

Docmail Connect Sage 50 Edition Quick Start Guide

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Getting started with Docmail Connect

Docmail Connect Sage 50 Edition is a plug in for Sage 50 to allow you to create Docmail-ready documents directly from Sage 50 output.

To get started, download the version of Docmail Connect that is suitable for your version of Sage 50. Currently, we support both the 2010 and 2011 versions.

Setting up Docmail

Docmail Connect Sage 50 Edition is a plug in for Sage 50 to allow you to create Docmail-ready documents directly from Sage 50 output.

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Concepto Docenal	This tool is designed to allow you to mail do	se of Docmail Connect!
		to developed you'll be able to use Docrnail Connect to mail more and toon in the main menu on the left, and the he top of the menu bar when it is selected.
	Sign-up to Docmail Top-up Account	You do not have one please use the link on the nd password you specified, complete Dormai's Settings and enter them there.
Home	Finally you'll need to ensure Docmail Connec Line SO Getting started with Sage SO wh	t will not be able to mail your documents.
🔆 Settings	That's it! You can get more detailed informat contact Docmail support;	ion in the Help section but if you are still having problems please
👔 Help	Email: docmailsupport@cfh.com Telephone: 01761 416311 (9.00am-5	.30pm Monday-Friday)
nady		LIVE UI Version 1.0.0.0 Lb Version 1.0.0.0

When you launch the application, the explorer window on the left shows two options, the most important being to create a Docmail account if you don't already have one. If you ALREADY have an account, click on the 'Settings' button below the explorer and add your Username and Password there. More on this later...

Click on 'Sign-up to Docmail':

ocmail Connect e Help				
docm	ail connect sage 50 edition			
Signup to Docmail	Confirm email address	docmailsupport@cfh.com		i •
	Account name	DecmailSupportSage		1 •
	Login user 1D	DecmailSupportSage		1 •
	Password			1.4
	Confirm password			1 •
	Allow web service access? (e.g. docmail express)	v		
	Referred by			1
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	Select your specific market sector	Sage		
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Settings				Bign up
Help				4.)
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Complete the sign-up form in the right hand window and click 'Sign up'. Once done, a login page appears into which you should enter your newly created Username and Password. This completes the Docmail account creation stage.

The next stage involves topping up your Docmail account to ensure you have funds to cover the mailing you will want to do. It is important to do this now, as this initial release of Docmail Connect does not permit an account top-up during the mailing process and deletes the mailing if there's insufficient money in the account.

Click 'Top-up Account' in the explorer window:

Docrmal Connect	- (*) - (*)
	ail connect sage 50 edition
Sign-up to Docmal Top-up Account	None + strike + my account adjury + top-up account
	200 200 200 200 000
Home Sign Line 50 v2011	or enter other amount: (IB-UP MY ACCOUNT Please note that a 35p sur- docrnoil EDO orount toring orount toring
🔆 Settings	or enter other amount: £ 10.00 TOP-UP
Ready	Please note that a 35p surchage will be applied

Add any of the stamp values or the amount you wish to load into your account and follow payment instructions.

There! Docmail is set up and ready to go. To be sure that Docmail has your details each time Docmail Connect is launched, click on 'Settings', enter your Username and Password there too, along with any changes you might want to make to document printing and postage defaults:

Efe type	
docmail connect sage 50 edition	
Image: Settings Image: Cogon Details Image: Sage Line 50 v2011 Username: CogonalSupportSage Password: [Image: CogonalSupportSage]	
	l from Sage Line Docmail Connect
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Setting up Sage 50

To proceed, we now have to make sure that Sage 50 is linked in to Docmail. To do this, open Sage 50. Once a Docmail account has been set up using Docmail Connect in the steps outlined above, you'll notice a new 'Docmail' button on the far right of Sage 50's button bar:

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Help	0								
					(All Records) 🔍 Ch	ange View y	- x
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	Invoice	Credit	Charges	Labels	Letters	Statement	Reports	Docmail	
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		0.00	0.00	Fred Briant		01	908 78787	7878	
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		1075 10	4000.00	Alleria	JLU		40 501 0	40004	

So far so good, but before we can use Docmail Connect to feed our Sage 50 output into printable documents, we must see if 3rd party integration is enabled. Click Help/About/System Information and look at the following box:

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General Technical Sup	oport System	n Information	
System Info System Trivers Trivers Frinters Application Directories Licence Informat Data Information Updates DLL Versions	Item Companies: Users: CIS Enabled SDO Enabled	Value 5 2 No No	
	<u>(•)(</u>)		
		Print	ОК

