



DIGI-MAIL

User Guide

# Digi-Mail user guide

Citipost Mail are proud to introduce our innovative software solution Digi-Mail! With our state-of the art platform, you can be sure that your mail is being processed efficiently and securely. We offer a flexible solution at an affordable price for every letter you send!

This guide will take you through our simple processes. We've designed Digi-Mail to be as straightforward as possible. This guide will walk you through each step... We want to ensure that every single item you upload is printed perfectly, so please take the time to familiarise yourself with the Digi-Mail system and the contents of this user guide

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# How does Digi-Mail work?

At Digi-Mail, we understand that your time is valuable. That's why we've developed an online solution that makes it easy to manage your mailing needs. Our process is simple:

**1.**



Select your  
required  
document

**2.**



Drag and  
drop your file  
to upload

**3.**



Choose your  
delivery method

**4.**



We'll print your  
file, envelope  
and dispatch

**5.**



We'll Deliver  
your mail...

**6.**



...directly to  
their door



# The Digi-Mail portal

## Accessing Digi-Mail

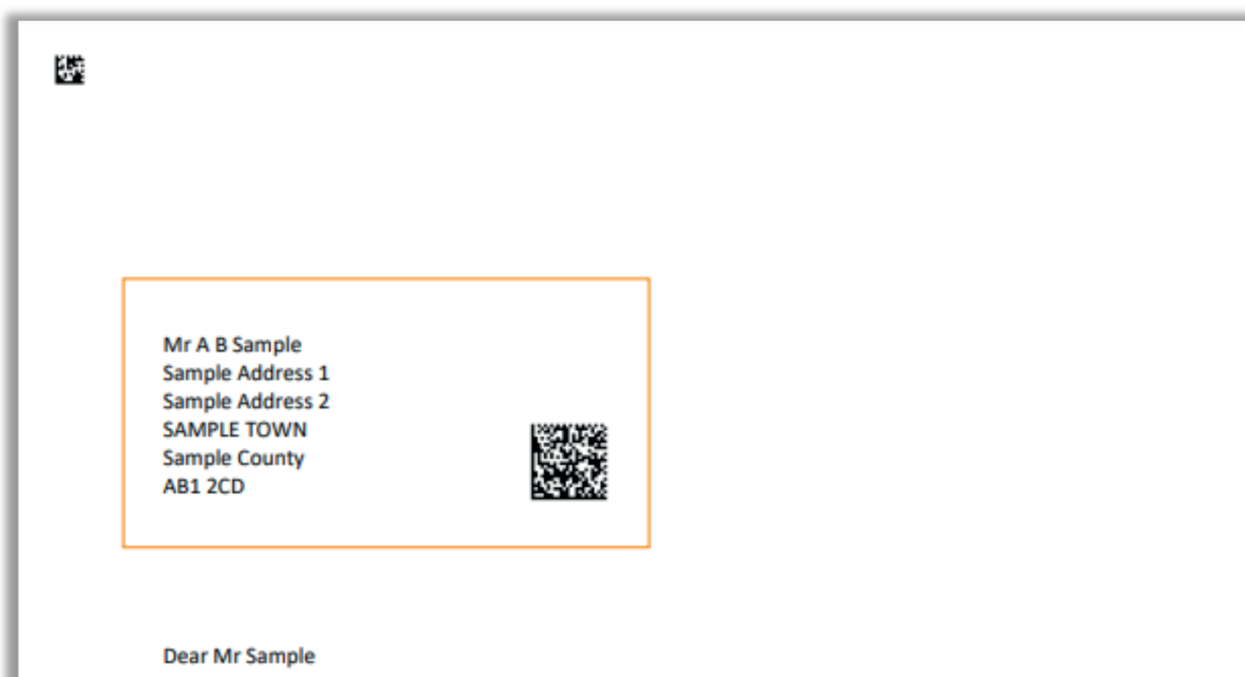
Digi-Mail is an online software solution that does not require any complicated installs or downloads. It can be accessed on any PC with an internet connection allowing you to send mail from anywhere in the world via the following link: <https://portal.digi-mail.co.uk>

## Creating your mailing items

Digi-Mail is great at one thing and that's streamlining the process of getting your letters where they need to go. However, there are some specifications that need to be adhered to, to ensure that your mail items are created and delivered correctly.

### Letters and Large letters:

For A4 letters and Large Letters (C5 & C4), it is important that the items are designed in portrait and that the address is placed in the outlined clear zone, so that the address sits behind the envelope window.



## Image quality

If you are adding images to your letters or postcards, below are some helpful tips to optimise the final print quality:

### Do's:

- Do use a high-resolution JPEG or PNG in your documents; image quality should be 300dpi for printed documents
- Do use the original high-resolution image
- Do try to use images that are naturally large in size, and reduce their size appropriately in the document
- In the PDF settings, ensure that 'Optimize for' option is set to 'Standard (publishing online and printing)'
- If using PDF Optimisation software to reduce the size of your final PDFs, ensure that 'Downscale Images' options are not checked
- If using PDF Optimisation software to reduce the size of your final PDFs, ensure that any quality settings are set to the highest available option

### Don'ts:

- Don't use the 'Compress Images' function in order to reduce the file size of your documents
- Don't use images in your documents that have been captured via screenshot
- Don't use images in your documents that have been downloaded from a web page
- Don't use images that are naturally small and need to be enlarged in the document

## Addressing

Addressing standards are in line with Royal Mail's requirements - a summary of which is listed below but please refer to Royal Mail's full guides for more details;

[https://personal.help.royalmail.com/app/answers/detail/a\\_id/81/-/clear-addressing---how-to-address-your-mail](https://personal.help.royalmail.com/app/answers/detail/a_id/81/-/clear-addressing---how-to-address-your-mail)

- All mail items must comply with Royal Mail's guidelines for offensive material & fair trade and competition laws.
- Each individual element of the address must be on a separate line
- The house number and the street name must always be printed on the same line
- The Postcode must always be in 'UPPER CASE', and must be on the last line of the Delivery Address
- There should be a gap of 1-2 spaces between the 2 parts of the postcode
- Only punctuation that is included with the PAF address should be included, or alternatively all punctuation may be removed
- The Delivery Address should be printed in 'Title Case' (preferred) or 'UPPER CASE'
- The word spacing should be 1-2 spaces and no more than 5mm
- The Delivery Address block skew should be no more than plus or minus 5°
- There must be a minimum of 3 lines of an address
- In the case of International items, the country must be on the last line of the address
- Addresses should be validated against PAF

## Preferred Fonts

A Single font should be used for the whole Delivery Address block and this should be using a 10-12pt font with normal character spacing and with the pitch set at 10-12 characters per inch. Only machine-readable fonts should be used, a list of preferred fonts is below for your reference:

Courier, Courier New, Letter Gothic, Lucida Console, Lucida Sans Typewriter, OCR B, Word Gothic

Acceptable Proportionally Spaced Fonts are :- Arial, Avant Garde, Calibri, Estrangelo Edessa, Eurostile, Frankfurt Gothic, Franklin Gothic (Book), Gautami, Geneva, Gill Sans, Helvetica, Latha, Lucida Sans, Mangal, News Gothic MT, Optima, Ravi, Shruti, Trebuchet MS, Tunga, Univers, Verdana L Fonts -

In general, any fonts that are used should be simple and easy to read. The following fonts should not be used:

Italic, bold, pseudo script, serifs, computer zero (Ø), or any font that looks hand written.

## Embedding Fonts

All fonts must be embedded in your document before being uploaded to the Digi-Mail portal, if you are using Mail Merge and saving as a PDF, please follow the below instructions to ensure all fonts are embedded correctly:

1. Once you have completed the mail merge, click the 'Print' option in the mail merge menu
2. Select the range of documents to export and click 'Ok'
3. Select Adobe PDF from the dropdown menu and click 'Properties'
4. Ensure 'Rely on system fonts only; do not use document fonts' is unchecked and click 'Edit'
5. In the Compatibility dropdown, ensure Acrobat 8.0 is selected then click 'Fonts' from the left-hand menu.
6. Ensure all 3 options at the top of the Fonts setting are checked, the dropdown for 'When embedding fails' should state 'Warn and continue'. If there are any fonts in the bottom right 'Never embed section', highlight them all and click 'Remove'
7. Click 'Save as'
8. Select the filename for the settings and click 'Save' and the 'Ok'
9. You'll be returned to the PDF Properties menu - the name will be saved in your settings and will now be in the Default Settings dropdown. Next time you export your mail merge to PDF you can simply ensure this option is selected

If you would like to see a step by step guide including images, please refer to appendix one.


## International Items

International items can be handled in the same way as any other mail item, we just require that the "International" postage

**Postage**

---

Service

Envelope 

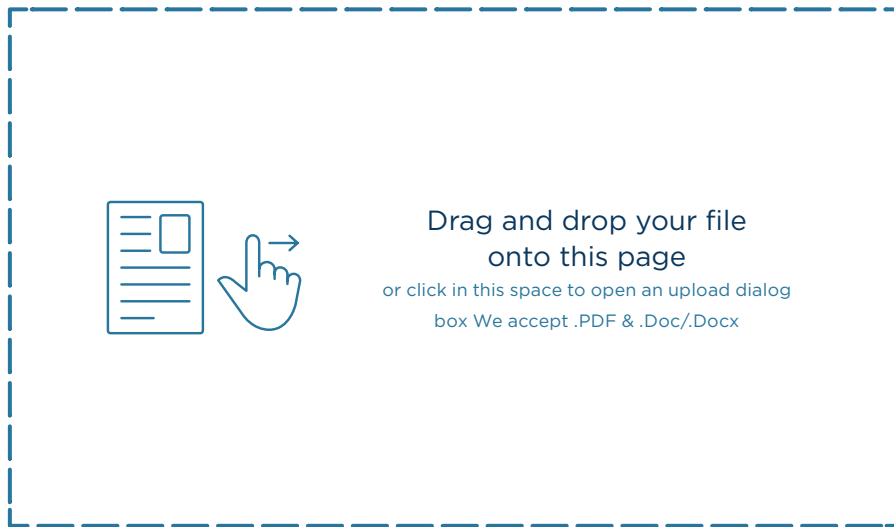
# Uploading your mail items

Once you have finished creating your mail items and saved them locally as a PDF DOC or DOCX file (PDF or Word), you can proceed to upload them to Digi-Mail!

To upload a file simply log into your Digi-Mail account at <https://portal.digi-mail.co.uk/>

Drag & drop your saved document into the indicated area or click the link titled “click here to upload” to select your document from its saved location on your computer.

Digi-Mail upload area:



Please note that if this is a multi-page document, with content going to multiple recipients we recommend uploading as a PDF only.

The maximum file upload size is 100 megabytes.

Once your document has been uploaded you will be automatically redirected to the print preview page to select your print and postage options.

# Preparing your document for printing

## Setting a document reference

Setting a print reference for your document is an easy and quick way to ensure that you can easily find your document again in the future. Simply enter the name or title of your document in the print reference field and your print reference will be assigned automatically. This can be very useful if you need to refer back to your document later as it will make searching for your document much easier. By default, we use the name of the file that was uploaded, but this can be changed by simply editing the field. If the field is changed, then we merge both names in the following format (Custom Reference (File: Original Reference)).

Reference

One Off.pdf

## Nudge a document

The position of the address is an important part of your letter, we not only need to extract the address for certain post types, but your letters are posted in windowed envelopes and therefore the address needs to be positioned correctly for the delivery service. Sometimes the address may only need to be moved by a subtle movement to ensure it sits behind the address window correctly, which is why we introduced 'nudging'. This feature allows you to move the position of the 1st page slightly in any direction. The measurement is in millimetres.

### Nudge

---

Right ?

e.g. 1 or -1

Top ?

e.g. 1 or -1

A positive number in the "Right" field will move the 1st page to the right. A negative number will move the 1st page left.

A positive number in the "Top" field will move the 1st page to down. A negative number will move the 1st page up.

## Document Splitting

Digi-Mail allows you to upload a single document containing multiple letters. From there, you can then split the document into multiple letters, saving you valuable time. Below you will find two quick options to handle all your document splitting requirements.

### How to split your documents by word or phrase

In the following example, we have uploaded a single PDF containing 100 separate letters, each letter has an unknown page length, so we must split by a word or phrase that is unique to each 1st page. i.e. “Dear” or “Private and Confidential”

1. After uploading your document, click “Split into several letters”

#### Print Preview £9.73 £11.68 incl. VAT 279 pages 1 letter

Reference

Mail Merge Variable Pages.pdf

Split into several letters

Additional pages

#### Printing

Double Sided

No

Premium

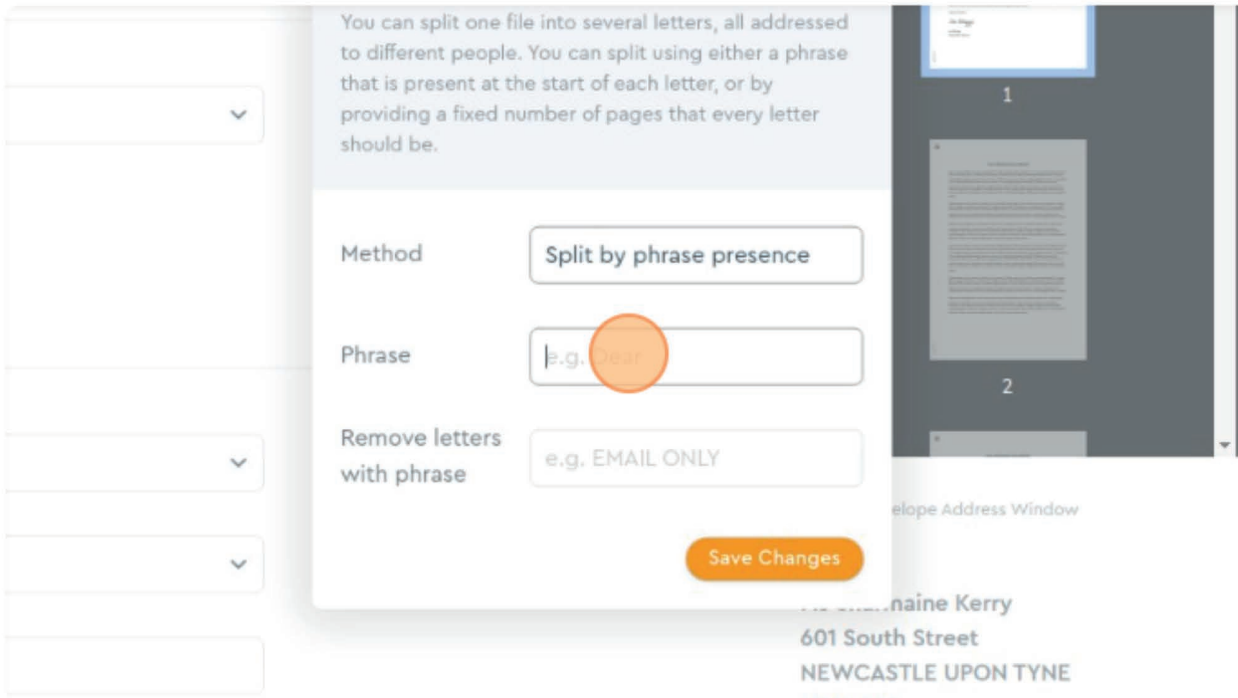


2. Click the “Method” dropdown and select “Split by phrase presence”

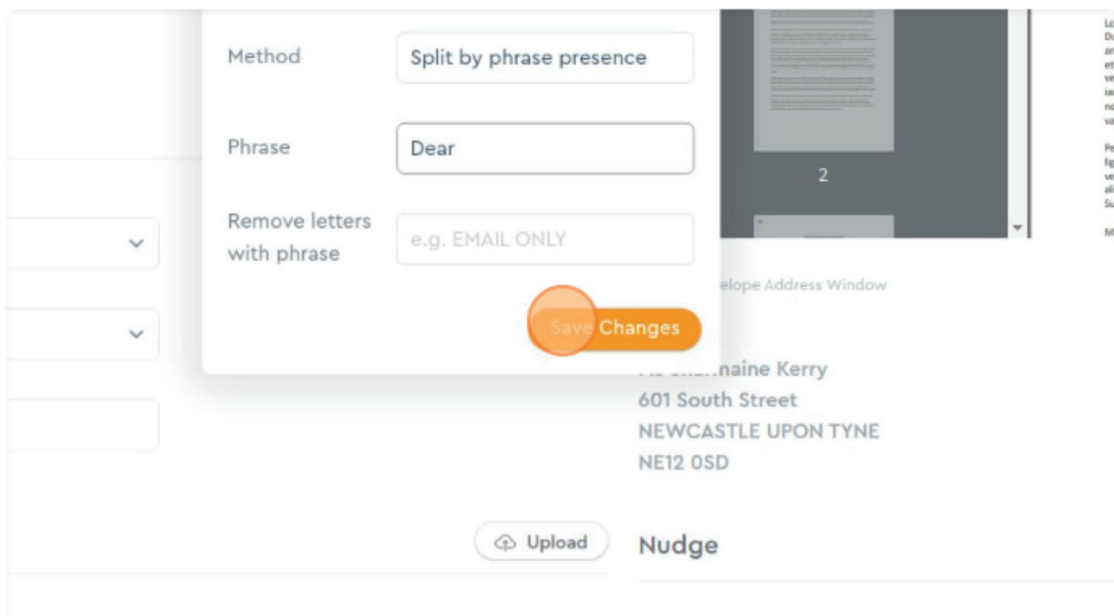
The screenshot shows a 'Splitting' modal window with the following content:

- Splitting**
- You can split one file into several letters, all addressed to different people. You can split using either a phrase that is present at the start of each letter, or by providing a fixed number of pages that every letter should be.
- Method** dropdown menu with 'None, one letter' selected.
- Save Changes** button.
- Background preview of a document with page numbers 1 and 2.
- Address: Ms Sharmaine Kerry, 601 South Street, NEWCASTLE UPON TYNE.

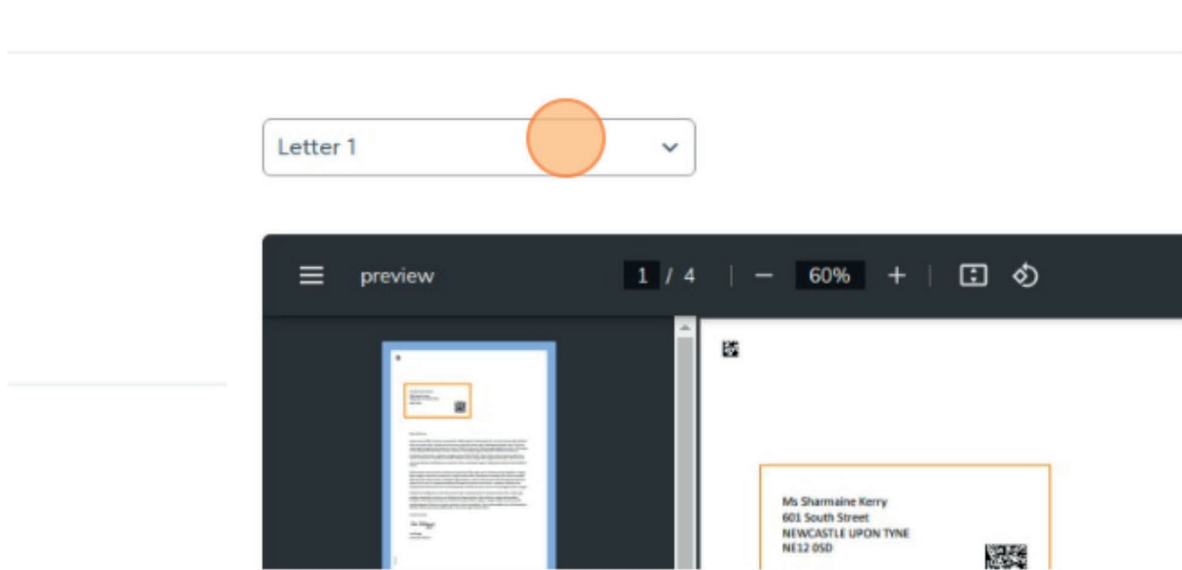
3. Click the "Phrase" field.



4. In our example, the word "Dear" only appears on the first page of each letter. So, in the phrase field type "Dear" (Note: this is case sensitive) and save the changes.



5. You should now notice a new drop down above the document preview screen, clicking this will allow you to preview each of the letters. From here you can check each letter to ensure it has been split correctly.





## How to split your documents by a fixed number of pages

In the following example, we know that each letter is a fixed number of pages throughout the document and can therefore tell the system at what point one letter ends and the next letter begins.

1. After uploading your document, click “Split into several letters”

### Print Preview

£9.73 £11.68 incl. VAT

279 pages

1 letter

Reference

Mail Merge Variable Pages.pdf

Split into several letters

Additional pages

### Printing

Double Sided

No

Premium



2. Click the “Method” dropdown and select “Split by number of pages”

**Splitting**

You can split one file into several letters, all addressed to different people. You can split using either a phrase that is present at the start of each letter, or by providing a fixed number of pages that every letter should be.

