Fast·Class File

SmartOffice

Volume 55: Creating Envelopes

You can easily create custom envelopes for holiday greetings or any other correspondence needs you may have throughout the year.

Before creating a custom envelope document, you will need Microsoft® Word 2000 or a later version 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 envelopes in SmartOffice:

- Select **Office Setup** in the main menu, and then select **Form Letters**.
- In the **Search Form Letters** screen, select the **Envelopes** option 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**.

Figure 1: The Search Form Letters screen.

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

To view an envelope document:

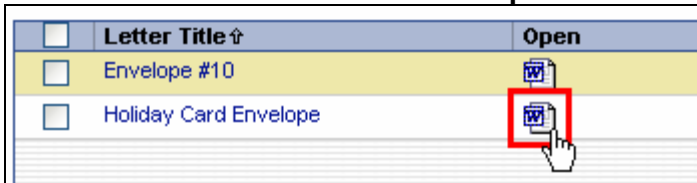- Click on the **Word** icon in the **Open** column of the selected envelope document.

	Letter Title ⇧	Open
☐	Envelope #10	📄
☐	Holiday Card Envelope	📄

Figure 2: The Word icon in the Open column.

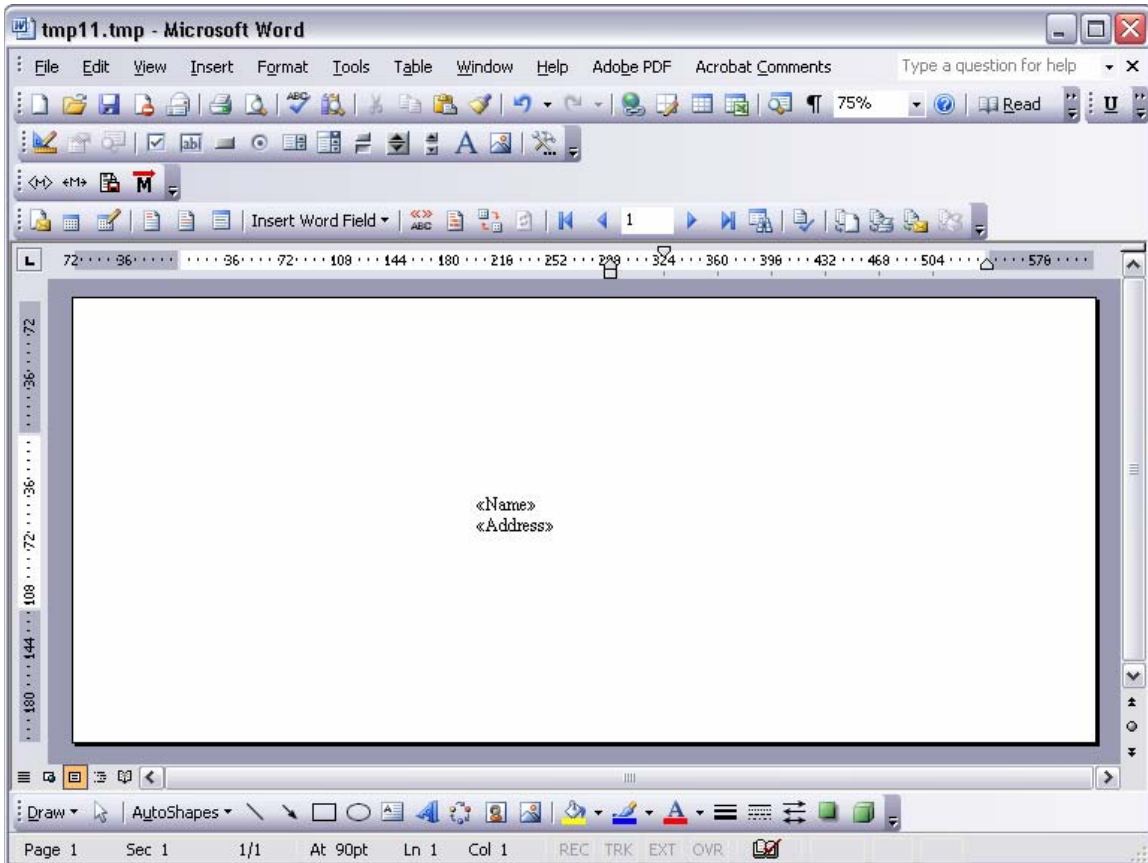- SmartLink for Word will open the envelope document in Word.

