Fast•Class File

SmartOffice

Volume 54: Creating Labels

You can easily combine contact information captured in SmartOffice with a Microsoft[®] Word document formatted for Avery[®] Label paper to create labels for holiday greetings or any other correspondence needs you may have throughout the year.

Before generating the labels, you will need Microsoft[®] Word 2000 or later installed on your system. You will also need to install SmartLink for Word from the **Installations** screen available from the **User Setup** menu in SmartOffice

To view a listing of all available labels in SmartOffice:

- Select Office Setup in the main menu, then select Form Letters.
- In the Search From Letters screen, select Labels in the Include These Document Types section (other document types may need to be deselected) and leave the Title field blank to perform an open search.
- Click Search.

🐔 SmartOffice We	b Page Dialog 🛛 🔀
Search Form Letters	
Title	
Keyword	T
Purpose	All
Created By	
Include These Docum	ient Types
Form Letters Labels	Headers/Footers
Templates	
Search © 2000-2005 E-Z Data	Add Close

Figure 1: The Search Form Letters screen.

• SmartOffice will display a list of all available Labels in the **System Letter Summary** screen.



	System	Letter Summary			
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Letter Title 🕆	Open	Keyword	Created By	Modified On	
Avery Label 5160	1	Label - Name	ALLUSERS	02/22/2004 10:18PM	^
Avery Label 5162	1	Label - Name	ALLUSERS	02/22/2004 10:19PM	
Avery Label 5164	1		Daniel Odell	11/08/2005 02:24PM	
Avery Label 5168	1	Label - Name	ALLUSERS	02/22/2004 10:19PM	
Avery Label 5260		Label - Name	ALLUSERS	02/22/2004 10:19PM	
Avery Label 5261	B	Label - Name	ALLUSERS	02/22/2004 10:19PM	
Avery Label 5262	B	Label - Name	ALLUSERS	02/22/2004 10:19PM	
Avery Label 5660		Label - Name	ALLUSERS	02/22/2004 10:20PM	
Avery Label 5661	1	Label - Name	ALLUSERS	02/22/2004 10:20PM	
Avery Label 5662	1	Label - Name	ALLUSERS	02/22/2004 10:20PM	
Avery Label 5920	1	Label - Name	ALLUSERS	02/22/2004 10:20PM	
Avery Label 5922	1	Label - Name	ALLUSERS	02/22/2004 10:20PM	
Avery Label 5930		Label - Name	ALLUSERS	02/22/2004 10:20PM	
Avery Label 5960		Label - Name	ALLUSERS	02/22/2004 10:21PM	
Avery Label 5961	8	Label - Name	ALLUSERS	02/22/2004 10:21PM	
Avery Label 5962		Label - Name	ALLUSERS	02/22/2004 10:21PM	
Avery Name Badge CB71C	8	Name Badge	ALLUSERS	02/22/2004 10:21PM	_
Records Shown: 20 Total Records: 20		Nono Bodgo	ALLICERC	02/22/2004 40:240M	_ v
2000-2005 E-Z Data, Inc. All rights reserved.					

Figure 2: The System Letter Summary screen displaying all available label documents.

To view a label document:

• Click on the Word icon in the **Open** column.

Letter Title û	Oper	n
Avery Label 5160	1	
Avery Label 5162	1	
Avery Label 5164	1	
Avery Label 5168	1	
Avery Label 5260	•	

Figure 3: The Word icon in the Open column.

• SmartLink for Word will open the label document in Word.



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«Name»	«Next Record»«Name»	«Next Record»«Name»	
«Address»	«Address»	«Address»	
«Next Record»«Name»	«Next Record»«Name»	«Next Record»«Name»	
«Address»	«Address»	«Address»	
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Figure 4: The Avery Label 5160 Word document with merge codes.

Important Note: Modifying the Avery[©] Label documents is not recommended. New label documents with custom merge codes and font settings can be made using the existing Avery[©] label documents as a template.

To create a custom label document using an existing Avery[©] label document as template:

- In the System Letter Summary, click the Add button.
- In the Select the Type of Document to be Created screen, select Label.



🕙 SmartOffice Web Page Dialog 🛛 🛛 🔀		
Select the type of document to be created		
Form Letter C Letter Template Envelope Headers/Footers		
Select Word Processor		
OK Cancel © 2000-2005 E-Z Data, Inc. All rights reserved.		

