



**INTEGRITY  
CONNECT**



# CLARITY MAIL USER GUIDE

# CLARITY MAIL OVERVIEW

Clarity Mail is a printer driver installed on your computer as a network printer. It enables you to submit documents for central production right from their desktop. You can continue to use Windows applications with which you are familiar, such as Microsoft Word.

This means that your existing work pattern is not interrupted and hence reduces training requirements and overall deployment costs and complexities. Documents are encrypted in real-time and transmitted by a secure FTP link to our ISO27001 accredited manufacturing facility to ensure data security.

## END USER BENEFITS...

You are able to work more efficiently by passing the labour intensive and costly document production process away from their office environment and utilise our high speed print and mail facility - continuing to use your existing office applications (such as MS Word or SAGE), thereby reducing the organisational impact and training requirements.

## ORGANISATIONAL BENEFITS...

By producing documents using a high volume outsourced facility, you can both reduce the cost of office mail as well as gain greater control over ad-hoc mailings and the time taken to produce and deliver these mailings. Clarity allows clients to automate and aggregate mailings to match the production capabilities and further reduce costs associated with postage, operational inefficiencies and consumables. Clarity delivers control over costs by centrally monitoring mail usage to help understand the true costs of your office mail.



## USING CLARITY MAIL

Clarity Mail is a simple to use system that is easy to deploy across organisations and allows you to continue creating documents in your standard desktop applications.

Once the print driver has been installed on your network you are immediately able to start sending documents to the mail server.

This process uses the latest encryption technology to ensure your data is transferred with total security to our SFTP site



## ON-LINE USER GUIDES

There are a number of online video resources available on the Integrity Connect Website:



OR  
direct from these links:





# STEP BY STEP GUIDE TO SINGLE DOCUMENT SUBMISSION

To print using the Clarity Mail system, follow the instructions below. These use an example document created in Microsoft Word.

**1** Create the document and then select **'Print'** from the Windows menu.

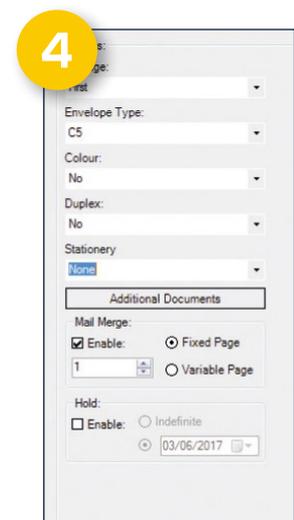
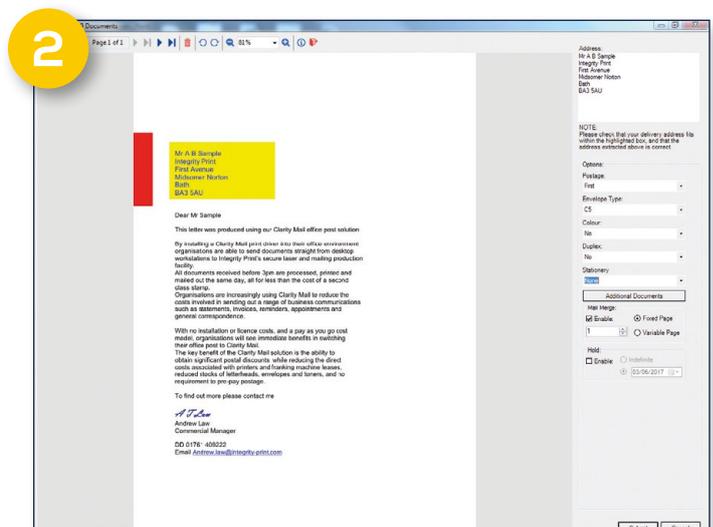
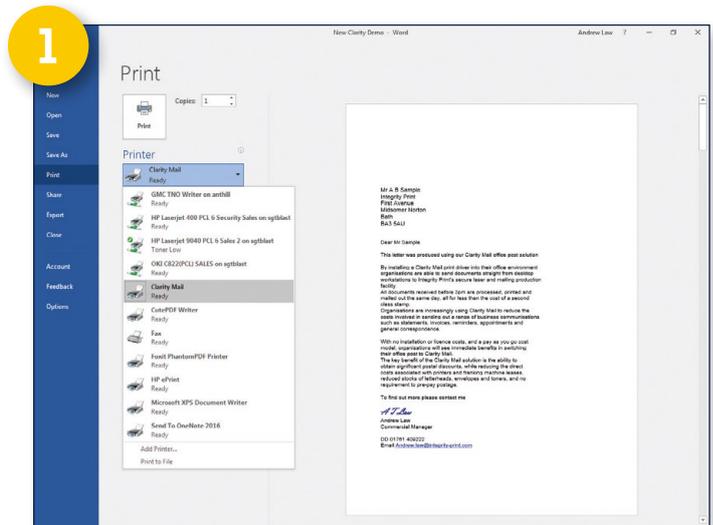
The Clarity Mail print driver is selected from the drop down printer menu, and the document is submitted for print, by clicking on **'OK'**.