Figure 3: The Avery Label 5160 Word document with merge codes.

To create a custom envelope document:

- In the **System Letter Summary**, click the **Add** button.
- In the **Select the Type of Document to be Created** screen, select **Envelope**.
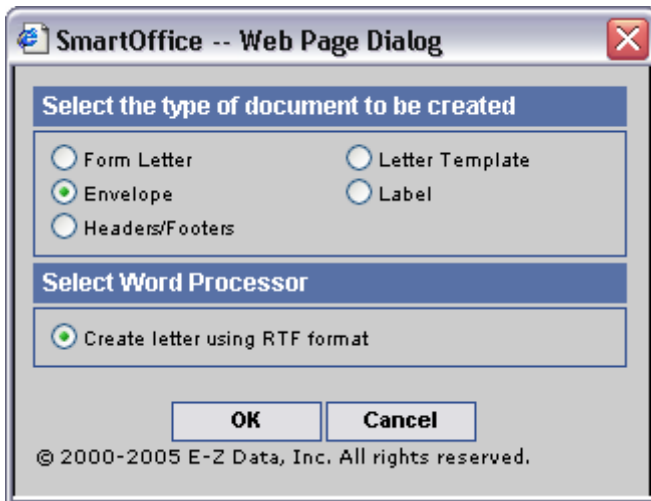
Figure 4: The Select the Type of Document to be Created screen.

- Click **OK**.
- SmartOffice will ask if the new document is to be based on an existing document. Select **No**.
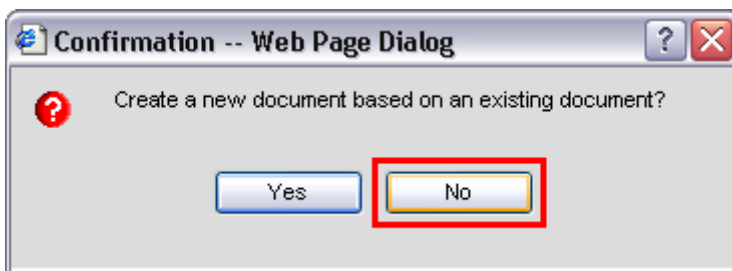

Figure 5: The New Document Confirmation screen.

- SmartLink for Word will open a new document.
- To change the dimensions of the document to fit the size of the envelope that the document is based on, click **File** in the main menu bar and then select **Page Setup** in the **File** menu.
- On the **Margins** tab of the **Page Setup** window, select the **Landscape** option in the **Orientation** section.
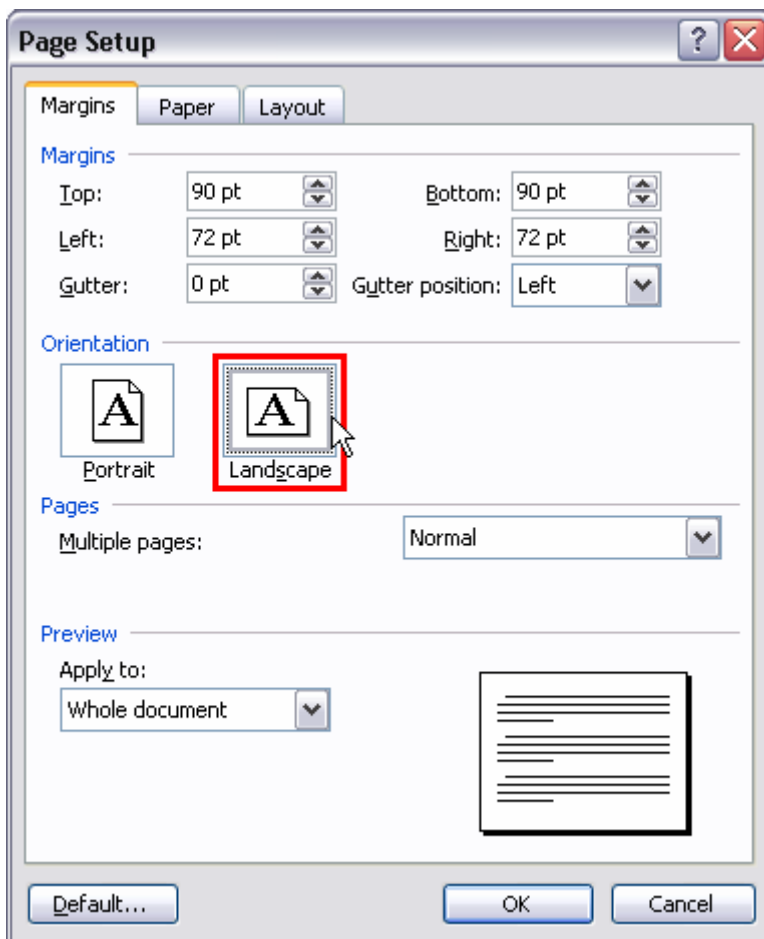
Figure 6: The Landscape option on the Margins tab of the Page Setup window.

