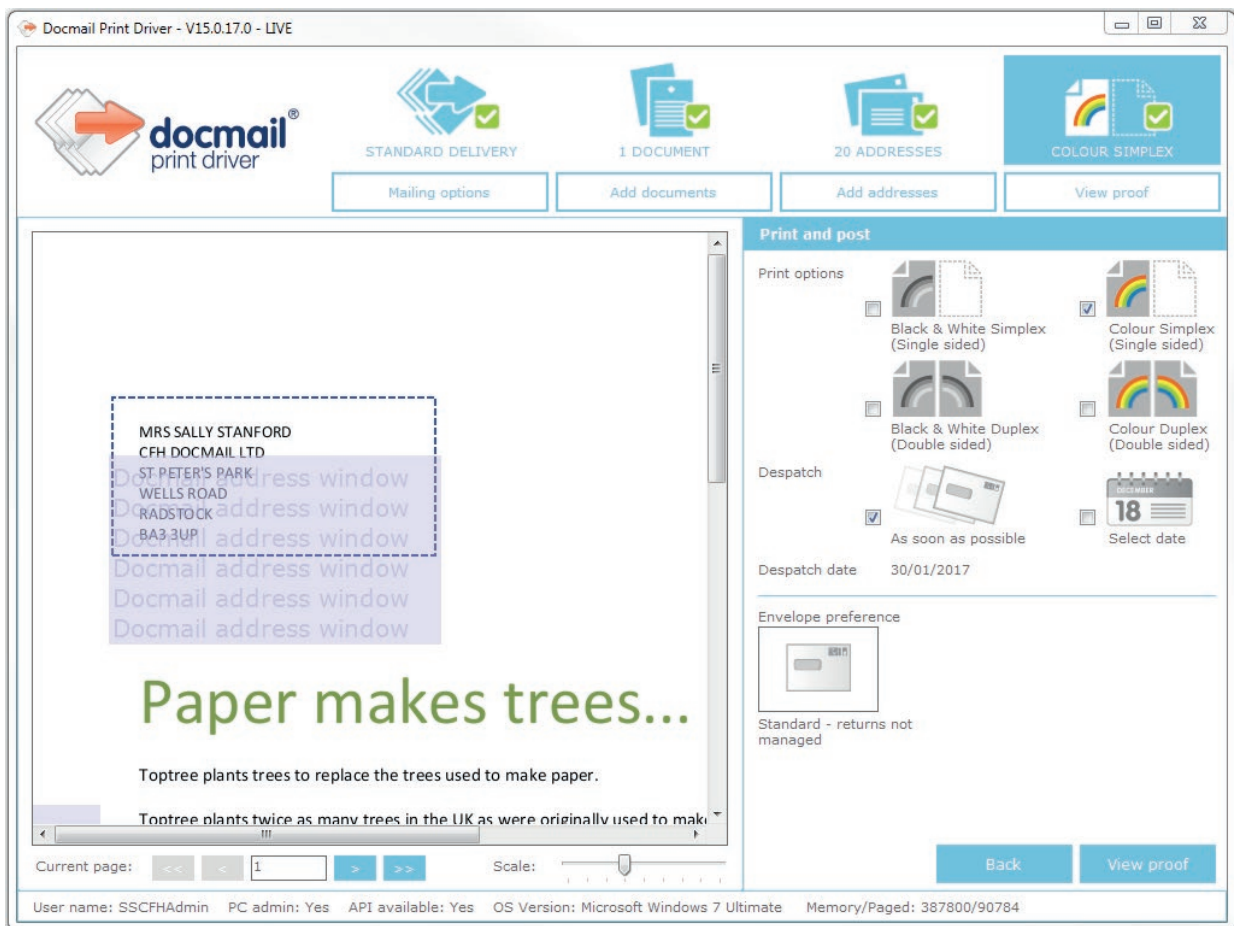
When manually entering addresses, you can specify how many pages each person has in their envelope. This can be done by changing the 'Pages in set' option. This will default to one.

The 'All remaining' option allows you to specify whether the remainder of file belongs to one recipient once you have allocated/entered at least one address.

When you have entered all the names and addresses that you require, click on Next.

PRINT & POST

The Print and Post section allows you to choose how your document is printed.