**2** The Printer Driver then launches Clarity Mail and presents a submission preview screen as shown here.

**3** It is important to ensure that the address is positioned within the yellow highlighted area as this represents the window position of the envelope being used. *If the address position needs to be adjusted, click on the **'Cancel'** button and modify the document accordingly and then re-submit.*

The red box should also be kept clear as we use this area to apply an audit control barcode.

**4** You can then select from a number of options from the right hand side of the screen. The options available include First or Second Class post, colour or mono print, simplex or duplex print and C5 or DL envelope size.





**5 Clarity Response**

You also have the option of adding a Freepost Business Reply Envelope in with your outbound mail. Simply click on **'Yes'** in the drop down box under Response Envelope.

**For more information about Clarity Response please click here:**

**5**

NOTE: Please check that your delivery address fits within the highlighted box, and that the address extracted above is correct.

Options:

Postage: Second

Envelope Type: C5

Colour: Yes

Duplex: No

Stationery: None

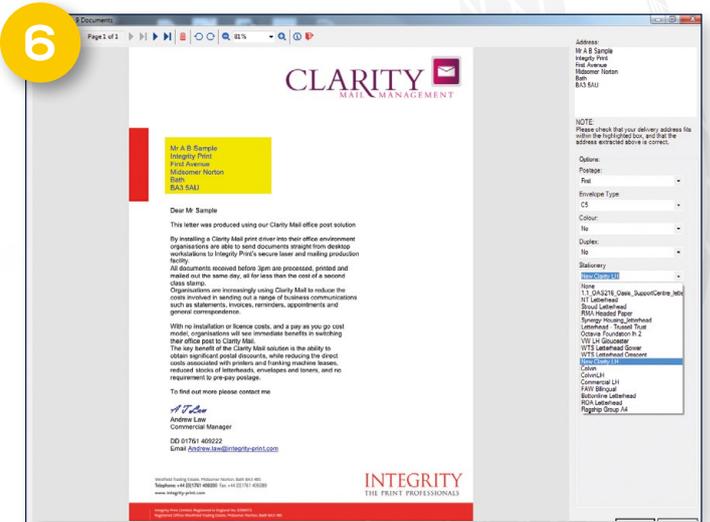
Response Envelope: Yes

Additional Documents

**6** You also have the option to add in a corporate letterhead as a background using the Stationery button, which opens a pull down menu with the options available to you.

When you select the background, it will appear in the preview screen, allowing you to position your letter correctly. This allows Clarity Mail to print your letterhead on the fly in either colour or mono. New letterhead designs can be added either by using the Clarity Web Portal or contacting your Clarity Mail system administrator.

