

# 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 -- Web Page Dialog

**Search Form Letters**

Title

Keyword

Purpose

Created By

**Include These Document Types**

Form Letters ☐ Envelopes ☐

Labels ☒ Headers/Footers ☐

Templates ☐

**Search** **Add** **Close**

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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

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

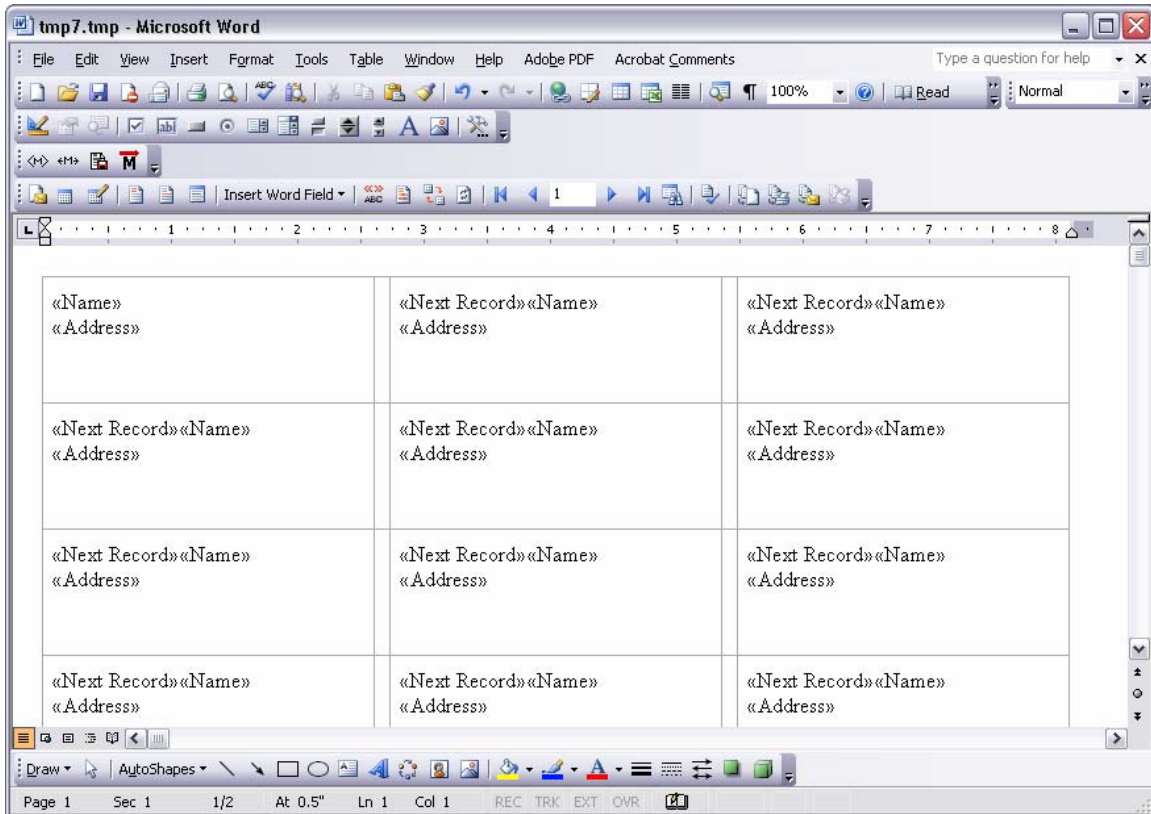
### To view a label document:

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

<input type="checkbox"/> Letter Title ↑	Open
<input type="checkbox"/> Avery Label 5160	
<input type="checkbox"/> Avery Label 5162	
<input type="checkbox"/> Avery Label 5164	
<input type="checkbox"/> Avery Label 5168	
<input type="checkbox"/> Avery Label 5260	

Figure 3: The Word icon in the Open column.

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



**Figure 4: The Avery Label 5160 Word document with merge codes.**

*Important Note: Modifying the Avery<sup>®</sup> Label documents is not recommended. New label documents with custom merge codes and font settings can be made using the existing Avery<sup>®</sup> label documents as a template.*

### **To create a custom label document using an existing Avery<sup>®</sup> 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**.