Print options

Tick the boxes to choose whether your letter is printed in black & white or colour, and on one or both sides of paper

Despatch

Choose a despatch date for your letters or leave the date as shown for despatch to take place as soon as possible. (The earliest date is shown.)

Docmail operates a next working day despatch if your order is placed Monday to Friday. Orders placed over the weekend or on Bank Holidays are processed the next working day.

The table below indicates when your letter should arrive.

| Day you place your order* | Day it should arrive using standard service | Day it should arrive using 1st class service |
|---------------------------|---|--|
| Monday | Thursday | Wednesday |
| Tuesday | Friday | Thursday |
| Wednesday | Saturday | Friday |
| Thursday | Monday | Saturday |
| Friday | Wednesday | Tuesday |
| Saturday | Thursday | Wednesday |
| Sunday | Thursday | Wednesday |

*Orders need to be submitted before 5.00pm.

For Dotpost the default is 'Deliver on the despatch date' meaning that documents are despatched at the same time as the physical Docmail mailing.

Envelope preference

Select standard envelopes for the cheapest envelope option or alternatively you can choose between window envelopes or adding a custom designed envelope.

You can choose from one of the following outer envelope options:

- **Standard envelopes**

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

If you select to use your own return address with standard envelopes then only non-window envelopes will be used.

- **Window envelopes**

If you choose window envelopes then Docmail will produce all your documents in window envelopes.

- **Custom design envelopes**

Choose a closed face envelope (non-window) that you have designed online and saved to your library in your For-Mail account. These can include images, personalised text and your own return address.

Returns

When items cannot be delivered they are returned to Docmail. If returns are not managed then they will be securely destroyed.

If you select returns to be managed then return addresses will be entered into the system before the item is destroyed and will be visible via the returns management page in the admin section.

If you wish to handle your own returns then you can enter your own return address.

Address panels

If you are using a custom design envelope or a standard envelope with your own return address you can choose not to have an address panel added to your output document. For other options an address panel must be added to your document.

If you are using a custom design envelope or using your own address for returns the options are –

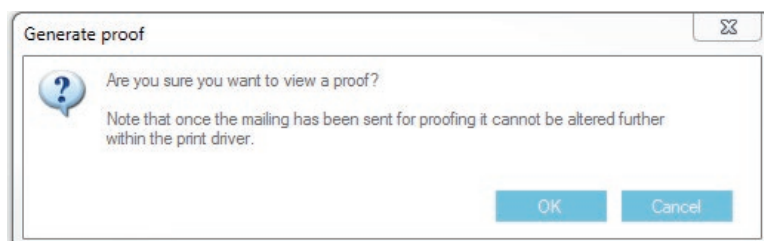
- Add to output document
- No address panels

If you select 'Add to output document' your document will have the address showing and can go into a window envelope. If you select 'No address panels' no address will be shown on the document.