Once the selections have been made, click the **'Submit'** button to send the document. A message will appear on screen to confirm successful document submission. Upon submitting the document, the Clarity Mail Client submits the encrypted PDF from the working folder via FTP to the Clarity production facility. To monitor progress of your job you can log into the Clarity Web portal for a job status update. Mail can be submitted until 5pm Monday to Friday and will be mailed out on the next working day.



## STEP BY STEP GUIDE TO SENDING A MAIL MERGE

The Mail Merge feature allows you to submit documents that have been through the Microsoft Word (or equivalent) Mail Merge process. This allows you to submit multiple documents in one go, for example if you are doing a mail-shot to multiple addresses.

**1** The default setting in Clarity Mail switches to Mail Merge if you submit 7 or more pages in a print file. A message will pop up when you send a file containing more than 7 pages.

**2** Click on 'OK' to proceed to the preview screen.

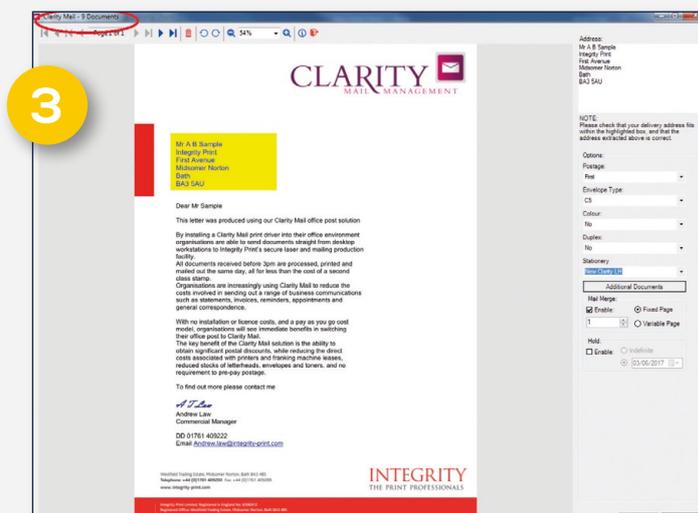
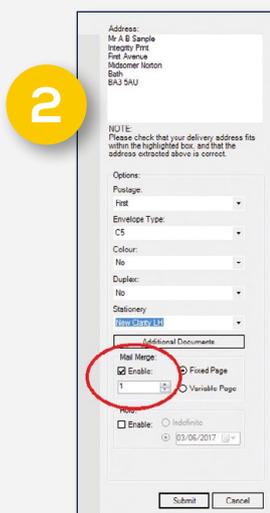
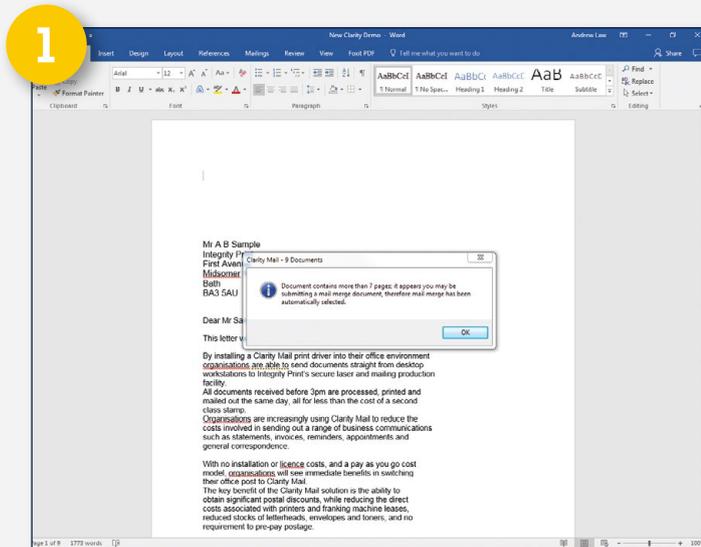
When the document preview screen appears check that the mail merge option is ticked, as highlighted below.

