DOCCMAL OR CODE USER GUIDE



USING MAIL MERGE FUNCTIONALITY TO ADD QR CODES TO YOUR DOCMAIL MAILINGS

Microsoft Word has the ability to generate QR codes and add them to your document using the mail merge functionality. All you need to do is set the data that you wish to use in your QR code, and then tell Word to insert the data as a QR code.

In this worked example, we have a sports studio that wishes to mail a discount code to their members for use in the café.

The first thing that we want to ensure is that we have a data file that contains the mail merge information. We have created a basic Excel file for this, that contains the member's personal details, their membership number and the information that will be contained within the QR code.

4	A	B	С	D	E	F	G	н	1	J
1	Full name	First name	Last name	Address line 1	Address line	2 Address li	City	Post code	Membership number	Discount code
2	Chuck Weatherwax	Chuck	Weatherwax	Riverside Building	County Hall	Westmins	London	SE1 7PB	344420704	344420704_Chuck_Weatherwax Valid until Oct 2021
3	Tomas Bingham	Tomas	Bingham			Birmingha	West Midlands	B40 1NT	138995682	138995682_Tomas_Bingham Valid until Oct 2021
4	Chasidy Mickle	Chasidy	Mickle	Castle Esplanade			Stirling	FK8 1EJ	388384121	388384121_Chasidy_Mickle Valid until Oct 2021
5	Tessa Matsuo	Tessa	Matsuo	Clifton			Bristol	BS8 3HA	336229365	336229365_Tessa_Matsuo Valid until Oct 2021

We can now write our letter. Here we have prepared the letter and noted where we want to place mail merge tags.



FULLNAME ADDRESS LINE 1	
ADDRESS LINE 2	
ADDRESS LINE 3 CITY	
POSTCODE	
Membership number: MEMBERSHIP NUMBER	
Dear FIRST NAME,	
Thank you for renewing your membership for another ye	ear.
As a thank you, you can get 20% off in our on-site café af replacement membership card simply present this letter give you the discount.	
QR CODE	
We hope that you continue to enjoy our facilities, howev	er as ever if you have any feedback please
don't hesitate to chat to any member of staff. We look forward to seeing you soon!	
Sincerely	
fit	
Ronald Reyes	
Membership Manager	

We can do most of the mail merge in the usual way. In Word, select **Mailings > Select Recipients > Use an Existing List**, and then select our Excel file.



We can then begin to place the merge tags into our document, but we won't add the QR code just yet.

Need help? Call: 01761 409701 Email: customersupport@cfh.com

Mailings	Review	View	Help	Q	Tell	me what y	ou want to do
	Review	sert Merge Field ~ Full_na First_n Last_na Addres	Rules Match Updat	• • • Field:	s els	Preview Results	Pou want to do
		Post_c Memb	ode ership_nur int_code	nber		ADD ADD ADD CITY	INAME RESS LINE 1 RESS LINE 2 RESS LINE 3 TCODE

When we want to insert the QR code, we need to do something a little different. Firstly, select where we are going to place the QR code and delete the holding text.



Now on your keyboard press the Ctrl and F9 keys at the same time. You'll see a set of braces inserted into the document.

Thank you for renewing your membership for another year. As a thank you, you can get 20% off in our on-site café after 9am. Whilst you're waiting for your replacement membership card simply present this letter and a member of staff will scan the code to give you the discount.

We look forward to seeing you soon!



Within the braces, enter the text:

MERGEBARCODE DISCOUNT_CODE QR

This will tell the mail merge operation to enter the data in the Discount Code field ('discount_code') as a barcode here ('mergebarcode') in the format of a QR code ('QR'). Note how even though in our data file the column is called 'Discount code' we have to include an underscore between the words – this is normal when entered merge fields in your document. If you do not do this you'll get an error.

Once done, right click what we've just entered and select Update Field.

Thank you for renewing your me	nembership for another year
As a thank you, you can get 20%	9 Calibri (Body) - 11 - A A → 🛠 🗛 📩
replacement membership card give you the discount.	B I U A T E T Styles New Comment
{ mergebarcode discount_code	lor 1
We hope that you continue to e	er if you have any feedback please
don't hesitate to chat to any m	E Copy
We look forward to seeing you	Paste Options:
Sincerely	
	Departe Field
	Edit Barcode
Conte	Toggle Field Codes
V	A <u>F</u> ont
Ronald Reyes	<u>≣</u> ¶ <u>P</u> aragraph

Word will now complete the setup the merge tag for us.

Thank you for renewing your membership for another year.
As a thank you, you can get 20% off in our on-site café after 9am. Whilst you're waiting for your replacement membership card simply present this letter and a member of staff will scan the code to give you the discount.
«discount_code QR Code»
We hope that you continue to enjoy our facilities, however as ever if you have any feedback please don't hesitate to chat to any member of staff.
We look forward to seeing you soon!

We are now ready to perform our mail merge.

Mailings	Review	View	Help	Qте	ell me what yo	ou want to do			
ght Address ields Block	Greeting Ins Line	ert Merge Field *	Rules	Fields	Preview Results	Find Recipient	Finis	h&	
1	Write & Inser	rt Fields				Preview Results	Ę.	Edit Individual Documents	
				1 . 2 . 1	1	1 • • • 2 • • • 3 • • • 4 • • • 5 • •	•	Print Documents	13+++14+++15++
							P	Send Email Messages	

In this case, we've printed straight to the Docmail Print Driver to complete our mailing.

😁 Docmail Print Driver - V15.4.7.0 - LIVE		– 🗆 X
docmail print driver		Add addresses Print and post
Docmall address window Docm Chuck Weatlerwaa Docm Courty Hall Docm Courty	ber of staff will scan the code to	Mailing options Profile $(blank mailing)$ Product A folded sheet A folded sheet A document Mailing name Membership letter pre-merge ta Mailing description Delivery services A folded delivery $First class$ U use Dotpost
	Zoom:	Next
User name: robert.weeks@cfh.com - PC admin: No - Displaying	page 1 of 10	



Advanced options

You can easily change the barcode type and how it looks on the page by right clicking on the barcode merge tag and selecting **Edit Barcode**.

wdiscount_code Q X Cut We hope that you don't hesitate to c Image: Copy owever as ever if you have any feedback please We look forward t Image: Copy Paste Options: Sincerely Image: Copy Image: Copy Image: Copy Image: Copy Image:
Edit Barcode Ioggle Field Codes A Eont

This allows you to change the field being used and barcode type (nb when selecting edit barcode ensure that your chosen field stays selected - Word has a habit of changing it to the first field in your data set!)

Select a Field and a Barco	ode Type		?	×
Select a field you'd like to and a barcode type. Full name First name Last name Address line 1 Address line 2 Address line 3 City Post code Membership number Discount code	Barcode type Casecode Code 39 Code 128 EAN-8 EAN-13 NW-7 QR Code UPC-A UPC-A UPC-E Postal barcode (Japan) Show all types	Barcode description QR Code is a 2D barcode symbol mainly used to encode URL. Full characters are not supported. Sample:	width	
Preview				
A preview of the barcod	de is displayed below after t	he field and type are selected.		
<u>A</u> dvanced		ОК	Can	cel



To amend how the barcode looks select Advanced. From here you can change the size (scale), rotation and colours.

	Advanced option: QR Code	?	×
1	Error correction		
d	Level (recovery capacity %): Q	(25) 🗸	
	Size and rotation		
ty	<u>S</u> cale: 100% 🜩		
	Rotation: 0° 🗸		
b	Color		
	<u>F</u> oreground: <u>b</u> ackg	round:	8
	ОК	Car	ncel



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