

IMMUNE DEFENCE STUDY: DOCMAIL INSTRUCTIONS

HOW TO LOGIN – setting up database mailings

1. Access Docmail online: www.cfhdmail.com
2. To sign in:
 - Click on **'Sign Up/Log in'** on bar at the top of the page.
 - You will be taken to the **Sign in** page, enter your **Login User ID** and **Password**.

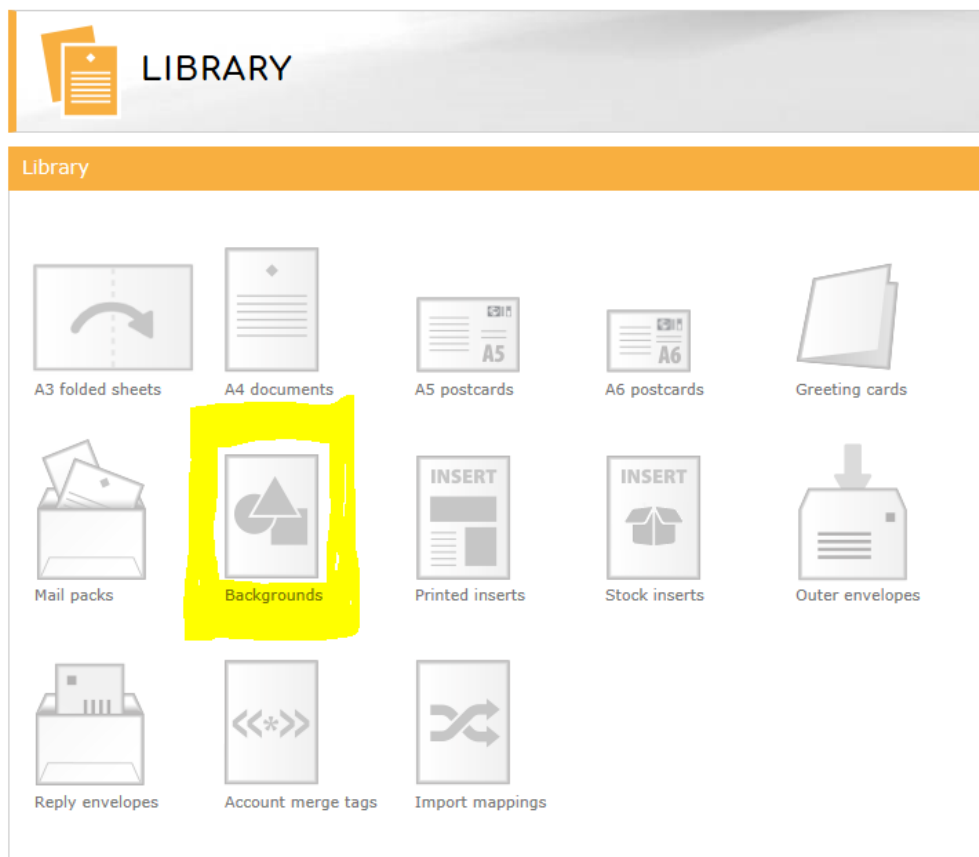
You may change the password at any time by going to Admin (on the tool bar). Select User then My Login Details and Edit password.