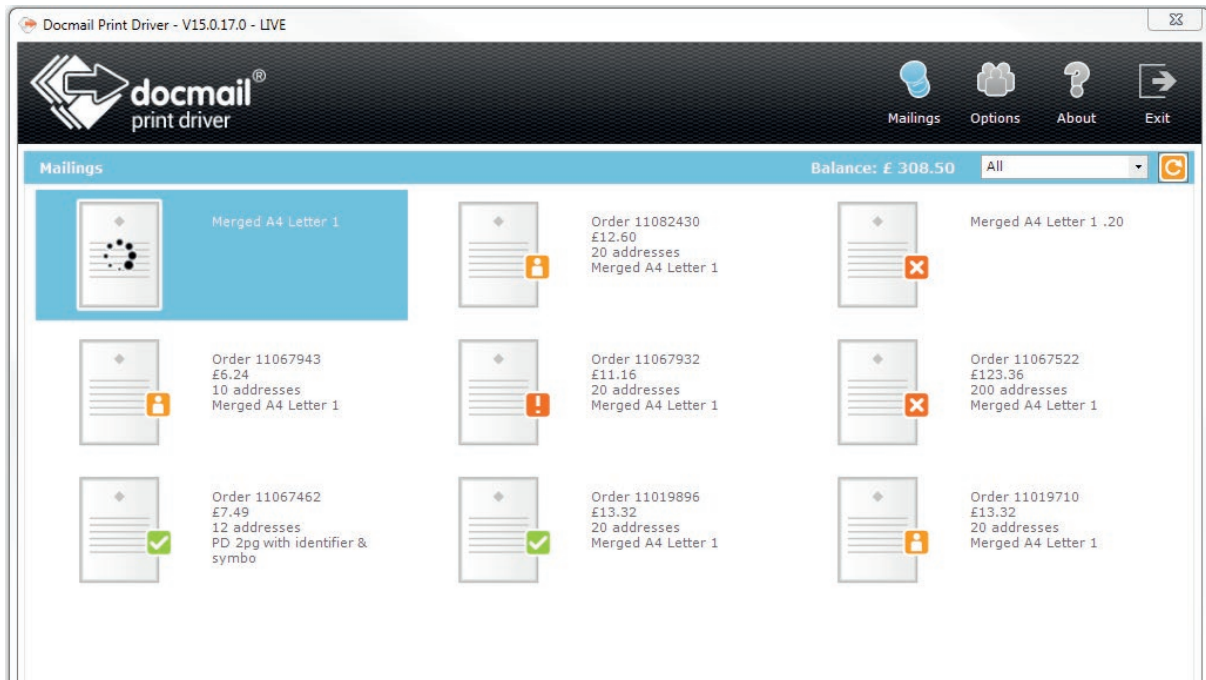
Envelope Design

This will confirm the type of envelope you have selected, and if you have selected 'Use own return address' there will be a panel which will show the return address that is held in your account information. This can be overwritten if required.

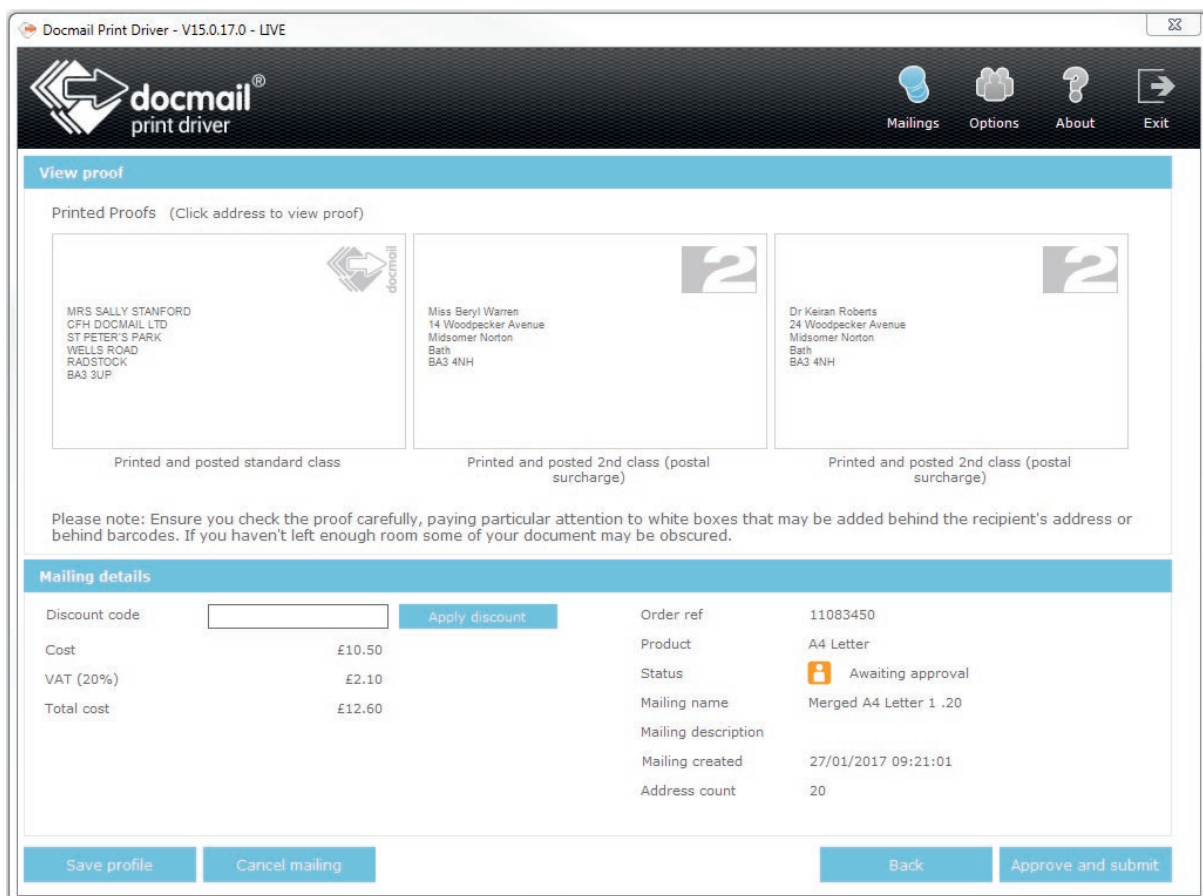
When you have completed the screen click 'View proof'. A box will pop up warning you that you will not be able to change your document once the proof has been generated. Cancel if you think you want to make further changes or click on OK to proceed.



