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.

🕙 SmartOffice We	b Page Dialog 🛛 🛛 🔀
Search Form Letters	
Title	
Keyword	
Purpose	All
Created By	
Include These Docum	ent Types
Form Letters Labels Templates	Envelopes Headers/Footers
Search © 2000-2005 E-Z Data	Add Close , Inc. All rights reserved.

• 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.



Figure 2: The Word icon in the Open column.

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

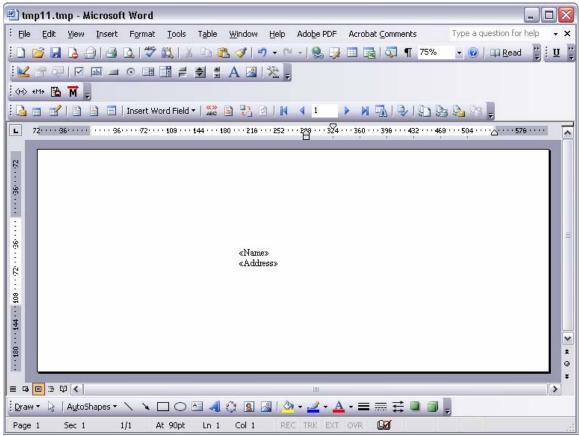


Figure 3: The Avery Label 5160 Word document with merge codes.

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.



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

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**.

🕙 Confirmation Web Page Dialog 🛛 🔹 👔 👔						
0	Create a new document based on an existing document?					
	Yes 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.



Page Setu	ab 🕹 🚺	<
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Margins -		
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Left:	72 pt 🚖 <u>R</u> ight: 72 pt 🚔	
<u>G</u> utter:	0 pt 🔄 Gutter position: Left 💉	
Orientatio		
Preview - Apply to Whole a	o: document	
<u>D</u> efault	OK Cancel	

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.



P	Page Setup	? 🗙
ſ	Margins Paper Layout	
	Paper_size:	
	Custom size	_
	<u>W</u> idth: 6"	_
	H <u>e</u> ight: 4 "	
	Paper source	
	Eirst page: Other pages:	_
	Default tray (Automatically SDefault tray (Automatically SAutomatically SelectAutomatically SelectAuto SelectImage: SelectUpper Paper TrayUpper Paper TrayManual Paper FeedManual Paper TrayLower Paper TrayImage: Select	ally S 🔨
	Preview	
	Apply to:	_
	Whole document	
	Print Op <u>t</u> ions	_
	Default OK	Iancel

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.



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Figure 8: The Browse Merge Codes button.

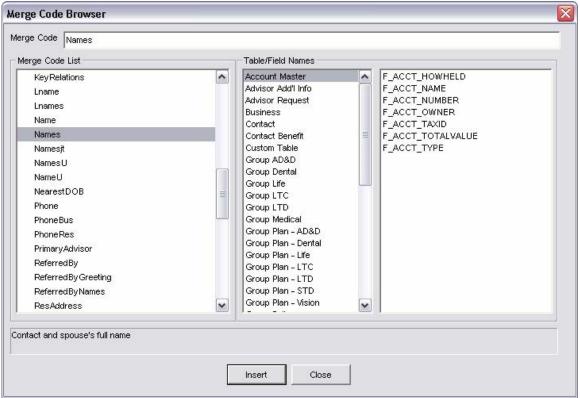


Figure 9: The Merge Code Browser.

• 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.

🕷 SmartLink for Word - [Save Envelope] 🛛 🛛 🔀							
Title	Holiday Card Envelope						
Keyword	Holiday Greetings						
Category	Miscellaneous		•				
Purpose			•				
🔲 Private			C Solicitation				
	[Save	Cancel				

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.)



🕘 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 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.

🕙 SmartOffice Web Page Dialog 🛛 🛛 🔀						
Search Form Letters						
Title Holiday Card Envelope						
Keyword	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: Holida Basic Advanced Exclusion Sort	ay Card Envelope					
Letter Output Media						
Contact's Preferred Method Contact's Preferred Method Print Letter Send as e-mail						
Inserts/Handling Instructions/E-mail Su	ıbject					
	∞ ⊂					
E-mail Attachments						
Add/Remove Email 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 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.



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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.

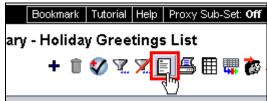


Figure 18: The Letter (Mass Correspondence) button in the Set summary toolbar.



- 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.

🐔 SmartOffice Web Page Dialog 🛛 🛛 🔀		
Letter Printin	g Options	
O Print Form		
Print Envelope		
O Print Label		
Search Criteria for Form Letter		
Title		
Keyword		
Purpose		
Use default letter printing options		
© 2000-2005	OK Cancel E-Z Data, Inc. All rights reserved.	

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.



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Dr. and Mrs. Joseph Ackerman 488 S. Oakland Avenue Pasadena, CA 91101	
	*
Page 1 Sec 1 1/1 At 1.6" Ln 1 Col 1 REC TRK EXT OVR	

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.