- Click the **Paper** tab and select **Custom Size** in the **Paper Size** drop-down field.
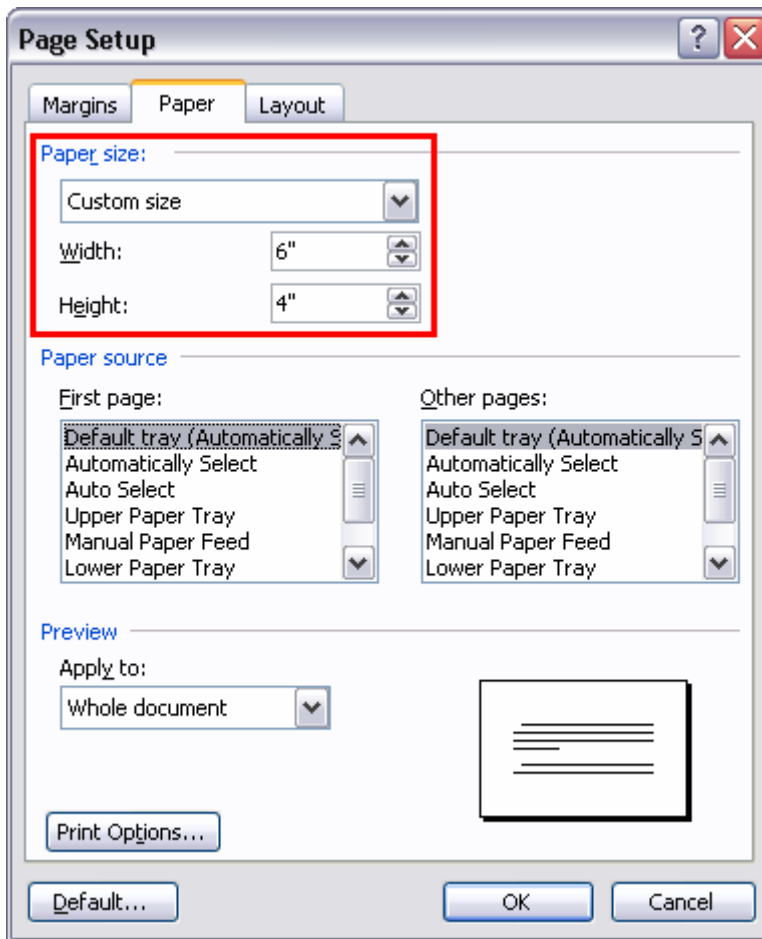
Figure 7: The Paper Size options on the Paper tab of the Page Setup window.

- Enter the dimensions of the envelope in the **Width** and **Height** fields.
- When finished, click **OK**.