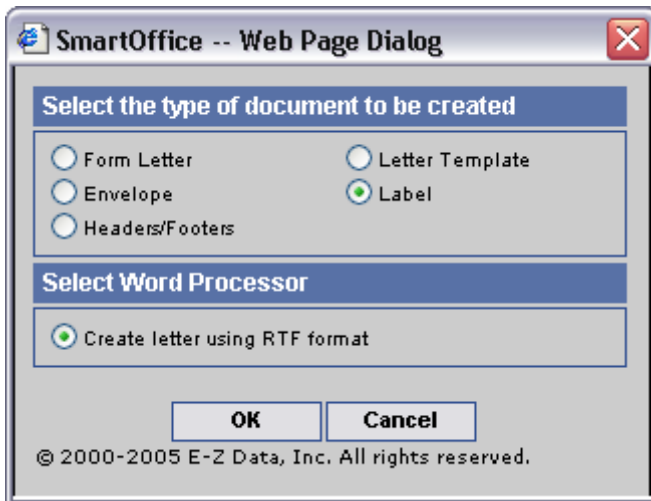


Figure 5: The Select the Type of Document to be Created screen.

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

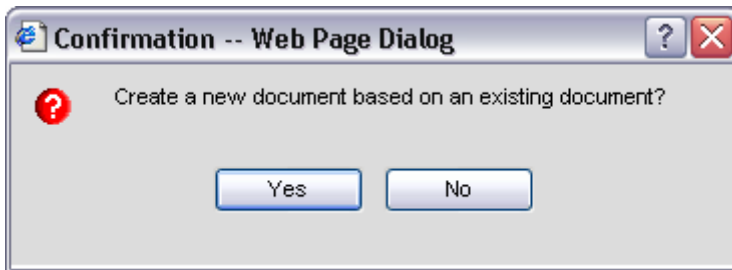


Figure 6: The New Document Confirmation screen.

- 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.

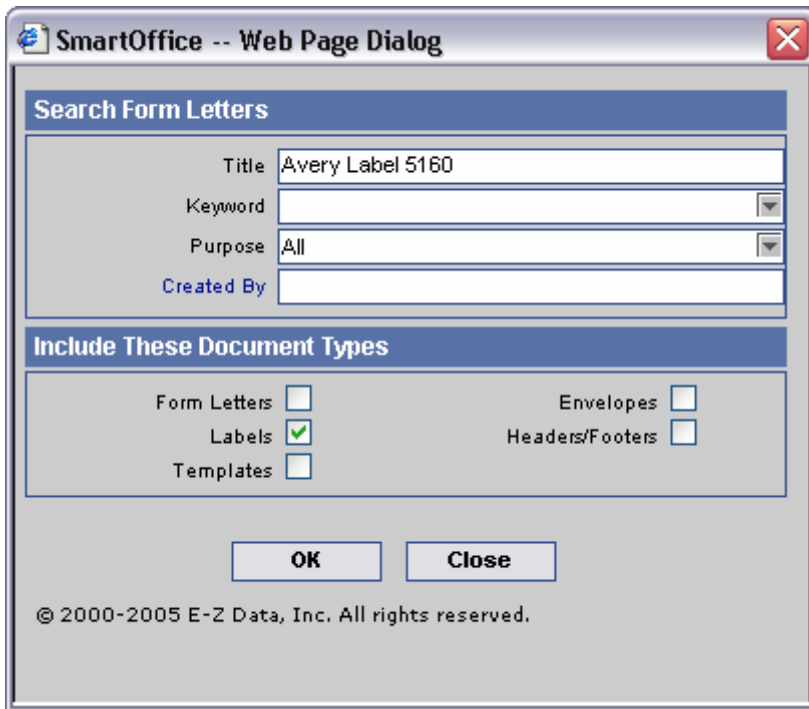


Figure 7: The Search Form Letters screen.

- 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.

