DOCMAIL:
STANDARD USER GUIDE

November 2018

docmail®

BEFORE YOU START, YOU'LL NEED:

A document (usually a Word or PDF file)...

- with a blank area 7cm wide x 4cm deep positioned 4.5cm from the top and 1.3cm from the left side of your document if you want Docmail to insert the name and address details

- with tags added if you want to use extra personalised details within your document

The format of a tag is <<field>> so if you have a data field for fullname, the tag to use would be <<fullname>>. Docmail will recognise these tags and replace them with the correct piece of data in a similar way to a mail merge.

A list of names and addresses...

- in a spreadsheet or CSV file. The spreadsheet should contain labelled columns of data to correspond with the tags in your Word document. You can use up to 6 columns for the components of your address

1. CREATE MAILING

Select 'Create Mailing' and choose either A4 letter, A3 folded sheet, Greeting Card, Postcard or SMS. A document type will be selected as a default but you can change this by clicking in the box that you want to use.

Click 'Next'.

2. MAILING OPTIONS

You can give your mailing a name and choose your delivery service on this first screen.

"Mailing name"

You can give your mailing a name to identify it. This is optional.

"Mailing description"

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

"Delivery services"

Select 'Standard delivery' or 'First class'. Choose standard delivery if you want the lowest prices. You can also select 'Use Dotpost'. Dotpost is a secure online document hub where users can securely view and manage their important letters and documents. You can tick this box if you are a Dotpost user to send your mailing to your addressees who use Dotpost.

If you do not currently use Dotpost but would like to clicking here will bring up an application for you to complete. See the Dotpost Guide for more information.
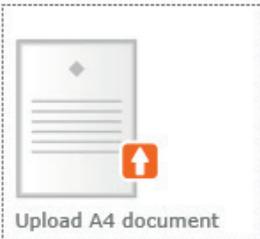
Click 'Next'.

3. ADD DOCUMENTS

Upload your document which could be a **Microsoft Word** file (.doc or .docx), an **Open Office** file (.odt), a file in **Rich Text Format** (.rtf) or an **Adobe Acrobat** file (.pdf).

Click the option that you would like to use. Clicking in the 'New document' section will allow you to find a document stored on your computer.

When you are writing your letter you do not need to add the recipient's address as Docmail can do this for you.

Or:

Clicking in the 'Add from library' section lets you use documents, mail packs or inserts that you have already stored in your library.

Or:

'Add from previous mailing' to recall a document that you have used on a mailing that you have already made.

You can apply any logos or signatures that you want to use in two ways. Either embed them in your documents or use a 'Background'. These can be selected under the Edit Document section which will come up when you click 'Next'.

Edit Document

In this section you can check the document that you have chosen by clicking on it. If you have made a mistake you can select another document to use.

Background

Backgrounds are stored separately from your documents and can hold, for example, logos or letterheads; they can be applied behind your document. Their use is optional. Different backgrounds can be stored and you can choose the correct one for the mailing that you are creating. Click on the image to view an existing Background. For example, these can be PDF (.pdf), Microsoft Word (.doc), or Rich Text Format (.rtf) files.

Shrink to fit is selected as this is generally the best option to use. This will shrink your document by 3mm margin and apply a white border to your finished document. If you do not require a white 3mm border you can tick Use Original Size. This is applicable when you are producing a postcard or greetings card.

4. ADD ADDRESSES

This is where you upload your Spreadsheet file or CSV containing the addresses of the recipients to whom you wish to send your letter.

You can also click on 'Enter addresses' to enter your address details manually.

You can click on 'Add self' to include your account address on the address list; Docmail will automatically upload your address from the contact details held in your account and add it to the mailing list for you.

Click on 'Upload addresses' and find the file on your PC. Select the uploaded file format (e.g. Spreadsheet).

STANDARD DELIVERY	1 DOCUMENT	0 ADDRESSES	SET OUTPUT OPTIONS
Mailing options	**Add documents**	**Add addresses**	**Print and post**

Upload addresses

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 address list:

Address file   [   ]   Select   Clear

File contains column headers? ☑
File format   (automatic from file type) ▾
Mapping   (automatic) ▾

Back   Next

Based on the names of the fields in your file, Docmail will map them to the correct target field. If you have fields in your document that are not standard Docmail fields, then you will need to select 'Add Custom Field' for the required field.