**3** The Clarity Mail driver will then break up the overall document into individual documents of the specified number of pages ready for submitting to the print facility.

*Please ensure that you specify the number of pages going into each envelope by using the up and down arrows.*

You may use the arrows at the top of the screen to scroll through your file to check multiple documents. The tool bar also highlights how many letters you have in the file.

Once you completed this process and are happy with the mailing, click 'Submit' and a message will appear to confirm how many documents you have submitted. Double check that the number of documents submitted is the same as you expected!



## STEP BY STEP GUIDE TO VARIABLE MAIL MERGE

Clarity Mail includes the facility to submit a file with variable page extents. Although the process is described below, it is fairly complex and we recommend that you contact us before using this function.

- 1 The Variable Mail Merge feature allows you to submit documents that have been through the Microsoft Word (or equivalent) Mail Merge process and are of a varying number of pages.
- 2 The default setting is to place all pages of your document into a single envelope. With the Variable Mail Merge feature, you can decide to break up your document into multiple envelopes.

When you do a Mail Merge in Microsoft Word, the document produced contains all the individual documents one after another.

Check the Variable Mail Merge option to turn this feature on. You will then be presented with a new toolbar.



Using the draw tool, select an area on the page which determines the start of the next document.

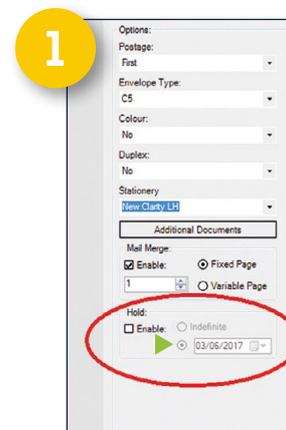
The Clarity Mail driver will then break up the overall document into individual documents based on your rule ready for submitting to Clarity Mail.

## STEP BY STEP GUIDE TO HOLD UNTIL FEATURE

You have the facility to submit a mailing but request that it is not mailed until a certain date by using the 'Hold until' feature, illustrated here.

- 1 To submit a mailing but request that it is not mailed until a certain date simply use the 'Hold until' button, highlighted right.

You can then select the required release date using the calendar feature, highlighted by the green arrow symbol right.



### IMPORTANT NOTE

Clarity Mail remembers your previous settings from a document submission and will set these as default next time you use the system. This is particularly important if you use the hold until feature, as it will use this as the default setting for your next mailing, so you will need to make sure this is switched off when not required.

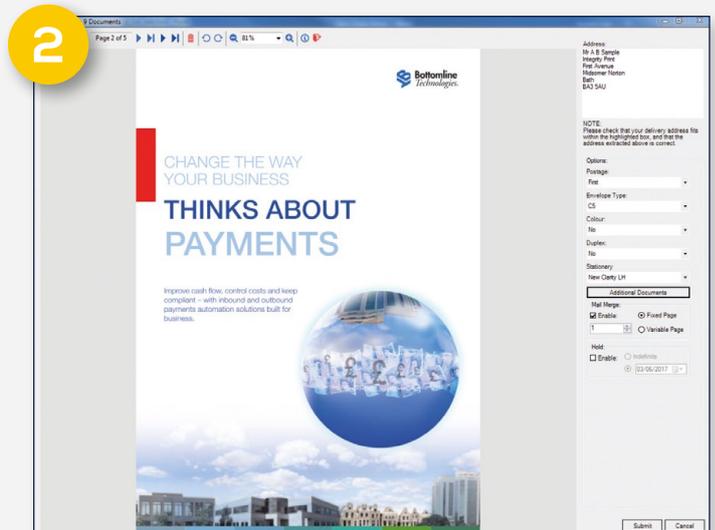
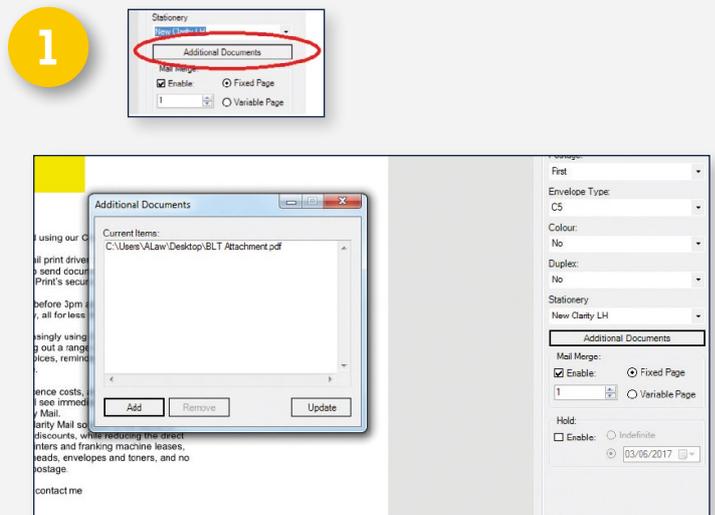
# STEP BY STEP GUIDE TO ADDITIONAL DOCUMENTS