You will be directed to the Print Driver dashboard where you can click on your created order to view the proof.



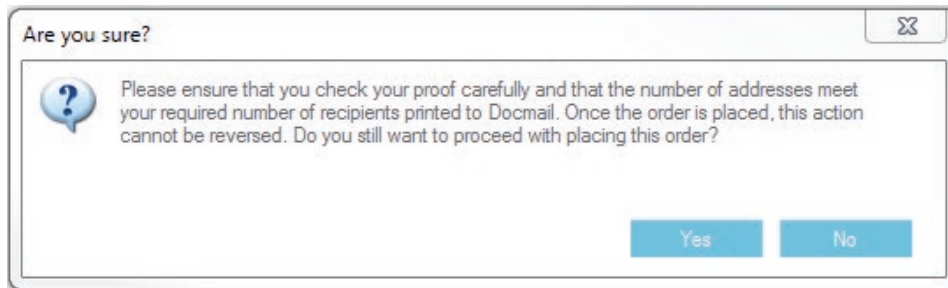
This is the screen that will be displayed. Click on an address to view the proof.



If you would like to save your profile, you can click on Save Profile where you will be prompted to enter a profile name. Saving the profile will allow you to use the same mailing settings on future orders.

You will be displayed random samples from your mailing along with the mailing details and cost of the order.

If you are happy with the proof click on 'Approve and submit'. Another warning will be shown.



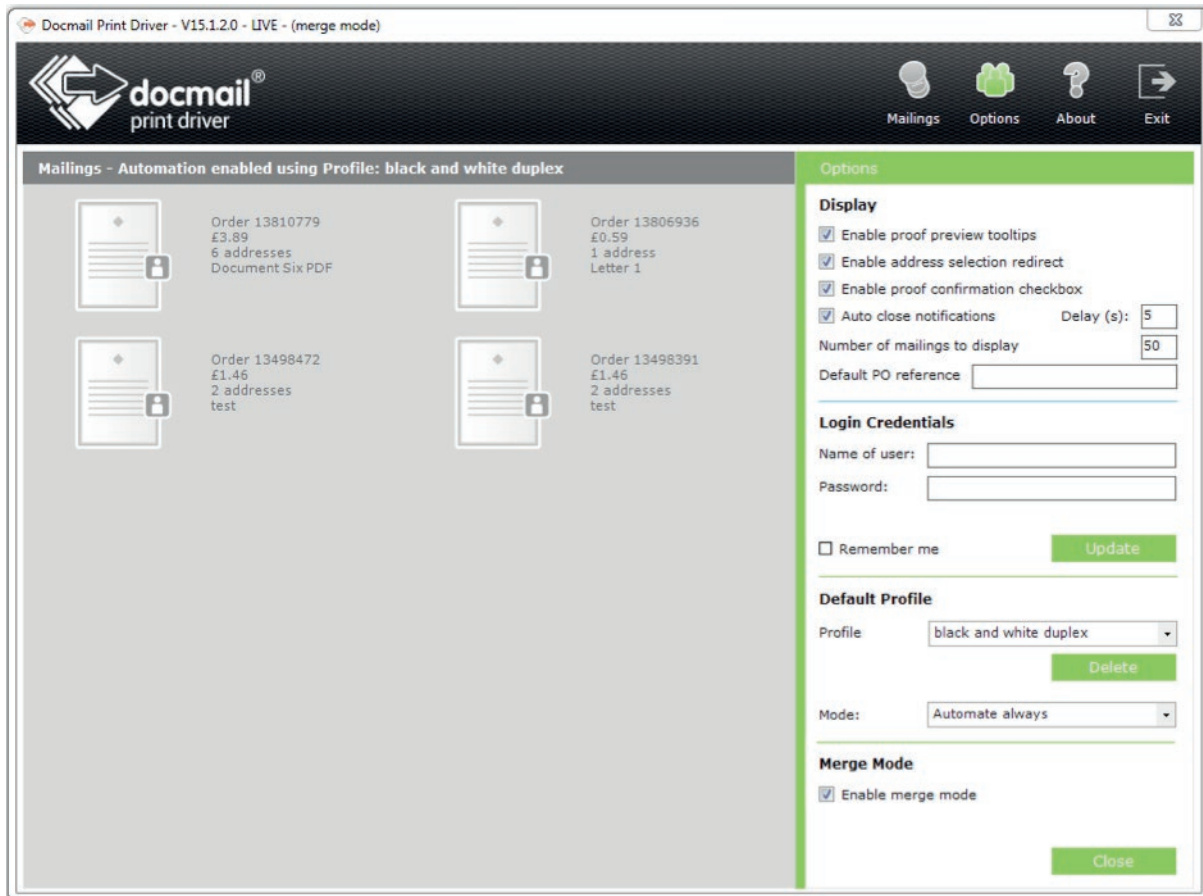
If you are happy to proceed, click on 'Yes' and your order will be submitted. The mailing status will be updated to 'Submitted (Awaiting production)'.

