Icon

Description automatically generated

4.5 cm to top of clear zone

Please ensure this area is always keep clear so that docmail can add the name and address.

The size of the area is 7cm wide and 4cm deep.

1.3cm

Welcome to Docmail.

This example template is designed to give you some information on how to set up your documents so they’re compatible with Docmail.

When you use Docmail, we automatically add the name and address in the right place on your document, so the first thing to remember is the clear zone you need to leave for the name and address (as shown above). We also print a barcode in the left margin on the front of each page which means you’ll need to make sure to leave a 1.3cm left hand margin for this. Remember to check your proof to see that this has all formatted correctly.

You don’t need to worry about any thing else for the name and address. Docmail will put the name and address in the right place using the fields from the addresses you add.

You can choose the format of the name to display when you do your order, but this does depend on the fields you have in your data. For example, you couldn’t choose to use “Title FirstName Surname” if you have that data in separate columns in your file. Alternatively, you could opt for fullname if you have the name in one field. Docmail will then also add company name and job title (if they are present in your data) plus up to 6 address lines.

It’s as simple as that…you can of course use any of the fields from your address list elsewhere in your letter. To do this, you need to use what we call “**tags**”. Docmail will recognise the tags and replace them with the right piece of data in a similar way to a mail merge. *If you have a pre-existing template with mail merge tags you’ll need to ensure that the tag names match the column header in your mailing list file.*

The format of a tag is <<field>>.

So, if you have a data field for fullname, the tag to use would be <<fullname>>.

This will then get replaced with the contents of the field fullname

So:-

Dear <<fullname>>

becomes

Dear Mr John Smith

A full list of the tags you can use is as follows:

|  |  |  |
| --- | --- | --- |
| **Field** | **Tag to use** | **Max length** |
| Address1 | <<Address1>> | String (50) |
| Address2 | <<Address2>> | String (50) |
| Address3 | <<Address3>> | String (50) |
| Address4 | <<Address4>> | String (50) |
| Address5 | <<Address5>> | String (50) |
| Address6 | <<Address6>> | String (50) |
| CompanyName | <<CompanyName>> | String (50) |
| Custom1 | <<Custom1>> | String (50) |
| Custom2 | <<Custom2>> | String (50) |
| Custom3 | <<Custom3>> | String (50) |
| Custom4 | <<Custom4>> | String (50) |
| Custom5 | <<Custom5>> | String (50) |
| Custom6 | <<Custom6>> | String (50) |
| Custom7 | <<Custom7>> | String (50) |
| Custom8 | <<Custom8>> | String (50) |
| Custom9 | <<Custom9>> | String (50) |
| Custom10 | <<Custom10>> | String (50) |
| DirectLine | <<DirectLine>> | String (20) |
| Email | <<Email>> | String (70) |
| ExtraInfo | <<ExtraInfo>> | String (50) |
| Facsimile | <<Facsimile>> | String (20) |
| FirstName | <<FirstName>> | String (30) |
| FullName | <<FullName>> | String (100) |
| Initial | <<Initial>> | First letter in first name field |
| JobTitle | <<JobTitle>> | String (60) |
| Mobile | <<Mobile>> | String (20) |
| Notes | <<Notes>> | String (100) |
| Surname | <<Surname>> | String (30) |
| Telephone | <<Telephone>> | String (20) |
| Title | <<Title>> | String (15) |

The 10 custom fields can be used for any field you may have in your file for which there is no suitable direct match in Docmail. For example, you may have a reference number in your data which you can assign to field custom1, and calling this column in your data file ‘custom one’, and finally by using the tag <<custom1>> it will get merged into your letter. You are also able to create custom fields with your own description. Just remember to ensure the column header in your data matches the tag description on your document.

If you have custom fields within your mailing list that already have column headers, you can select AddCustomField upon assigning fields. The column header needs to be identical to the merge field name.

Additionally, you can also use tags for docmail to add the date in a specific format.

|  |  |
| --- | --- |
| **Format of date to display** | **tag to use** |
| 23/06/23 | <<date1>> |
| Monday 23rd June 2023 | <<date2>> |
| 23 Jun 2023 | <<date3>> |
| 23rd June 2023 | <<date4>> |

Another useful function is the ability to add a letterhead background to a template. If you have a pdf of your letterhead, this can be stored in the Docmail library and then selected to be used when creating a template, meaning the letter will print on the letterhead background. Simply set up your background in “Library”, select “Backgrounds” then “Add New Background”. You just need to ensure that your pdf is A4 size and does not have any print/crop marks on it as these will not be removed.

This template is designed to give you a very quick overview of setting up your templates.

For more detailed instructions, please refer to the help centre.

Thanks for using docmail, and if you have any questions or queries, don’t hesitate to contact us at [customersupport@cfh.com](mailto:customersupport@cfh.com), or telephone 01761 409701.