Order ref 57131

Top-up balance: £1.00

STANDARD DELIVERY	1 DOCUMENT	0 ADDRESSES	SET OUTPUT OPTIONS
Mailing options	Add documents	Add addresses	Print and post

File uploaded Addresses1.xlsx

CHANGE FILE

Assign fields

SET TO DEFAULT MAPPING

Column Header	Sample Data	Map To
Name	Mr F Bloggs	Full Name
Address1	1 Acacia Ave	Address Line 1
Address2	Bristol	Address Line 2
Address3	BS3 1UP	Address Line 3
Address4		Address Line 4
Availability	y	- Add Custom Field -
email	fb@outlook.com	Email

Back   Next

12

If you need to change any field, click on the target field (Map To) drop down to choose the field that you want assigned.

Click 'Next'. Check the format of the address and then click' Next' again.

Set address name format

Address name prefix [   ] Refresh

Full name
Mr F Bloggs
1 Acacia Ave
Bristol
BS3 1UP

Show all address name formats

Back   Next

When your file is uploaded addresses are validated to check that they are deliverable. Docmail checks against the Royal Mail database to see that addresses are complete and correct. If they vaildate against the Royal Mail address database, they will have a green tick.

If you have an orange question mark, then your address may be incomplete or incorrect and will incur a surcharge. You have an option to 'Edit' these.

For overseas mail you will be shown a blue aeroplane. These addresses will also incur additional charges to cover the cost of posting abroad.

5. PRINT AND POST

"Print options"

Choose whether you would like your letter printed in black and white or colour, and on one or both sides of the paper (simplex or duplex).

"Despatch"

Tell us when to despatch your letters. (The earliest possible date is shown.) You can choose another date or leave the date as shown so that the despatch will take place as soon as possible.

"Envelope preference"

Clicking on the 'Envelope preference' will offer various options.

- You can select your envelope type.

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 have custom envelopes saved you can select which design to use.

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.)

Options other than standard will incur extra charges. Refer to the price list for details.

- You can also change the way that any of your mail that is undeliverable is dealt with.

If you have chosen standard envelope, you can select 'Use own return address' from the drop down options. This means that a non-window envelope will be used and the return address that you input will be shown on the envelope. A box displaying the return address will be shown.

If you have an address recorded against your account it will show here, otherwise you can input an address into the field.

'Use own return address' is also available if you use a standard envelope or a postcard.

Any mail that is undeliverable by Royal Mail, and has not got your return address on it, is returned to our site and disposed of securely. You have the option of having these returns managed; they can be recorded against your Docmail account with the reason for their return so that you can see which addresses have mail that has come back and the cause of the non-delivery.

Additional charges are incurred for dealing with returns or for using your own return address.

6. VIEW PROOF

At this stage you will be able to see a proof showing how your letter will look when printed. You must make sure that you check the proof, including address and barcode position, before approving the mailing. Click on the envelope to see the proof. If you are not happy with how your letter looks then you can make changes to your mailing. Amend your original document (letter) and then follow the steps again to upload the new document. You will not need to upload your data list again as it is already saved to the mailing.

STANDARD DELIVERY | 1 DOCUMENT | 4 ADDRESSES | COLOUR SIMPLEX

| Mailing options | Add documents | Add addresses | View proof |

View proof

Printed proof (click address to view proof):

Mr F Bloggs
1 Acacia Ave
Bristol
BS3 1UP

Printed and posted 2nd class (postal surcharge)

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.

Mailing cost

VIEW MAILING SUMMARY

Discount code [   ] APPLY DISCOUNT

Cost	£2.07
VAT (20%)	£0.41
Total cost	£2.48

If you choose to pay by credit or debit card a surcharge of 35p will be applied to cover the card payment charges.

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

Follow the payment options to complete the order.

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

docmail®

CFH Docmail Ltd
St Peter's Park,
Wells Rd,
Radstock BA3 3UP

Telephone: 01761 409701/409702

Web: www.docmail.co.uk

Email: docmailsupport@cfh.com