From this screen go to the top black tool bar and click on **'create mailing'**

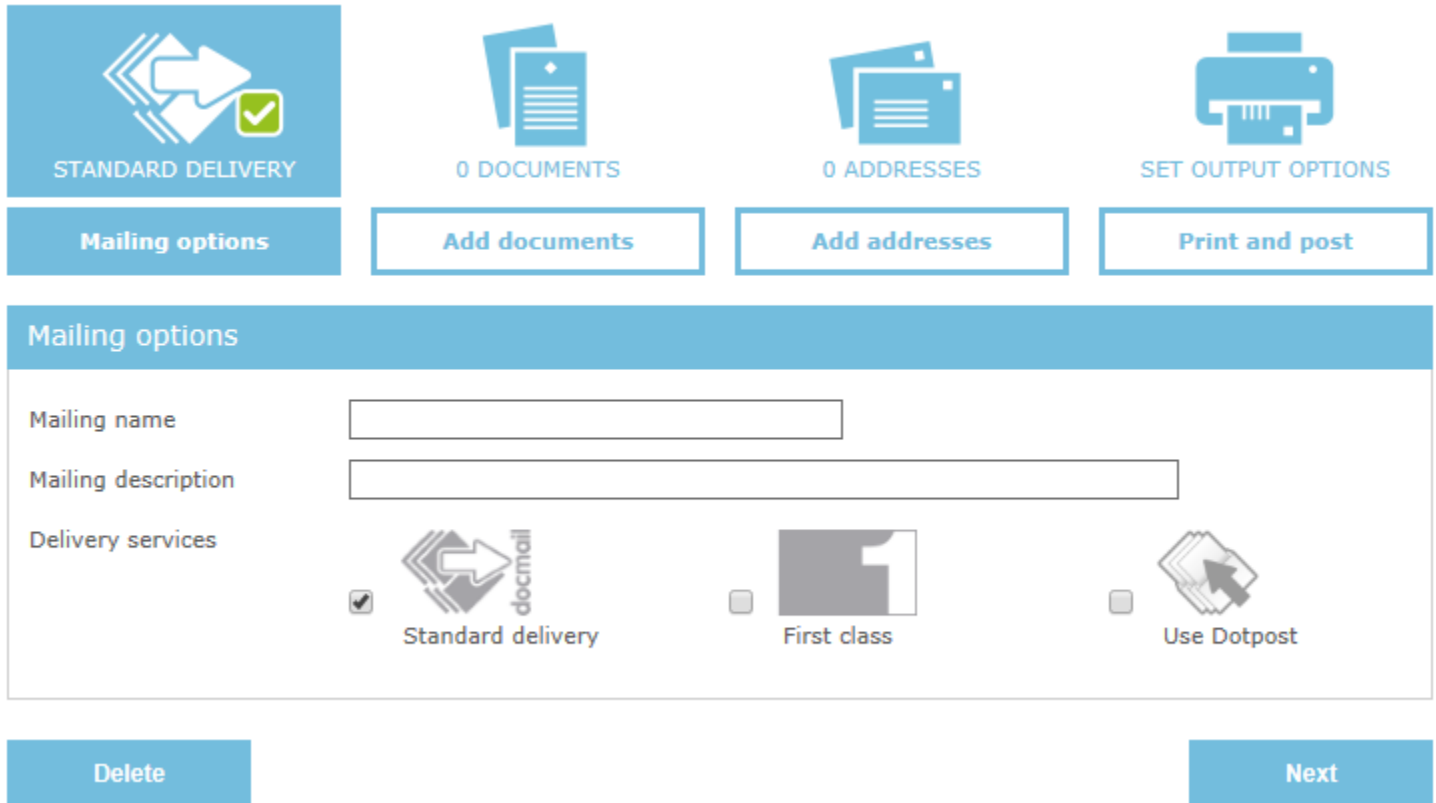
3. Adding your letter head

Before creating your mailing, the letterhead will need to be added into your library so that this can be manually added on to your order later on in your mailing.

On the tool bar at the top of your page you will need to select the library option where you will then be presented with a logo for 'backgrounds'. Click on the background's logo. You will then be given the option to add new background. From here, you would need to select your saved letter head to upload this in to your Docmail library. Once this has been done you can then begin to create your mailing.



4. **To create a mailing:** The Option for Create mailing will be on the black tool bar at the top of the page.
- Choose **A4 letter**
 - You will be taken to the **Mailing Options** page



The screenshot shows the Docmail interface for creating a mailing. At the top, there are four main action buttons: 'Mailing options' (with a checkmark icon), 'Add documents' (0 DOCUMENTS), 'Add addresses' (0 ADDRESSES), and 'Print and post' (with a printer icon). Below these is a 'Mailing options' section with input fields for 'Mailing name' and 'Mailing description'. Under 'Delivery services', there are three options: 'Standard delivery' (checked), 'First class', and 'Use Dotpost'. At the bottom, there are 'Delete' and 'Next' buttons.

