

DOCMAIL & FLEX :

PULLING TOGETHER TO MAKE CUSTOMER CONTACT EASIER



HOW IT WORKS

Leading hybrid print and mail system Docmail and Optinet have pulled together to offer you the perfect solution for customer communication.

Docmail is fully integrated with Optinet FLEX allowing you to print and mail to your customers direct. No need to come out of your software and login to Docmail – saving you even more time!

To begin the Docmail sign up process follow the below link:

<https://www.cfhdocmail.com/Live/signupnew.aspx?VM=OptinetVM>

REGISTERING AND LOGGING IN TO **DOCMAIL**

The above link will take you to the following page, to complete the sign up process. During the sign up, you will receive an activation code by email to activate the account so that it is ready to use.

docmail[®] *Overview | Walkthru | FAQs | Sign in | Sign-up | Try as a guest*
(Signed out) - Please [Sign-in](#)

Sign up
Please enter your details below so you can start saving time and money creating your mailings today!

SIGN UP

Step 1 of 3 - Name

Title: (Please select) ▾
First name:
Surname:
I'm not a robot check: Enter four digit number:

4535
[REGENERATE NUMBER](#)

[Next](#)

When registering, the Optinet vertical market is already a preselected option, ensuring that you receive the benefits from the integration. The image below shows this.

[MANAGE DOTPOST CLIENT](#) | [MANAGE ADDRESS PLUGIN](#) | [INVOICE ADDRESS](#)

Account number	ZDM000000
Account name	Awaiting signup_4d2ee31b-9913-4036-81ce-4d64f5e
Vertical market	OptinetVM
Activation code	ypuqf760
Notes	

You can now login to Docmail from our website <http://www.cfhdocmail.com/live/login> using the username and password given when you signed up.

When you are logged in you will be on the Docmail home page and you can navigate the system from here. You are now able to print and mail to your customers, helping you receive the best results.

TOPPING UP YOUR ACCOUNT

You can add credit to your Docmail account by visiting admin, top-up account.

The screenshot shows the Docmail Admin interface. At the top, there is a navigation bar with the Docmail logo and links for Home, Create mailing, My mailings, Library, Admin, Help, and Proxy logout. The main content area is titled 'ADMIN' and displays the account number ZDM000000. Below this, there are four main sections: Mailing, User, Account, and Corporate. The Mailing section includes links for MY MAILINGS, MY INVOICES, MY ACCOUNT ACTIVITY, TOP-UP ACCOUNT, POSTAL RETURNS, and REPORTS. The User section includes MY LOGIN DETAILS and MY ADDRESS. The Account section includes ACCOUNT DETAILS, ACCOUNT ADDRESS, INVOICE ADDRESS, ADDITIONAL USERS, and DEFAULT MAILING OPTIONS. The Corporate section includes a link to contact support for more information. A 'Back' button is located at the bottom right of the page.

Admin

From here you can easily see the status of all your mailings, get copies of previous invoices as well as being able to update the details we hold for your account.

Click on the relevant link for the option of your choice, or click on the "back" button to return to the home page.

home > admin

ADMIN

Account number: ZDM000000

Mailing

- MY MAILINGS
- MY INVOICES
- MY ACCOUNT ACTIVITY
- TOP-UP ACCOUNT
- POSTAL RETURNS
- REPORTS

User

- MY LOGIN DETAILS
- MY ADDRESS

Account

- ACCOUNT DETAILS
- ACCOUNT ADDRESS
- INVOICE ADDRESS
- ADDITIONAL USERS
- DEFAULT MAILING OPTIONS

Corporate

Interested in additional corporate features? Please contact Docmail support for more information.

[Back](#)

Choose one of the standard amounts by clicking the stamp symbol or enter your own amount and click the 'Top-up my account' link. From here follow the online prompts to complete the payment. Please note that it is not possible to refund top-up monies and the credit must be used within 24 months of the top up date.

[home](#) > [admin](#) > [top-up account](#)



TOP-UP ACCOUNT



or enter other amount: £ [TOP-UP MY ACCOUNT](#)

[Back](#)

REPORTING SYSTEMS

To run and view existing reports on your mailings, visit the reports section on the Admin page. This page allows you to run new reports and view report history which are all available to download.