*Note: The examples shown above are from Word 2003. If you are using a previous version of Word, the **Page Setup** window may be slightly different. However, you will be able to make adjustments to the same settings. **Remember, you will need to have Word 2000 or a later version installed on your system to create custom envelopes in SmartOffice.***

- Make any necessary adjustments to the page margins.
- Use the **Merge Code Browser** to add Merge codes. Launch the **Merge Code Browser** using the **Browse Merge Codes** button in the **SmartLink for Word** toolbar.

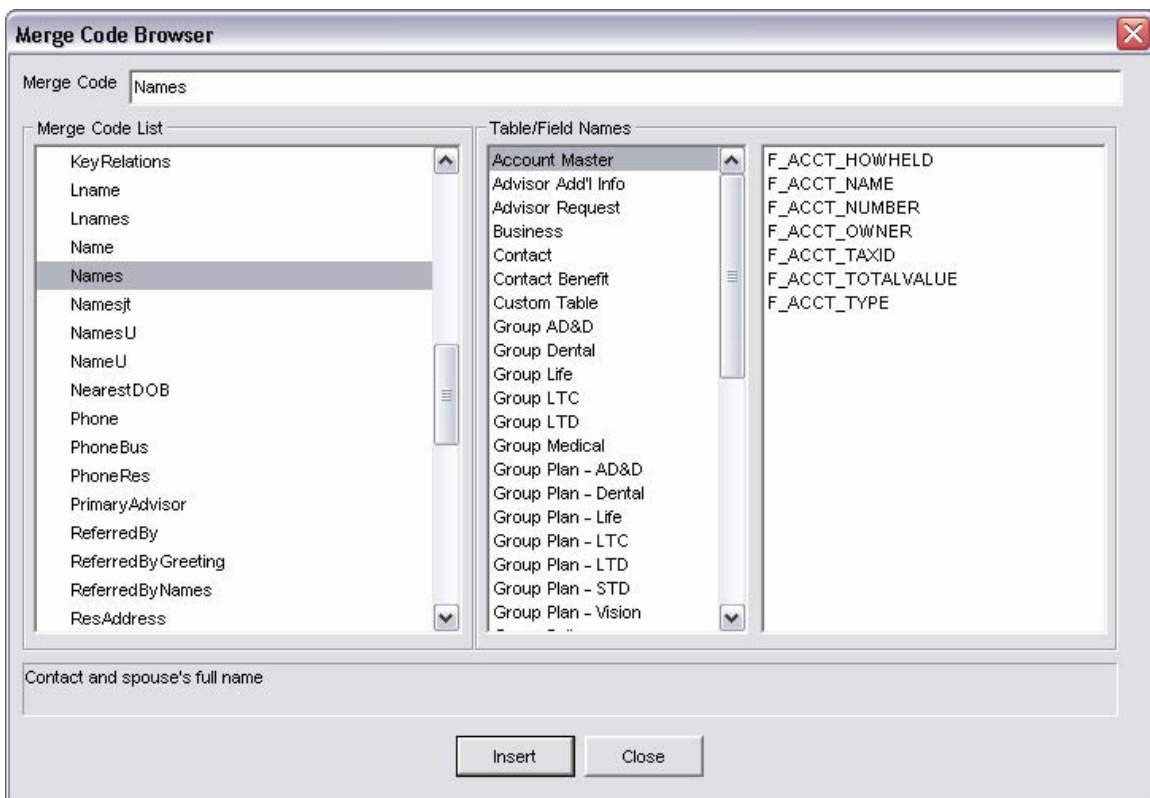**Figure 8: The Browse Merge Codes button.**

Figure 9: The Merge Code Browser.

- After adding merge codes, close the **Merge Code Browser** and close the document using the **Save and Close** button in the **SmartLink for Word** toolbar.
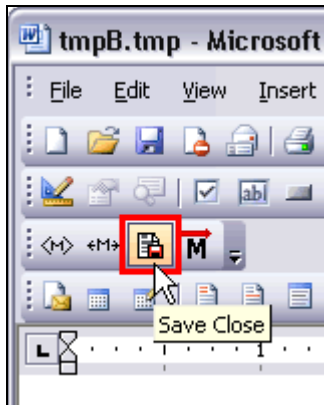
Figure 10: The Save and Close button.