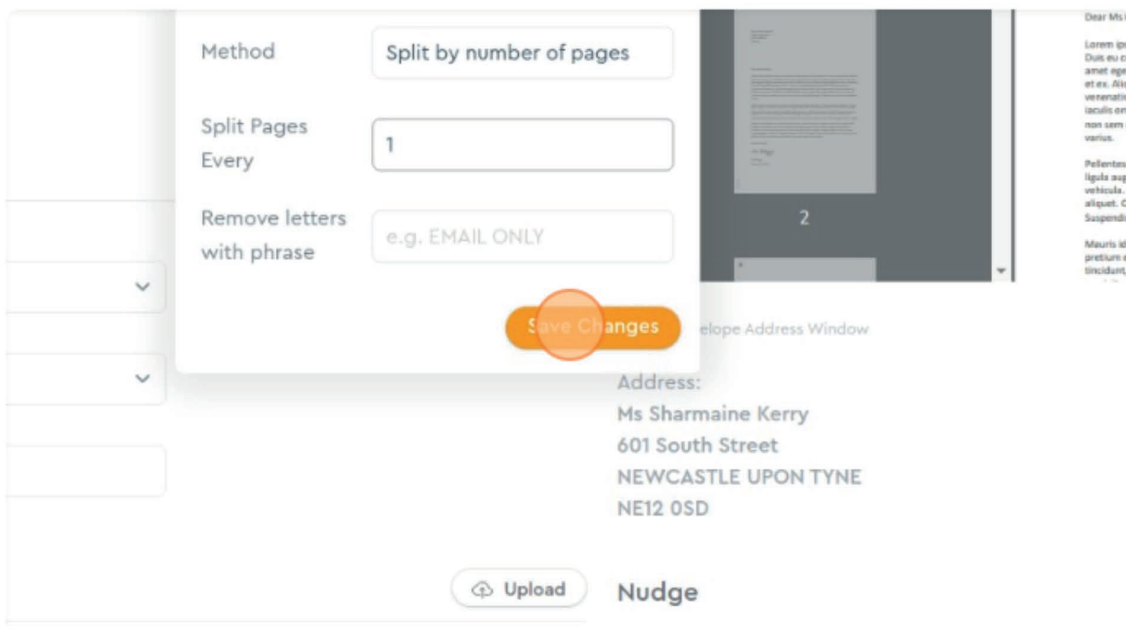
Method **None, one letter**

Save Changes

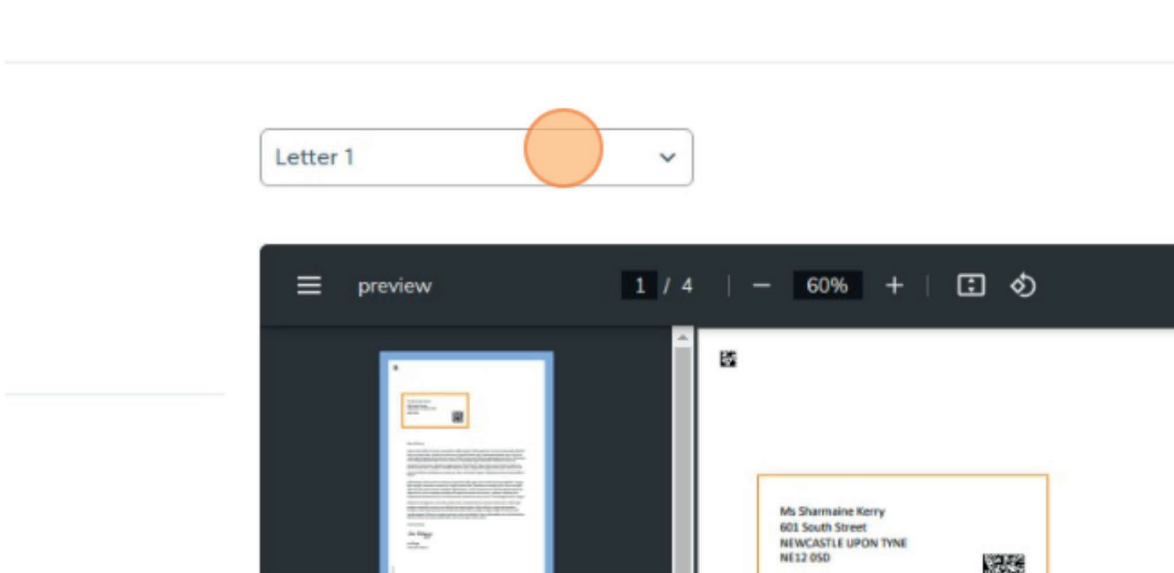
Envelope Address Window

Address:  
Ms Sharmaine Kerry  
601 South Street  
NEWCASTLE UPON TYNE

- In the “Split Pages Every” field, enter the number of pages to split by. In our example, each letter is a single page, so we would enter the number 1 and save the changes.



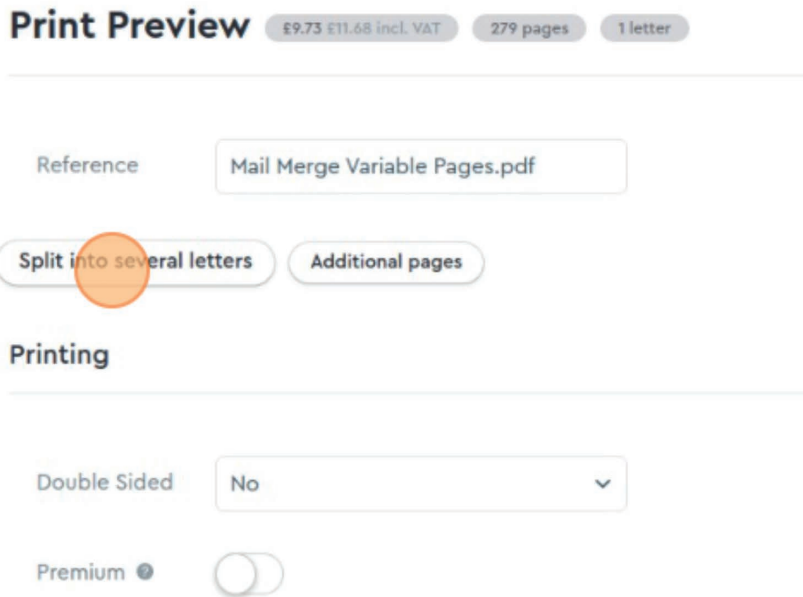
- You should now notice a new drop down above the document preview screen, clicking this will allow you to preview each of the letters.



## How to remove letters based on certain word or phrase.

You can use the splitting option to also remove letters based on a word or phrase. E.g. "Email Only"

1. After uploading your document, click "Split into several letters"



**Print Preview** £9.73 £11.68 incl. VAT 279 pages 1 letter

Reference: Mail Merge Variable Pages.pdf

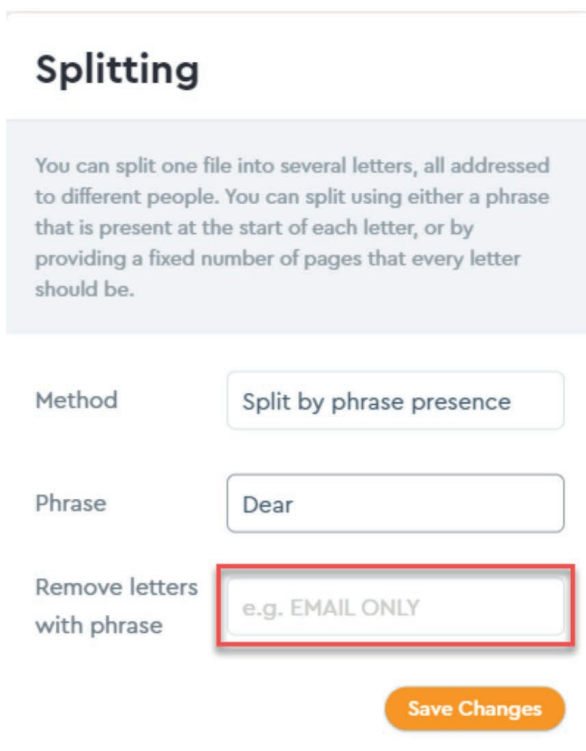
**Split into several letters** Additional pages

**Printing**

Double Sided: No

Premium

2. Enter the word or phrase to search for in the "Remove letters with phrase" field.



**Splitting**

You can split one file into several letters, all addressed to different people. You can split using either a phrase that is present at the start of each letter, or by providing a fixed number of pages that every letter should be.

Method: Split by phrase presence

Phrase: Dear

Remove letters with phrase: e.g. EMAIL ONLY

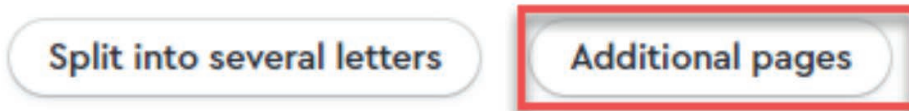
Save Changes

3. Finally, save the changes. All letters containing the word or phrase entered will now be removed from the print run.

## How to add additional pages to your letters

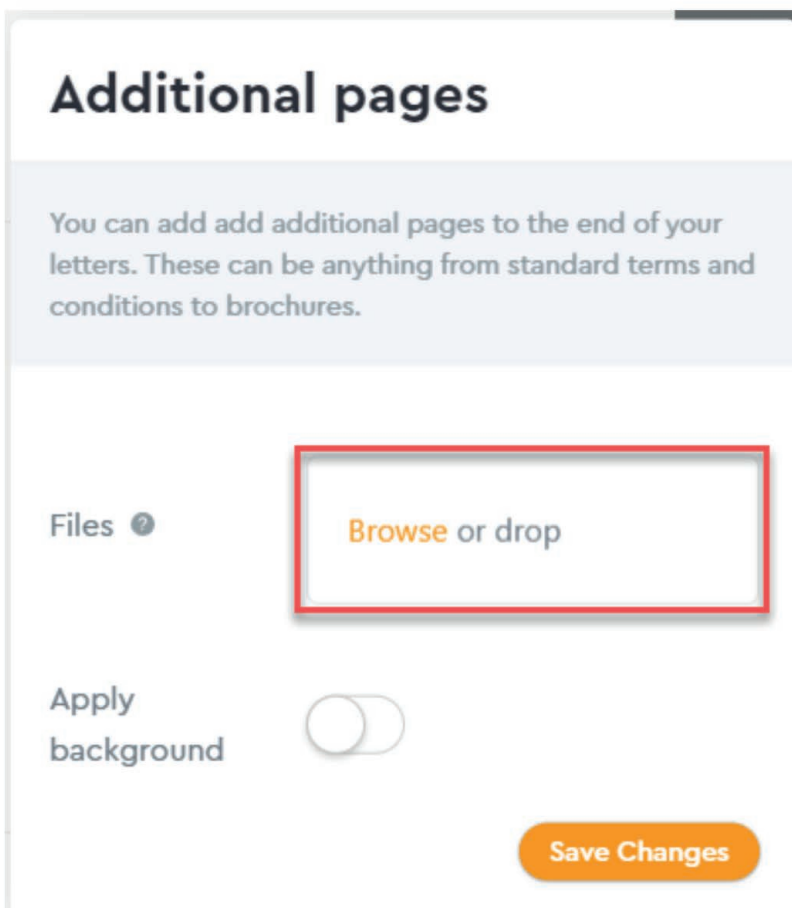
With Digi-Mail it's quick and easy to add additional pages to your letters. Any pages added here will be added to the end of your letter. If the document was previously split into multiple letters, then the additional pages will be added to the end of each letter. This is great for adding in things like promotional materials or other standard documents like terms and conditions.

### Step 1 - Click "Additional Pages"



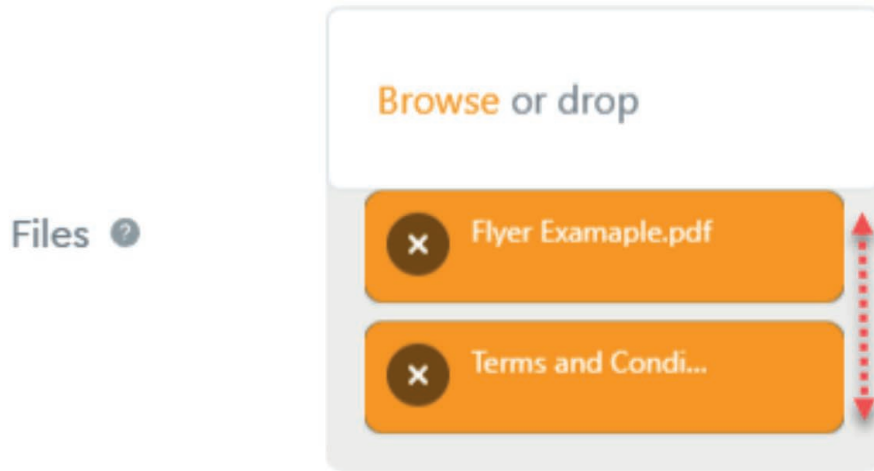
### Step 2 - Upload your additional documents

You can upload multiple documents at the same time by either dragging and dropping into the highlighted area or browsing your system for the desired files.



**Step 3 - Change the order, if required.**

The order shown on the “additional pages” popup is the order the documents will be added to each letter. To change the order, simply drag and drop them into the desired order.



**Step 4 - Decide if your additional pages should display a background**

This is a simple toggle that is either on or off. The background used will be the “other pages” background (See the “Setting backgrounds” section for more information)



**Step 5 - Save changes**



Looking in the document preview window will show the updated letter. If you’re not happy with the layout simply open the additional pages tab again to re-order or remove any of the additional documents.

## How to printing sides

Digi-Mail offers two different options for printing on a page, Simplex (print on one side only ) and Duplex (print on both sides of a page):

### Double sided printing

Simply select “Yes” from the double-sided printing dropdown.

Double Sided

If ‘No’ is selected, the print will default to Simplex (single sided printing).

## Adding backgrounds to your letters

Adding backgrounds to your letters is quick and easy. Backgrounds can be uploaded from either the print preview page or from the backgrounds tab. All backgrounds that are uploaded to the system are then available for future use and can be managed from the backgrounds tab.

The screenshot shows the 'Background' tab in the Digi-Mail interface. On the left is a navigation menu with icons and labels: Home, Print History, Undelivered Mail, Backgrounds (highlighted in orange), and Tools. The main content area is titled 'Background' and features an 'Upload' button with a plus icon. Below this are two dropdown menus: 'First Page' and 'Other Pages', both currently set to 'None'.

## Uploading backgrounds

From the print preview page, click the upload button in the background section.

**Background** Upload

---

First Page

Other Pages

Give your background a name and then either drag and drop your file, or browse your computer for the required file.

## Upload a background

Name

File ?

Available To

Upload

When using “teams” you can also set which team should be able to see a particular background. This is very useful if you have multiple office locations and require letterheads with different addresses or logos.

## Setting backgrounds

Uploaded backgrounds will then be available in the “First page” and “Other Pages” dropdowns.

**Background** Upload

---






First Page None ▼

Other Pages None ▼

This provides the ability to have a certain background for the first page of each letter and a separate background for all other pages.

## Managing saved backgrounds

Backgrounds can be managed on the Backgrounds tab

-  Home
-  Print History
-  Undelivered Mail
-  **Backgrounds**
-  Tools

From here, you can view, rename, assign to teams and delete backgrounds. To delete a background, first hover over the ellipse (...) and click Delete

**Background** ...

Name

Available To Everyone ▼

Update

Delete



## Advanced print preview features

To embed a font, click the “File” menu while working on a document in the Windows versions of Word

### Advanced

Email Confirmation

Confidential

Insert None

## Email confirmation

This setting is on by default and allows the system to send you an email confirmation when your job has been sent to print.

## Confidential

This marks the document as confidential within the system, meaning that other users on your account will not be able to see the content of the letter(s)

## Error items

We do our best to catch errors as soon as possible, but always recommend you thoroughly check the print preview window for any issues and check the final confirmation window before submitting a job. Below we will show some of the errors we aim to detect at the time of the upload.

## No postcode found

If no postcode is detected in your letter, the system will give you the ability to add an address manually.

**(NO POSTCODE FOUND)** [Add Manually](#)

### Manually Add Address

We'll add your keyed-in address as a new page to the start of this letter.

Line

Mr A B Sample

Sample Address 1

Sample Address 2

Postcode

Country

[Edit](#)

*Please note: Adding or editing an address carries an extra charge of 1 sheet. This is due to using windowed envelopes and our requirement to display the address correctly on the 1st page of each letter. We take the updated address and add a new coversheet at the beginning of the updated letter.*

## No address found – single letter

If no address is detected in your letter, the system will give you the ability to add an address manually.

Address: **NO ADDRESS** [Add Manually](#)

### Manually Add Address

We'll add your keyed-in address as a new page to the start of this letter.

Line

Mr A B Sample  
Sample Address 1  
Sample Address 2

Postcode

Country

[Edit](#)

*Please note: Adding or editing an address carries an extra charge of 1 sheet. This is due to using windowed envelopes and our requirement to display the address correctly on the 1st page of each letter. We take the updated address and add a new coversheet at the beginning of the updated letter.*

## No address found – multiple letters

If you have split a document into multiple letters, the system will show you any detected errors in the letter drop down, located above the document preview window. You can then either work through each letter to update the addresses or use the “Remove Problematic Letters” button to simply remove any letter with a detected error.

[Letter 2 \(NO ADDRESS\)](#) [Remove Problematic Letters](#)

# Choose your print and delivery method

By default, the system prints in Simplex (print on only one side of each piece of paper), you can select the 'Double Sided' option to switch to Duplex (print on both sides of a piece of paper).

Here you can also choose to print in black and white only by toggling on the 'Black & White' option. If this is not selected, print will be completed in colour, there are no additional charges for this.

The final option is Premium Print. This option delivers a premium laser print on those letters that contain images or require that extra touch of luxury, for a small additional cost. Use the toggle to switch on Premium Print if it is required. Standard print is the system default.

## Printing

---

Double Sided

No



Black & White



Premium ?



Digi-Mail aims to provide you with the cheapest possible options for postage, these settings can be changed at any point from the print preview page.

## Postage

---

Service

Second Class



Envelope ?

C5



Mail Date ?

Next Available

## Postage service options

We offer several delivery services, please use the table below to help you select which method is best for you

Service	Description	Cut Off	Example
First Class	Next Day delivery (24 hr).	Files must be uploaded before 3pm for items to be delivered the next day	Upload before 3pm on a Monday, item will be delivered on a Tuesday
Second Class	2-4-day delivery	Files uploaded before 6pm for items will be printed and handed over for delivery the next day.	Upload by 6pm on a Monday, item will be delivered Thursday/Friday.
International	3-6-day delivery service in Europe & 5-9 days delivery for ROW	Files must be uploaded before 3pm for items to be sent the same day.	Upload before 3pm on a Monday, item will be delivered between Thursday-Tuesday (Europe), Monday-Thursday (ROW)

Please note these are not guaranteed services and as such these are non-compensated services.

## Envelope/pack type

Using Digi-Mail you can send items out as Letters, Large Letters,

Pack Type	Description
C5 Envelope	C5 Letter envelopes hold a maximum of 15 A4 sheets folded to a A5 paper size
C4 Envelope	C4 Large Letter envelopes hold a maximum of 50 unfolded A4 sheets of paper.

## Mixed pack types

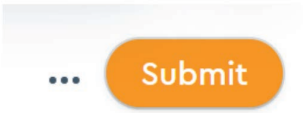
Digi-Mail is unique in that we allow different envelope types in the same submission. For example, if you choose to send your letters in c5 envelopes but several letters are more than 15 pages, only the letters over 15 pages will be upgraded to Large Letter envelopes and this will be done automatically. This makes it much easier to manage your mailings with our service.

Letters and large letters are printed on 90gsm A4 paper and placed in your selected envelope size after it has been printed. All envelopes are 90gsm.

# Submitting your document

## Submit

When you're happy with everything, simply press the Submit button located in the top right of the print preview screen.



## Review

You will then be presented with a summary of the job you're about to submit.

This will include the following:

- Total number of pages
- Total number of letters
- Total price including and excluding VAT
- Selected print type: Single sided (simplex) or Double sided (Duplex)
- Selected postage class
- Selected postage date

## Send 1 letter?

By confirming, you accept that the job will be printed as specified. It is your responsibility to check the print preview and all settings, including splitting and document removal, are correct.

**2** pages

**1** C5 letter

**Double  
Sided  
Printing**

**Second  
Class  
Posting**

**Next  
Available  
Mail date**

## Send

Finally, click the Send Letter button at the bottom of the review popup to add your letters to the print queue.

# Cancel a document

A job can only be cancelled when it has a status of “Waiting to print”


## STATUS

● Waiting To Print

While items are in the status ‘waiting to print’ there are two options available to make changes:

## Cancel an entire submission

All drafts, queued, cancelled & submitted jobs can be viewed on the “Print History” tab.

 Home

 Print History

Once you’ve found the submission you’d like to amend, click anywhere on the line to view the print order screen. From the print order screen, you can either cancel all letters by clicking the “cancel all letters” button located in the top right corner.

Cancel all letters

## Cancel individual letters from within a submission

You can view and cancel an individual letter by clicking the cancel button next to the relevant letter on the print order screen (shown above)

Letter 1

 PDF

 Cancel

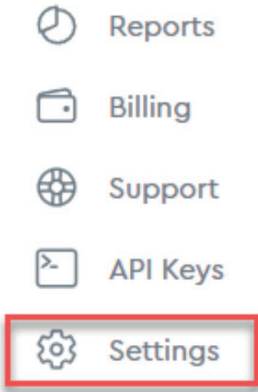
Please Note: Once a letter has changed status to “Printing” or “Sent” the letter can no longer be cancelled or changed.

# Users and teams

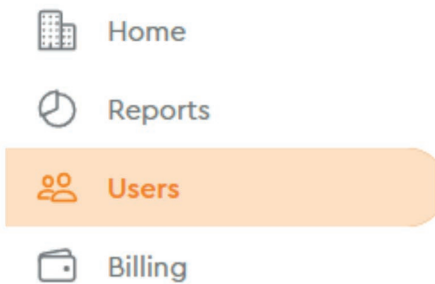
The Digi-Mail portal allows the account owner to add multiple users to their account. Users can also be grouped into teams. A team is a group of users to which special permissions can be added or revoked from all users of a team.

To manage users or teams please follow the below steps:

First click the Settings Tab



Then click the “Users” tab



This will give you a list of all users and teams on your account and give you the ability to add new users and teams.

## Adding a team

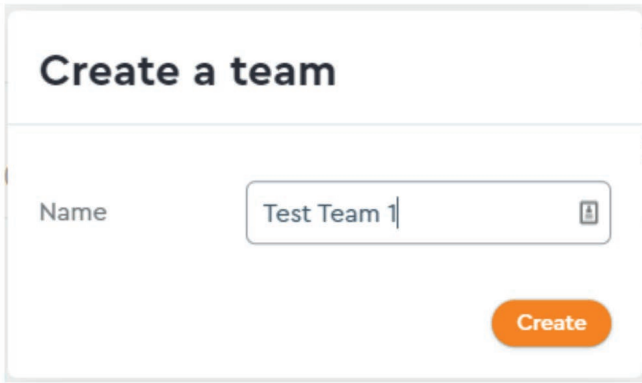
Teams are a great solution for grouping users and setting default options for all members of each team. Imagine you want a team to only have the ability to send 2nd class letters or use a specific letter head. This can all be setup when using teams to group your users.