Complete as follows:

Mailing name: **Surgery Name (confirm with Study group)**

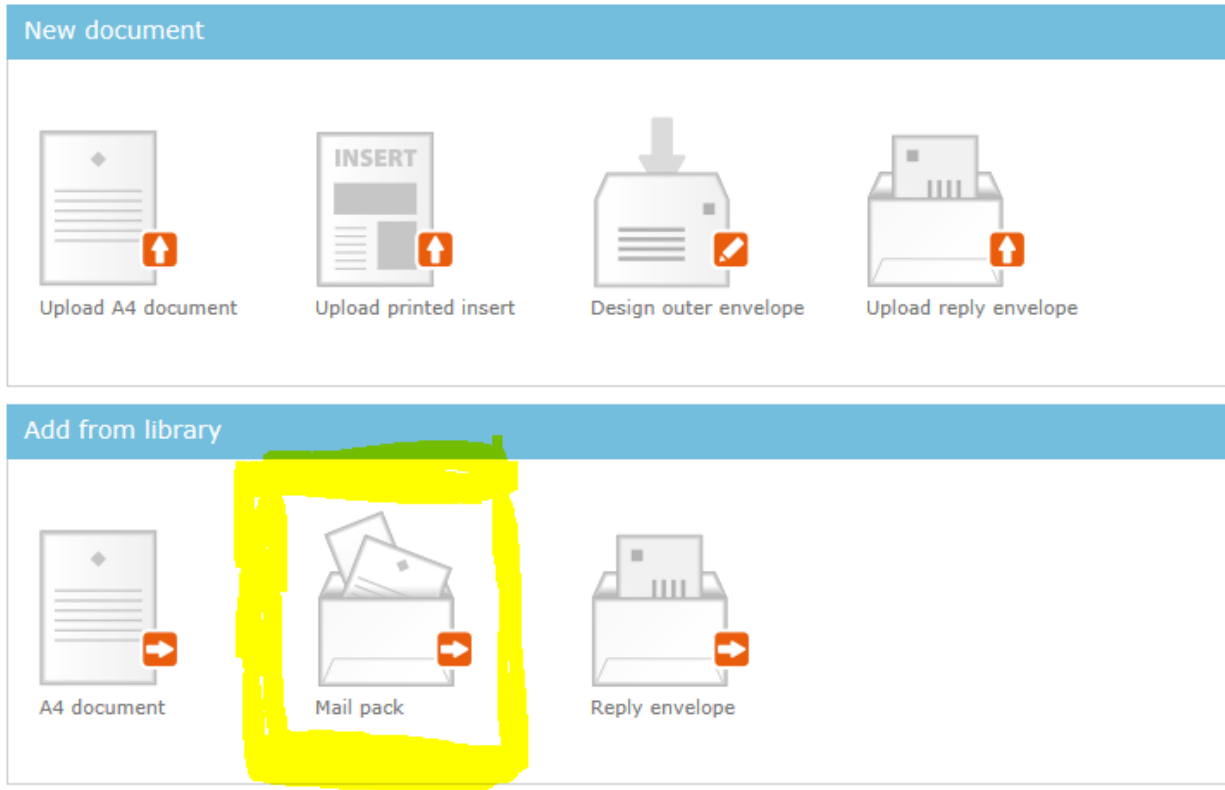
Leave company as it is.

Delivery Services: **Leave as standard delivery unless told otherwise.**

- Click on **'Next'**

5. To add documents:

- Within the add from library section, click onto the 'mail pack':



This will take you through to select mail pack to add, you will then see images of the mail packs, click onto the image of the mail pack that you require. **Invitation Mailpack.**

- A message will appear asking if you would like to add all of the documents from the selected mail pack.
- Click on 'OK'
- This will then show you and image of each template within the mail pack.

You should see 3 documents – Immune Defence Patient invitation letter, Immune Defence Patient Information and Immune Defence how to take part.