- Give the customized envelope a unique name in the **Title** field of the **SmartLink for Word [Save Envelope]** 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.

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

- Click **Save**.

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

To print envelopes 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.)
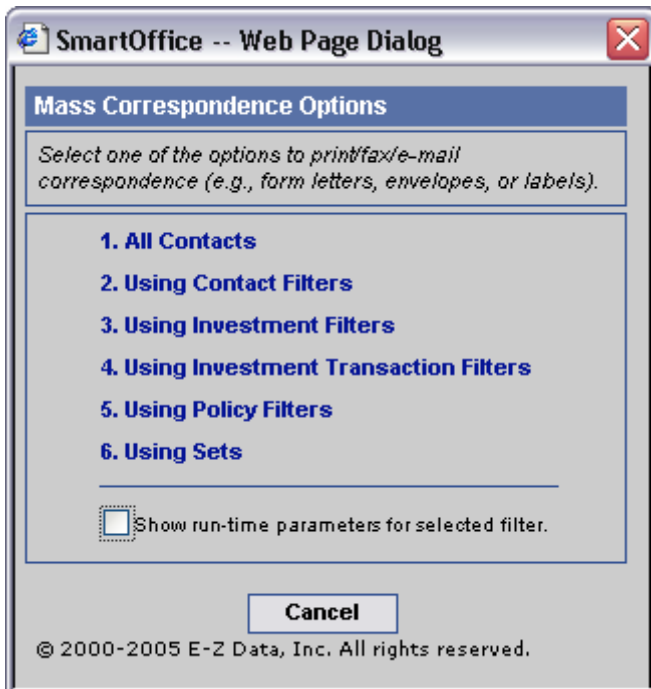
Figure 12: The Mass Correspondence options screen.

- 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 Envelope** option in the **Letter Printing Options** screen.

Figure 14: The Letter Printing Options screen.

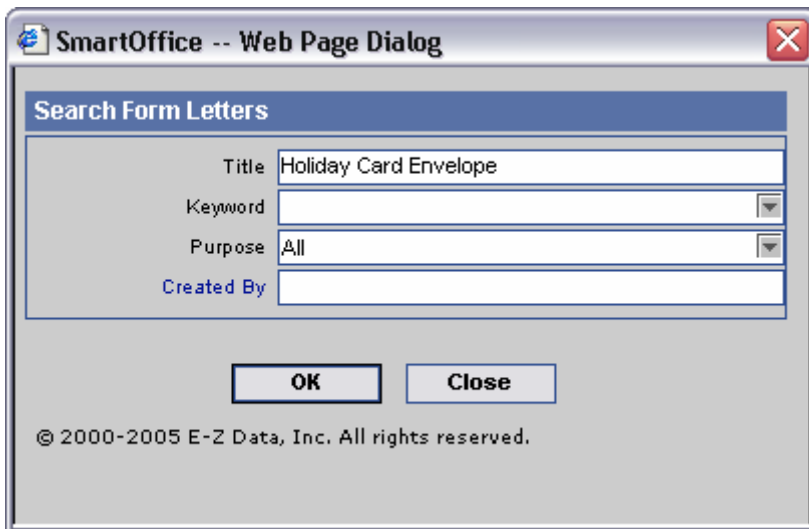- Use the **Search Form Letters** screen to search for the envelope document that will be used to create the envelopes.

Figure 15: The Letter Printing Options screen.