1. To add a team, navigate to the “Users” page as shown above.
2. Scroll down the page until you see the “teams” section, then click the “New” button

## Teams



3. Give your team a name



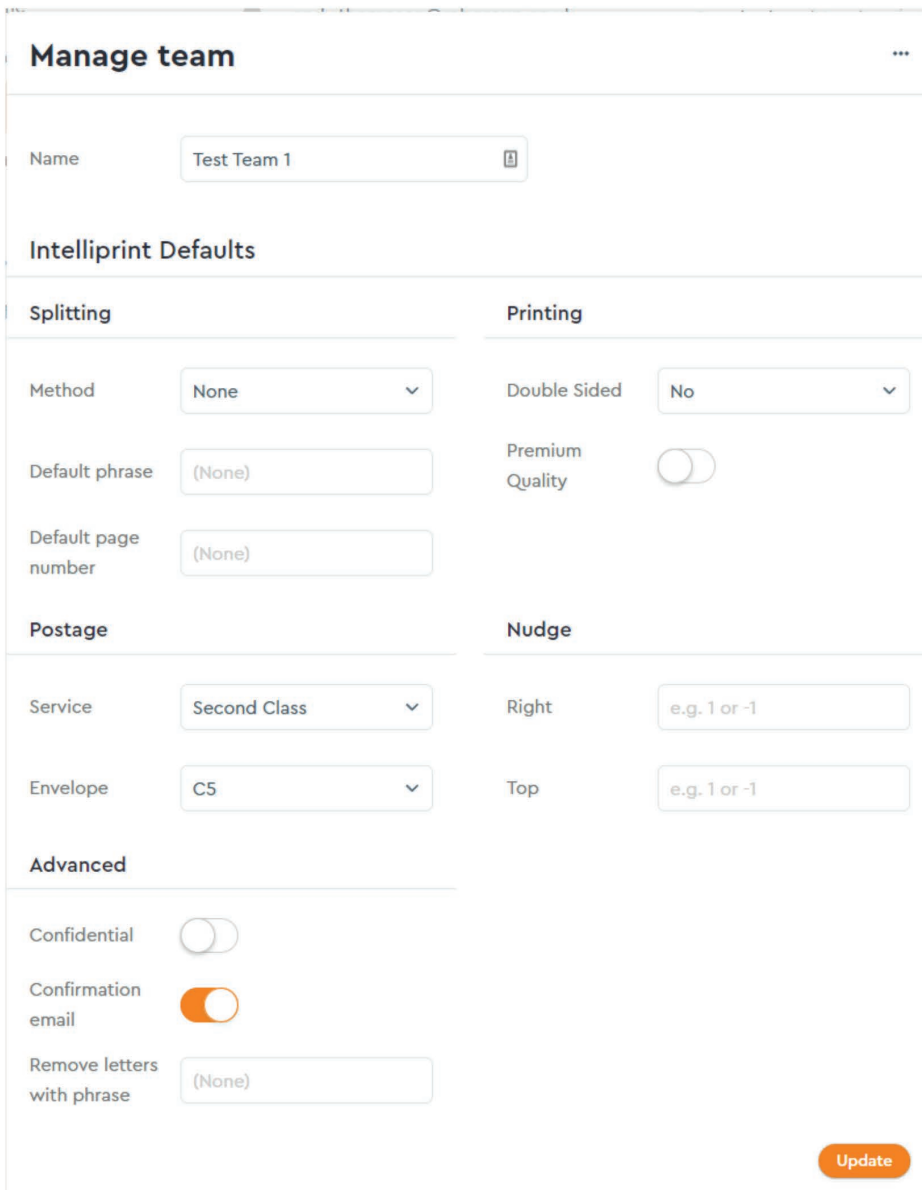
**Create a team**

Name

**Create**

4. Look in the list of teams and click “Manage” to change available default settings for this team.

The default settings that can be changed are shown below:



**Manage team**

Name

**Intelliprint Defaults**

**Splitting**

Method

Default phrase

Default page number

**Printing**

Double Sided

Premium Quality

**Postage**

Service

Envelope

**Nudge**

Right

Top

**Advanced**

Confidential

Confirmation email

Remove letters with phrase

**Update**

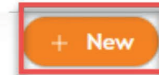
Please Note: Assigning backgrounds to a team is handled from the “Backgrounds” tab.



## Adding a user

1. Navigate to the “Users” page as shown above
2. Click “New” next to the Users section of the page.

## Users



3. Enter the users email address
4. Select the users Role
5. Assign the user to a team if required.
6. Click Invite, an email will be sent to the users email address inviting them into the system.

**Invite a person to** [Group Name]

Their email:

Role:  ▼

Team:  ▼

Please refer to the table below for information on user roles and any special privileges

Role Name	Primary Privileges
Standard	<ul style="list-style-type: none"><li>• Can send mail</li><li>• Can view mail submitted from their account</li><li>• Can view returned mail they have submitted</li></ul>
Team Leader	<ul style="list-style-type: none"><li>• All privileges of a standard user</li><li>• Can view all items submitted or returned by users of that team (apart from items marked confidential)</li></ul>
Team Admin	<ul style="list-style-type: none"><li>• All privileges of a Team leader</li><li>• Can add users to a team</li></ul>
Admin	<ul style="list-style-type: none"><li>• All privileges of a standard user</li><li>• All privileges of a team leader and team admin</li><li>• Can view all mail on the account (apart from items marked confidential)</li><li>• Can setup new teams</li></ul>

# Other system features

## Merge files

From the Tools Menu

 Backgrounds

 **Tools**

You can merge multiple files into a single submission. This is useful if you have letters saved as individual files prior to uploading, already addressed.

Simply drag and drop multiple files or browse your computer for multiple files.

### Merge Files


[Browse](#) or drop some PDF or Word files

 You can reorder files to match the order you want them merged in.

You can submit either Word (Doc or Docx) or PDF files. The files will then be merged into a single submission.

## Undelivered mail

If, for any reason, a letter is marked return to sender or cannot be delivered to the requested destination. The letter will be returned to us, it will then be scanned into the system and will be available for you to view from the “Undelivered Mail” tab

 Home

 Print History

 **Undelivered Mail**

 Backgrounds

Typically, this will be due to an incorrect address. You will be able to review the returned item by clicking on the item and checking the items marked as returned.

## Letter 2



Status Returned

Cost £0.89

Address [Redacted]

Pages 1

Postage Service First Class

Envelope C5

Tracking Number None

You can also download the individual letter by clicking the “PDF” button

## Letter 2

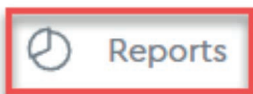


Status

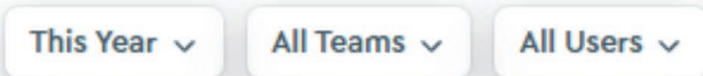
Returned

## Reports

We provide business insights for all our customers which is available from the Reports tab.

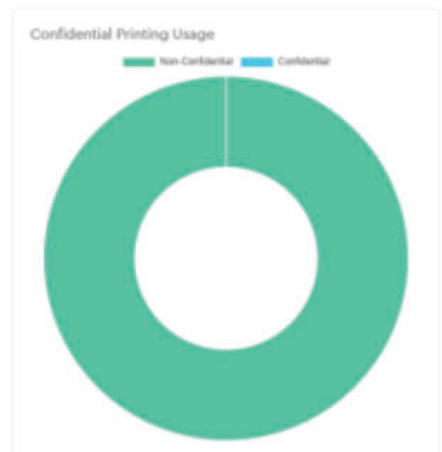
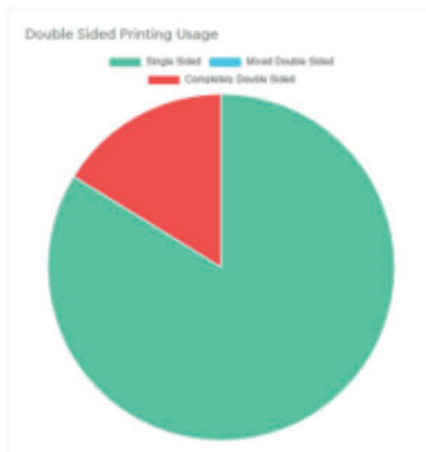
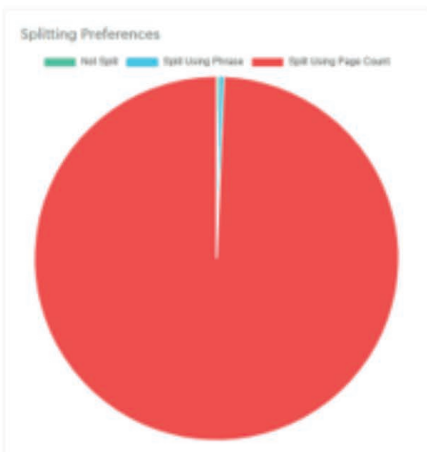
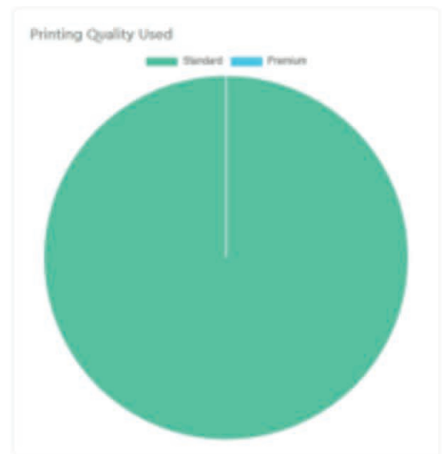
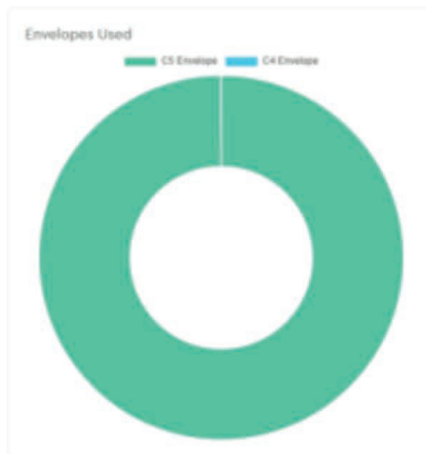
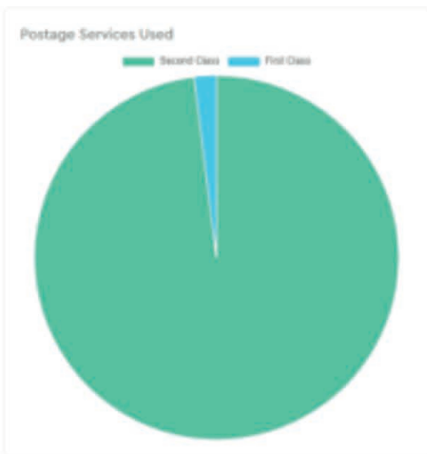
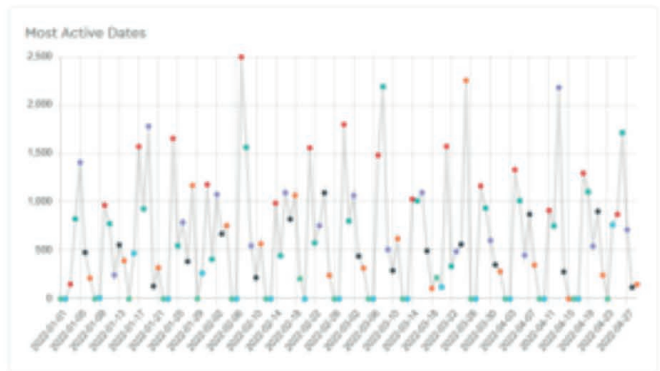
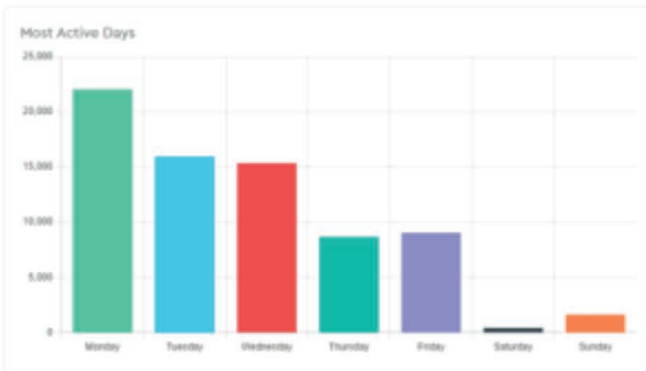


You can select the desired date range, team or user by using the drop downs at the top of your reporting dashboard.



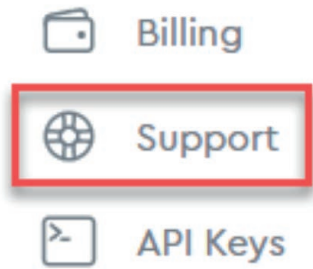
Our reporting dashboard offers the following metrics:

- Letters Sent
- Letters Returned
- Pages Printed
- Sheets Used
- Top Users
- Top Teams
- Most active days
- Most active dates
- Postage Services Used
- Envelopes Used
- Print Quality Used
- Splitting Preferences
- Double Sided Printing Usage
- Confidential Printing Usage



## Support

We have an inbuilt support ticket system. If you find yourself in need of any assistance. Please click the support tab



You can open a new ticket by clicking the “New” button located in the top right

## Support Tickets

+ New

When creating a ticket, please give as much detail as possible, you can also attach any screenshots or files if required.

## Support Tickets

+ New

When creating a ticket, please give as much detail as possible, you can also attach any screenshots or files if required.

## New Support Ticket

Title	<input type="text" value="Billing Issue"/>
Description	<input type="text" value="I need help with..."/>
Optional Attachments	<input type="text" value="Browse or drop"/>

Create

You can also update open tickets or view closed requests from this tab.

## Support Tickets

+ New

STATUS	DESCRIPTION	CREATED
● Closed	[REDACTED]	28 Mar 2022
● Closed	[REDACTED]	22 Sep 2021
● Closed	[REDACTED]	6 Sep 2021

## API documentation

A full API is available: all documentation is available upon request from your Client Relationship Manager.

## Contact us

We are always happy to help, so please feel free to get in contact:

**Phone:** 0800 085 7847

**Email:** [digimail@citipost.co.uk](mailto:digimail@citipost.co.uk)

[Customerservice-Digimail@citipost.co.uk](mailto:Customerservice-Digimail@citipost.co.uk)

**Website:** [www.digi-mail.co.uk](http://www.digi-mail.co.uk)

## Charges and invoicing

Upon your account activation, you will receive your rate card clearly showing the prices per item. As Digi-Mail is a product by Citipost Mail, you will receive one invoice weekly from us collating the previous week's (Monday to Sunday) submissions. Should you have any queries please feel free to get in touch.

# FAQS

## Can I cancel a mail run or document?

Once the document is submitted it will go into a "Waiting to print" status, whilst in this status the item can be cancelled. Depending on print load we can send items to print at any time, with the final print run being at 6pm. If the item is in "Waiting to print" state it can be cancelled.

## How secure is this system?

Digi-Mail uses passwordless authentication which is the process of verifying a software user's identity with something other than a password. Today's digital workers rely on a wide variety of applications to perform their jobs. Users are forced to memorize and track a dizzying array of frequently changing passwords. Overwhelmed by password sprawl, many users take risky shortcuts like using the same password for all applications, using weak passwords, repeating passwords, or posting passwords on sticky notes. Bad actors can take advantage of lax password management practices to mount cyberattacks and steal confidential data. In fact, compromised account credentials are a leading cause of data breaches.

We are also the proud owners of ISO accreditations 27001, 14001 and 9001 so you can rest assured that anything you send to us is produced securely, at quality and without unnecessary risk to the environment.

We understand that you may need to send us personal data that needs to be kept secure; we are fully GDPR compliant with an in-house data protection officer. Data is only kept for 90 days within the system and then deleted.

## What do the document status's mean?

Status	Description
Draft	The item hasn't been submitted for printing
Waiting to print	The item is queued for printing and can still be cancelled
Printing	The item is on the current print run
Sent	The item has been dispatched
Returned	The item has been sent but returned to our facility
Cancelled	The item has been cancelled and money refunded

## What if I upload a 1st class item after the 3pm cut off?

If a 1st class item is uploaded after the 3pm cut off, you will still be charged for a 1st class product, however the item may be subject to a 24hr delay. For example, if an item is uploaded at 4pm on a Monday it is likely to be delivered on Wednesday instead of Tuesday.



DIGI-MAIL

# User Guide

Appendix 1

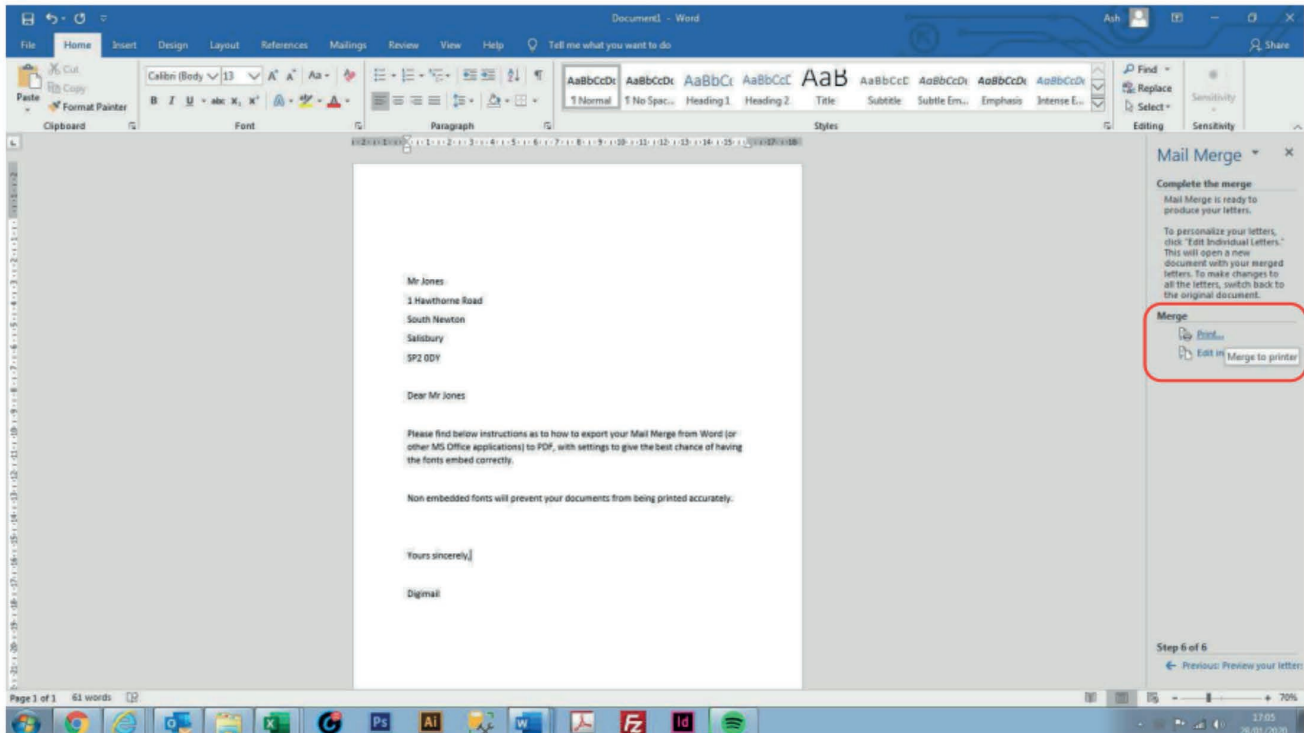
Embedding fonts in  
a PDF; full guide



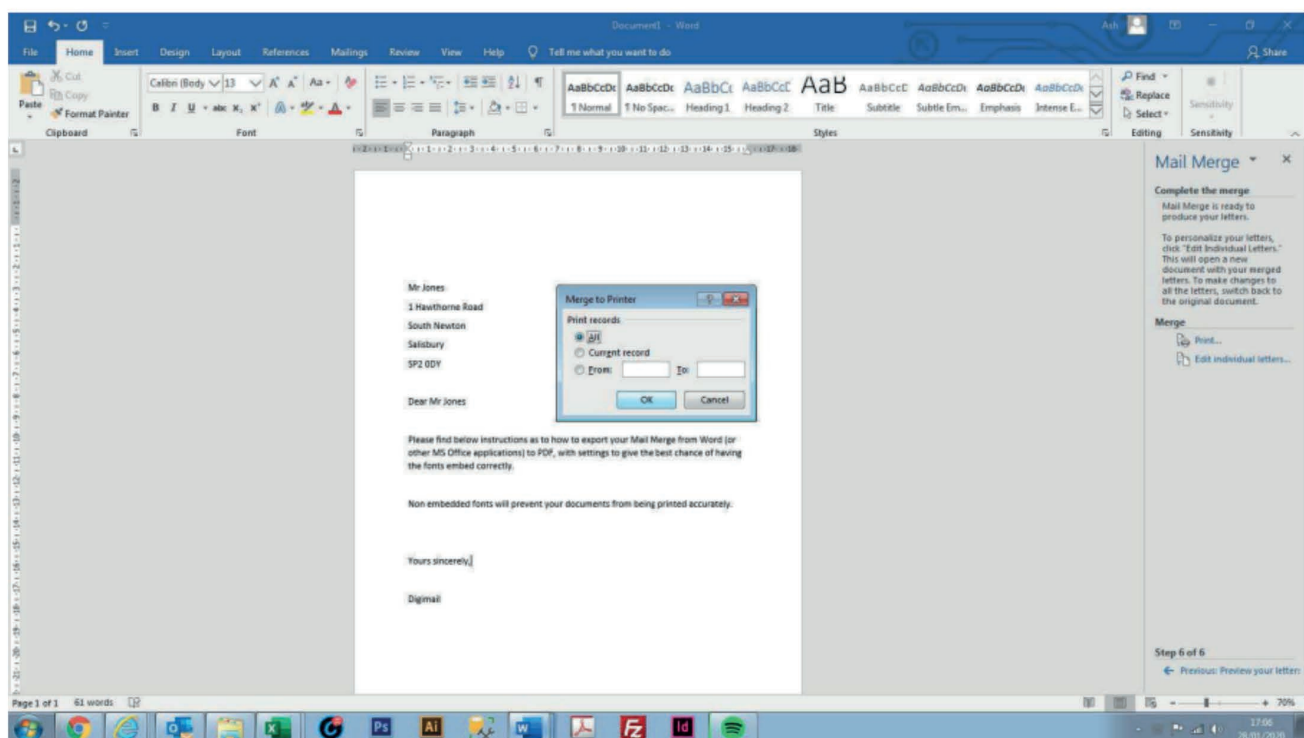
# APPENDIX 1 – Embedding fonts in a PDF; full guide