If you choose to cancel the order prior to production, it will then be cancelled on Docmail.

If you do not have enough credit on your Docmail account you will need to top-up by going into "Enter admin" on your Docmail account and then "Top-up your account".

Enabling Automation through the Print Driver

You can use the Options icon to choose various settings on the Print Driver screen. You can select a default profile from a drop down list of all current profiles.



If a default profile is selected when you next print to Docmail it will auto-populate the profile box at the first step on the screen.

When a default profile has been selected a box labelled 'Mode' will appear and there will be an option on the drop down selection to automate the Print Driver. If this is selected when you print to Docmail the system will automatically run through all the steps, with no user interaction, until you check your proof and select 'Approve and Submit' to complete your mailing.

APPENDIX 1

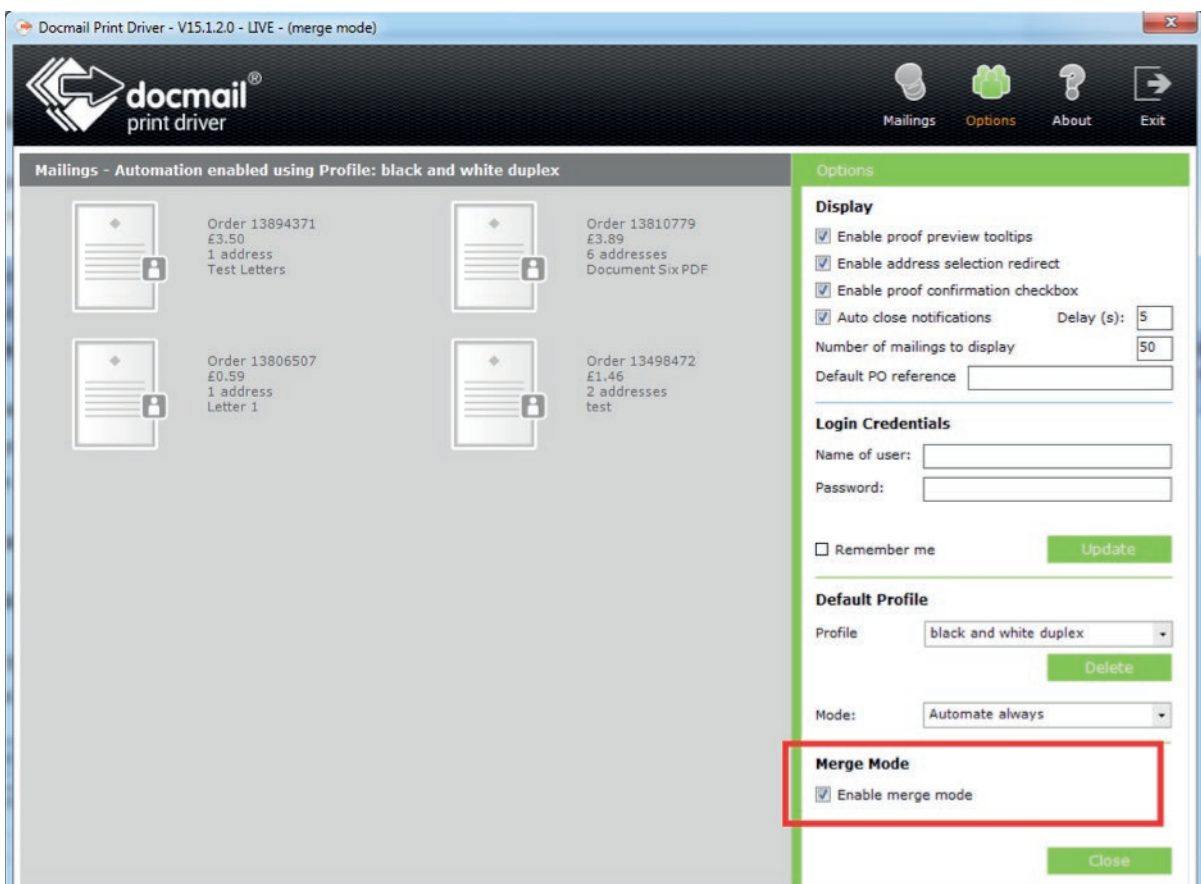
Enabling Merge Mode - combining multiple documents into a single file