This feature allows you to attach additional documents to your letter such as a newsletter or product sheet.

**1** Clicking on the Additional Documents button will open a dialogue box, click on the **'Add'** button and then browse your network for the document you need. Click on the required file and click on **'Update'** to place this document as a continuation page(s) in your mailing as an insert. You only have to add the document once and it will be added to all letters in a file. Repeat the process if you wish to add additional inserts.

Any additional documents you wish to add need to be available as a pdf and formatted to A4 size.

**2** The continuation pages will now appear in your print preview. The remove button allows you to take the additional pages out prior to clicking **'Submit'**. The screen below shows how an insert will now appear on the preview screen.





# USING THE CLARITY MAIL WEB PORTAL

This section guides you through the use of the Clarity Mail Web Portal.

Your welcome email required you to log into the web portal to set your password.

The site can also be accessed at <http://portal.clarity-mm.com/myportal>

## LOGIN

- Follow the link on your welcome email. You can choose to bookmark this page in your web browser for later use.
- Enter your email address and the password from your welcome email. Click **'Login'**.
- Once you login for the first time, you will be prompted to set a new password and security question.
- If, in the future, you forget your password, you can use the Password Reset option from the login page.

## ACTIVE JOBS PAGE

The Active Jobs page is accessed using the **'Home'** option on the menu.

This page displays all documents within the system that you have authority to view. This may be just the documents that you as a user have submitted, or it may be documents created by groups of users/companies depending on your access rights.

| Filters       | Documents   |                         |  |            |  |     |
|---------------|---|-------------------------|--|------------|--|-----|
| All           | Drag a column header here to group by that column |                         |  |            |  |     |
| Submitted     | Submission Date                                   | Company                 |  | Department | File Name  |     |
| On Hold       | 01/01, [x] [v]                                    | Integr [v]              |  | [v]        | [v]  |     |
| With Stock    | 10/01/2022 16:58:24                               | Integrity Print Limited | [checkbox] [icon] [icon] [icon] [icon] | Admin      | BOI January Maturity Proofs v3 BOIUK BOIUK SS BTL.pdf            | ... |
| Without Stock | 10/01/2022 16:58:24                               | Integrity Print Limited | [checkbox] [icon] [icon] [icon] [icon] | Admin      | BOI January Maturity Proofs v3 BOIUK BOIUK SS BTL.pdf            | ... |
|               | 10/01/2022 16:57:32                               | Integrity Print Limited | [checkbox] [icon] [icon] [icon] [icon] | Admin      | BOI January Maturity Proofs v3 BOIUK BOIUK Single Resi Sales.pdf | ... |

## SORTING

Clicking column headings allows you to sort the results by the content of that column.

| User Name   | Company | File Name | Status | Colour | Postal Class |
|---|---------|-----------|--------|--------|--------------|
| An  |         |           |        |        |              |
| Submission Date: 26/01/2022 00:00:00' And Begins with([User I |         |           |        |        |              |

## HOLD REQUEST

You can request that a document is placed on hold to prevent it from being processed. To do this, select the document(s) using the tick boxes on the left side of the results table then click the **'Hold Request'** button at the bottom of the page.