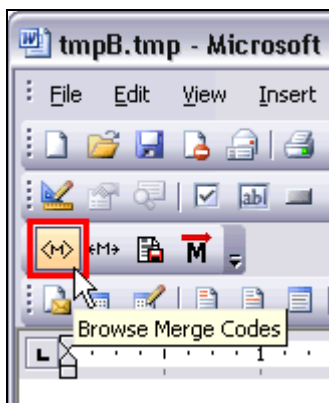
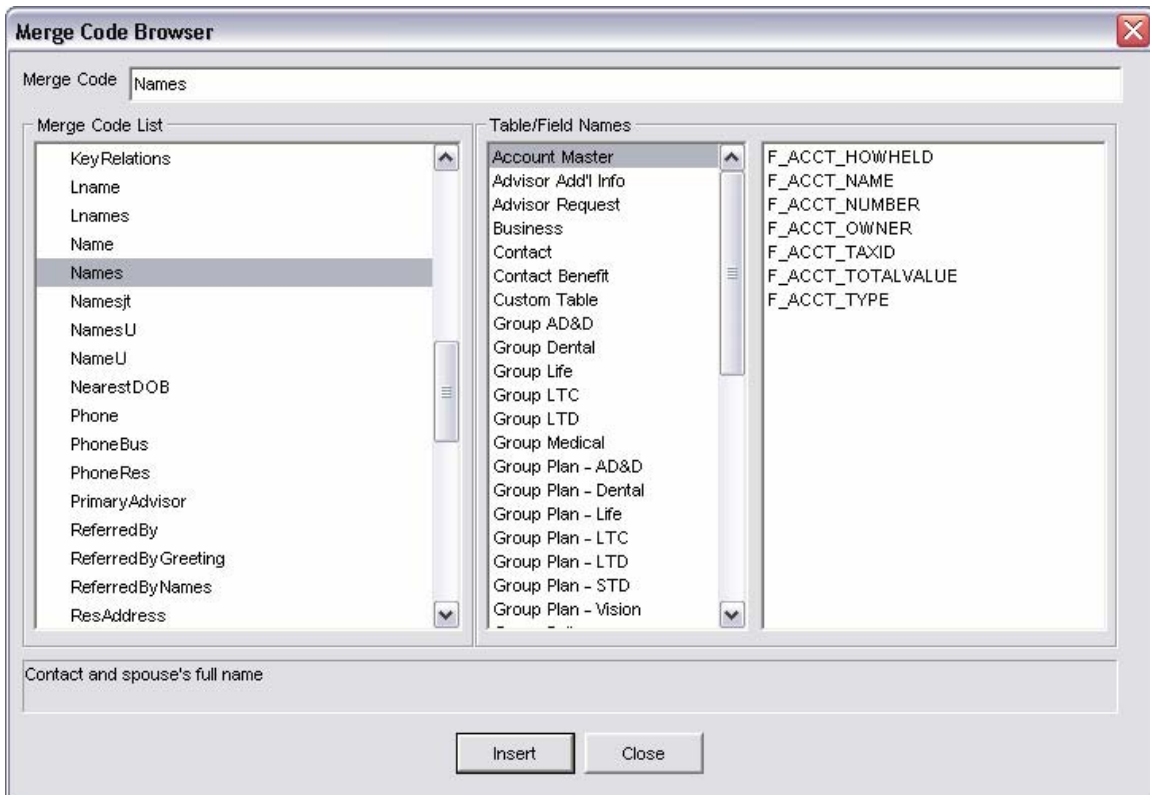
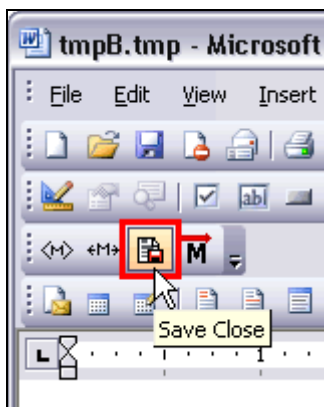


Figure 8: The Browse Merge Codes button.



**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.



The image shows a Windows-style dialog box titled "SmartLink for Word - [Save Label]". It contains four input fields: "Title" with the text "Holiday Labels", "Keyword" with the text "Holiday", "Category" with a dropdown menu showing "Miscellaneous", and "Purpose" with an empty dropdown menu. Below these fields are two checkboxes: "Private" and "Solicitation", both of which are unchecked. At the bottom right of the dialog are two buttons: "Save" and "Cancel".

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.)

