

# DOCMAIL: STANDARD USER GUIDE

Version 2.3 February 2016



## Before you start, you'll need:

### A Word document...

- 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 so that Docmail can 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 format - either Microsoft Excel or CSV. 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 or Postcard.





 **CREATE MAILING**

Select product type

☐  A3 Folded Sheet

☒  A4 Letter

☐  Greeting Card

☐  Postcard


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Click Next.

## 2. MAILING OPTION


You choose all of your mailing options on this screen.


 **MAILING OPTIONS**


Switch to advanced mode


Mailing name

Print options


☐  Black & White Simplex (Single sided)


☒  Colour Simplex (Single sided)

☐  Black & White Duplex (Double sided)


☐  Colour Duplex (Double sided)


Delivery type

☒  Standard delivery

☐  First class

Despatch


☒  As soon as possible

☐  Select date

Despatch date

12/01/2016


Dotpost

☐  Use Dotpost

Address name format

Full Name

Envelope preference

 Standard - returns not managed

### Mailing Name

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

### 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).

### Delivery Type

Tell us how to despatch your letters. Choose standard class if you want the lowest prices.

### Despatch

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

### Dotpost

Dotpost is a secure online document hub where users can securely view and manage their important letters and documents. Only tick this box if you are a Dotpost user. See the Dotpost Guide for more information.

### Address Name Format

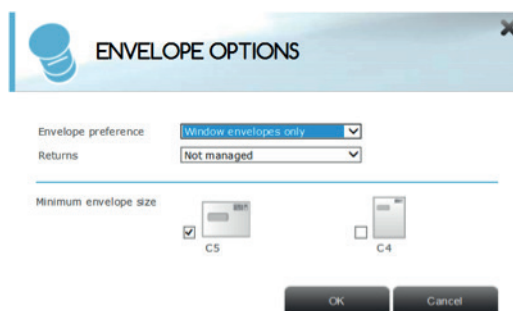
The drop down list against Address name format allows you to choose the way that you want the recipient's name shown in the address. This will depend on what you have in your name and address data, for example, if you only have 'fullname' in your list, you should not choose 'title surname' as your address name format.

### Envelope Preference

Clicking on the Envelope preference will offer various options.

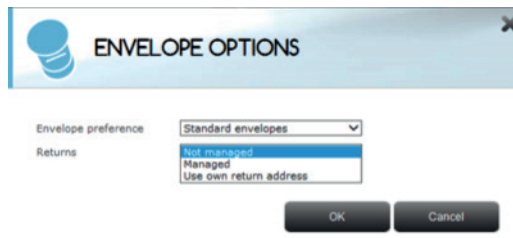
You can select your envelope type. If you choose standard envelopes Docmail will produce your documents at the most suitable location for your output - for example, Scotland output will be produced in Scotland. We will use either standard Docmail window or non-window envelopes as available at that location.

If you 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.) These options will incur an additional cost.



You can also use this box to say how 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. A box displaying the return address will be shown. This will be the address that is recorded against your account. 'Use own return address' is also available for postcards and greetings cards.



The 'ENVELOPE OPTIONS' dialog box features a blue header with a circular icon. It contains two sections: 'Envelope preference' with a dropdown menu set to 'Standard envelopes', and 'Returns' with a dropdown menu showing 'Not managed', 'Managed', and 'Use own return address'. At the bottom are 'OK' and 'Cancel' buttons.

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.

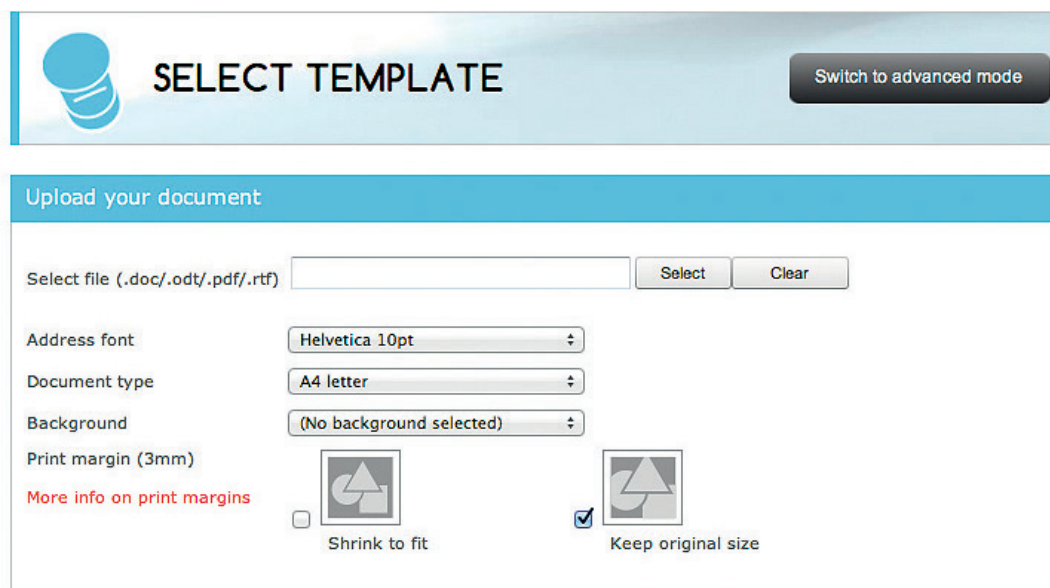
You have the option of having these returns managed; they can be recorded against your Docmail account with the reason for their return so that you can see which addresses have mail that has come back and the cause.