Merge mode allows you to combine multiple files using the Docmail file combiner into a single document which can be printed directly through Docmail.

We would recommend using Merge Mode if you are using a system which creates a new file for each individual letter in your mail merge or if your system sends smaller batches when completing a mail merge. Merge Mode may also be used to combine files which are sent from separate systems.

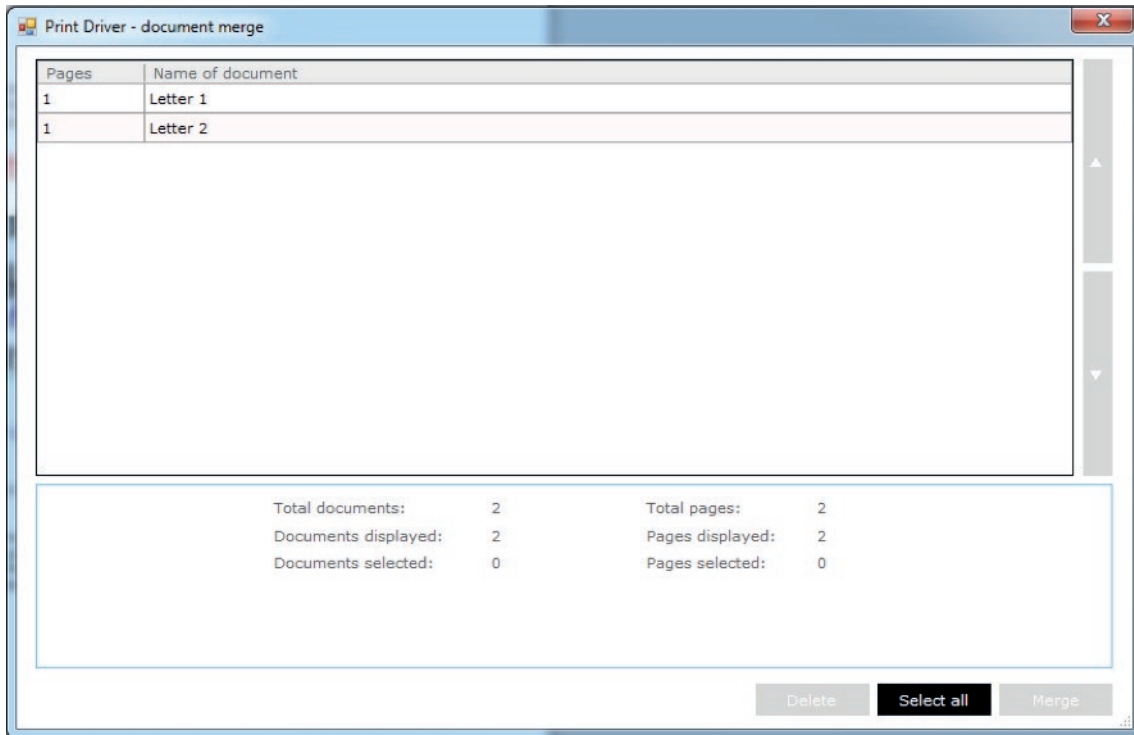
To enable merge mode please click on the Options icon and select 'Enable Merge Mode'. The next time you print to Docmail the file combiner will appear to allow you to combine your files into a single document.