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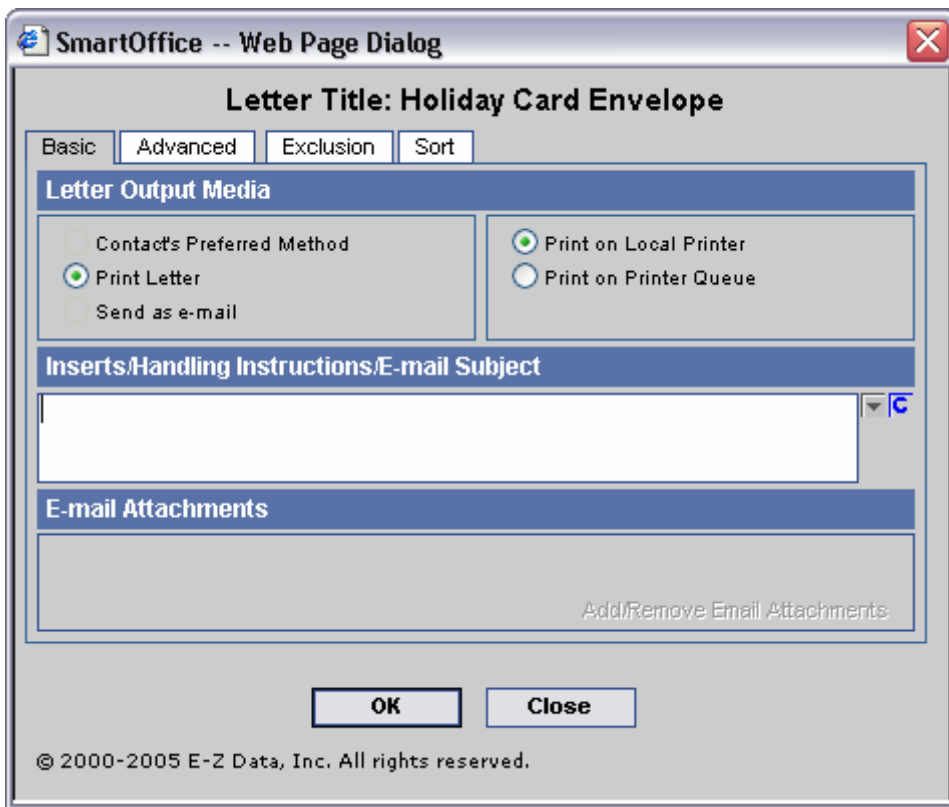- Select any necessary options, including sort and exception options in the **Letter Option** screen.

Figure 16: The Letter Options screen.

- Click **OK**.
- Any contacts exempt from having an envelope 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 first envelope in the series for the selected contacts. The merge codes will be expanded based on contact data.
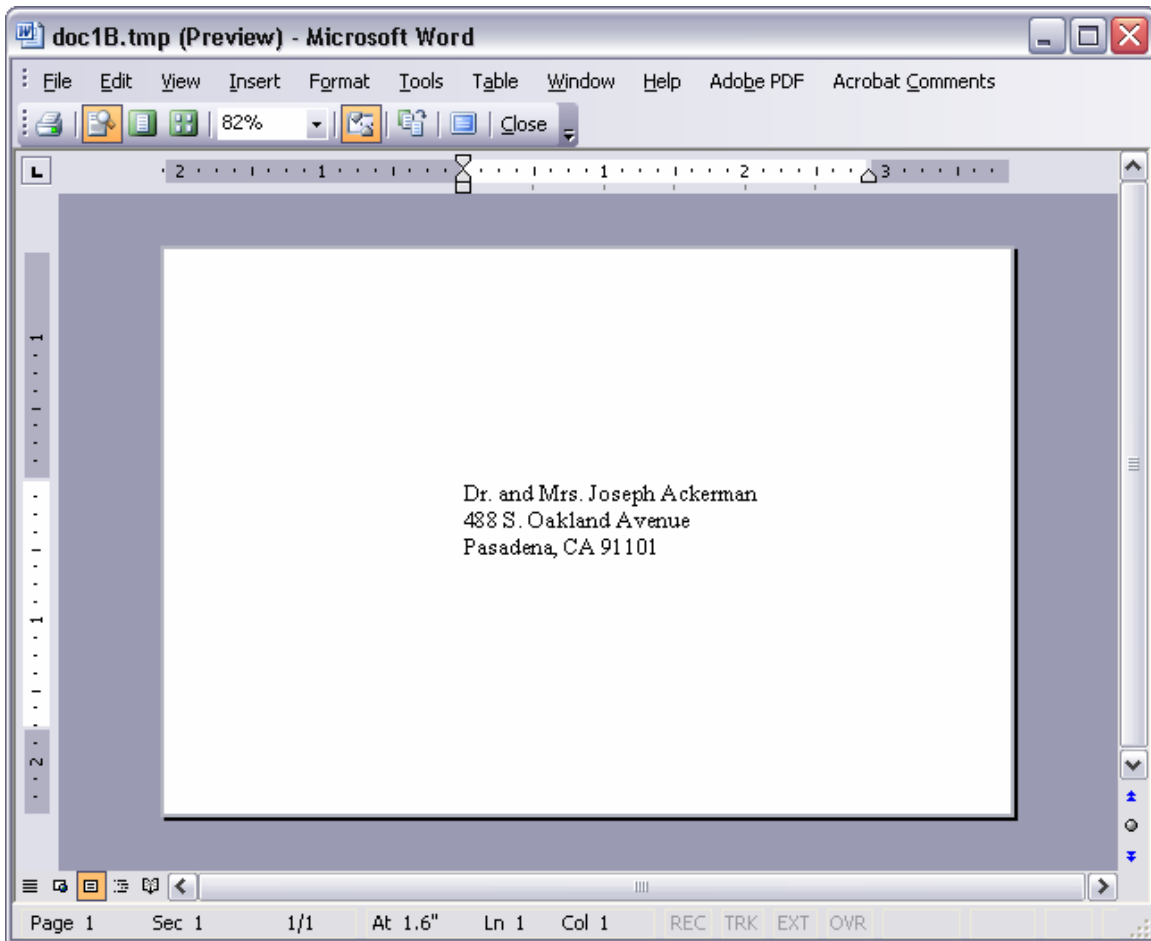
Figure 17: One envelope document in print preview with merge codes expanded.