Additional charges are incurred for dealing with returns.

Click next.

### 3. SELECT TEMPLATE

Upload your template which must be a Microsoft Word file (.doc or .docx), an Open Office file (.odt), a file in Rich Text format (.rtf), an Adobe file (.pdf) or use the Greeting card/Postcard designer.




The 'SELECT TEMPLATE' screen has a blue header with a circular icon and a 'Switch to advanced mode' button. Below is a section titled 'Upload your document' with a file selection area (input field, 'Select', 'Clear' buttons), and several dropdown menus for 'Address font' (Helvetica 10pt), 'Document type' (A4 letter), and 'Background' (No background selected). At the bottom, there are two options: 'Shrink to fit' (unchecked) and 'Keep original size' (checked), each with a corresponding icon.

Or ...


Select an existing template - showing 2 templates

Search template names

SEARCH



Letter  
DOWNLOAD



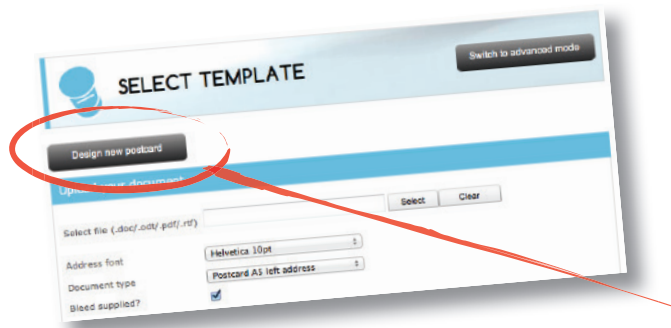
Postcard  
DOWNLOAD

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### Remember...

Docmail automatically adds the recipients address to your letter so you don't need to. If you are using an existing template that you have stored in your docmail library, you can search for the template name and then click on the image.




**TIP:**  
Why not try our Postcard and Greeting Card online design option?



## 4. EDIT MAILING LIST

This is where you upload your Spreadsheet file or CSV containing the addresses of the recipients whom you wish to send your letter to. You can select 'Add self' to add yourself to the mailing 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' and find the file on your PC. Select the uploaded file format (i.e. Excel or CSV).



### UPLOAD ADDRESSES

[Switch to advanced mode](#)

You can optionally download an example template with the standard column headers in Excel CSV format:

[DOWNLOAD EXCEL CSV TEMPLATE](#)

Select a CSV, Excel 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) ▾

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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 letter template that are not standard Docmail fields, then you will need to select 'Add Custom Field' for the required field.

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

### Assign fields

Column Header	Sample Data	Map To
Title	Mr	Title ▾
First name	John	First Name ▾
Surname	Smith	Surname ▾
Full name	John Smith	Full Name ▾
Company name	ABC Company	Company Name ▾
Job title	Director	Job Title ▾
Address 1	1 House	Address Line 1 ▾
Address 2	House Street	Address Line 2 ▾
Address 3	House Town	Address Line 3 ▾
Address 4	Somewhere Nice	Address Line 4 ▾

When your file has been uploaded you have to validate the addresses to check that they are deliverable. Select 'Validate all addresses' to complete this check.

home > library > all addresses

## ALL ADDRESSES

[ADD NEW ADDRESS](#) | [DELETE ALL ADDRESSES](#) | [VALIDATE ALL ADDRESSES](#)

Results per page: 10

Filter: All addresses

Unlinked only? ☐



Search text:  [SEARCH](#)

Docmail checks against the Royal Mail database to see that addresses are complete and correct. If they are deliverable they will have a green tick.

## EDIT MAILING LIST

[UPLOAD](#) | [ADD NEW ADDRESS](#) | [ADD SELF](#)

[SEARCH](#) All addresses (2)

 Some addresses will incur a surcharge:  
REVIEW 1 ADDRESS marked as  "UK address - postal surcharge will apply"

Recipient	Original	Correction		
Kara Harrison, 15 Blakes Drive, Oldfield Park, Bath, BA2 1JW	✓	N/A	<a href="#">EDIT</a>	<a href="#">REMOVE</a>
Paul Williams, Unit 1, Bath Road Business Park, Weston, Bath	?	N/A	<a href="#">EDIT</a>	<a href="#">REMOVE</a>

Showing 1-2 of 2 1


If you have an orange question mark, then your address may be incomplete or incorrect and will incur a 13p 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. ORDER APPROVAL

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 order. If you are not happy with how your letter looks then you can make changes to your order. Amend your original document (letter) and then follow steps 3, 4 & 5 again. You will not need to upload your data list again as it is already saved to the order.

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



# APPROVAL


[Switch to advanced mode](#)

### Mailing proof

[VIEW MAILING SUMMARY](#) | [DOWNLOAD MAILING LIST](#)

Printed proof (click address to view proof):

Kara Harrison  
15 Blakes Drive  
Oldfield Park  
Bath  
BA2 1JW



Printed and posted standard class

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.

Don't like what you see in the proof? Here are some ways to change what you see:

[AMEND OPTIONS](#) | [AMEND TEMPLATE](#) | [AMEND MAILING LIST](#)

### Mailing cost

Discount code  [APPLY DISCOUNT](#)

Cost	£1.13
VAT (20%)	£0.23
Total cost	£1.36

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

[Back](#)[Approve](#)

Follow the payment options to complete the order.

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



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

Telephone: 01761 409701/409702  
Email: [docmailsupport@cfh.com](mailto:docmailsupport@cfh.com)  
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