You can switch the file combiner off at any time simply by unticking the 'merge mode' box.



Combining your documents

Print your documents to the Docmail Print Driver and this will open the file combiner as illustrated below:



If you are combining multiple files which are being sent from the same system please wait until all of your files have loaded before proceeding to the next step.

PDF files can be dragged on to the Dashboard or combiner window to add them to the list of files that can be merged.

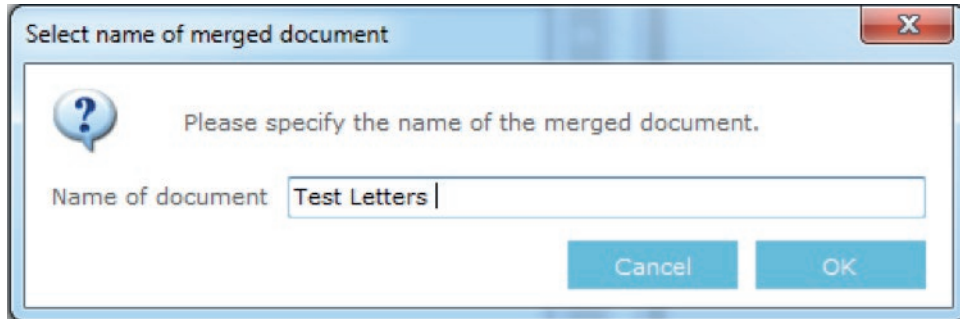
If you are combining files from multiple systems please print the documents in the order you wish them to appear in mail merge.

You may amend the order of your documents within the list at any time by selecting the documents you wish to move and selecting the up or down arrow to re-position them in your list. Alternatively if a document is no longer required you can remove it from your list by selecting 'Delete'.

Once all of your documents have been printed you can select to merge all of your documents by clicking on 'select all' at the bottom of the screen or select specific documents to merge by highlighting them within your list.