## Instructions to output mail merge to PDF, ensuring fonts are embedded

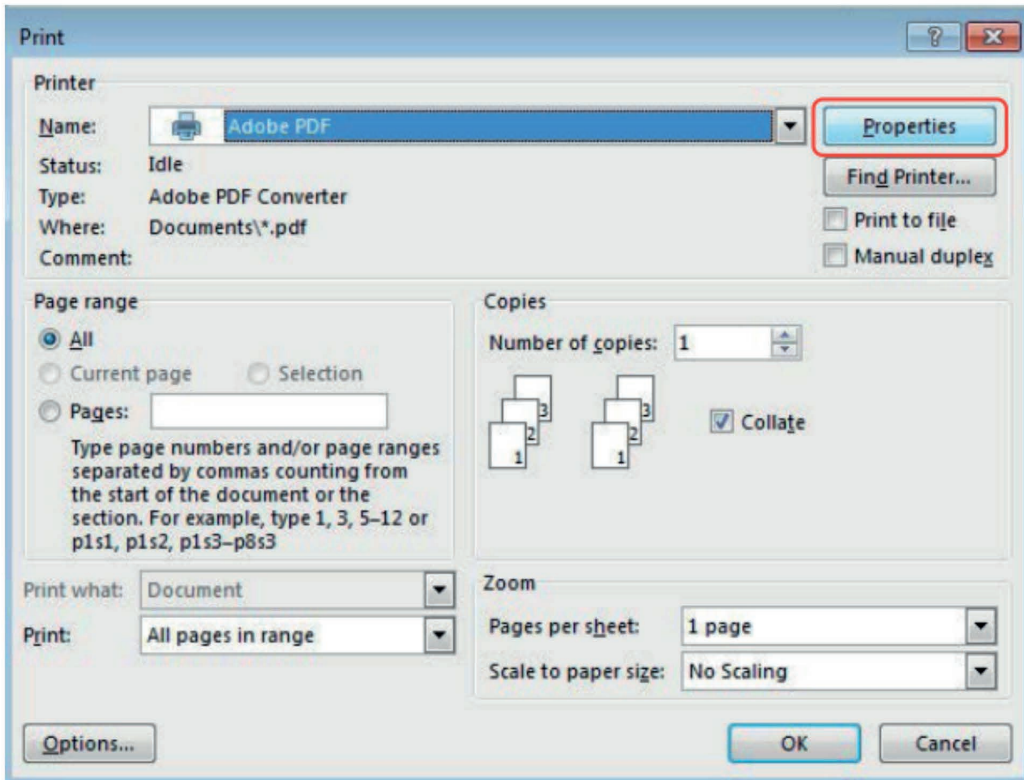
1. Once you have completed the mail merge, click the 'Print' option in the mail merge menu



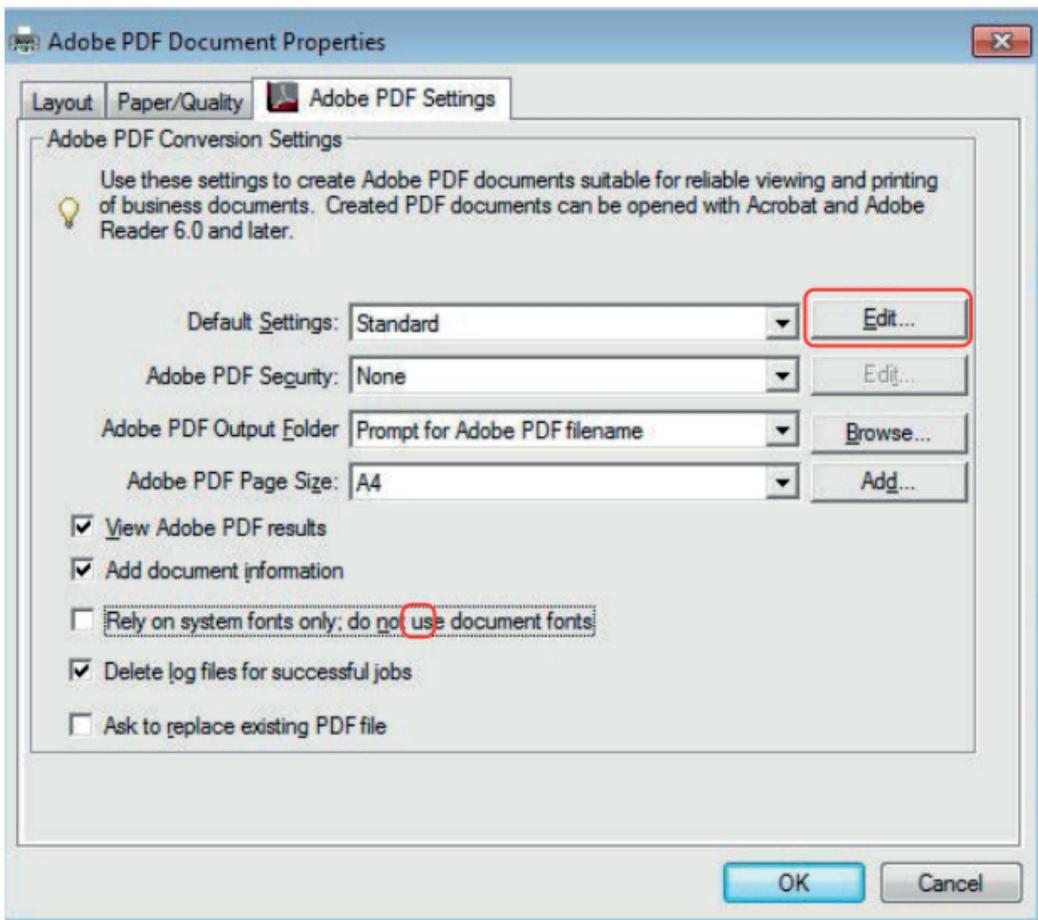
2. Select the range of documents to export and click ok



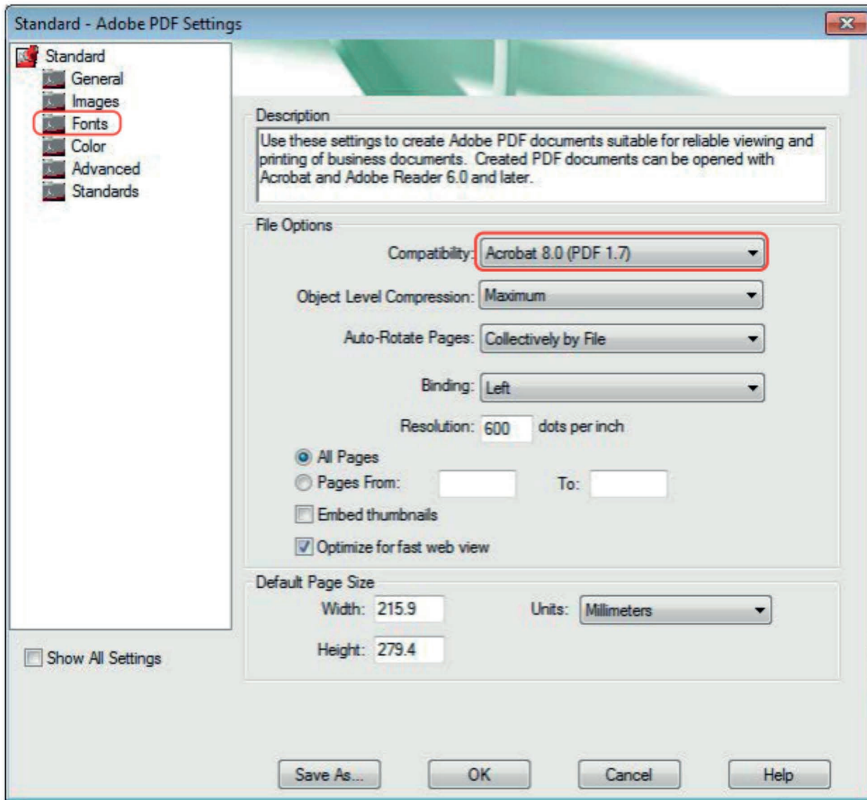
3. Select Adobe PDF from the drop-down menu, and click Properties



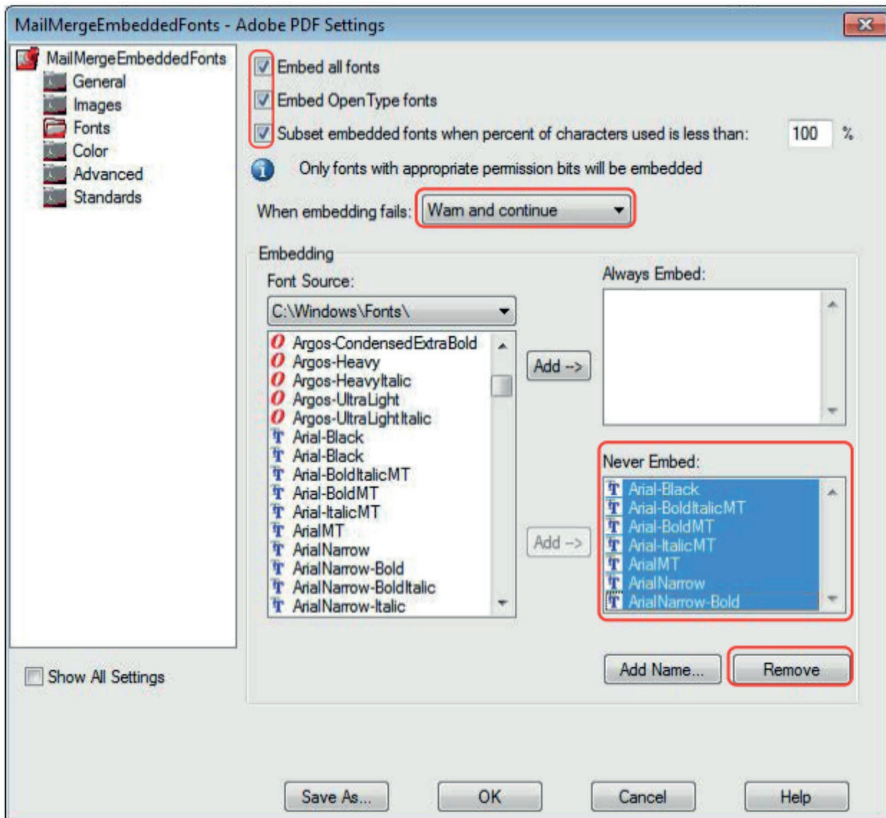
4. Ensure 'Rely on system fonts only; do not use document fonts' is unchecked and click Edit



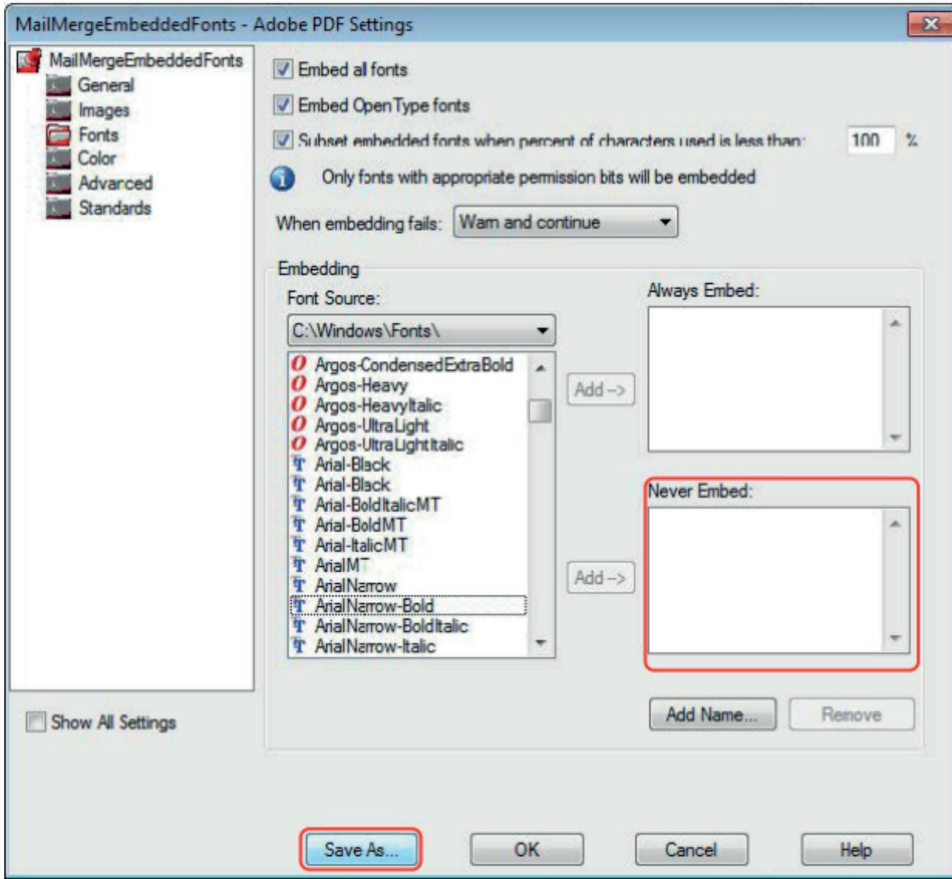
5. In the Compatibility dropdown, ensure Acrobat 8.0 is selected then click Fonts from the left-hand menu



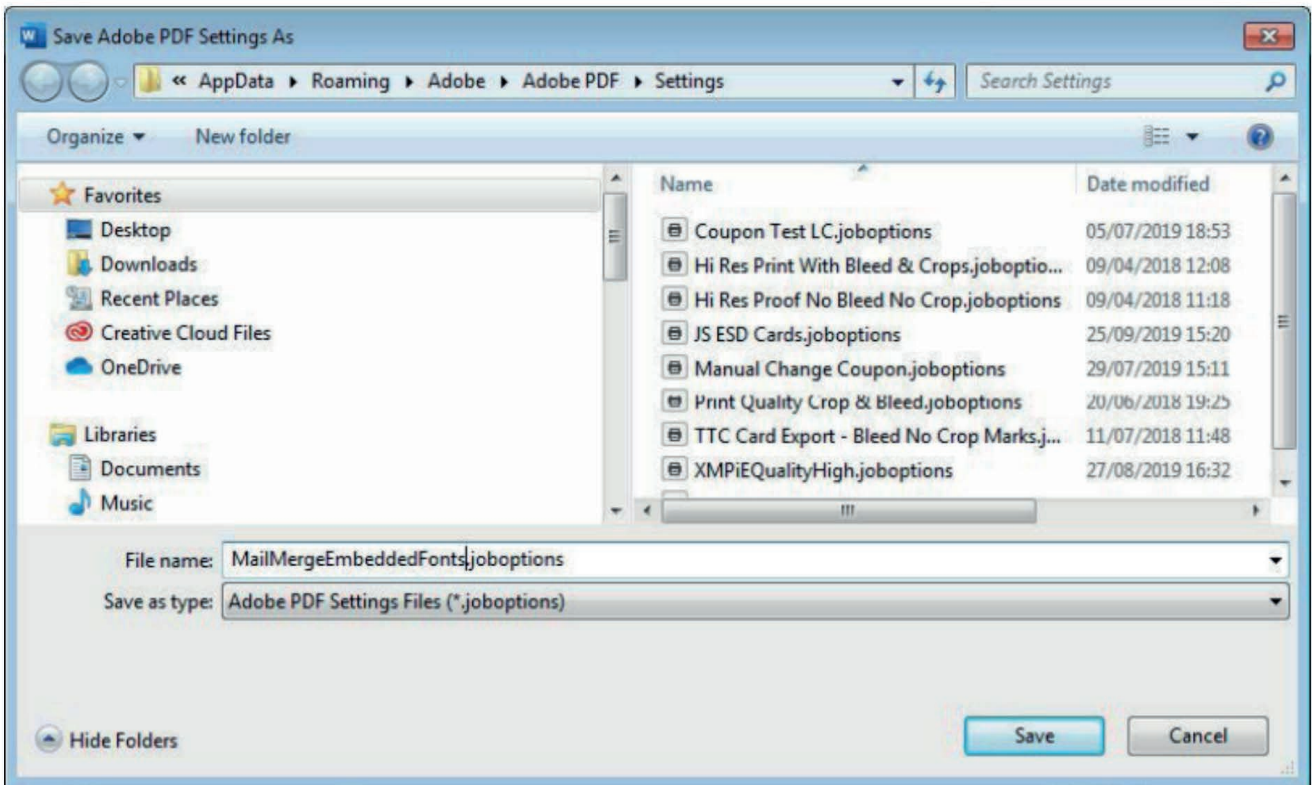
6. Ensure all 3 options at the top of the Fonts settings are checked and that the dropdown for 'When embedding fails:' says 'Warn and continue'. If there are any fonts in the bottom right 'Never Embed' section, highlight them all and click Remove.



7. The Fonts settings should now resemble the image below – when happy, click Save As

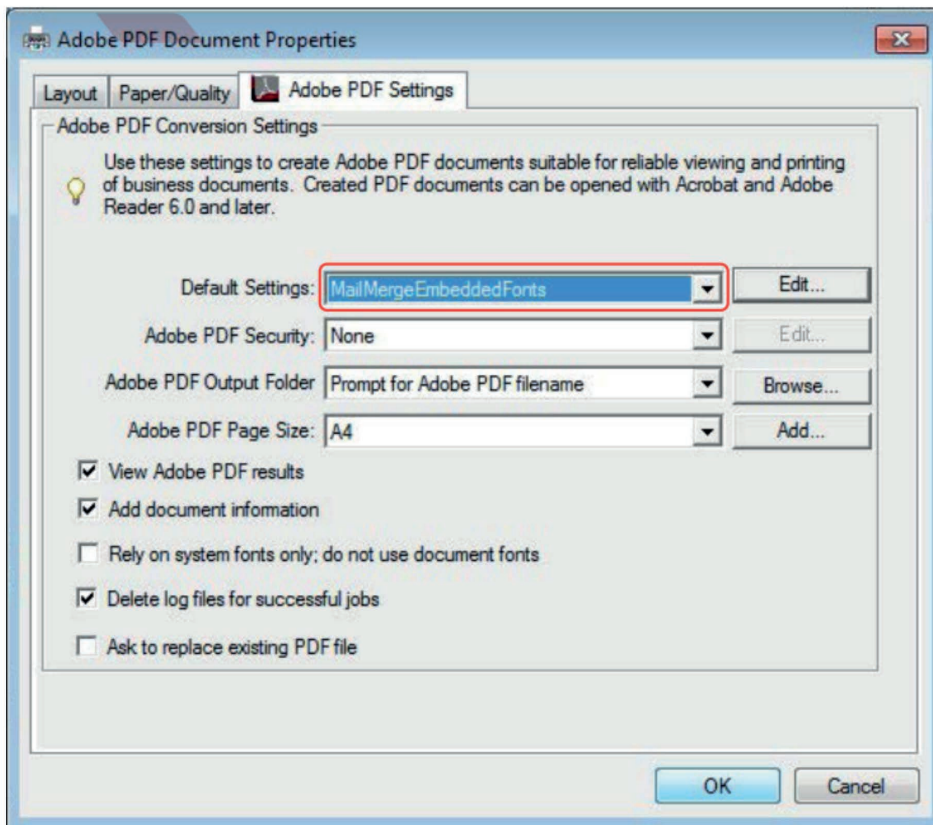


8. Select a filename for the settings and click Save and then OK





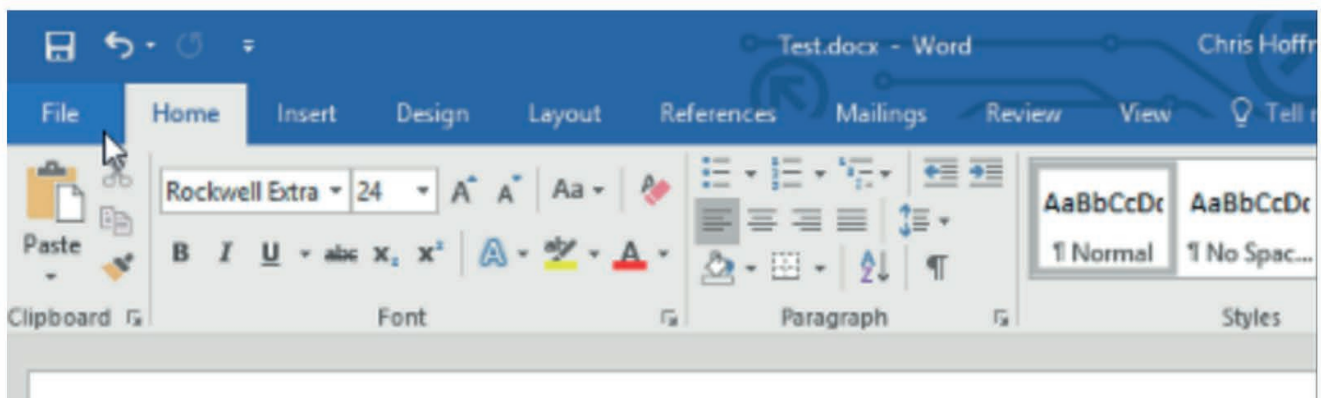
- You'll be returned to the PDF Properties menu – the name you saved your settings under will now be in the Default Settings dropdown. Next time you export your mail merge to PDFs you can simply ensure this option is selected.



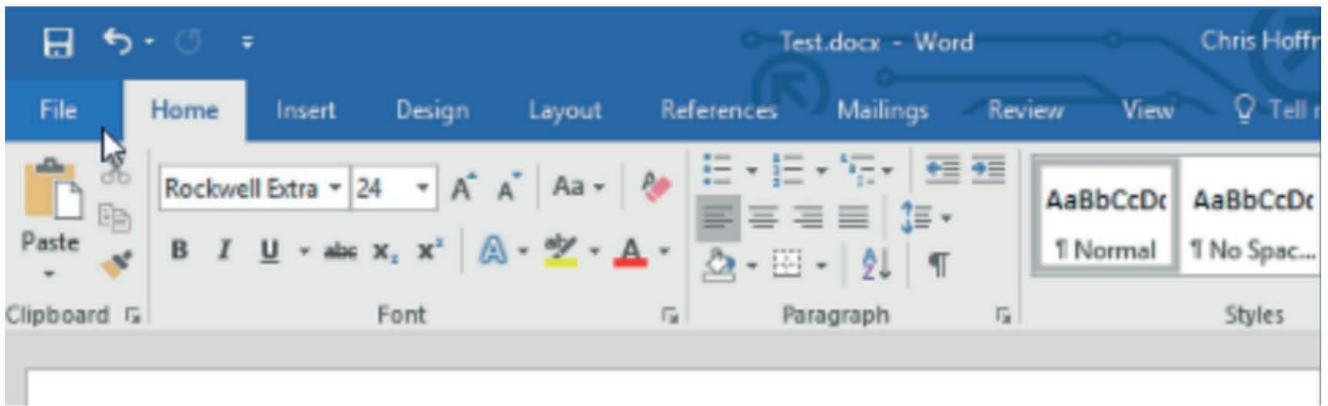
- Click OK to return to the Print menu, then OK again to export your PDFs. Enter a filename as usual and your PDFs will be output as normal.