If 'SDO Enabled' reads 'No' or zero, click Tools/Activation/Enable 3rd Party Integration and call the appropriate number shown to get this feature activated by Sage (FREE service!):

Enable 3rd	Party Integration	×			
	tion Form Instructions At Sage we recognise that no two businesses are alike. That's why we work very closely with over 700 Developers throughout the UK and Ireland who offer Sage add-on software to suit the specific needs of individual businesses. These developer-created software solutions provide truly effective integration, giving you increased power and functionality without the need to re-key data. Retail, Manufacturing and Construction are just some of the different markets already benefiting from a tailored solution from Sage Additions. To enable 3rd Party Integration, you must call Sage Customer Services on one of the following numbers:	×			
	Great Britain: 0845 111 6666 Northern Ireland: 0845 245 0280 Republic of Ireland: 1890 88 20 60				
	Registration Information Serial Number:				
	Activation Key:				
	Continue Cancel	ן			

Enter the Activation Key along with your Sage serial number into the boxes and now Sage output is ready for use.

The next step is to create a new user in Sage 50. Go to Settings/Access Rights/New and call the new user something. We suggest 'Docmail'.

💪 Sage 50 Accounts 2011 - Stationery &	Computer Mart UK	. # ×
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Customers	Welcome to Sage 50 Accounts	
Tada Rev Customer Edit Customer Charae Debit	Welcome to Sage 50 Accounts	_
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Gal Forum Anders Rev Case Castoner Write OttRefund Castoner Hind Castoner Hind New Days Event	What should I do fost? Not sure where to What should I do fost? Not sure where to What should I do fost? Not sure where to User Name User	
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Company Bank A Deschutz	Get More Help	
Products Diary Sage Additions Sage Services	Optiant Same Weblinks Meb Same Access your Help and Same Not super how or who to contact in Sage? Here are a number of ways for you to get in touch. Access your Help and Same and regulations or you want to know more about 5 more more abou	-
User: MANAGER Station: Console_828	16/02/2011 January 2008 123	4 1

Once you have done this, you now need to tell Docmail Connect how to use the data output from Sage. To do this, start up Docmail Connect and click on the 'Settings' button. In the explorer window above expand the Sage 50 option and click on 'Sage Settings'. Enter the username and password you have just created in Sage 50.

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	CONNECT sage 50 edition
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Home Sage Line 50 v2011 Settings Help	UDE (10 Verson 1.0.0.0 (10 Verson 1.0.0.0)

Finally, you should go through each of the Document settings and indicate your print and postage preferences.



Creating and sending an invoice via Docmail

We are now ready to output something from Sage 50 to a customer using Docmail! Firstly, let's create an invoice in Sage 50...

A1 Design Services 67a Station Road Blackpool Lancashire 8P12 7HT			Type Format Date A/C	Product 17/02/2011	Product Invoice Inv.No. CAutoNumber Order No Item No. Item 1 of 1
Product Code	Description A4 Carbon Copy Bo	Quantity ok - Triplicate O	Price £. 27.00	Net E 2.85	V.Α.Τ. Ε 76.95 1:

When you have done this, click Save and open Docmail Connect. Click the Sage button and select 'SL Invoices', then click Apply.

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File Help		
docmail	ONNECT sage 50 edition	
SL Invoices SL Statements Chase Debt	Pitt Ver Malage Piter Rest	Amount Printed Posted
Legal	Slifter Invoice Records	
	Select Custome Account Ret Filer By Date From: 127/11/2010 Date To: 127/02/2011 Invoice in Sage Printed? Invoice in Sage Pointed? Include previously Docmal printed? Accely Cancel	
Home		
🔆 Settings		
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Ready		LIVE UI Version 1.0.0.0 Lb Version 1.0.0.0 Q

You should see your newly created invoice appear in the main window...

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File Help		
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E Chase Debt	Print Vew Malings Filter Reset	
- Warning	No. Type Date Name 96 Invoice 17/02/2011 A1 Design Services	Anount Printed Posted 90.08
Home		
Settings		
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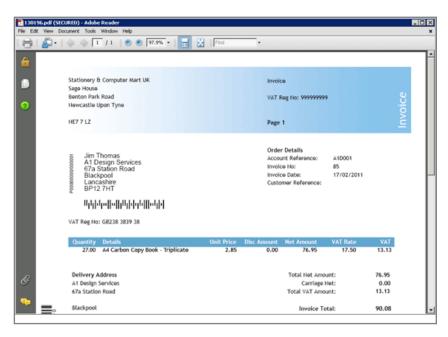
Highlight the entry(s) and hit the 'Print' button in the button bar.

