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# DOCMAIL

## QUICK START

## USER GUIDE

v4.2



# BEFORE YOU START, YOU'LL NEED:

## A document either in Word, PDF, OpenOffice or RTF file format

- If you would like Docmail to insert the name and address details, please include a blank area in your document that is 7cm wide x 4cm deep positioned 4.5cm from the top and 1.3cm from the left side of your document. Templates for Docmail can be accessed in the following location: <https://www.cfhdmail.com/live/help.aspx>
- If you wish to use extra personalised information within your document, you will need to add merge tags to your document.

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


Please note: Docmail will automatically add the name and address to your document, unless you choose otherwise, so you will not need Merge tags for the name and address in the top left hand corner of your letter.

## A spreadsheet or CSV file






- The spreadsheet should contain the names and addresses of your recipients and labelled columns of data to correspond with the tags in your Word document. Please also ensure that your Merge tags match your column headers. For example, if you have a Merge tag called <<InvoiceNumber>>, your column header in your spreadsheet would be called 'InvoiceNumber'. 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.



Select product type

 A4 document	 A3 folded sheet	 A5 postcard	 Greeting card	 Text message
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## 2. MAILING OPTIONS

On this first screen, you have the option to give a 'Mailing name'. Here you can enter in anything you like, so that you can identify your mailing in your dashboard and in reports.

There is also a 'Mailing description' box, where you can enter some further information about your mailing (this is optional).

The screenshot shows the 'Mailing options' interface. At the top, there are four main action buttons: 'Mailing options' (highlighted with a 'STANDARD DELIVERY' icon and a green checkmark), 'Add documents' (showing '0 DOCUMENTS'), 'Add addresses' (showing '0 ADDRESSES'), and 'Print and post' (with a printer icon and 'SET OUTPUT OPTIONS'). Below these is a 'Mailing options' form. It contains two text input fields: 'Mailing name' and 'Mailing description'. Under the 'Delivery services' section, there are three options: 'Standard delivery' (selected with a checked checkbox), 'First class' (with an unchecked checkbox), and 'Use Dotpost' (with an unchecked checkbox). A blue 'Next' button is positioned at the bottom right of the form area.

### "Delivery services"

Here you can select 'Standard delivery' or 'First class'. Choosing Standard delivery will get you the lowest prices. Please see [Appendix 1](#) for a delivery schedule for each delivery service.

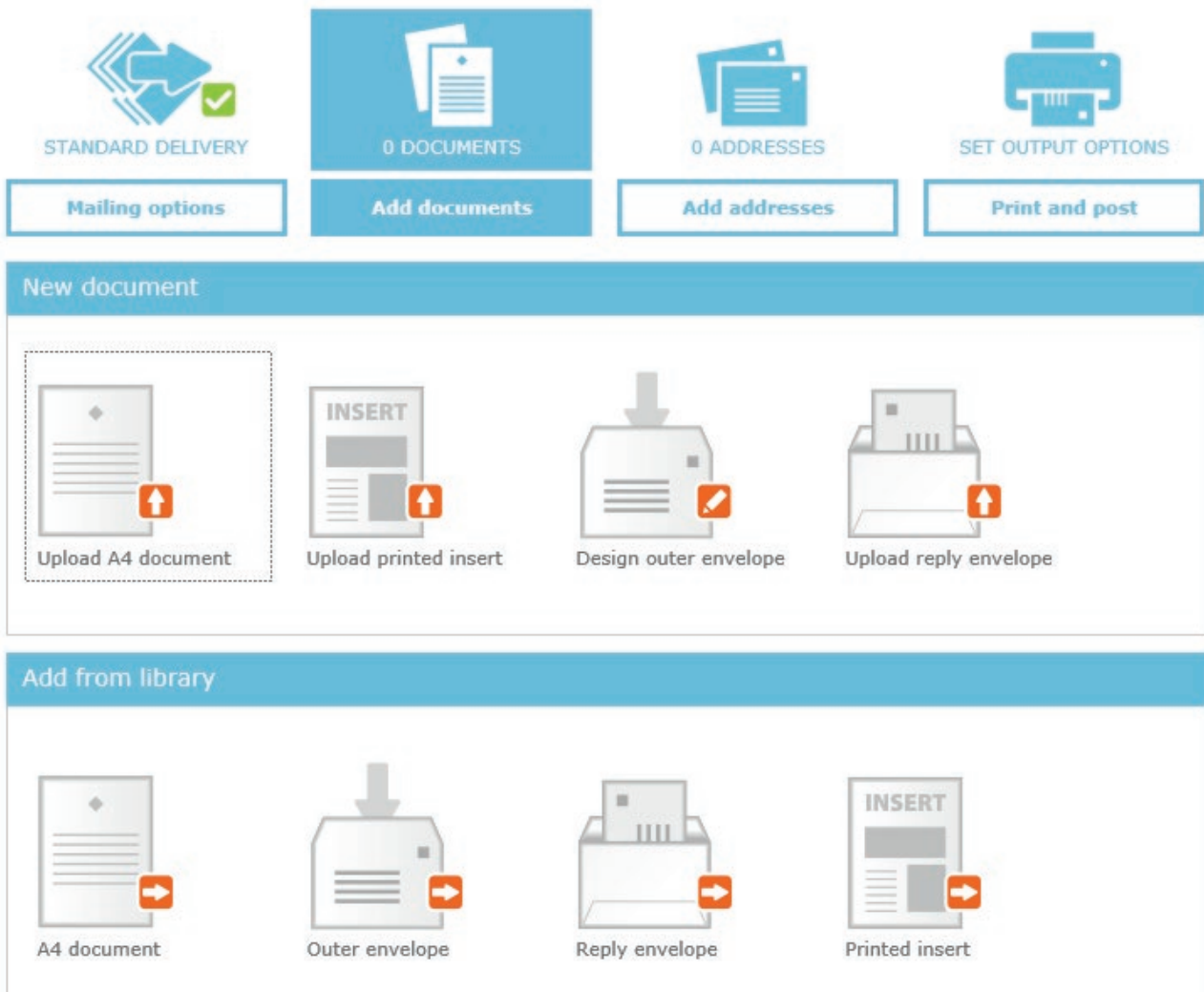
You can also select 'Use Dotpost'. Dotpost is a secure online document hub where users can securely view and manage their important letters and documents. You can tick this box if you are a Dotpost user to send your mailings to your addressees who use Dotpost.