## EMBEDDING FONTS IN WORD

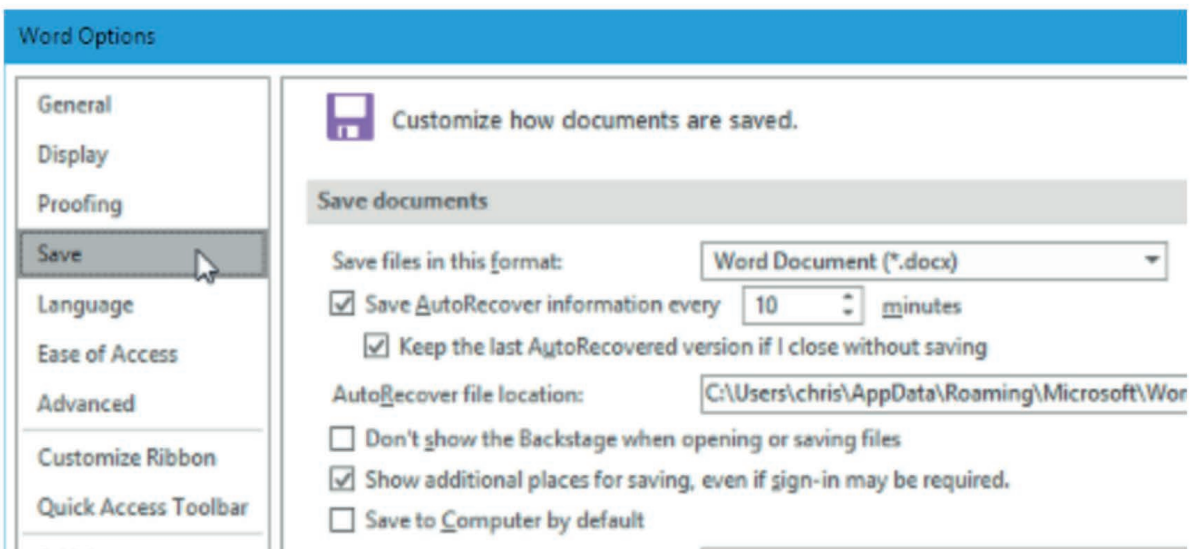
- To embed a font, click the “File” menu while working on a document in the Windows versions of Word



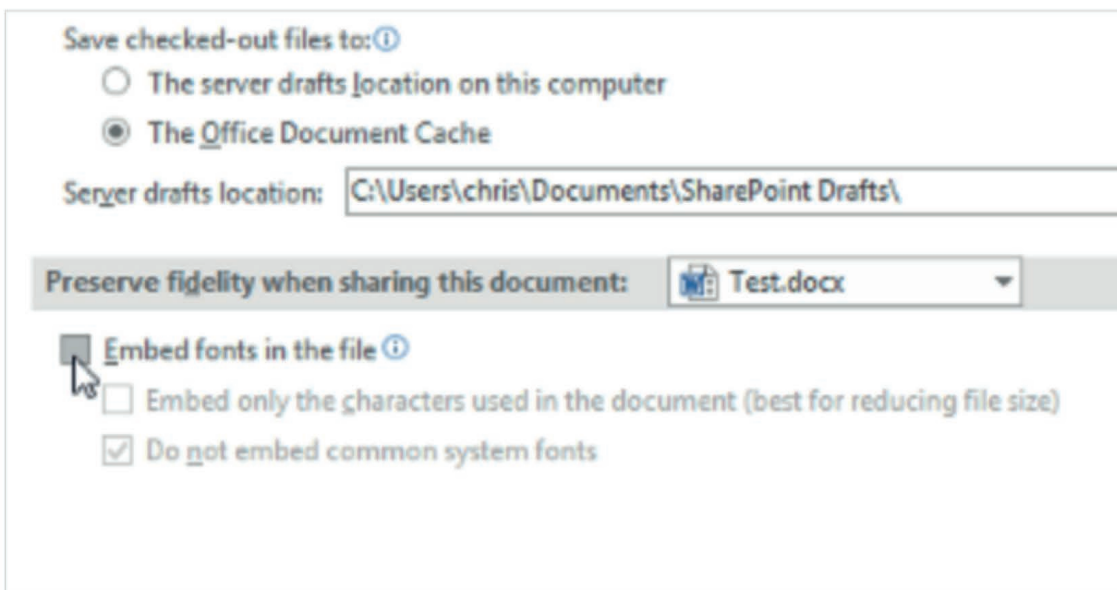
2. Click the “Options” link at the bottom of the menu that appears.



3. Click “Save” in the left panel.

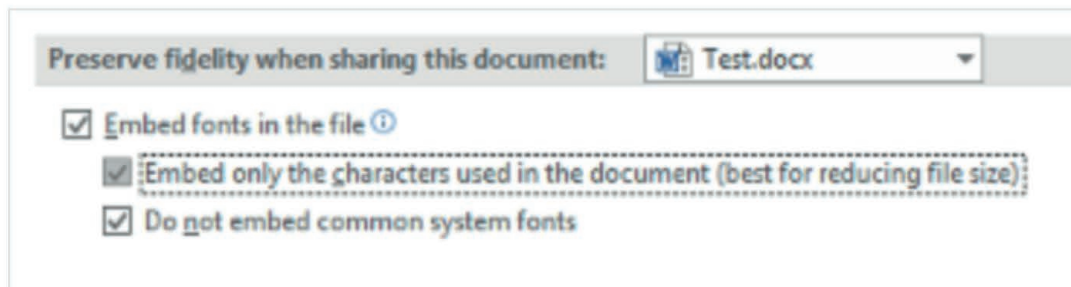


4. Under “Preserve fidelity when sharing this document”, check the “Embed fonts in the file” option.



5. To reduce the resulting document's file size, be sure to check the "Embed only the characters used in the document (best for reducing file size)" option. Office will only embed a font if it's used in the document. Otherwise, Office will embed other fonts from your system into the file, even if you haven't used them.

Leave the "Do not embed common system fonts" option enabled. This will also help reduce the file size by omitting Windows system fonts that the recipient likely has installed.





DIGI-MAIL

# User Guide

Appendix 2 | Postcards



# Digi-Mail user guide

## Appendix 2 - Postcards

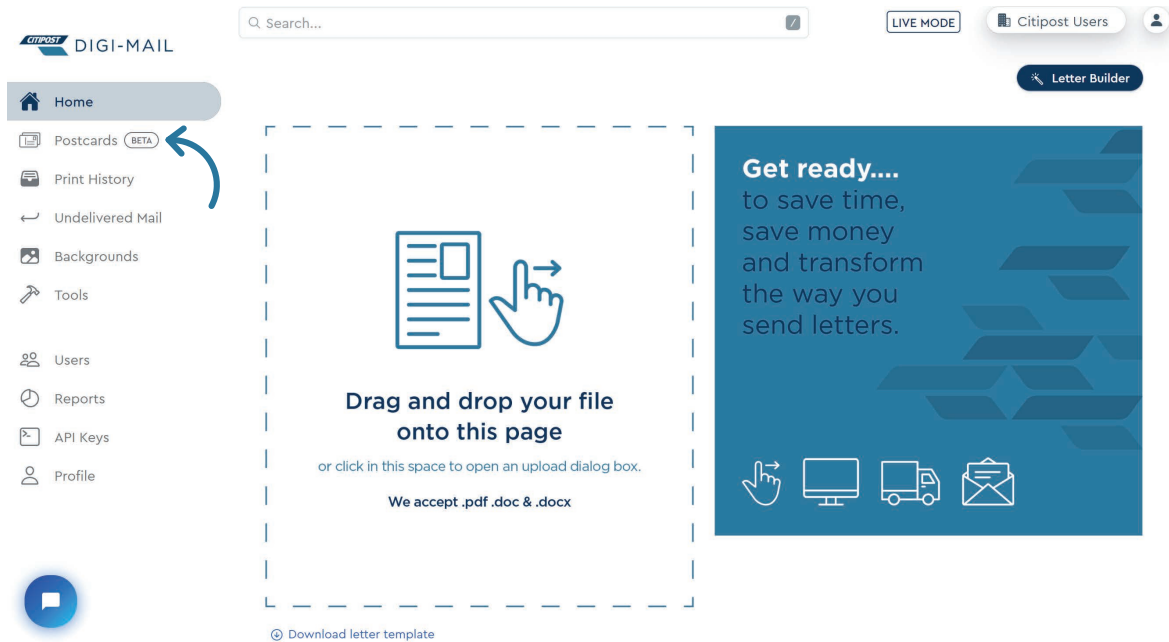
The Digi-Mail online portal includes the option to print and mail A6 & A5 postcards. Customer have the ability to design postcards within the Digi-Mail portal or to upload existing artwork. This guide aims to demonstrate all functionality of the postcard option within the Digi-Mail portal.

# Designing and Submitting Postcards

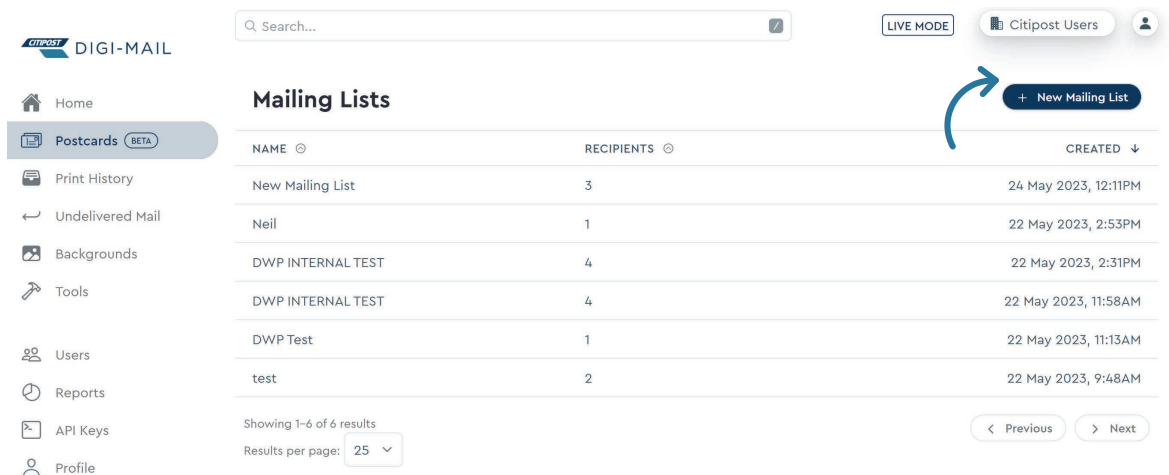
Postcard submissions are created in two stages, uploading your mailing list and designing the postcard in the Digi-Mail portal (or uploading the artwork directly). Once you are happy with your postcard design, you simply merge it with your recipient mailing list within the Digi-Mail portal and send it off to be printed and dispatched through our secure facility.

## Stage 1 - Uploading the recipient mailing list

1. Log into your Digi-Mail account and select the **'Postcard'** option from the left-hand menu

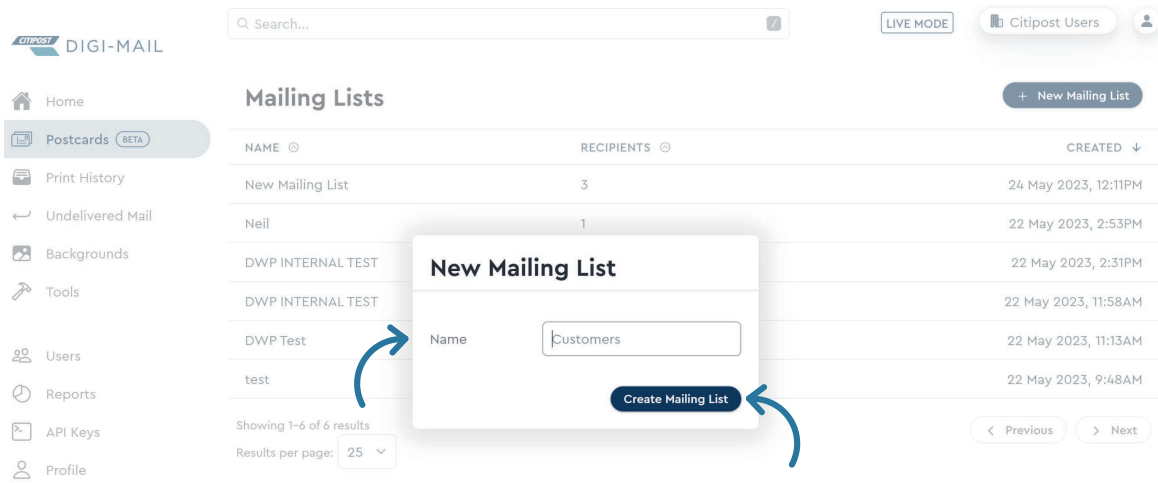


2. Select the **'+ New Mailing List'** option to add your client mailing data or select an existing mailing list from the 'Mailing Lists' table



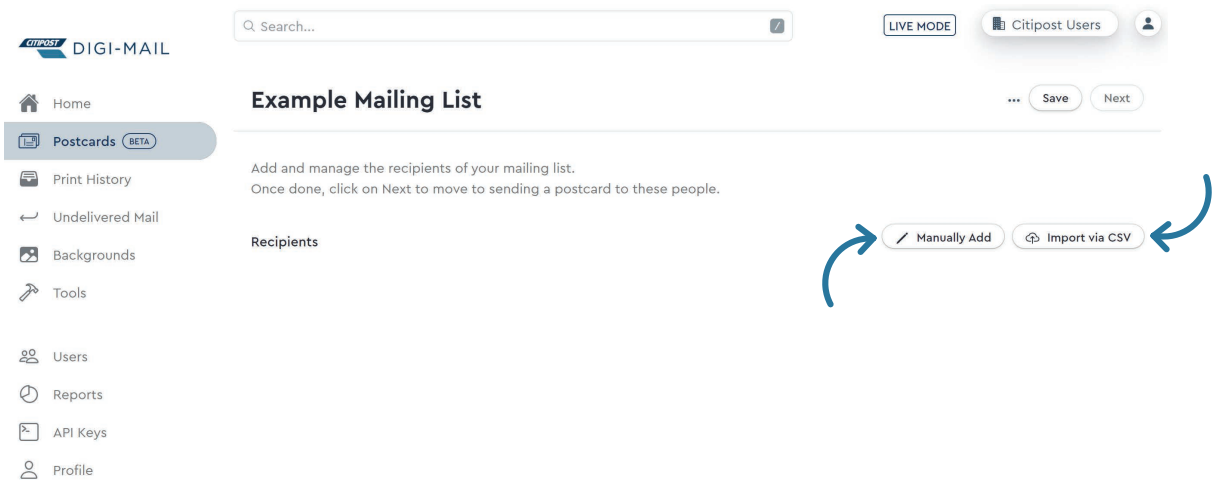
3. **Adding a new mailing list**

When the **'+New Mailing List'** is selected, a pop-up window will appear, enter a name for your mailing list. The name you allocate will appear in your table of uploaded mailings lists to ensure you can always identify the correct mailing list for your campaigns. Select **'Create Mailing List'** to move to the next step.



4. **Select how you want to add your mailing information**

Select **'Manually Add'** to add individual address and mailing information or select **'Import Via CSV'** to bulk import your campaign address and mailer details.



- 4a. **Manually adding a mailing list option:** Will open the below page. Complete the recipient details and add as many custom fields as you would like using the **'+ Add New Field'** option. Custom fields can be used to add unique information to your design either on a recipient or campaign level during the design stage.

**DIGI-MAIL** Search... LIVE MODE Citipost Users

Home Postcards (BETA) Print History Undelivered Mail Backgrounds Tools Users Reports API Keys Profile

### Example Mailing List

Save Next

Add and manage the recipients of your mailing list. Once done, click on Next to move to sending a postcard to these people.

Recipients Manually Add Import via CSV

**Recipient #1**

Name John Doe

Address 221B Baker Street  
Line 2, etc...

Postcode Required

Custom Fields  
+ Add New Field

Once you have added the recipient details, select **'Save'** to save your progress and the new file details. Select **'Manually Add'** to add additional recipients to your mailing file or select **'Next'** to move on to the design element of your postcard mailer.

**DIGI-MAIL** Search... LIVE MODE Citipost Users

Home Postcards (BETA) Print History Undelivered Mail Backgrounds Tools Users Reports API Keys Profile

### Example Mailing List

Save Next

Add and manage the recipients of your mailing list. Once done, click on Next to move to sending a postcard to these people.

Recipients Manually Add Import via CSV

**Recipient #1**

Name John Doe

Address 221B Baker Street

Postcode EC1 2EG

Custom Fields

{Demo 1} Example 1

{Demo 2} Code 12345XYZ

+ Add New Field

4b. **Importing a mailing list via a CSV file option:** This option allows you to bulk upload recipient details including any custom fields. Your \*CSV file should follow the below format:

Name	Job Title	Company	Line 1	Line 2	Line 3	City	County	Postcode	Variable
John Doe	Manager	ABC Company	123 Main Street	Apt 4B		London		SW1A 1AA	1
Jane Smith	Engineer	XYZ Corp	456 Park Avenue		Suite 10	Manchester	Lancashire	M2 2GT	2

\*You can download an example file using the 'Import Via CSV' option.

To bulk upload your recipient mailing file, use the **'+ New Mailing List'** detailed in the second step, once you have given your list a name, select **'Import Via CSV'**.

**DIGI-MAIL** Example Mailing List Save Next

Home  
**Postcards (BETA)**  
 Print History  
 Undelivered Mail  
 Backgrounds  
 Tools  
 Users  
 Reports  
 API Keys  
 Profile

Add and manage the recipients of your mailing list.  
 Once done, click on Next to move to sending a postcard to these people.

**Recipients** Manually Add Import via CSV

**Recipient #1**

**Name** John Doe

**Address** 221B Baker Street

**Postcode** EC1 2EG

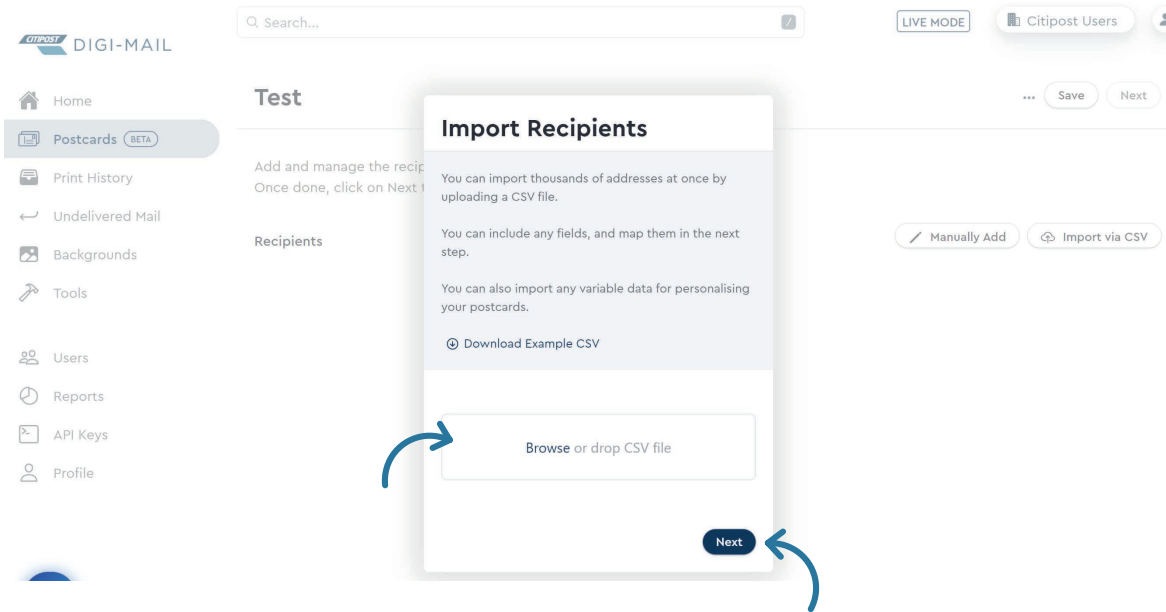
**Custom Fields**

{Demo 1} Example 1

{Demo 2} Code 12345XYZ

+ Add New Field

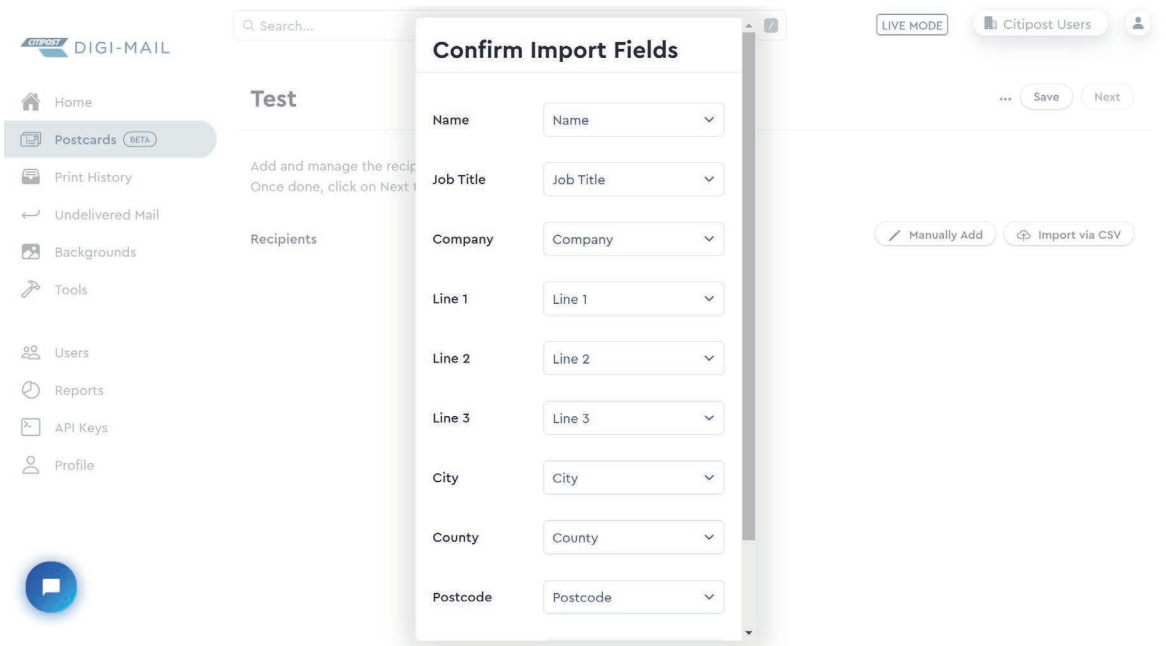
This will open the 'Import Recipients' pop-up window:



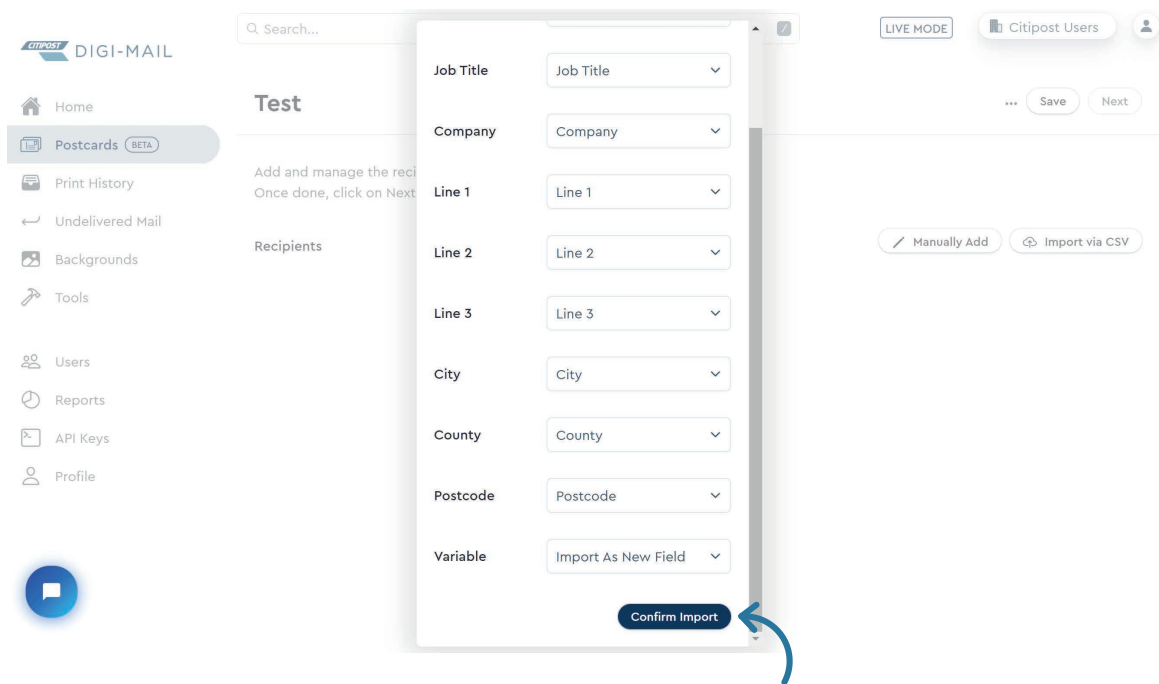
Select **'Browse'** to select your CSV file from its locally saved position, or drag and drop your file into the file area. Select **'Next'** when the file is uploaded.

