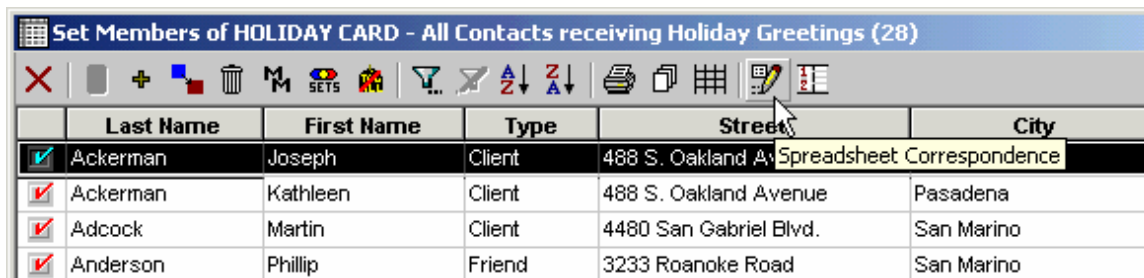# Fast·Class File

Client Data System

Volume 73: Creating 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 in the **Reports** menu.

To create labels using the Spreadsheet Correspondence button:

- Open any summary screen that has a **Spreadsheet Correspondence** button (e.g., the **Contact Summary** tab, **Set Membership** screens, **Dynamic Report** result screens, etc).
- Tag selected contacts then click the **Spreadsheet Correspondence** button.

Figure 1: The Spreadsheet Correspondence button in a Set Membership window.

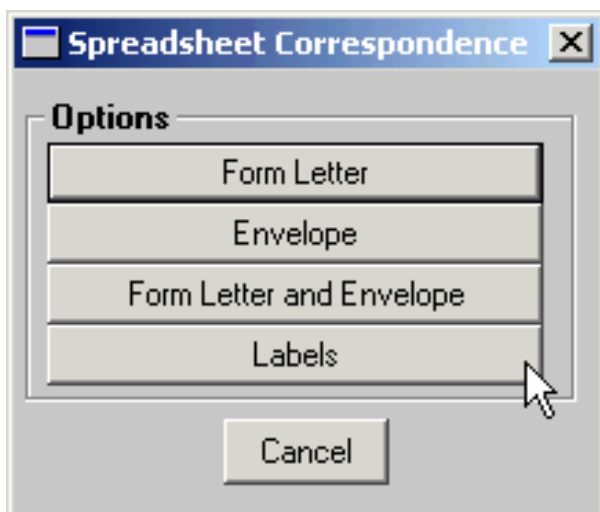- Select **Labels** in the **Spreadsheet Correspondence** window.

Figure 2: The Spreadsheet Correspondence window.

- In the **Label Setup** window, select the label setup with a **Label Report** that matches the labels to be used - Avery 5160, 5162, etc.

Label setups with a matching **Description** and **Label Report** are system label setups and can be used to create labels for virtually any grouping of contacts. System label setups are designed to populate the selected labels with a contact's full name and preferred address.

- Click on the **OK** (green check mark) button, to create labels.

Figure 3: The Select Label Setup screen.

- Review the labels in the **Print Preview**.
- Load the label paper into the printer.
- Click the **Print** button in the print preview toolbar.

Figure 4: The Label Print Preview screen.

To create a custom Label Setup:

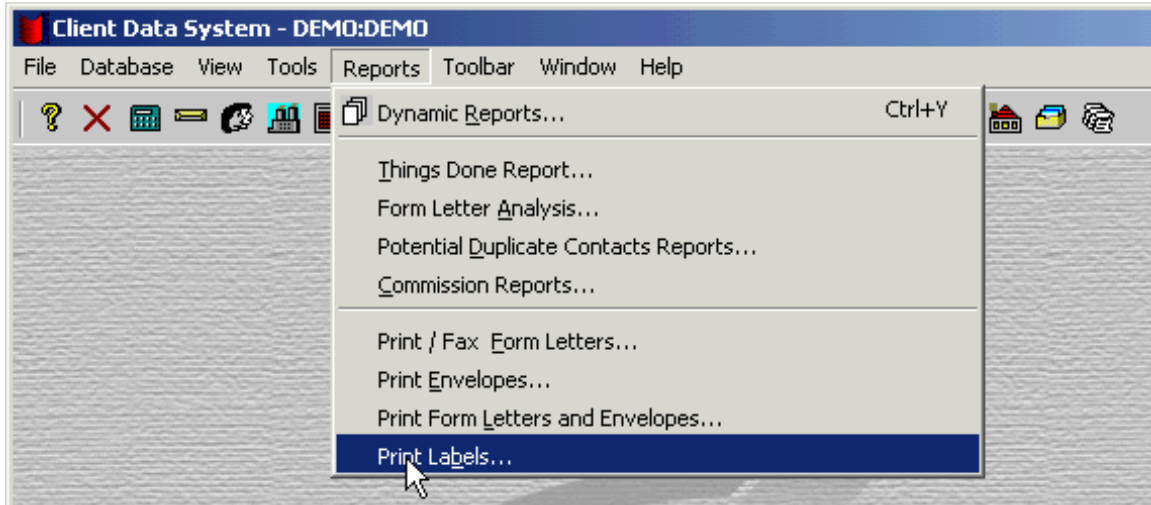- Select **Reports** in the Main Menu then select **Print Labels**.

