Fast-Class File

Client Data System

Volume 124: Custom Labels

As shown in the Creating Labels Fast Class, there are two ways to create labels with CDS. You can use the **Spreadsheet Correspondence** button or use the **Print Labels** option to customize your label information in the **Reports** menu.

To create a custom Label Setup:

- Select Reports in the Main Menu then select Print Labels.
- In the Label Setup screen, click the Add Record button.

📧 Label Setup (19)	
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Description	Label Report 🔥
Avery 5095, 5395, 5895 (2 x 4) Name Badge	Avery 5095, 5395, 5895 (2 × 4) Name Badge
Avery 5160, 5260, 5920, 5960 (3 x 10)	Avery 5160, 5260, 5920, 5960 (3 x 10)
Avery 5161, 5261, 5961 (2 x 10)	Avery 5161, 5261, 5961 (2 x 10)
Avery 5162, 5262, 5922, 5962 (2 x 7)	Avery 5162, 5262, 5922, 5962 (2 x 7)
Avery 5163, 5263, 5923, 5963 (2 × 5) Shipping Address	Avery 5163, 5263, 5923, 5963 (2 x 5) Shipping Address
Avery 5164, 5264, (2 x 3) Shipping Address	Avery 5164, 5264 (2 x 3) Shipping Address
Avery 5165, 5265 (1 x 1)	Avery 5165, 5265 (1 × 1)
Avery 5266, 5066, 5366, 5766, 5866, 5966 (2 × 15) File Folder	Avery 5266, 5066, 5366, 5766, 5866, 5966 (2 x 15) File Folde
Avery 5267, 5167, 5927 (4 x 20) Return Address	Avery 5267, 5167, 5927 (4 x 20) Return Address
C Avery 5294 (3 x 4) Round	Avery 5294 (3 x 4) Round
C Avery 5383, 5390 (2 × 4) Name Tag	Avery 5383, 5390 (2 × 4) Name Tag
C Avery 5384, 5392 (2 × 3) Name Tag	Avery 5384, 5392 (2 × 3) Name Tag
Avery 5385 (2 x 4) Rotary Index	Avery 5385 (2 x 4) Rotary Index
C Avery 5386, 5388 (1 x 3) Rotary Index	Avery 5389 (1 x 2) Index / Postcard
Avery 5389 (1 x 2) Index/Postcard	Avery 5389 (1 x 2) Index / Postcard
C Avery 5660, 5930 (3 x 10) Clear	Avery 5660, 5930 (3 × 10) Clear
Avery 5662, 5932 (2 x 7) Clear	Avery 5662, 5932 (2 × 7) Clear
Avery 5663 (2 x 5)	Avery 5663 (2 x 5)
🔲 Avery 5883 (2 x 4) Name Tag Blue	Avery 5883 (2 x 4) Name Tag Blue
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Figure 1: Label Setup window

• In the first **Label Setup** screen, select the **Description** (Avery label template) of the label you will use.

• Click Next.

• In Step 2, define the **Label Contents**. The default merge codes in the **Label Contents** (&Name and &Address) will populate the selected labels with a contact's full name and the address you specify in Step 6.

🗖 2 of 7 - Label Setup - Avery 5160, 5 🔀	
Label Contents	
j\$Name	
&Address	
Merge Code	
Previous Next Cancel Help	

Figure 2: Label Setup: Step 2

• Delete any unwanted merge codes and add new merge codes by clicking the **Merge Code** button.

• In the Merge Code Browser, select from the list of merge codes in the Merge Code List or from the merge codes in the Table/Field Names section.

Note: Be sure an active cursor is in the field where you would like to add a merge code before clicking the Merge Code button to launch the Merge Code Browser.

• After selecting a merge code, click the **Insert** button. When you are finished click **Close**.

Note: You can also add typewritten text in the **Label Contents**. Place an active cursor in the field where text is to be added. Type the text to be added to the label.

• After defining Label Contents, click Next.

• In the third **Label Setup** screen, associate a group of contacts with a label setup by using a **Filter** or **Set**. Record selection based on a filter or set can be defined at run time by selecting the **Selection Criteria at run time** option.

Note: Only filters built on the **Contact Record** table can be used in a label setup.

• After you have defined the Record Selection, click Next.

• In the fourth Label Setup screen, select the Sort Option. Labels can be sorted by Last Name, Zip/Postal Code, or, using the Ad hoc Sort selection, by virtually any field on the Contact table. Sort selection can also be defined at run time by selecting the Sort Selection at run time option.

• After selecting Sort Option, click Next.

• In the fifth Label Setup screen, select miscellaneous Options:

Select the Create Follow-up Activity option to have CDS create followup activities for all contacts in the label setup when the setup is run.
 Select the Post description to Smartpad option to have a Smartpad record created for all contacts in the label setup when the setup is run.

• Select the **Print Bar Code** option to print bar codes on the labels.

• Select the **Print One Label Per Family** option to eliminate duplicate mailings to a family if more than one contact from the same family has



been selected for label creation. All of the options in step 5 can be specified at run time by selecting the **Specify these options at run time** option.

🔲 5 of 7 - Label Setup - Avery 5160, 5 🔀	
Options	
Create Follow-up Activity	
Post description to Smartpad	
Print Bar Code	
Print One Label Per Family	
Specify these options at run time	
Previous Next Cancel Help	

Figure 3: Label Setup: Step 5

• After selecting **Options**, click **Next**.

• In the sixth **Label Setup** screen, select the contact address to be used when creating labels. **Address Selection** can be specified at run time by selecting the **Address Selection at run time** option.

• After defining Address Selection, click Next.

• In the seventh **Label Setup** screen, give the custom label setup a unique name in the **Description** field. Add any keywords if desired.

• After naming the label setup, click Finish.

The custom label setup will appear in the Label Setup summary screen.

To print labels using the custom label setup:

- Select **Reports** in the Main Menu then select **Print Labels**.
- Tag the desired Label Setup.
- Click the **Run** button.
- Review the labels in the label print preview screen.
- Load the label paper into the printer.
- Click the **Print** button in the label print preview.