Figure 5: The Select the Type of Document to be Created screen.

- Click OK.
- SmartOffice will ask if the new document is to be based on an existing document. Select **Yes**.

街 Confirmation Web Page Dialog 🛛 🔹 👔 🔀			
0	Create a new document based on an existing document?		
	Yes No		

Figure 6: The New Document Confirmation screen.

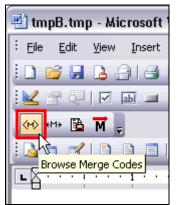
- SmartOffice will open a new Search Form Letters screen.
- Type the name of the label to be used as a template for the new label document in the **Title** field and select **Labels** in the **Include These Document Types** section.



🕘 SmartOffice We	b Page Dialog 🛛 🛛 🔀
Search Form Letters	
Title	Avery Label 5160
Keyword	T
Purpose	All
Created By	
Include These Docum	ent Types
Form Letters Labels Templates	Headers/Footers
© 2000-2005 E-Z Data	OK Close a, Inc. All rights reserved.

Figure 7: The Search Form Letters screen.

- Click **OK**.
- SmartLink for Word will open a new document based on the selected label document.
- Use the Merge Code Browser to make any needed merge code changes. For consistency, each merge code will need to be updated individually in each label cell. Launch the Merge Code Browser using the Browse Merge Codes button in the SmartLink for Word toolbar.





ge Code List	 Table/Field Names		
KeyRelations Lname Lnames Names Names Namesit NamesU NameU NearestDOB Phone PhoneBus PhoneRes PrimaryAdvisor ReferredBy ReferredBy ReferredBy Names ReferredBy Names	Account Master Advisor Add'l Info Advisor Request Business Contact Contact Benefit Custom Table Group AD&D Group Dental Group LITC Group LTC Group LTD Group Medical Group Plan - AD&D Group Plan - Dental Group Plan - LITC Group Plan - LTD Group Plan - STD Group Plan - STD Group Plan - Vision		F_ACCT_HOWHELD F_ACCT_NAME F_ACCT_NUMBER F_ACCT_OWNER F_ACCT_TAXID F_ACCT_TAXID F_ACCT_TOTALVALUE F_ACCT_TYPE
ct and spouse's full name	Insert Close	1	

Figure 9: The Merge Code Browser.

- Modifications to the font style, size, and color can be made using the standard font tools in Microsoft[®] Word.
- When label modifications are complete, click the **Save and Close** button in the **SmartLink for Word** toolbar.

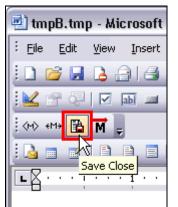


Figure 10: The Save and Close button.

• Give the customized label document a unique name in the **Title** field of the **SmartLink for Word [Save Label]** screen. Additional information regarding the new label document can be entered in the **Keyword**, **Category** and **Purpose** fields for ease in searching but is not required to save the document.



🔻 SmartLir	ık for Word - [Save Label] 🛛 🛛 🔀
Title	Holiday Labels
Keyword	Holiday
Category	Miscellaneous
Purpose	•
🔲 Private	Solicitation
	<u>S</u> ave <u>C</u> ancel

Figure 11: The SmartLink for Word – [Save Label] screen.

• Click Save.

The new label document will be added to the **System Letter Summary** and can be used for mass correspondence.

To generate labels for contacts in SmartOffice (Mass Correspondence):

- Select Reporting/Marketing in the main menu.
- Select Mass Correspondence in the Reporting/Marketing menu.
- Select the appropriate contact list option in the **Mass Correspondence** Options screen. (For this example, the **Using Sets** option will be used.)



🕘 SmartOffice Web Page Dialog 🛛 🛛 🔀		
Mass Correspondence Options		
Select one of the options to print/fax/e-mail correspondence (e.g., form letters, envelopes, or labels).		
1. All Contacts		
2. Using Contact Filters		
3. Using Investment Filters		
4. Using Investment Transaction Filters		
5. Using Policy Filters		
6. Using Sets		
Show run-time parameters for selected filter.		
Cancel © 2000-2005 E-Z Data, Inc. All rights reserved.		