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

To print envelopes 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.
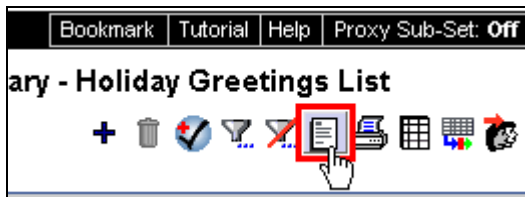

Figure 18: The Letter (Mass Correspondence) button in the Set summary toolbar.

11

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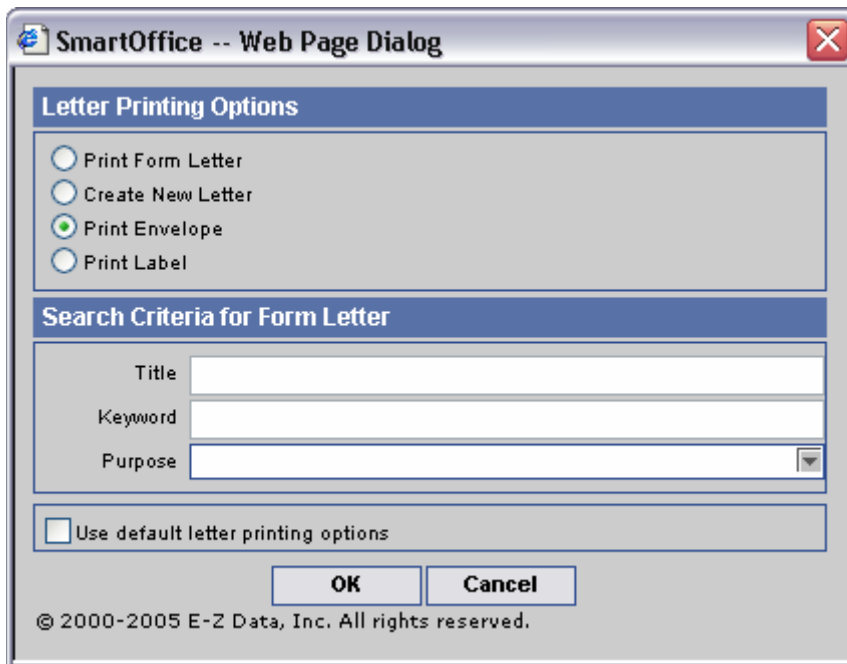

Figure 19: The Letter Printing Options screen.