You will see that the document status will change to **'Hold Requested'**. Please refer to your service provider to determine what level of action will be taken when a document is placed on Hold Request. *Note that only documents which have not begun processing and have a status of **'Submitted'** can be placed on Hold Request.*



| Department: Sales (Documents = 18) |   |                      |                |
|------------------------------------|---|----------------------|----------------|
| <input type="checkbox"/>           |  | New Clarity Demo.pdf | Submitted      |
| <input type="checkbox"/>           |  | New Clarity Demo.pdf | Hold Requested |

## VIEW DOCUMENT

To view a preview of any document in the system, click the view option on the leftmost column of your results table.

A new window will open displaying a preview of your document. You may need to disable popup blockers to allow this to happen.



| Department: Sales (Documents = 18) |   |                      |                |
|------------------------------------|---|----------------------|----------------|
| <input type="checkbox"/>           |  | New Clarity Demo.pdf | Submitted      |
| <input type="checkbox"/>           |  | New Clarity Demo.pdf | Hold Requested |

## LOGOUT

The logout menu item allows you to exit the system.

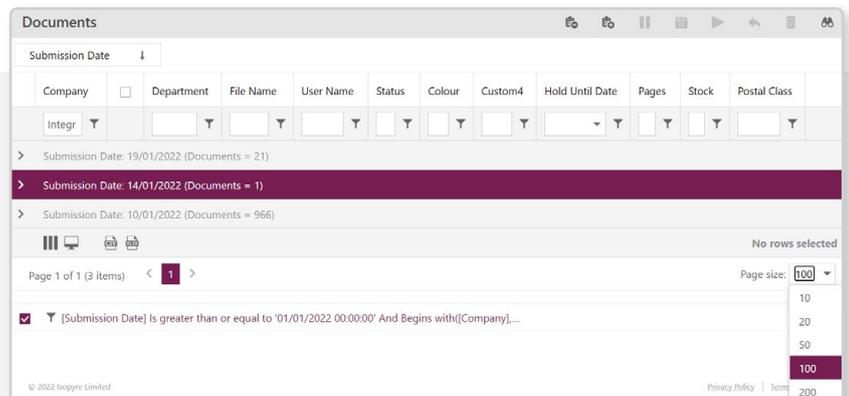
## ADVANCED FUNCTIONS



This section will guide you through some of the more advanced functionality within the Clarity Mail web portal.

## PAGES

If the number of results that are returned is more than will fit on one page, the results are split into several pages, you can access these pages using the options at the bottom of the table.



| Documents  |            |           |           |        |        |         |                 |       |       |              |                |
|--|------------|-----------|-----------|--------|--------|---------|-----------------|-------|-------|--------------|----------------|
| Company  | Department | File Name | User Name | Status | Colour | Custom4 | Hold Until Date | Pages | Stock | Postal Class |                |
| Submission Date: 19/01/2022 (Documents = 21)   |            |           |           |        |        |         |                 |       |       |              |                |
| Submission Date: 14/01/2022 (Documents = 1)  |            |           |           |        |        |         |                 |       |       |              |                |
| Submission Date: 10/01/2022 (Documents = 966)  |            |           |           |        |        |         |                 |       |       |              |                |
| No rows selected   |            |           |           |        |        |         |                 |       |       |              |                |
| Page 1 of 1 (3 items)  |            |           |           |        |        |         |                 |       |       |              | Page size: 100 |
| [Submission Date] is greater than or equal to '01/01/2022 00:00:00' And Begins with([Company]... |            |           |           |        |        |         |                 |       |       |              |                |

## RESULTS PER PAGE

You can change the number of items that are displayed per page by altering this option at the bottom of the page.