Figure 5: The Print Labels option in the Reports menu.

- In the **Label Setup** screen, click the **Add Record** button.
- In the first **Label Setup-New** screen, select the **Description** (Avery label template) of the label you will use.
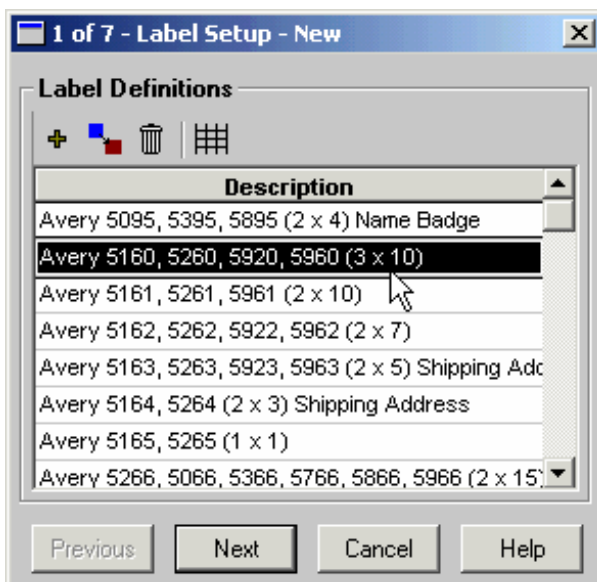- Click **Next**.

Figure 6: Label Setup-New screen 1 of 7.

- In the second **Label Setup-New** screen, 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.
- Delete any unwanted merge codes and add new merge codes by clicking the **Merge Code** button.
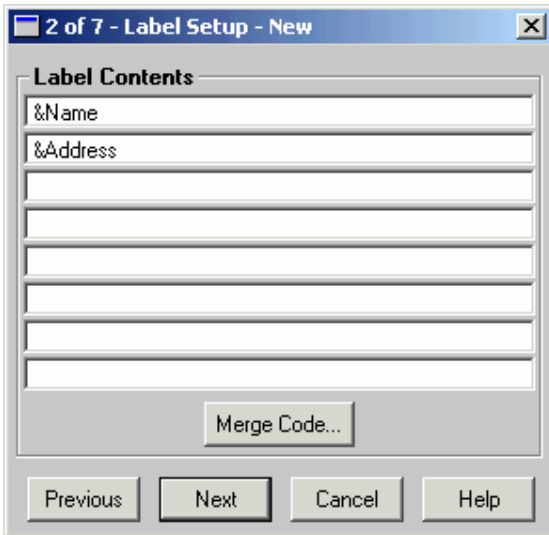

Figure 7: Label Setup-New screen 2 of 7.

- 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.
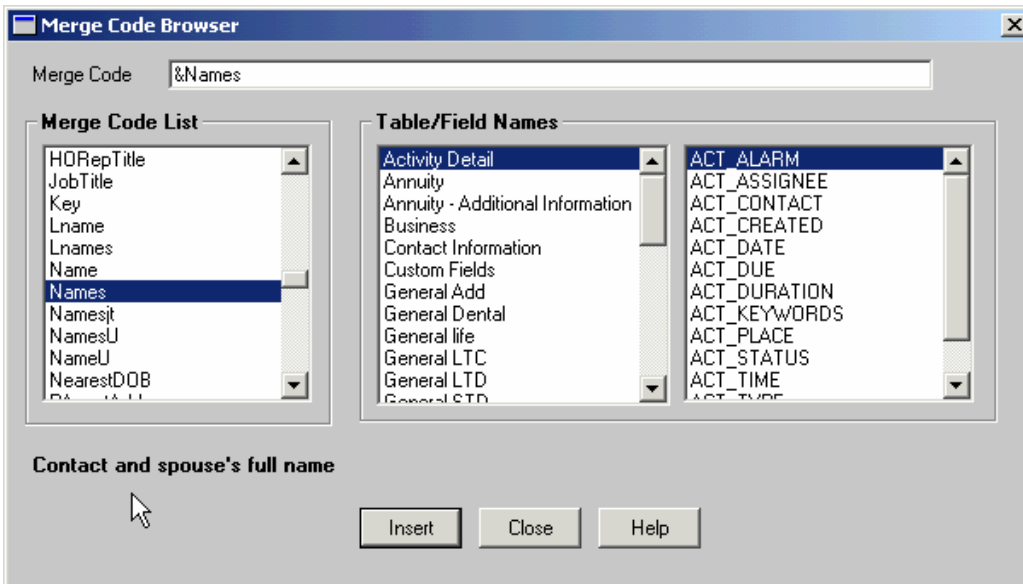