[Home](#) | [Create mailing](#) | [My mailings](#) | [Library](#) | [Admin](#) | [Help](#) | [Proxy logout](#)

Reports

This screen lists previously run reports, click the run new report button to generate a new report.

[home](#) > [admin](#) > [reports](#)



REPORTS

[Run new report](#)

Search

[Search](#)

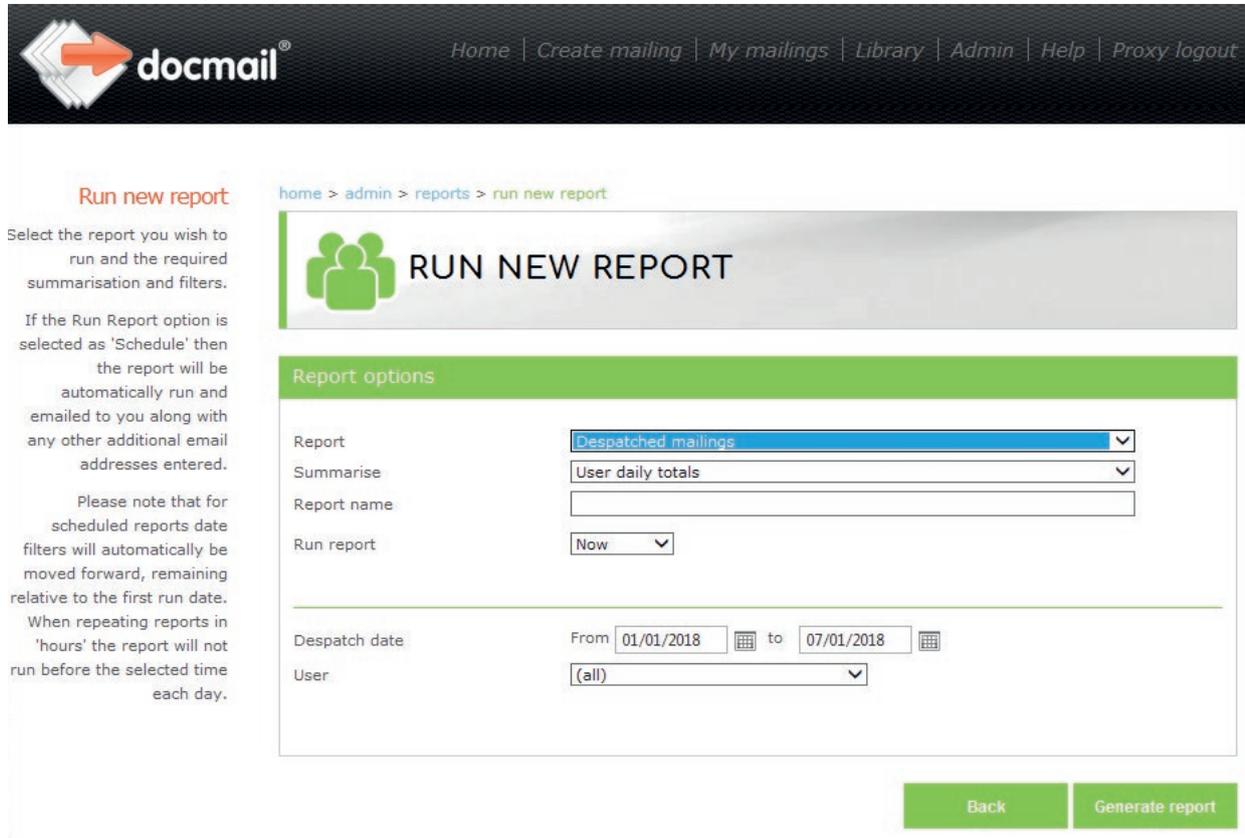
Page size

There are no reports for the search criteria.

[Back](#)

To run a new report, use the drop down menus to determine the information you want to see displayed. From here you can view your reports online or they are free to download. You can also schedule a report to run on a regular basis which will be stored in the reports section of your account.

You will receive a secure link via email to access the report directly and you can invite others to view the report as well.



Crown
Commercial
Service
Supplier



If you require any assistance whilst using Docmail, please contact our friendly customer service team on:

T: 01761 409701/2 | E: docmailsupport@cfh.com

www.docmail.co.uk