This is the stage you add your surgery letterhead. Click on the 'Immune Defence Patient Invitation letter' and where it says 'background' and (no background selected), press 'Change Background' written in orange. Select your letter head from the drop-down box that will appear. Press next to save this.

Please note the letter head will not be visible on this document until you get to the proofing stage.

- Click on 'Next'



6. **To add addresses:**

- Click on 'upload addresses'.
- You will be taken to a page to upload your excel address spread sheet.

Address File: 'select'

Browse for the file on your PC. (You will be shown a window, you then search for your address file, select your file then click on 'open' Your file will then show in the 'address file' on the page)

'File contains column headers' check it is ticked
 File format automatic from file type
 Mapping: automatic

Click 'Next'.

You will be taken to the assign field's page.

Assign fields

SET TO DEFAULT MAPPING

Column Header	Sample Data	Map To
Title	Mr	Title
First Name	Joe	First Name
Surname	Bloggs	Surname
Address Line 1	CFH Docmail Ltd	Address Line 1
Address Line 2	St Peter's Park	Address Line 2
Address Line 3	Wells Road	Address Line 3
Address Line 4	Radstock	Address Line 4
Address Line 5	BA3 2RA	Address Line 5
Address Line 6		Address Line 6
GP Name	Dr Jones	- Add Custom Field -
Practice Name	Your Doctors	- Add Custom Field -
Participant Code	123456	- Add Custom Field -

You will need to make sure all data is mapped correctly as above.

- Click on 'Next'

7. To set address name format:

- You will see a number of envelopes displayed showing the different ways in which the name can be displayed on the letter.
- Click onto the envelope 'Title Firstname Surname'

Set address name format

Address name prefix

Full name Joe Bloggs CFH St Peter's Park Wells Road Radstock Ba3 3up	Title first name surname Mr Joe Bloggs CFH St Peter's Park Wells Road Radstock Ba3 3up	Title initial surname Mr J Bloggs CFH St Peter's Park Wells Road Radstock Ba3 3up
First name surname Joe Bloggs CFH St Peter's Park Wells Road Radstock Ba3 3up	Title surname Mr Bloggs CFH St Peter's Park Wells Road Radstock Ba3 3up	

- Click on 'Next'.

The address will then appear with one of the below:

Red Cross you will need to validate the address by clicking the validate button in the bottom right hand corner

Green ticks show the address is fine.

Orange question marks mean your address may be **incomplete or incorrect** and will incur a 5p surcharge.

Amending incomplete or incorrect addresses - You have an option to edit these so please do. If any address has an orange question mark next to it, and a faded grey tick next to this, please select 'Edit'. You will be taken to the edit addresses screen, where you should see an edited address. If you think this is correct, select the tick the box stating, 'Use Corrected?' to use this instead.

- Click on 'Next'.



8. Print and post:

Print options: **Colour duplex - however these will be pre-selected for you by the study.**

Despatch: **As soon as possible.**

Envelope Preference: Leave as selected (standard – returns not managed).

➤ Click on 'Next'.

9. To approve the mailing:

Click on **the address within the envelope** to view the document. (you can either download this or view online) **Please check this CAREFULLY.**

Check that the letter includes patient title, first name, surname and full address. Check the address panel is not covering any text.

Check the rest of the documents in the pack by clicking on them from the left-hand side.

Click the document to close the proof.

Please do NOT send the document if you have concerns or are unsure

ANY PROBLEMS AT THIS STAGE PLEASE PHONE DOCMAIL HELPDESK AND THEY WILL BE HAPPY TO ASSIST. For example, the recipient's name has not merged correctly on the document.

Once you are satisfied that everything is OK then:

- Click the anywhere on the proof and this will shut the proof down for you.
- Select 'Sam Williams' from the content approver drop down and press 'approve'.
- The Study will now check they are happy with the mailing before approving for production.

**The order has now been submitted for production.
Your mail out is now complete.
Thank You!**



DOCMAIL Contact Details

Email support: docmailsupport@cfh.com

Telephone support: 01761 409701/702
9.00am-5.30pm Monday-Friday

Address:

CFH Total Document Management Ltd
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BA3 3UP

Tel: 01761 416311