If you do not currently use Dotpost but would like to, clicking here will bring up an application for you to complete. You can also take a look at the Dotpost Guide for more information. Please email [customersupport@cfh.com](mailto:customersupport@cfh.com) for a copy of the user guide.

Then click 'Next'.

### 3. ADD DOCUMENTS





Next you will need to upload your document. This 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).



The screenshot displays the Docmail interface with four main action buttons at the top: 'Mailing options' (with 'STANDARD DELIVERY' and a checkmark icon), 'Add documents' (with '0 DOCUMENTS' and a document icon), 'Add addresses' (with '0 ADDRESSES' and an envelope icon), and 'Print and post' (with a printer icon). Below these is a 'New document' section containing four options: 'Upload A4 document' (document icon with an upload arrow), 'Upload printed insert' (document icon with 'INSERT' and an upload arrow), 'Design outer envelope' (envelope icon with a pencil), and 'Upload reply envelope' (envelope icon with an upload arrow). The 'Upload A4 document' option is highlighted with a dashed border. Below this is an 'Add from library' section with four options: 'A4 document' (document icon with a right arrow), 'Outer envelope' (envelope icon with a right arrow), 'Reply envelope' (envelope icon with a right arrow), and 'Printed insert' (document icon with 'INSERT' and a right arrow).

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.


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


Upload A4 document

Select new file

Background

Print margin (3mm)

 Shrink to fit


 Keep original size

Advanced options ▼

Or:


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

The library is your space in Docmail to upload your frequently used files, helping you save time. For more information on using the library please read our Standard User Guide.




STANDARD DELIVERY

Mailing options




1 DOCUMENT

Add documents



0 ADDRESSES

Add addresses






SET OUTPUT OPTIONS

Print and post

Select A4 document to add

Search  Search Page size 4 ▼

Showing 3 A4 documents

 <p>Sample letter DOWNLOAD</p>	 <p>Template Set up example DOWNLOAD</p>	 <p>Template Set up example DOWNLOAD</p>
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Back


If you want to use logos or signatures in your mailing you can do this in two ways:

- Embed them in your documents before you upload them to Docmail
- Use a 'Background'. A background requires to be preloaded into your Docmail account for you to choose this option (see below and the Advanced User Guide for more information).


To use a background from your library, simply select your pre-loaded background under the 'Edit document' section.