This action will open the **'Confirm Imports Fields'** pop-up window. Use this form to map your mailing information data fields by selecting the description that best fits the field contents. Your field header names will appear on the left-hand side, select an option from the drop-down arrows in the right-hand of the window for each field header. Where the system recognises your header names it will automatically map these for you, however you can change the description by selecting another option from the drop-down menu.

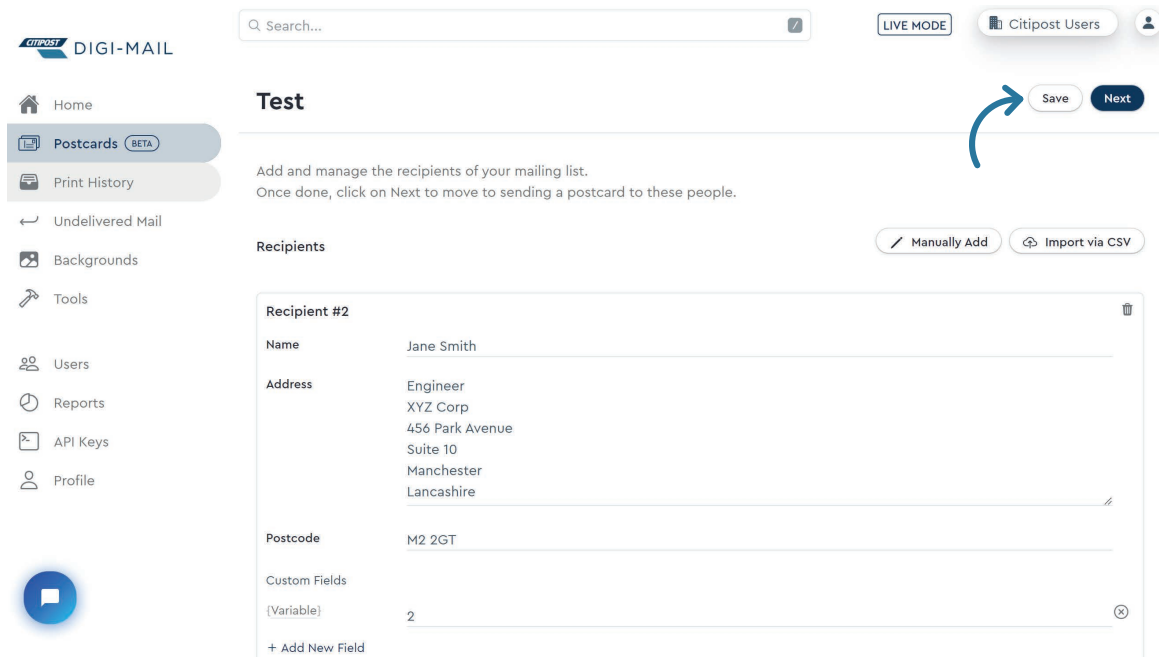
For variable fields, select **'Import as New Field'**.



Once all the fields are mapped select 'Confirm Import' and this will create a new mailing list that will be available in the postcard section of the Digi-Mail portal.



Select 'Save' to add the uploaded recipients to your table of available mailing lists



## Stage 2 - Uploading your Postcard artwork

### 1. Log in

Log into your Digi-Mail account and select the 'Postcard' option from the left-hand menu

The screenshot shows the Digi-Mail dashboard. On the left, a navigation menu includes 'Home', 'Postcards (BETA)', 'Print History', 'Undelivered Mail', 'Backgrounds', 'Tools', 'Users', 'Reports', 'API Keys', and 'Profile'. The 'Postcards (BETA)' item is highlighted with a blue arrow. The main area features a large dashed box with the text: 'Drag and drop your file onto this page' and 'or click in this space to open an upload dialog box. We accept .pdf .doc & .docx'. Below this is a 'Download letter template' link. To the right, a blue banner reads: 'Get ready... to save time, save money and transform the way you send letters.' with icons for a hand, a monitor, a truck, and an envelope. The top of the page includes a search bar, 'LIVE MODE' indicator, 'Citipost Users' count, and a 'Letter Builder' button.

### 2. Locating your new mailing list

Select the required saved mailing list from the table 'Mailing Lists'

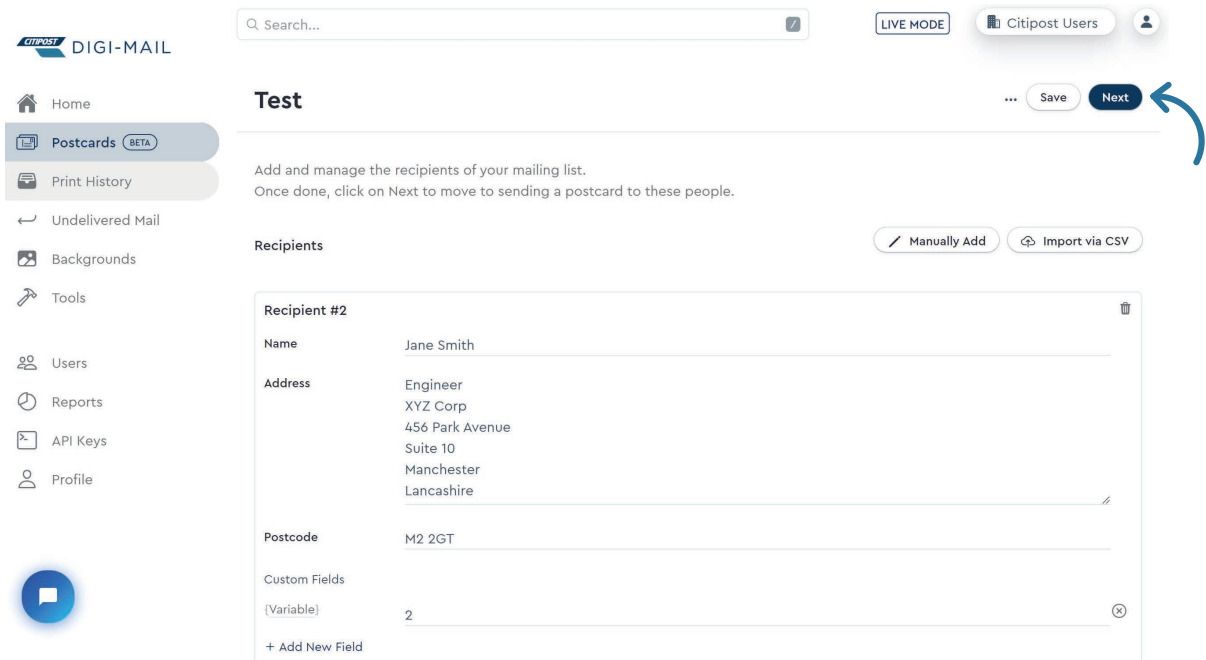
The screenshot shows the 'Mailing Lists' section of the Digi-Mail dashboard. The table has three columns: 'NAME', 'RECIPIENTS', and 'CREATED'. The 'New Mailing List' row is highlighted with a blue arrow. The table shows 6 results, with the first row being 'New Mailing List' with 3 recipients, created on 24 May 2023, 12:11PM. The table also includes a 'Showing 1-6 of 6 results' indicator and a 'Results per page: 25' dropdown menu. The top of the page includes a search bar, 'LIVE MODE' indicator, 'Citipost Users' count, and a '+ New Mailing List' button.

NAME	RECIPIENTS	CREATED
New Mailing List	3	24 May 2023, 12:11PM
Neil	1	22 May 2023, 2:53PM
DWP INTERNAL TEST	4	22 May 2023, 2:31PM
DWP INTERNAL TEST	4	22 May 2023, 11:58AM
DWP Test	1	22 May 2023, 11:13AM
test	2	22 May 2023, 9:48AM



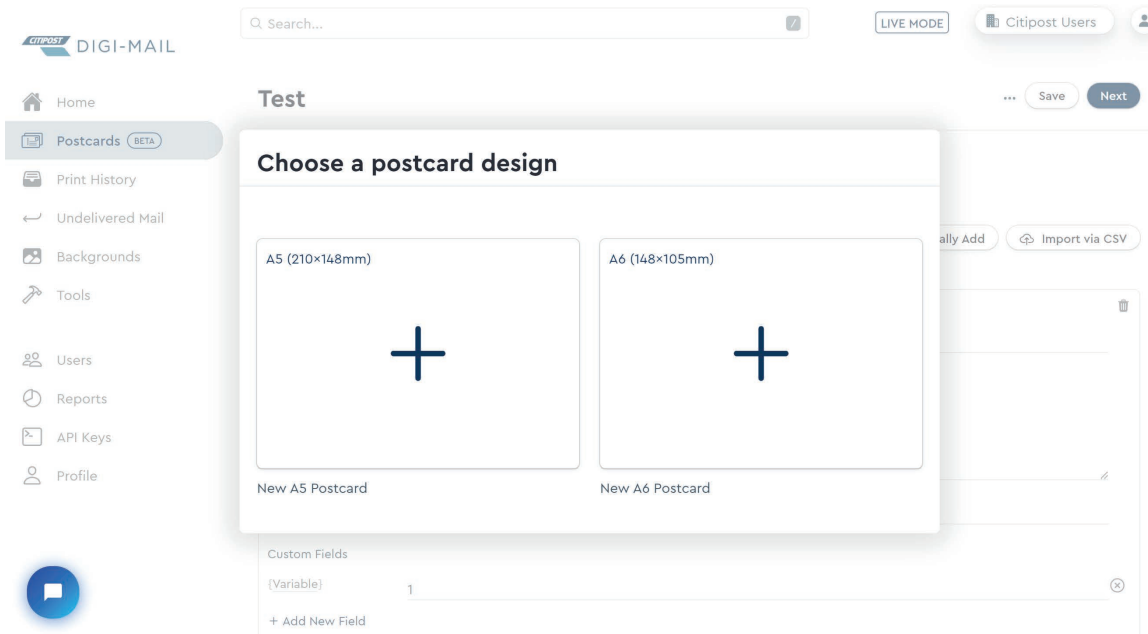
### 3. Review your mailing list

Here you can review the mailing list, add or amend recipient information, or select 'Next' to proceed to design/upload your artwork



### 4. Select your postcard size

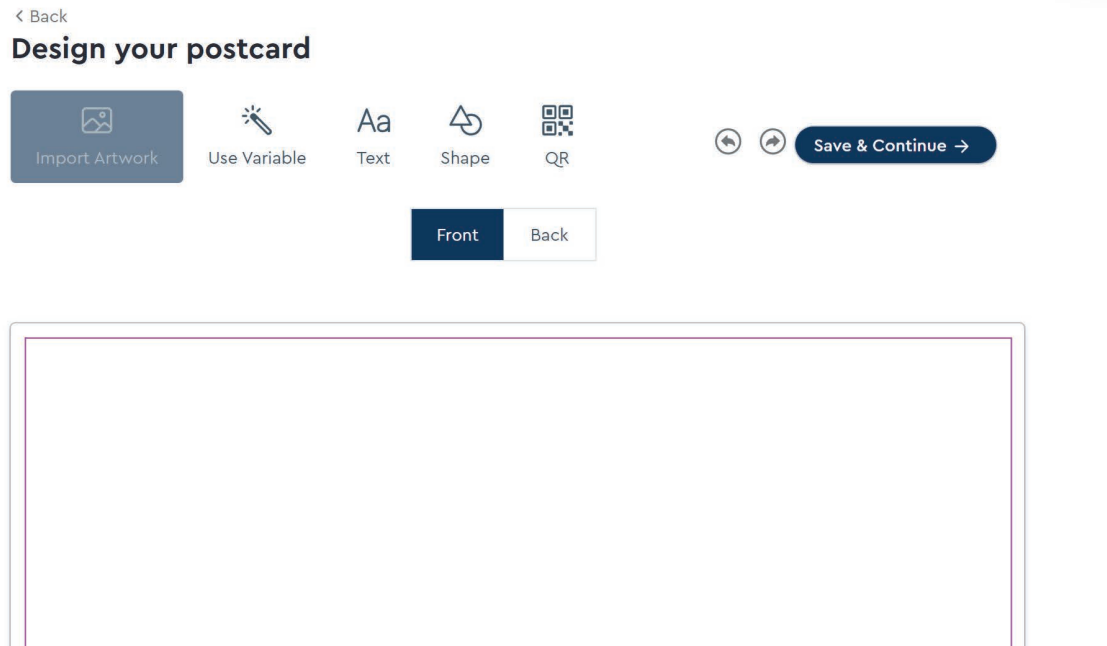
Select your postcard size from the available options, which are A5 or A6. You will then be directed to the postcard designer interface



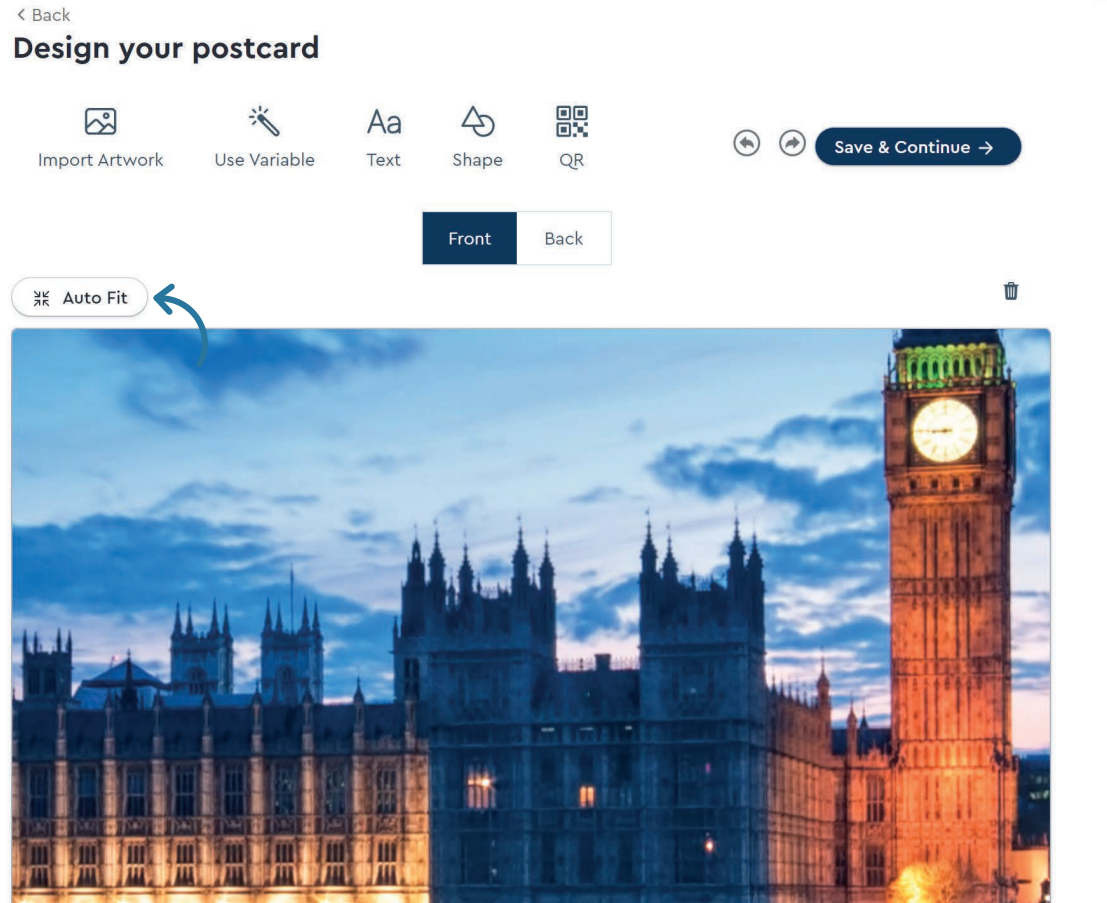
The system allows you to import your own artwork or design it within the interface. Please note if you are creating artwork to import to the Digi-Mail system, please create the artwork so that the image side is first and the address side is second.

5. **Importing your artwork**

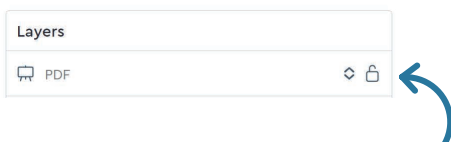
In the 'Design your Postcard' screen select 'Import Artwork' and select your artwork from it's saved location. Please be aware that the magenta line surrounding the canvas represents the crop mark, indicating the final size.



Your uploaded artwork will appear in the 'Design your Postcard' screen, if the full artwork is not visible in the design area select 'Auto Fit' and this will resize the image to fit correctly.

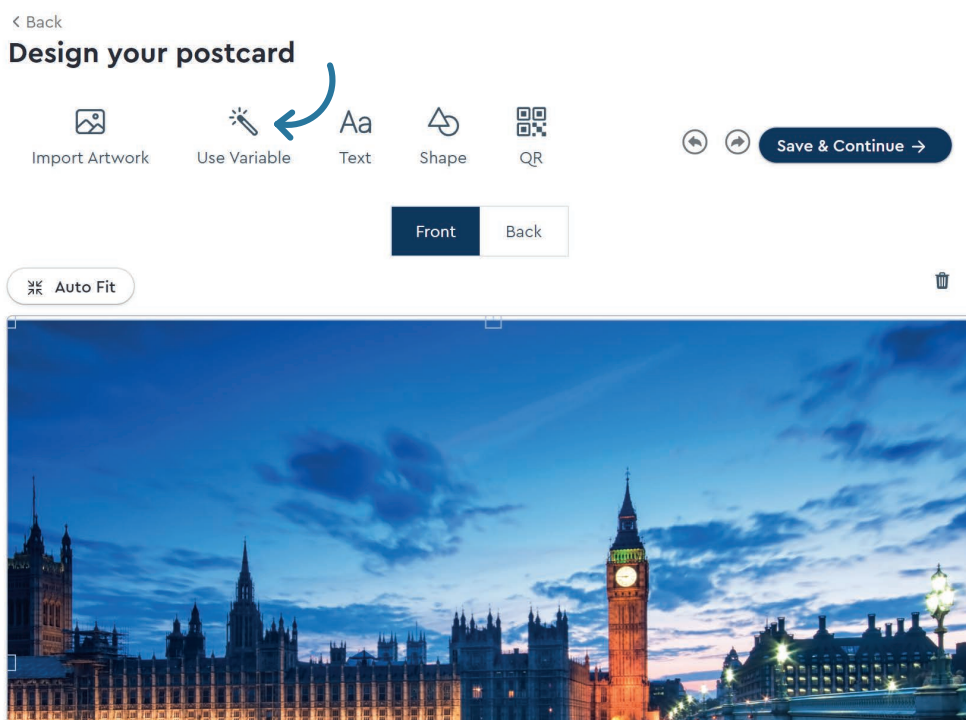


Now that the image is the correct size, to ensure that no further modifications are made to this layer, let's lock it in place. Locate the layers panel and click on the **'Padlock Icon'** corresponding to this layer to secure it

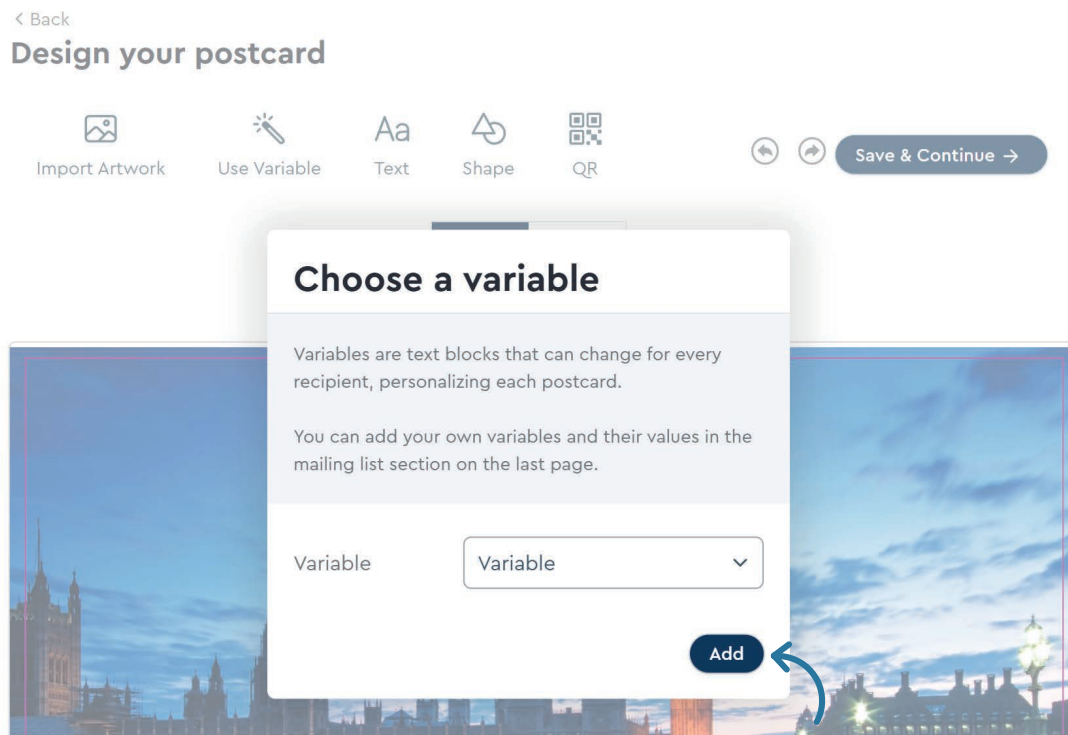


#### 6. Adding personalisation with custom fields

During the creation of our mailing list, we imported a custom field for a personalised discount code. Let's incorporate these into our postcard by clicking the **"Use variable"** button.