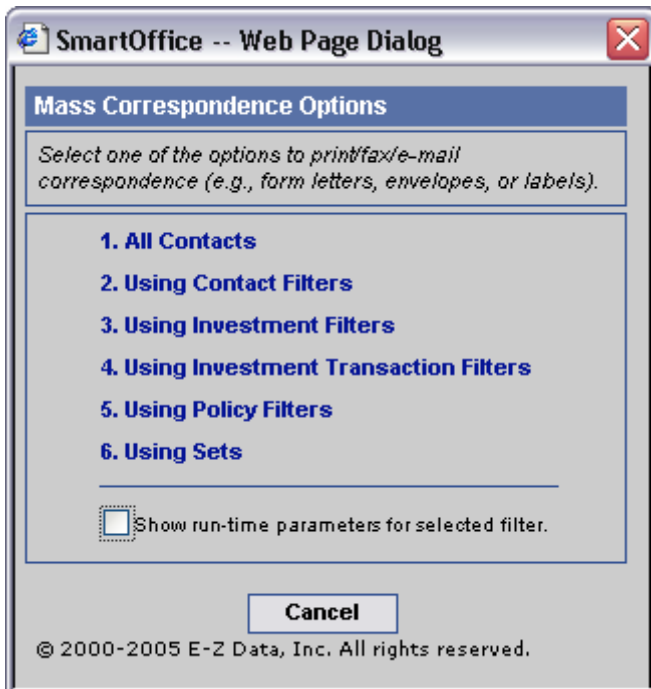


Figure 12: The Mass Correspondence options screen.

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

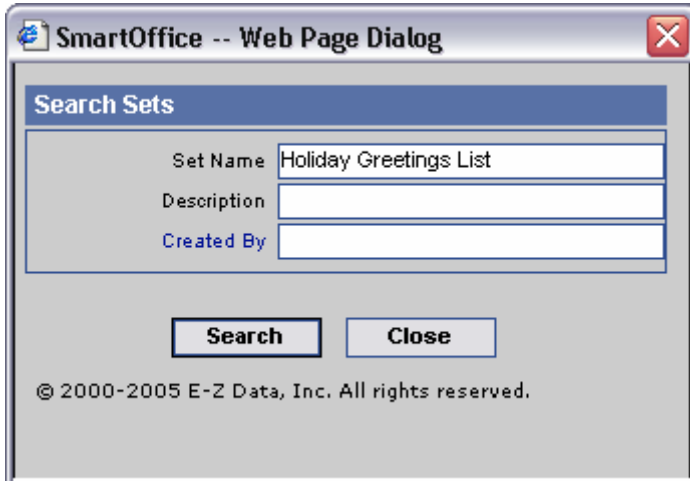


Figure 13: The Search Sets screen.

- 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.