Figure 8: The Merge Code Browser.

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

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.

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-New** 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.
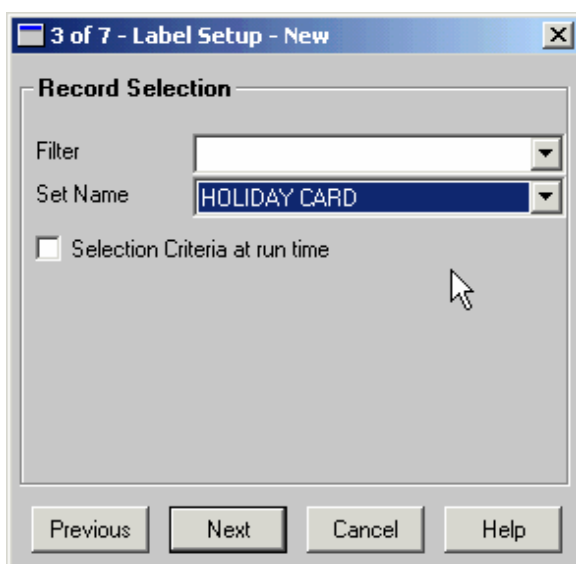

Figure 9: Label Setup-New screen 3 of 7.

*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-New** 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.
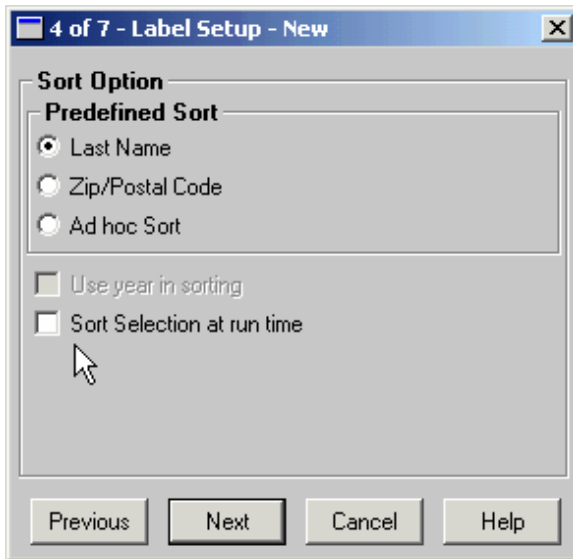
Figure 10: Label Setup-New screen 4 of 7.

- After selecting **Sort Option,** click **Next**.
- In the fifth **Label Setup-New** screen, select miscellaneous **Options -**
  - Select the **Create Follow-up Activity** option to have CDS create follow-up 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.
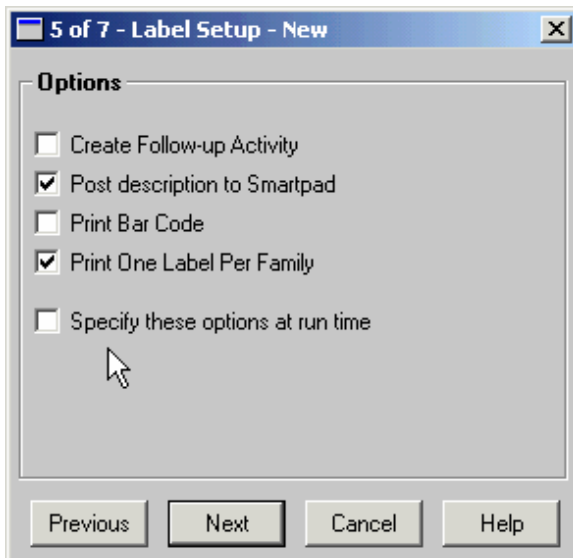

Figure 11: Label Setup-New screen 5 of 7.