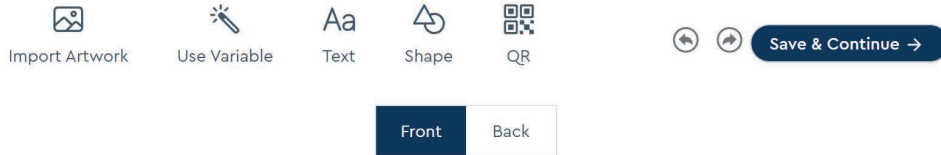


Choose a variable field from the pop-up window 'Chose a Variable' and select 'Add'

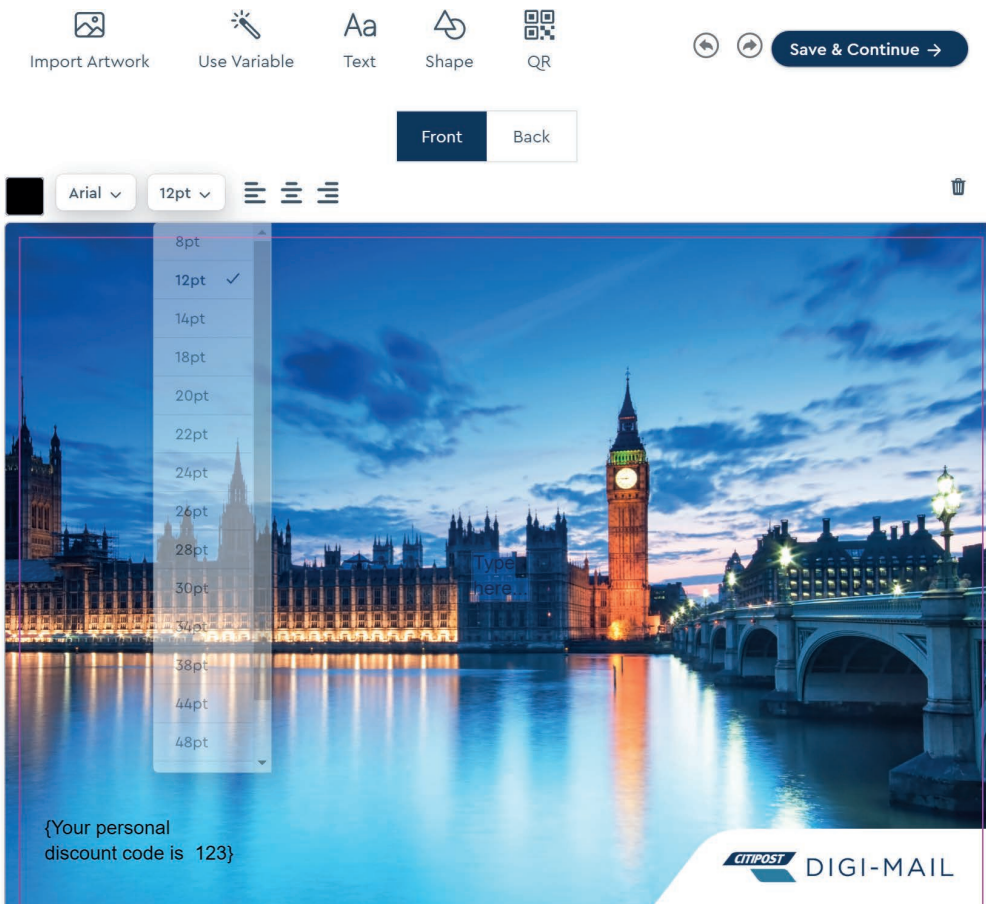


Your variable text will appear in the middle of the postcard, you can select it to move the field to anywhere on the postcard. **While keeping the imported field wrapped in curly braces, you have the flexibility to add text before or after the variable.**





Utilise the provided tools to modify the font type, size, colour, and justification

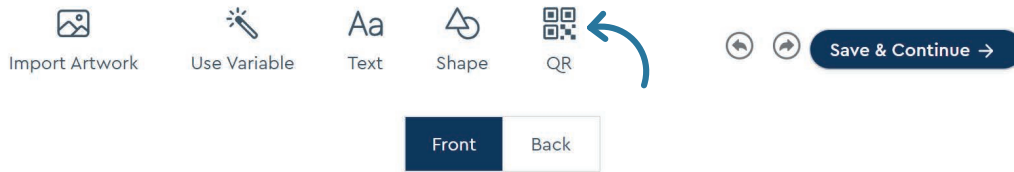


7. **Adding a QR code**

The design feature also has the ability to include a QR code that links to a website, click on the 'QR' button at the top of the page to add a QR code

< Back

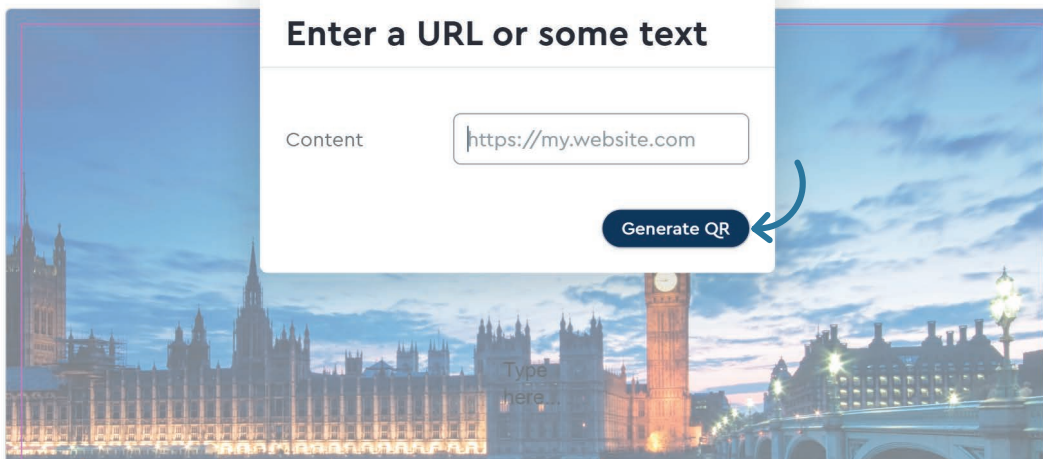
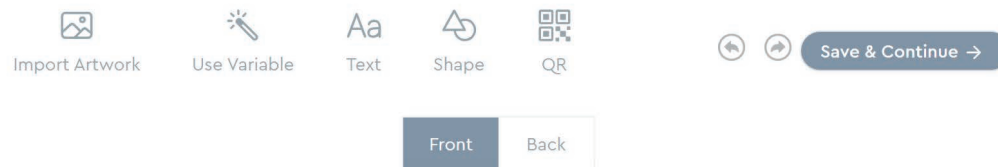
### Design your postcard



This will open the pop-up window 'Enter a URL or some text', add your details and select 'Generate QR'

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### Design your postcard



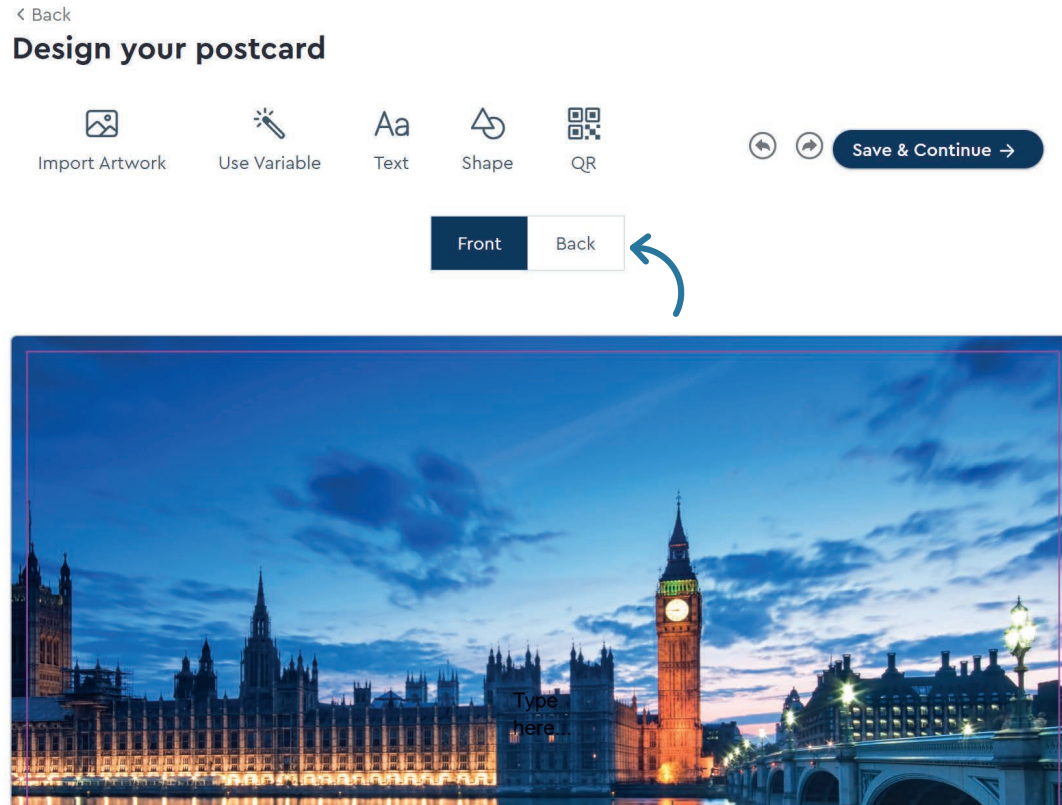
The QR code will appear in the middle of your postcard, select the QR code and position it on your artwork as desired





8. **Customising the back of the Postcard**

In the Postcard design screen, select **'Back'** to change to the reverse of your Postcard



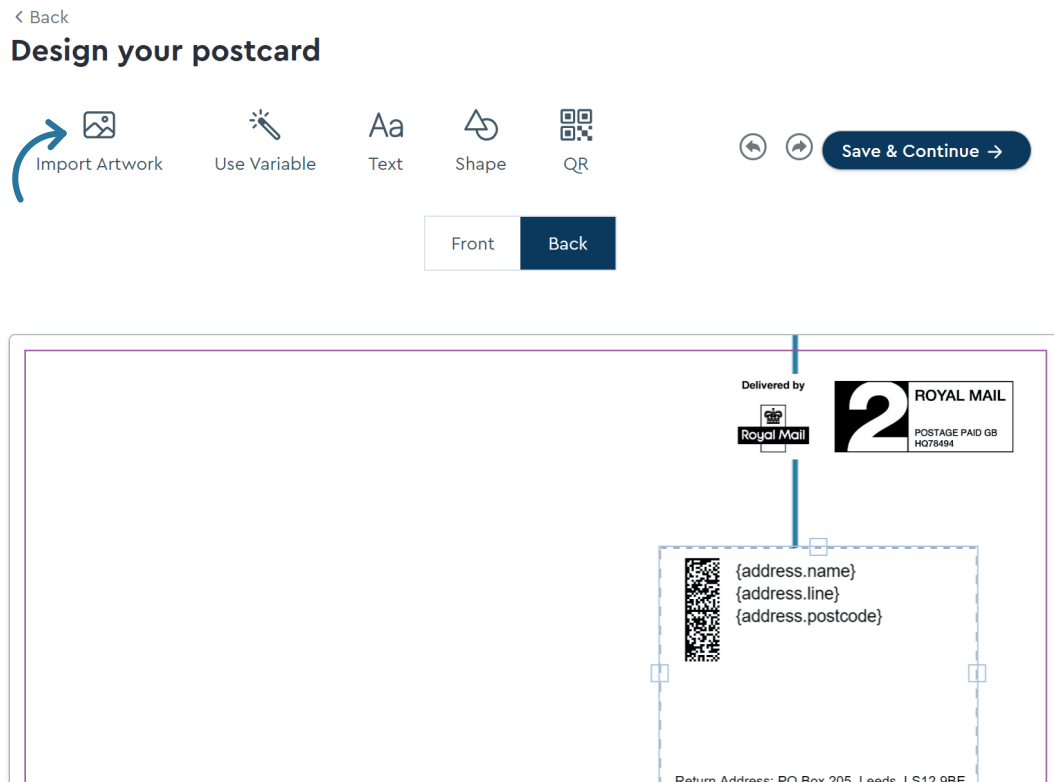
The second page of the postcard design will appear with the postage impression mark already situated in the correct location. You will be able to select between 1st class and 2nd class postage options at a later stage. The correct stamp mark will be applied during the print process.



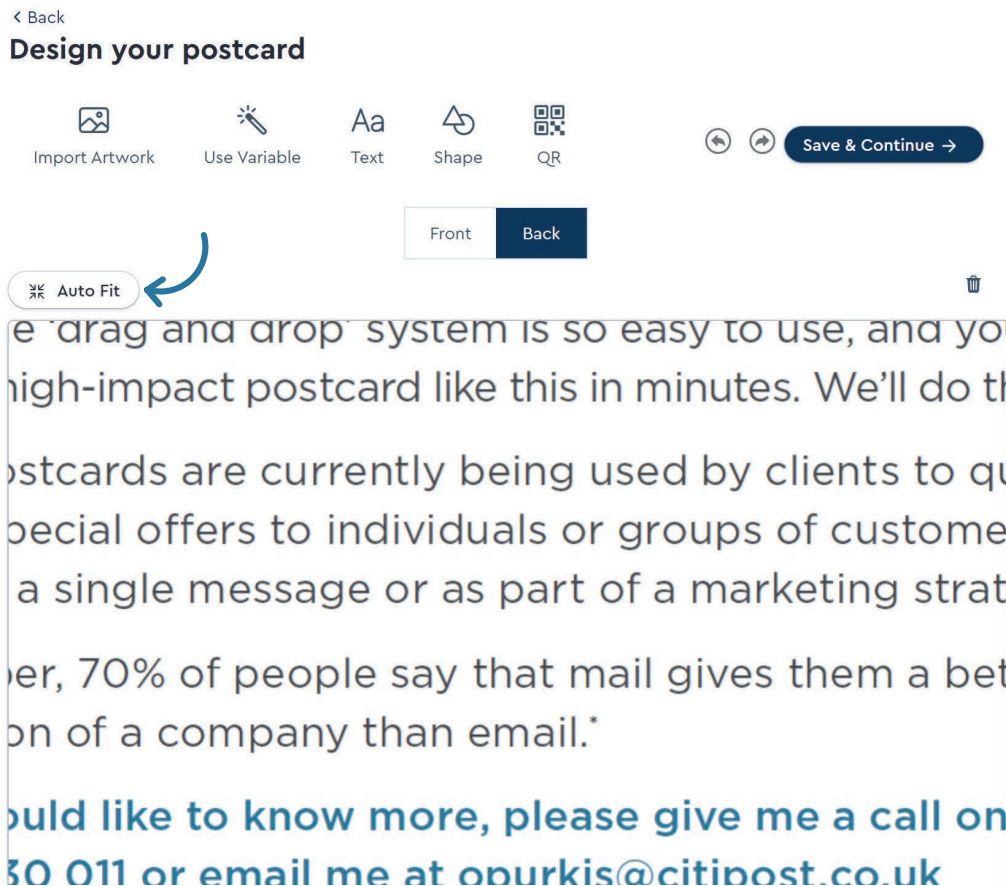


9. **Adding your own artwork to the address side of a postcard**

Once again, click on **'Import Artwork'** and import the desired artwork for the back of the postcard from its locally saved location



Click on the **'Autofit'** button to automatically scale the artwork to fit it within the canvas area

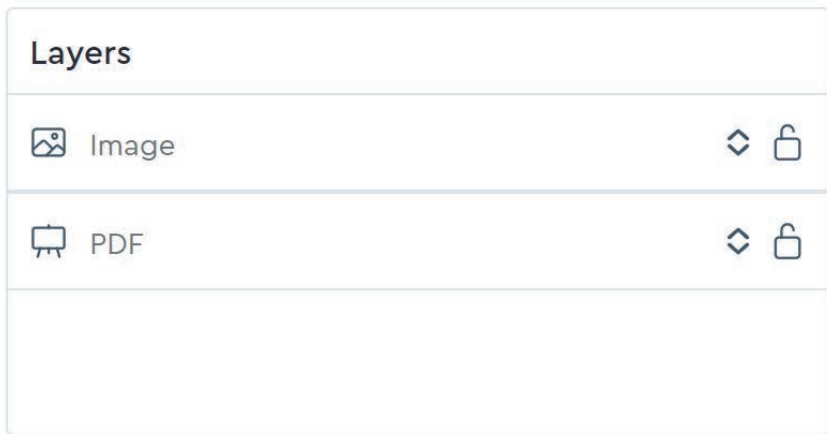


The image will be rescaled and can be moved to a preferred location on the postcard, example below:



10. **Locking the design in place**

To ensure that no further modifications are made to this layer, let's lock it in place. Locate the layers panel (below the postcard design area) and click on the padlock icon corresponding to this layer to secure it

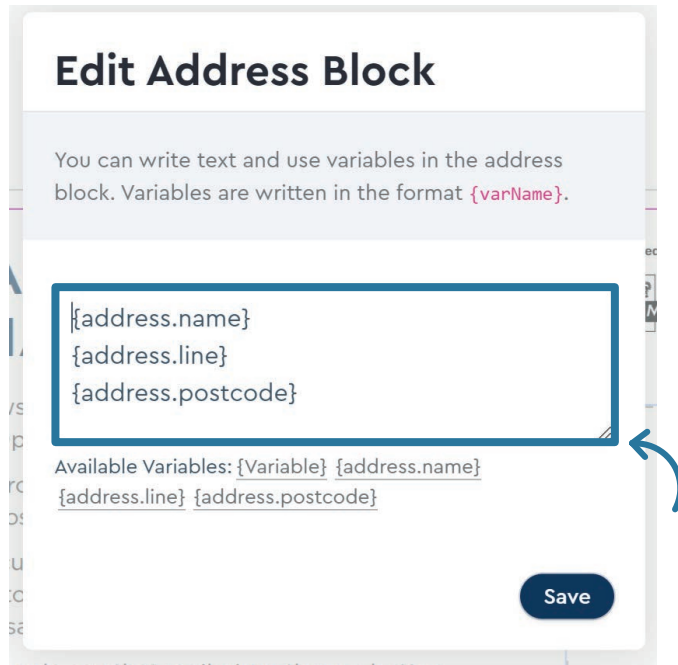


11. **Editing the address block area**

Double click on the address block area to open the address block editor

This will open the pop-up window 'Edit Address Block'. While editing the address block, you have access to various options that can be copied and pasted into the desired position within the address text block. This allows you to have complete control over the formatting and arrangement of the address.

Select 'Save' when complete to move back to the design window.