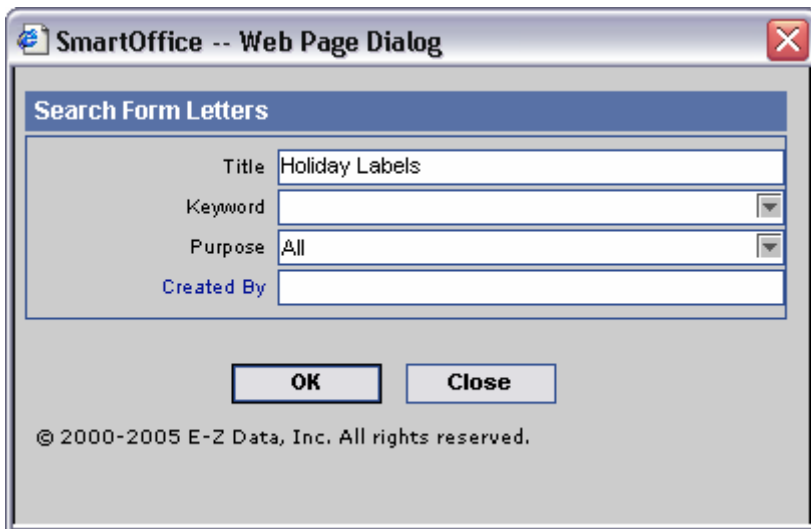
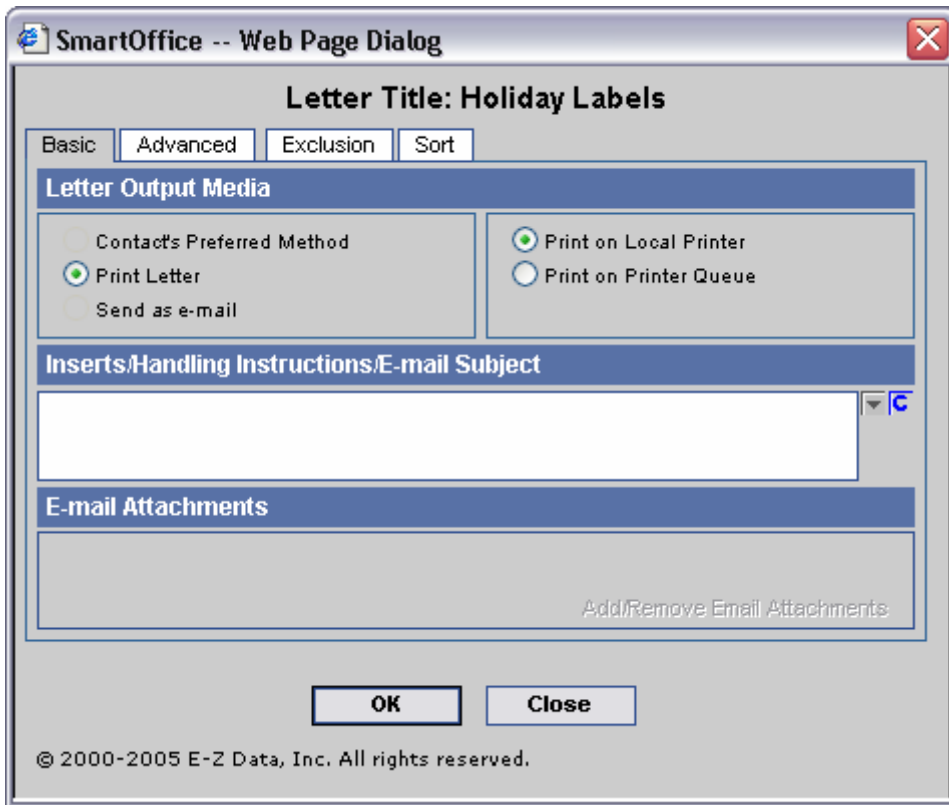


Figure 15: The Search Form Letters screen.