## VIEW TYPE

You can apply a master filter against all results to allow you to view which documents have been processed and which are still pending. Jobs will change to **'Processed'** status after 5pm each working day when we begin the printing and mailing of all packs received that day.

| Filters        | Documents   |
|----------------|---|
| All            | Submission Date ↓   |
| Submitted      | Company <input type="checkbox"/> Department File Name Use   |
| <b>On Hold</b> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| With Stock     | > Submission Date: 20/01/2022 (Documents = 138)   |
| Without Stock  | > <b>Submission Date: 19/01/2022 (Documents = 31)</b>   |
|                | > Submission Date: 18/01/2022 (Documents = 5)   |
|                | > Submission Date: 17/01/2022 (Documents = 11)  |

## FILTERING

If you wish to filter your results to only display documents matching certain criteria, you can type filter values into the box at the top of each column and click the filter symbol.

| Submission Date ↑                                   | Company ↑                | Department | File Name                | User Name                | Status                   |
|---|--------------------------|------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/>                            | <input type="checkbox"/> | Sales      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ▼ Submission Date: 19/01/2022 (Documents = 231)     |                          |            |                          |                          |                          |
| ▼ Company: Integrity Print Limited (Documents = 18) |                          |            |                          |                          |                          |
| <input type="checkbox"/>                            | <input type="checkbox"/> | Sales      | New Clarity Demo.pdf     | Andrew Law               | Submitted                |
| <input type="checkbox"/>                            | <input type="checkbox"/> | Sales      | New Clarity Demo.pdf     | Andrew Law               | Hold Requested           |
| <input type="checkbox"/>                            | <input type="checkbox"/> | Sales      | New Clarity Demo.pdf     | Andrew Law               | Complete                 |

## GROUPING

By dragging column headings to the top of the table, you can group results by values in that column. In the example shown, the Postal Class column has been dragged to the top so all results are now grouped into records of the same Postal Class.

| Filters    | Documents  |
|------------|--|
| All        | Submission Date ↑ Company ↑ Postal Class ↑   |
| Submitted  | <input type="checkbox"/> Department File Name User Name Status BatchID Colour C  |
| On Hold    | <input type="checkbox"/>       |
| With Stock | Sales <input type="checkbox"/> |

## EDIT COLUMNS

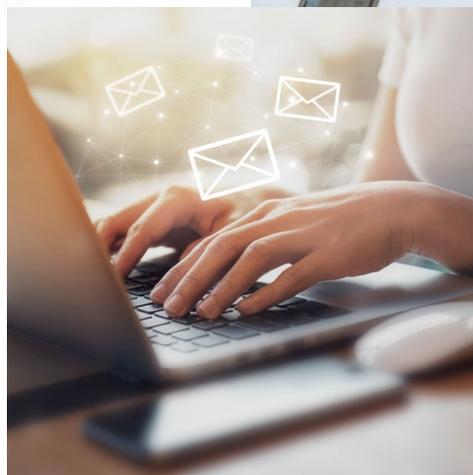
You can move the position of columns by dragging the column headings.

To add and remove columns, click the **'Edit Columns'** button at the bottom right of the page to open the column editor panel. Then drag column headings from your result table to and from the column editor pane.



### NOTES

For the View Document feature to work, you may need to install a PDF viewer onto your computer or browser. Internet Explorer users should disable Compatibility Mode for this site to ensure all features work correctly.



If you have any questions or problems while using Clarity Mail please contact our Helpdesk:

[support@clarity-mm.com](mailto:support@clarity-mm.com)

CLARITY MAIL MANAGEMENT **DELIVERING POSTAL SAVINGS FOR BUSINESS MAIL**



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