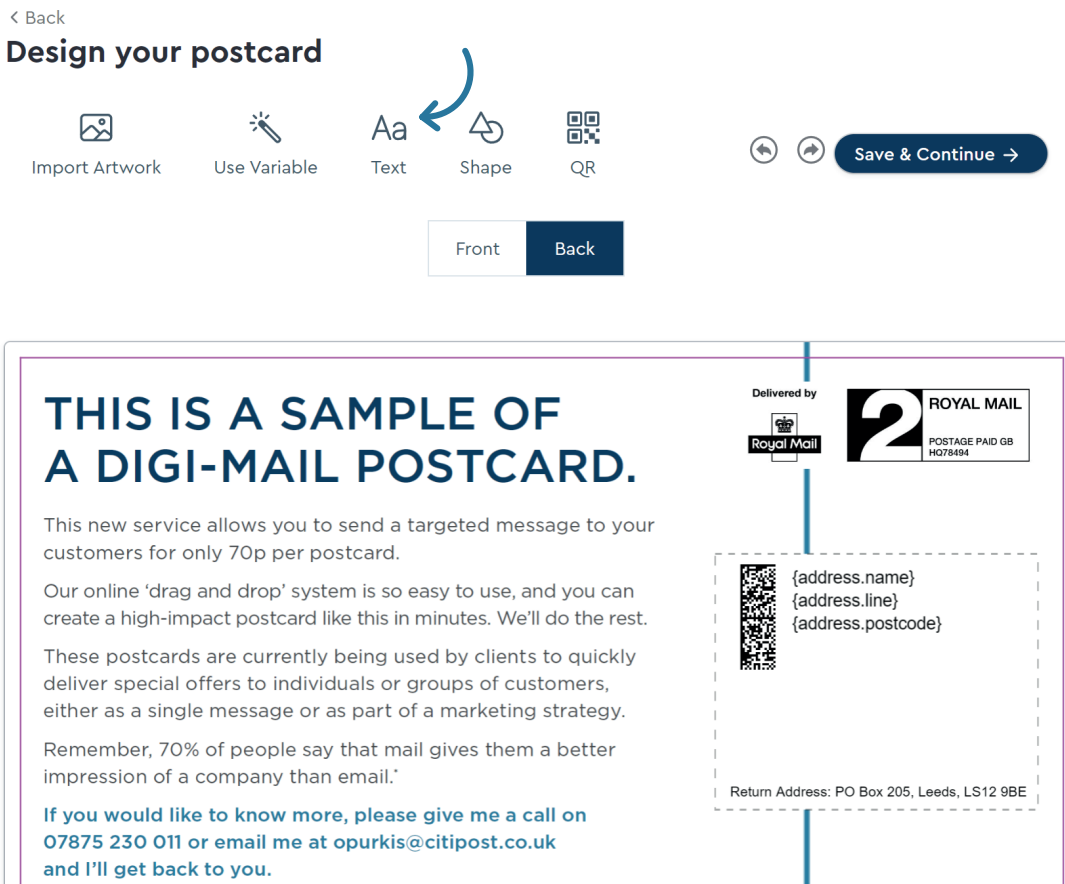
12. **Repositioning the address block**

Reposition the address block on the postcard by selecting it and using the outside edges to move the text box, ensuring that it has ample space to accommodate addresses of varying lengths

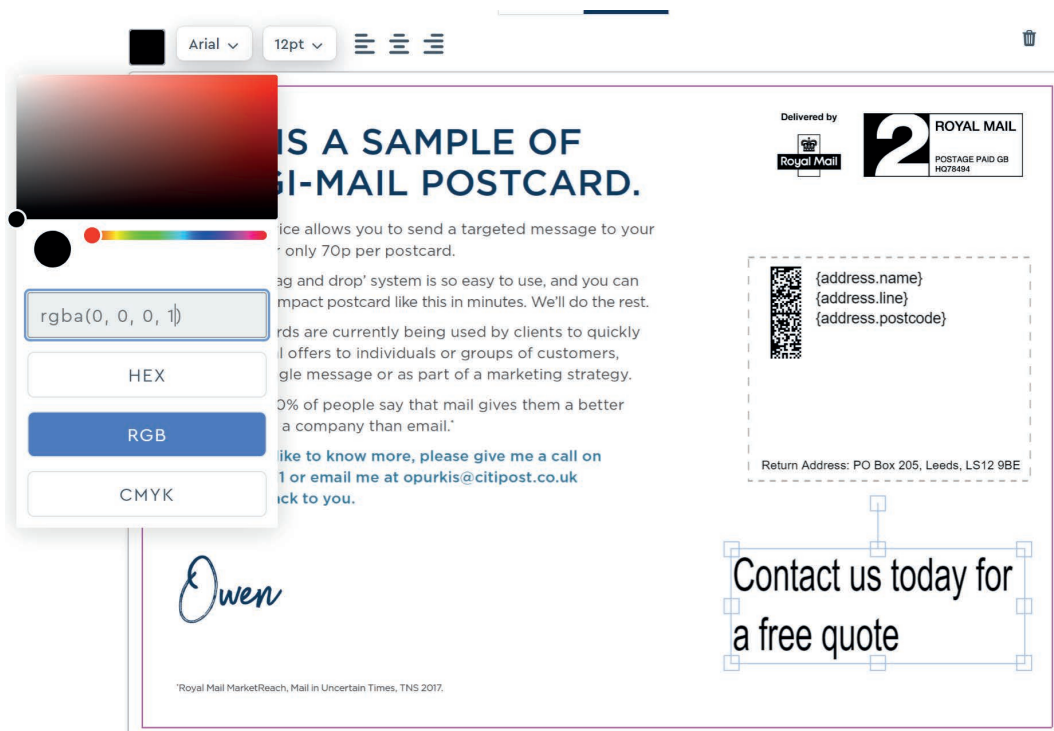


13. Adding new text to the postcard design

To incorporate some new text into the postcard design, select the 'Text' button

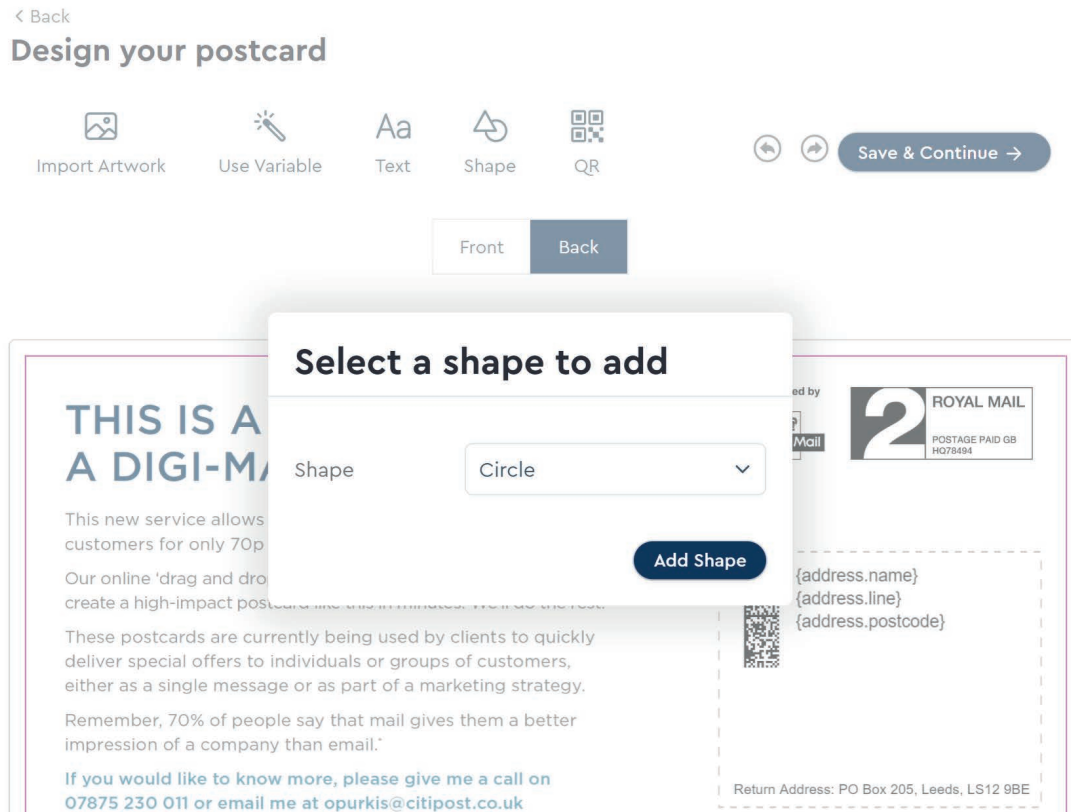


This will add a text box to the centre of the postcard design, position the text box as required and utilise the provided tools to modify the font type, size, colour, and justification



14. **Adding a shape to a postcard design**

Click the shape button to open the 'Select a shape to add' pop-up window and select a shape from the drop-down menu. Select 'Add Shape' to close the pop-up window and add the shape to your design.

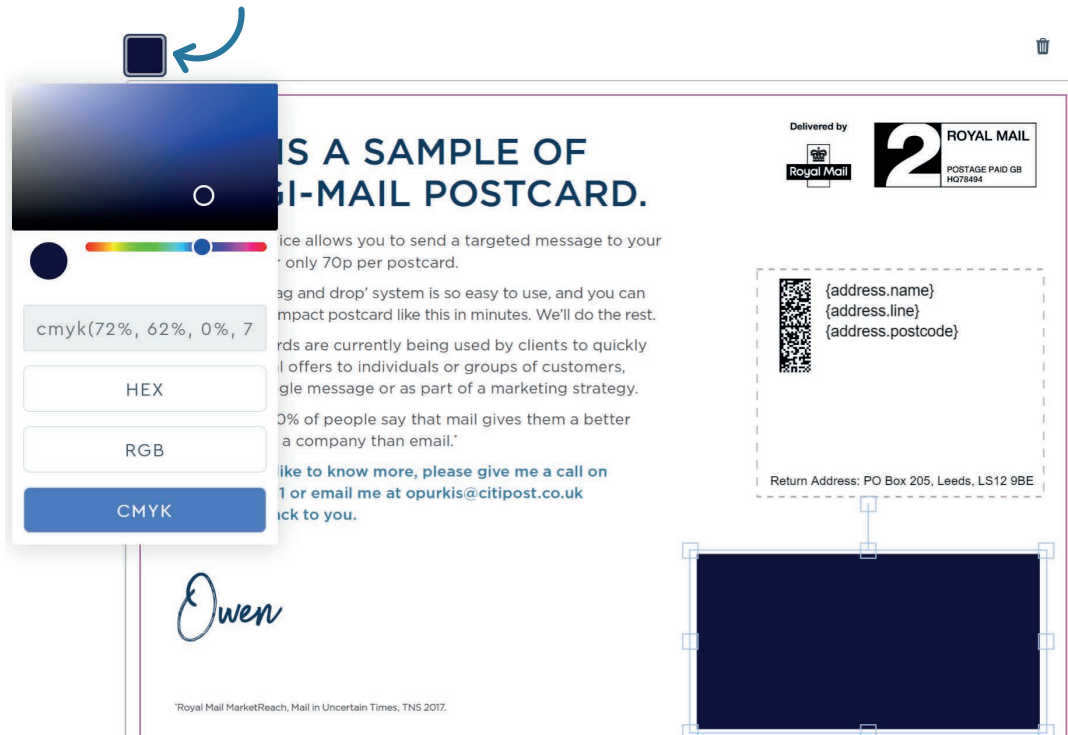


Select your shape and use the anchor points to scale, rotate, and move your shape into position. Shapes can also be overlaid with text



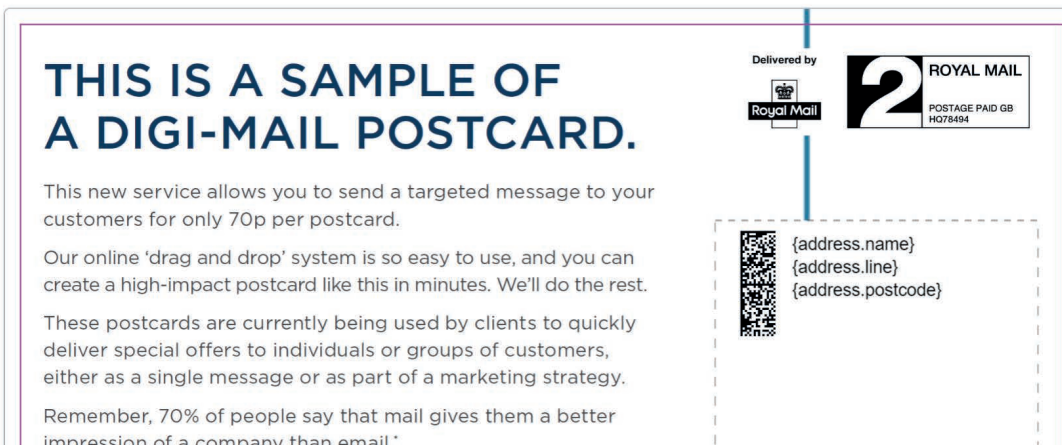
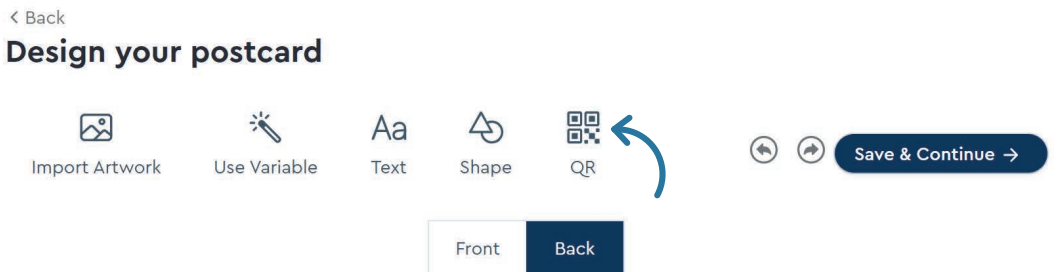


Customise the colour of your shape in the design tool



15. Adding a QR Code to the address side of a postcard

You can add a QR code to the reverse in the same way it can be added to the front page, simply select the 'QR' option in the 'Design your postcard' screen, add your URL and select 'Generate QR'. Position the QR code to your preferred location.



16. **Saving your design**

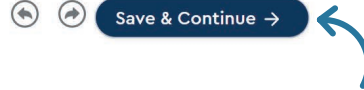
When you're happy with your design and layout, click **'Save & Continue'**. This action will merge the address data with the postcard design and allow you to review and send to post in the follow-on screen.

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### Design your postcard

Import Artwork   Use Variable   Text   Shape   QR

Front   Back



## THIS IS A SAMPLE OF A DIGI-MAIL POSTCARD.

This new service allows you to send a targeted message to your customers for only 70p per postcard.

Our online 'drag and drop' system is so easy to use, and you can create a high-impact postcard like this in minutes. We'll do the rest.

These postcards are currently being used by clients to quickly deliver special offers to individuals or groups of customers, either as a single message or as part of a marketing strategy.

Remember, 70% of people say that mail gives them a better impression of a company than email.\*

**If you would like to know more, please give me a call on 07875 230 011 or email me at [opurkis@citipost.co.uk](mailto:opurkis@citipost.co.uk) and I'll get back to you.**

Delivered by  
Royal Mail

**2** ROYAL MAIL  
POSTAGE PAID GB  
H078494

{address.name}  
{address.line}  
{address.postcode}

Return Address: PO Box 205, Leeds, LS12 9BE

## Stage 3 – Reviewing your merged addressed postcards

### Checking the merged recipient address details

Now that your postcard design has been merged with your recipient data list, on the right-hand side of the screen you will be able to preview each addressed postcard by selecting the recipient from the **'Recipient'** drop-down menu. In checking you should notice that each postcard has been populated with the correct address data and custom field data.

**Send Postcard to Test** ... Continue

Reference:


Size: A5

Service:

Mail Date:

Recipients: 2

Recipient #1



## Stage 4 – Selecting your postage options and sending your postcards to print

### 1. Selecting the postal options

On the left-hand side of the screen are your postage options. In the **'Service'** option you can select between 1st class and 2nd class postage options. Following that in the **'Mail Date'** option you can select when you would like the postcards to be distributed.

Use the drop-down menu options to select your preferences.

**Send Postcard to Test** ... Continue

Reference:


Size: A5

Service:

Mail Date:

Recipients: 2

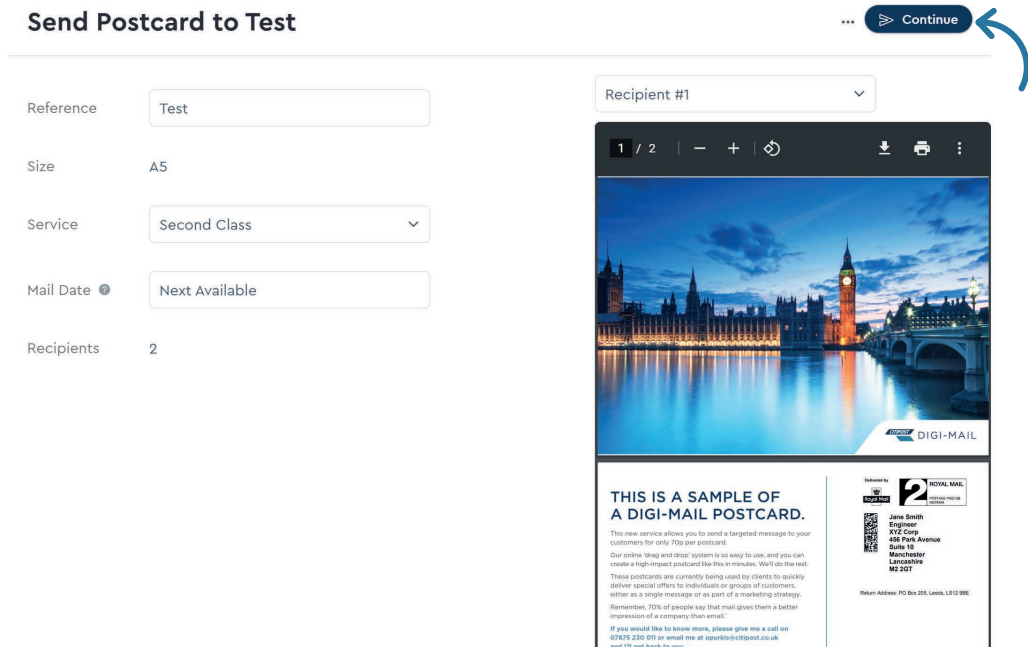
Recipient #1





2. **Submitting to print and dispatch**

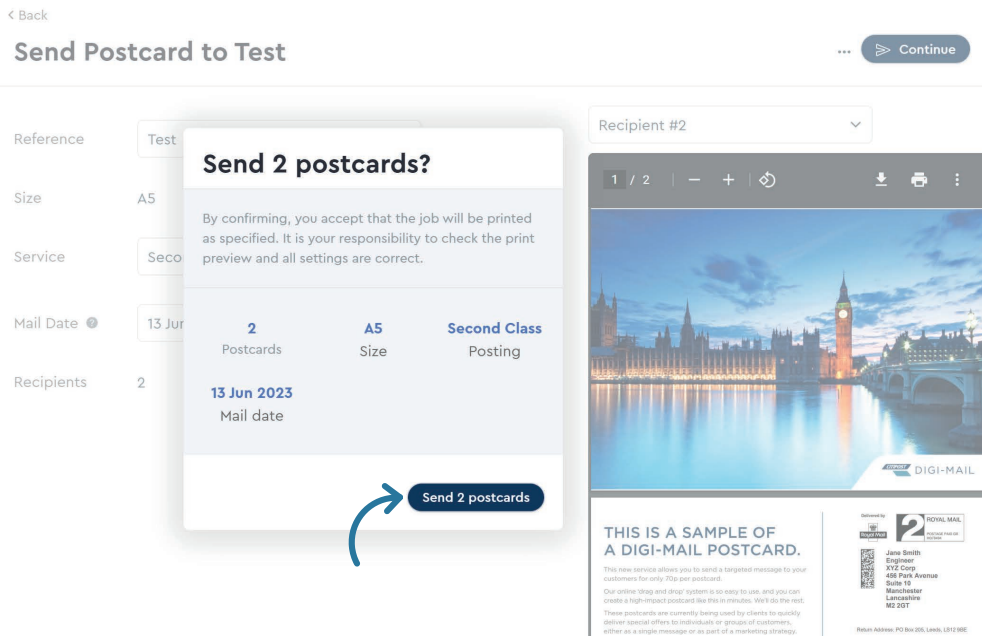
Select the 'Continue' option at the top right-hand of the screen



A summary screen will then appear detailing:

- The number of postcards that are being submitted for print and dispatch
- The size of the postcard selected
- The postage option selected (1st or 2nd class)
- The mailing date selected

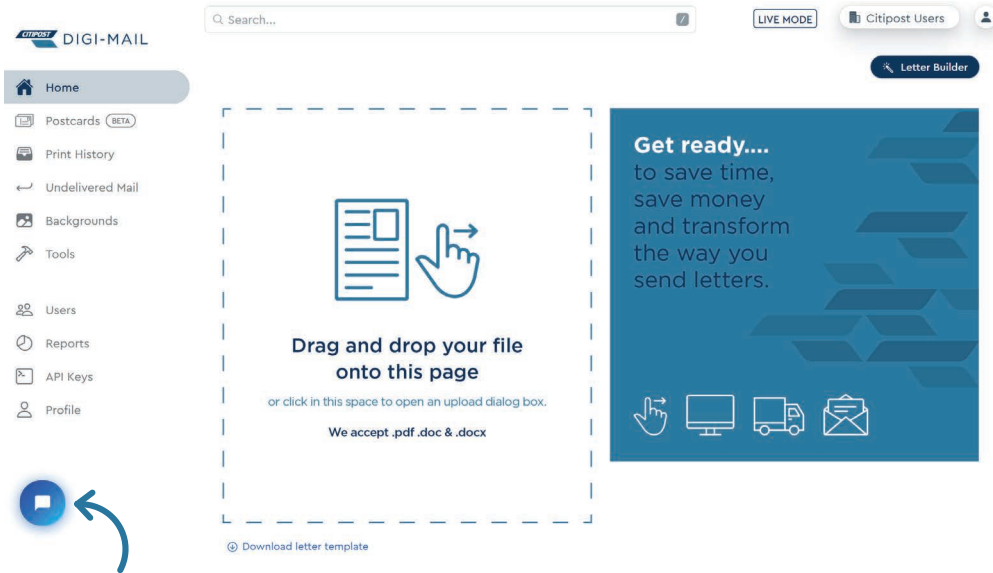
Please review these details and select 'Send (number) postcards' to complete your submission.



Your postcards will now be professionally printed and posted on your behalf.

## Here to help

If you have any questions throughout this process you can contact your dedicated Client Relationship Manager or select the 'Chat' icon in the lower left-hand of the screen and one of the technical support team will be available to assist during working hours 9am-5pm, Monday to Friday (Bank Holidays are not included).



# RESPONSIBILITIES

As the originator of any image and content, you must ensure that you comply with the requirements below:

You must ensure that you:

- 1) Compete fairly.
- 2) Will not use any image that may cause offence or is misleading
- 3) Will not use any indecent images that contain any sexual reference, or refer to indecency, obscenity or pornography.
- 4) Are compliant with the British Code of Advertising Practice.
- 5) Are compliant with the law and the images used do not incite any person to break the law.
- 6) Will not use imagery that is derogatory or that defames any other person or business.
- 7) Own the intellectual property rights for any designs that you upload.
- 8) Indemnify Digi-Mail, RNB Group Ltd and Royal Mail Group Plc against any potential claim in relation to the breach of copyright law.

# PRIVACY POLICY

This can be viewed at <https://www.citipostmail.co.uk/privacy-and-cookie-policy/>



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