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



**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.

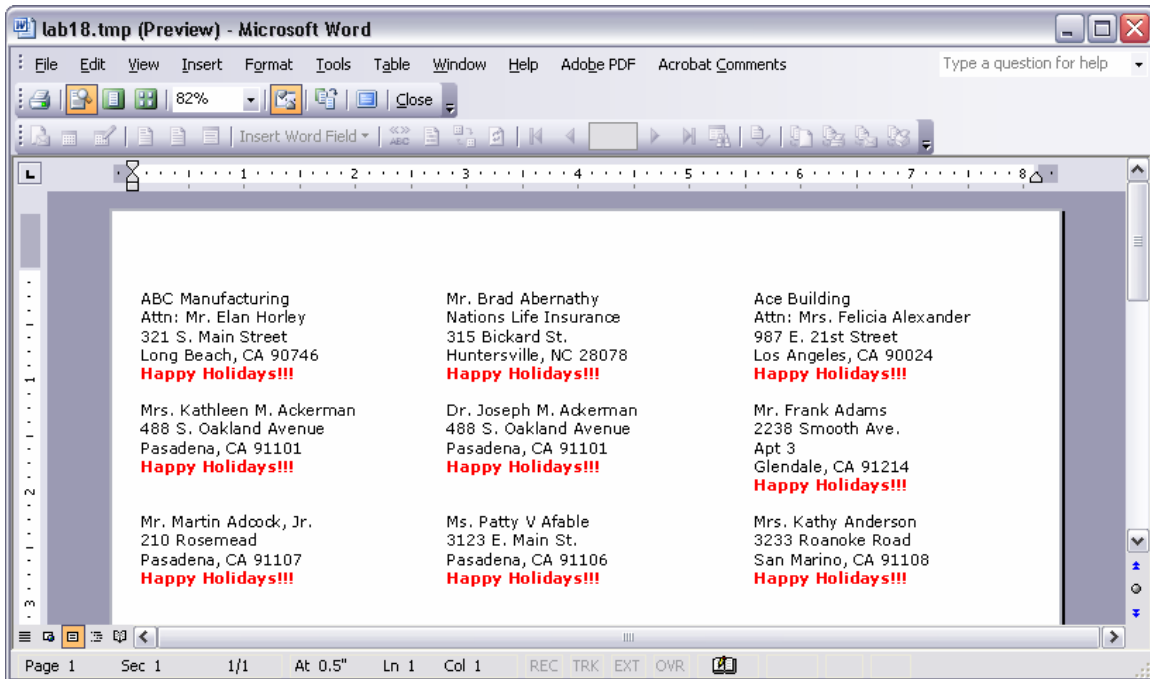


Figure 17: The label document in print preview with merge codes expanded.

- 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.

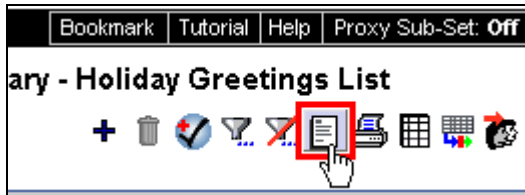


Figure 18: The Letter (Mass Correspondence) button in the Set summary toolbar.

- 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 Printing Options**

☐ Print Form Letter  
☐ Create New Letter  
☐ Print Envelope  
☒ Print Label

**Search Criteria for Form Letter**

Title:   
 Keyword:   
 Purpose:

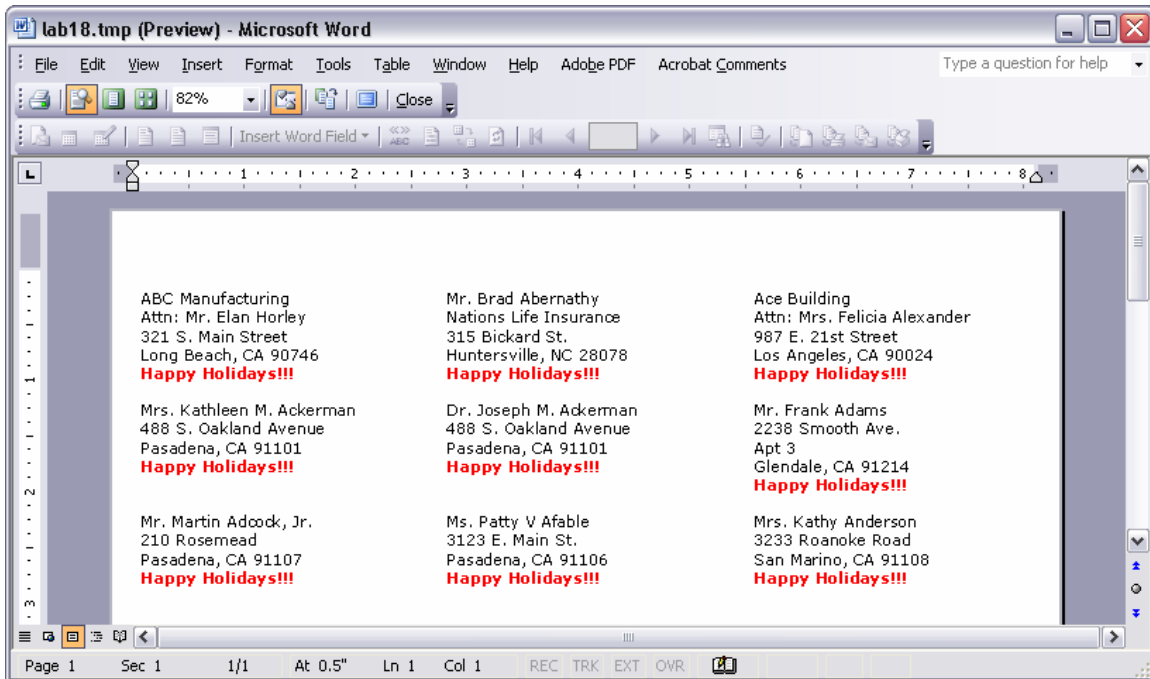
☐ Use default letter printing options

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.



**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.