## 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.




STANDARD DELIVERY



1 DOCUMENT



0 ADDRESSES



SET OUTPUT OPTIONS

Mailing options


Add documents

Add addresses

Print and post

### Edit A4 document

Current file



Sample\_Template.doc

[DOWNLOAD FILE](#)

Select new file


Select Clear


Background


Docmail Welcome Sample

[CHANGE BACKGROUND](#)

Print margin (3mm)

 Shrink to fit

 Keep original size

Advanced options 

Delete Back Next

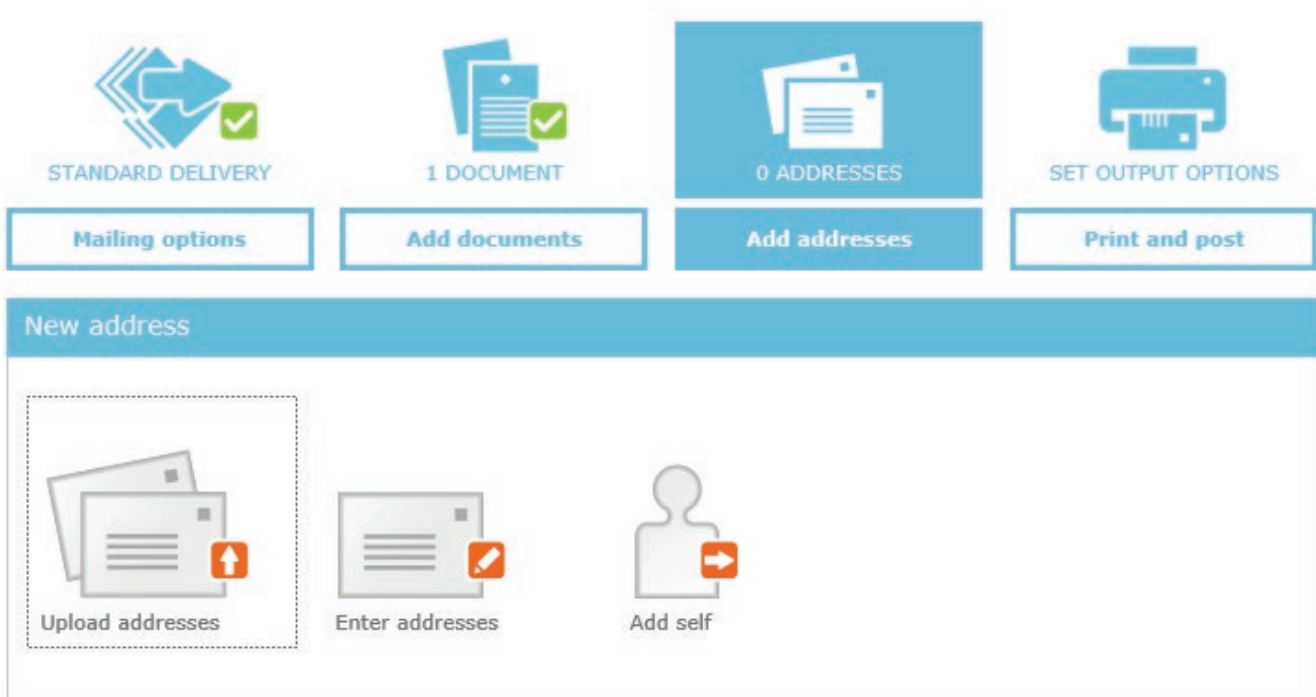
## Background

Backgrounds are stored separately from your documents and can hold content like logos or letterheads; they can be applied behind your document but their use is optional. You can store different backgrounds and choose the relevant one for the mailing that you are creating. The backgrounds can be PDF (.pdf), Microsoft Word (.doc), or Rich Text Format (.rtf) files.

Shrink to fit is selected as this is generally the recommended 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.' A common use of this is 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.







The screenshot shows the Docmail interface with the following elements:

- Top navigation bar: **STANDARD DELIVERY**, **1 DOCUMENT**, **0 ADDRESSES**, **SET OUTPUT OPTIONS**
- Buttons: **Mailing options**, **Add documents**, **Add addresses** (highlighted), **Print and post**
- New address** section:
  - Upload addresses** (highlighted with a dashed border)
  - Enter addresses**
  - Add self**

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

You also have the option to '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.



 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

File contains column headers?

File format

Mapping

If you click on 'Upload addresses' the above screen will appear, where you can select your file from your PC.