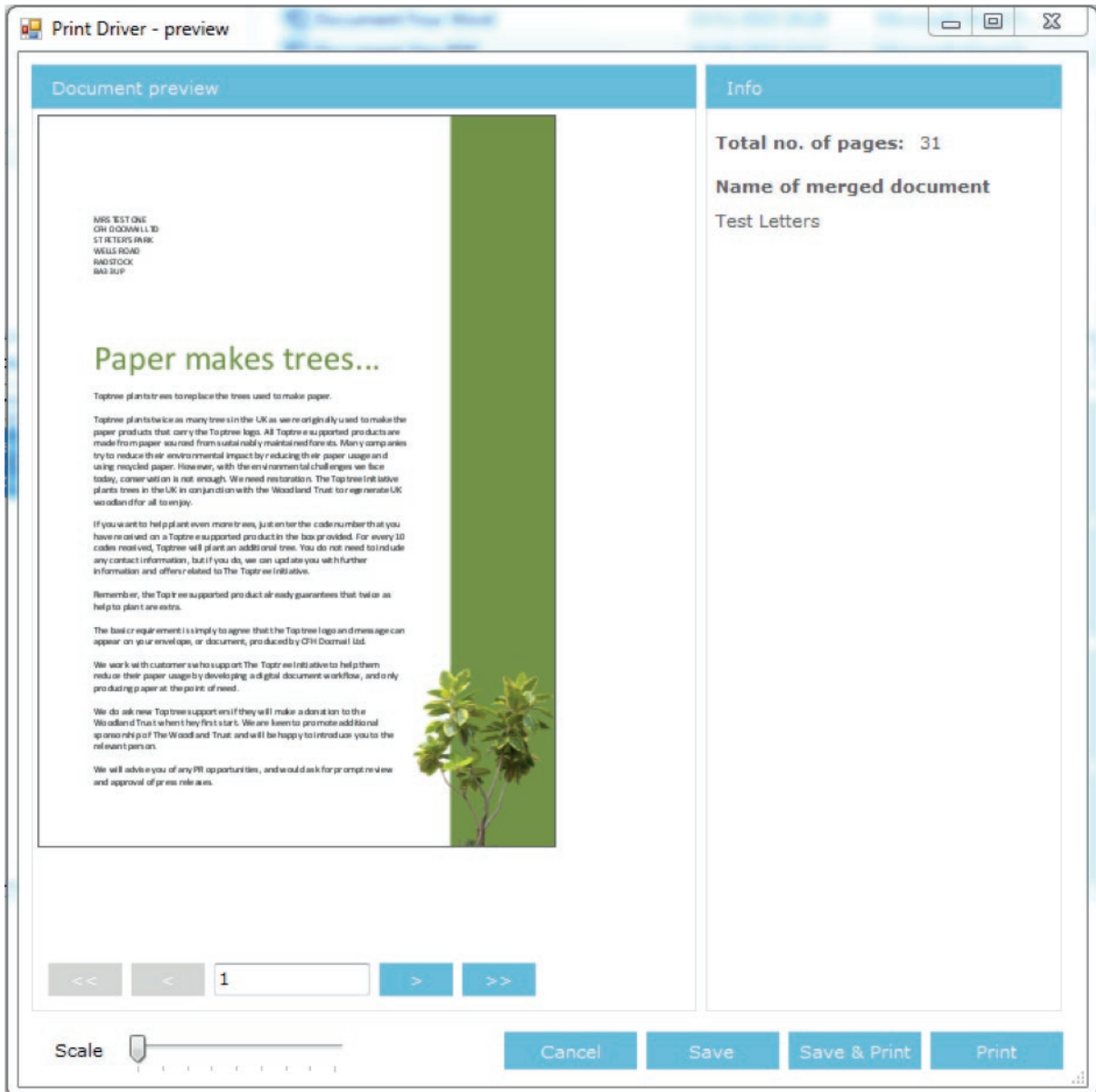
Once you have selected the documents you would like to combine please click on merge.

You will be given the option to rename your merged document for your reference. Please enter a document name in the box as illustrated below and click on OK:



Please note: To ensure processing is efficient the combiner will display up to 1000 pages to combine into a single file. If the number of pages exceeds 1000 any further documents will be held in a queue ready for you to merge once the first 1000 have been combined. A total number of documents and pages are displayed at the bottom of your combiner. This includes any documents which are held in the queue. The 'document displayed' and 'pages displayed' confirms the number of items which are available to include in the current merge. The 'documents selected' and 'pages selected' confirms the number of items you have selected to be included in your current merge.

Once you have selected to merge your individual documents you will be taken to a preview of your combined document as illustrated below:



To view the order of the pages please use the arrows on the bottom left hand corner of the screen.

Cancel – This will cancel the document and return all of the documents you have merged to the document merge screen where you will be given the option to re-order the documents, delete documents or select other documents to include

Save – This option allows you to save the document as a PDF to your PC

Save & Print – This will allow you to save the document to your PC and print the document to the Print Driver for printing and posting.

Print – This option allows you to print the document to Docmail for printing and posting without saving to your PC.

Please note: If you are printing more than 1000 pages you will be returned to the document combiner screen to action any files which are in the document queue before the Print Driver steps are launched.

Further to this, if any files remain in the file combiner when the merge has been completed, you will be returned to the merge screen to complete actions on these files (be it a further merge or deletion etc.)

When the combiner screen is closed, any files which remain in this screen will be discarded.



WWW.CFH.COM | WWW.DOCMAIL.CO.UK | WWW.DOTPOST.COM

RADSTOCK

St Peter's Park | Wells Road | Westfield | Radstock BA3 3UP | 01761 416311 | info@cfh.com

LIVINGSTON

Starlaw Business Park | Livingston EH54 8SF | 01506 462468 | information@cfh.com

SLOUGH

160 Edinburgh Avenue | Slough SL1 4UE | 01753 567100 | sales@print.uk.com