- Click **OK.**
- Any contacts exempt from having an envelope 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 open a print preview of the first envelope in the series for the selected contacts. The merge codes will be expanded based on contact data.
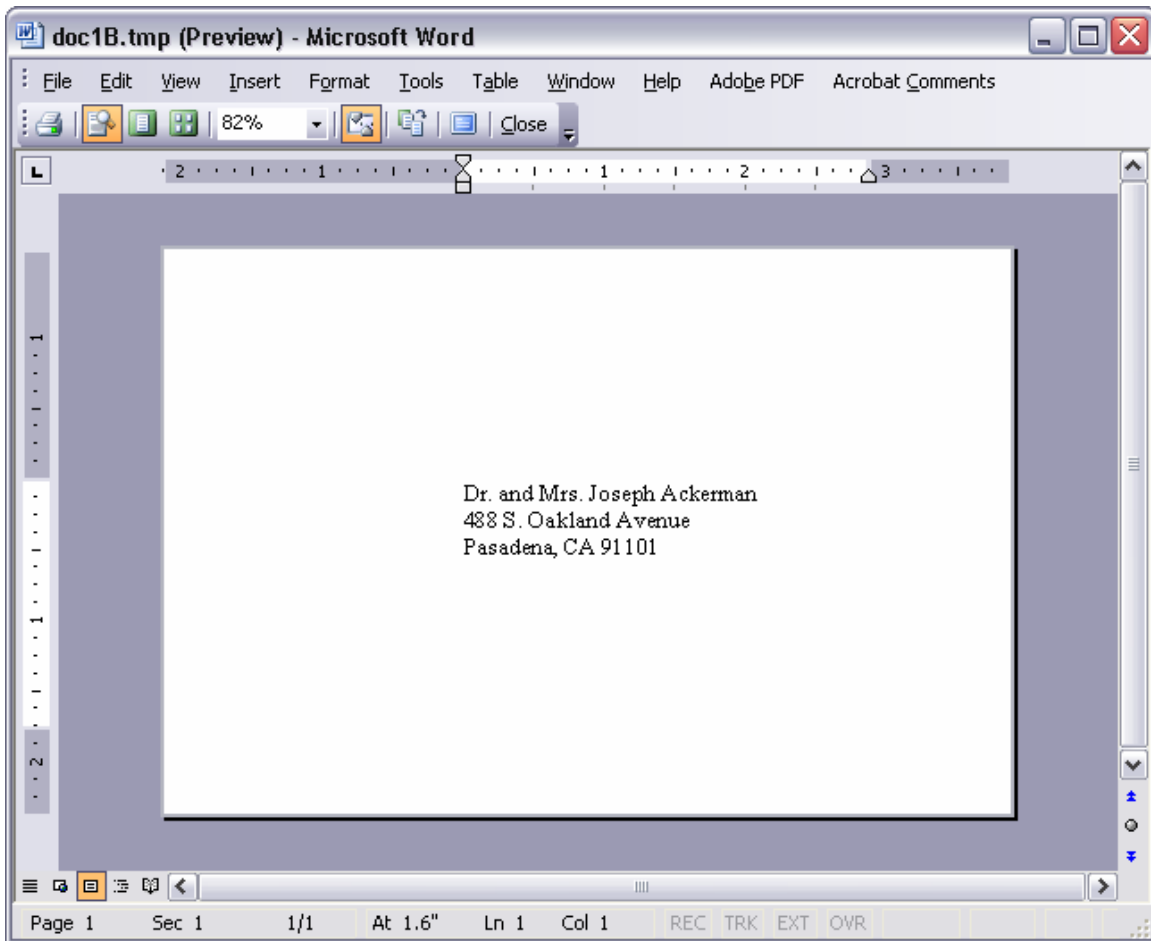
Figure 20: The label document in print preview with merge codes expanded.

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