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

Mailing options



1 DOCUMENT

Add documents



0 ADDRESSES

Add addresses



SET OUTPUT OPTIONS

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

If you need to change any field, click on the target field (Map To) drop down box to choose the field that you would like assigned, like we have done in the example above.

Click next, to check the format of your addresses.



STANDARD DELIVERY

Mailing options



1 DOCUMENT

Add documents



0 ADDRESSES

Add addresses



SET OUTPUT OPTIONS

Print and post

### 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 checked against the Royal Mail database to check they are deliverable. If they validate against the Royal Mail address database, they will have a green tick.




STANDARD DELIVERY

**Mailing options**




1 DOCUMENT

**Add documents**



4 ADDRESSES

**Add addresses**



SET OUTPUT OPTIONS

**Print and post**

Search 
All addresses (4)

Some addresses will incur a surcharge:

REVIEW 2 ADDRESSES marked as "UK address - postal surcharge will apply"

REVIEW 1 ADDRESS marked as Overseas - postal surcharge will apply

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

Showing 1-4 of 4
1

**ADDRESS OPTIONS**

[Back](#)

[Next](#)

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 any addresses that have a grey tick in the 'Correction' box, the Royal Mail data base can offer a correction. If you select 'edit' next to the address, you will be able to see the suggested correction, which you can use if you wish by selecting the amend.

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

 STANDARD DELIVERY	 1 DOCUMENT	 4 ADDRESSES	 SET OUTPUT OPTIONS
Mailing options	Add documents	Add addresses	Print and post

### Print and post

**Print options**

<input type="checkbox"/>  Black & White Simplex (Single sided)	<input checked="" type="checkbox"/>  Colour Simplex (Single sided)
<input type="checkbox"/>  Black & White Duplex (Double sided)	<input type="checkbox"/>  Colour Duplex (Double sided)

**Despatch**

<input checked="" type="checkbox"/>  As soon as possible	<input type="checkbox"/>  Select date
--	---

**Despatch date** 02/09/2016

**Envelope preference**

 Standard - returns not managed
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### "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. As soon as possible will show the earliest available date or you can select another date by choosing 'Select date' where you can choose a future date and we will despatch on the date you've chosen.

You can select a date that is up to 14 days from the current next despatch date.

## “Envelope preference”

Clicking on the 'Envelope preference' will offer various options that allow you to customise both the type of envelope we use for your mailing as well as other optional services:

- Outer envelope: the envelope type that we will use for your mailing. For an additional charge you can specify to use windowed envelopes or even your own design
- Returns: we can offer optional returns services for any items that are not able to be delivered, both managed (where items are returned to Docmail and securely destroyed) or to an address that you specify
- Address panels: by default, Docmail will automatically print the recipient's name and address on the first page of the mailing. Some envelope types allow you to turn this functionality off
- Envelope design: some outer envelope types allow you to choose additional elements such as size and custom designs

A summary of the different options available for each envelope type are shown in the table below.

	STANDARD	CUSTOM DESIGNED	WINDOW
Managed returns	✓	✓	✓
Use own return address	✓	✓	X
No address panels option	X	✓	X
C5 size option	✓	✓	✓
C4 size option	X	X	✓

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. Click on the envelope to see the proof. You must make sure that you check the proof, including address and barcode position, before approving the mailing. 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.

## View proof

Printed proof (click address to view proof):



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.**

If you ever require any assistance, then we have a friendly and knowledgeable support team who will be able to help. They are available Monday-Friday from 8.30am to 5.30pm and can be reached on [customersupport@cfh.com](mailto:customersupport@cfh.com) or 01761 409701.

## APPENDIX 1

### How long will it take for my letter to be delivered?

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.





**[WWW.CFH.COM](http://WWW.CFH.COM) | [WWW.DOCMAIL.CO.UK](http://WWW.DOCMAIL.CO.UK) | [WWW.DOTPOST.COM](http://WWW.DOTPOST.COM)**

**RADSTOCK**

St Peter's Park | Wells Road | Westfield | Radstock BA3 3UP | 01761 416311 | [info@cfh.com](mailto:info@cfh.com)

**LIVINGSTON**

Starlaw Business Park | Livingston EH54 8SF | 01506 462468 | [information@cfh.com](mailto:information@cfh.com)

**SLOUGH**

160 Edinburgh Avenue | Slough SL1 4UE | 01753 567100 | [sales@print.uk.com](mailto:sales@print.uk.com)