Figure 12: The Mass Correspondence options screen.

• Enter the name of the set (or filter, depending on mass correspondence option selection.)

🔄 SmartOffice Web Page Dialog 🛛 🛛 🔀
Search Sets
Set Name Holiday Greetings List Description Created By
Search Close © 2000-2005 E-Z Data, Inc. All rights reserved.

Figure 13: The Search Sets screen.

- Select the correct set in the Set Summary screen.
- Select the Print Label option in the Letter Printing Options screen.





Figure 14: The Letter Printing Options screen.

• Use the **Search Form Letters** screen to search for the label document that will be used to generate the labels.

🔄 SmartOffice Web Page Dialog 🛛 🛛 🔀								
Search Form Letters								
Title Holiday Labels								
Keyword								
Purpose	All							
Created By								
OK Close © 2000-2005 E-Z Data, Inc. All rights reserved.								

Figure 15: The Letter Printing Options screen.

- Click OK.
- Select any necessary options, including sort and exception options in the Letter Option screen.



🔄 SmartOffice Web Page Dialog	
Letter Title: H Basic Advanced Exclusion Sort	oliday Labels
Letter Output Media	
Contact's Preferred Method Print Letter Send as e-mail	 Print on Local Printer Print on Printer Queue
Inserts/Handling Instructions/E-mail Su	bject
E-mail Attachments	
	Add/Remove Enail Attachments
OK © 2000-2005 E-Z Data, Inc. All rights rese	Close rved.

Figure 16: The Letter Options screen.

- Click **OK**.
- Any contacts exempt from having a label printed due to incomplete address, mail privacy, or multiple contacts in the same household will be displayed.
- Override the exemptions by tagging the selected records or accept all of the exemptions by leaving all records untagged and click **Continue**.
- SmartLink for Word will a print preview of the selected label document. The merge codes will be expanded based on the data for the selected contacts.



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	Pasadena, CA 91107 Happy Holidays!!!	Pasadena, CA 91106 Happy Holidays!!!	San Marino, CA 91108 Appy Holidays!!!		
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Figure 17: The label document in print preview with merge codes expanded.

- Click the **Close** button on the toolbar after previewing the labels.
- Click **Yes** to confirm that the labels are to be printed on the appropriate media (default printing options).
- SmartOffice will send the letters to the printer or the print queue depending on the office settings.

To generate labels for contacts in SmartOffice (Contact Summary):

• From a summary list of contacts, click the Letter (Mass Correspondence) button. A summary list of contacts can be generated from a contact search, a dynamic report, or set membership summary.



Figure 18: The Letter (Mass Correspondence) button in the Set summary toolbar.

- Select the **Print Label** option in the Letter **Printing Options** screen.
- Enter the name of the label document to be used in the **Title** field of the **Search Criteria for Form Letter** section.



🐔 SmartOffice Web Page Dialog 🛛 🛛 🔀								
Letter Printin	g Options							
O Print Form	O Print Form Letter							
🔵 Create New	Letter							
O Print Envel	ope							
💿 Print Label								
Search Crite	ria for Form Letter							
Title	Holiday Labels							
Keyword								
Purpose								
Use default letter printing options								
	OK Cancel							
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Figure 19: The Letter Printing Options screen.

- Click OK.
- Any contacts exempt from having a label printed due to incomplete address, mail privacy, or multiple contacts in the same household will be displayed.
- Override the exemptions by tagging the selected records or accept all of the exemptions by leaving all records untagged and click **Continue**.
- SmartLink for Word will a print preview of the selected label document. The merge codes will be expanded based on the data for the selected contacts.



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E.		Mrs. Kathleen M. Ackerman 488 S. Oakland Avenue					Dr. Joseph M. Ackerman 488 S. Oakland Avenue			Mr. Frank Adams 2238 Smooth Ave.			
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		210 Rosemead Pasadena, CA 91107						3123 E. Main St. Pasadena, CA 91106			3233 Roanoke Road San Marino, CA 9110	18	×
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Figure 20: The label document in print preview with merge codes expanded.

- Click the **Close** button on the toolbar after previewing the labels.
- Click **Yes** to confirm that the labels are to be printed on the appropriate media (default printing options).
- SmartOffice will send the letters to the printer or the print queue depending on the office settings.