			Q	8
Prin	t Vie	w Mailings	Filter	Reset
No	Туре	Date	Name	
86	Invoice	17/02/2011	A1 Design Servi	ices

You will be asked to Confirm Mailing Options, then Docmail Connect sends the invoice to Docmail for print and despatch.

•	Docmail Mailin	g			×
	Mailing Co	mplete!			
	- Order Details				
	Order Details Order Ref:	130235	Total No. Add	resses:	1
	Delivery Type:	Standard class	No. Surcharge	e Addresses:	0
	Despatch Date:	21/02/2011	No. Overseas	Addresses:	0
	Print Type:	Simplex (Single Sided)	Created By:	user	
	Colour Type:	Colour	Created On:	17/02/201	1 12:37:22
	View 1	1 <u>30235.pdf</u>		Net Cost:	0.34
				VAT:	0.07
				Total Cost:	0.41
					Close

Once processing is complete, you will see the report window, showing what you have just done, and the cost. You can also view a PDF of the invoice...



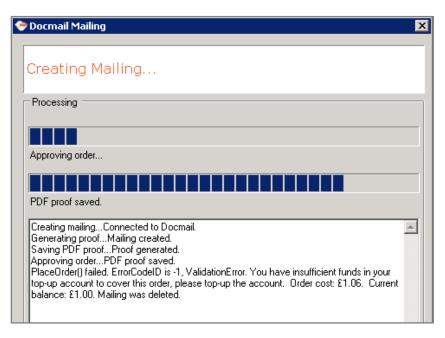
Add any of the stamp values or the amount you wish to load into your account and follow payment instructions.

There! Docmail is set up and ready to go. To be sure that Docmail has your details each time Docmail Connect is launched, click on 'Settings', enter your Username and Password there too, along with any changes you might want to make to document printing and postage defaults:

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docm	-	NECT sage 50 edition	×
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- A Docmail Settings	W	Logon Details Usemame: ocmaiSupportSage Password:	
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	1101	Default Print Type	
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		C Black and White Duplex (Double Sided) Colour Duplex (Double Sided)	
		Default Delivery Type	
Home		• S ^{tnd} c 1 st	
Sage Line 50 v2011		Standard Delivery First Class	
Settings		Save Cano	et
0			

Possible problems

1) If you do not have enough money in your Docmail account, you will see a message similar to this:



To correct this, you must click on 'Home' and go to 'Top-up Account'. Once the funds are in place, highlight the entry or entries and click the 'Print' button again.

2) You are not happy with the PDF proof, or you've spotted an error in the Invoice and you want to cancel the job.

Currently, this can only be done by accessing your Docmail acount via a web browser.

Log in to your Docmail account (https://www.docmail.co.uk/live/login.aspx), click on 'Administrate Data' and under 'Mailings', select 'MY MAILINGS'. You will see a list of mailings and their current status. The mailing you just sent via Docmail Connect will be there. Identify it by Order Ref or Mailing Name and select 'CANCEL'.

Order ref 🔻	Mailing name	Created	Status code	Price			
130196	Order 130196	17/02/2011	Payment success - awaiting production	£0.53	VIEW	EDIT	CANCEL

Your mailing will be deleted and your Docmail account credited with the full cost.

Adding backgrounds

home > library > backgro Backg	unds grounds						
ADD NEW BACKGROUND							
Results per page 4	*						
Product type A4 Lett	er 💌						
Search text		SEARCH					
Showing 4 backgrou	Showing 4 backgrounds						
ChaseDebtConnect DELETE	CreditConnect DELETE	InvoiceConnect DELETE	StatementConnect DELETE				

If you are new to Docmail the Docmail Connect backgrounds for Sage output will have been added for you when you created your account. Existing Docmail users will have to add the Backgrounds. Download these here http://www.docmail.co.uk/Downloads/Sage50_backgrounds.zip and unZip the package.

At this point, whilst they are on your system, you can customise them to your business. Why not add your company logo? Just remember that Docmail Connect places all the data in pre-determined positions, so it is best to try a few test outputs first.

Next, upload the backgrounds to Docmail. MAKE SURE THE NAMES ARE EXACTLY AS SHOWN ABOVE.

home > library > backgrounds > add new bac		
Name Upload file Document type Restrict use of the background to the creator?	InvoiceConnect	Select Clear
		Back Next

Each time you output Sage 50 via Docmail, the correct background will be automatically selected.



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