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

- After selecting **Options**, click **Next**.
- In the sixth **Label Setup-New** 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.
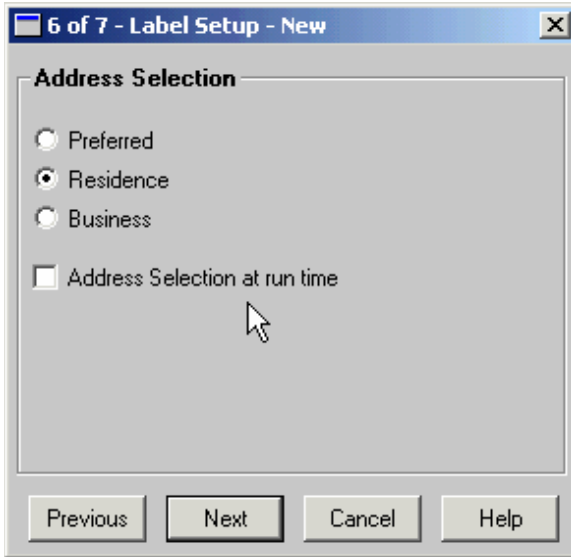

Figure 12: Label Setup-New screen 6 of 7.

- After defining **Address Selection**, click **Next**.
- In the seventh **Label Setup-New** screen, give the custom label setup a unique name in the **Description** field. Add any keywords if desired.
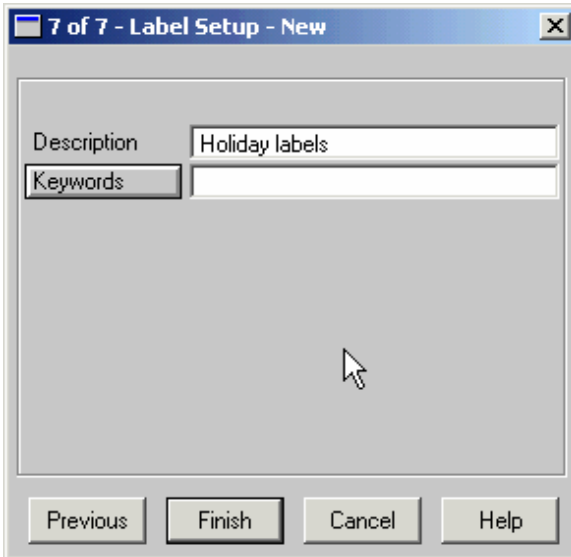

Figure 13: Label Setup-New screen 7of 7.

- 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**.
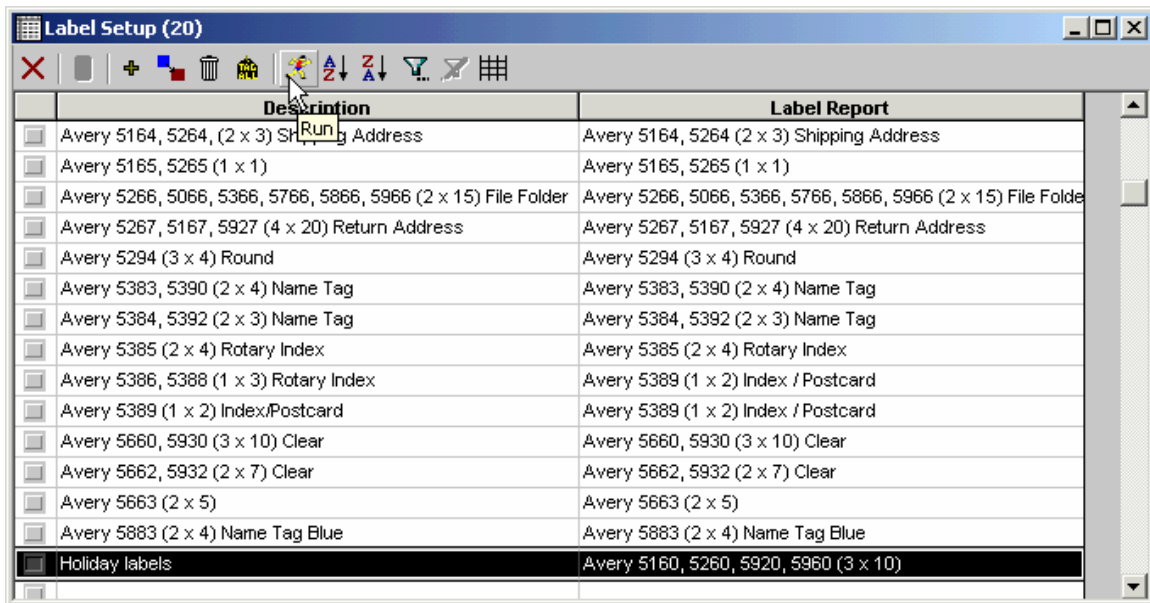- Click the **Run** button.

Figure 14: The Run button in the Label Setup screen.

- 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.