



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 unchecked) and leave the **Title** field blank to perform an open search.
- Click **Search**.
- SmartOffice will display a list of all available Labels in the **System Letter Summary** screen.

To view a label document:

- Click on the Word icon in the **Open** column.
- SmartLink for Word will open the label document in Word.

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

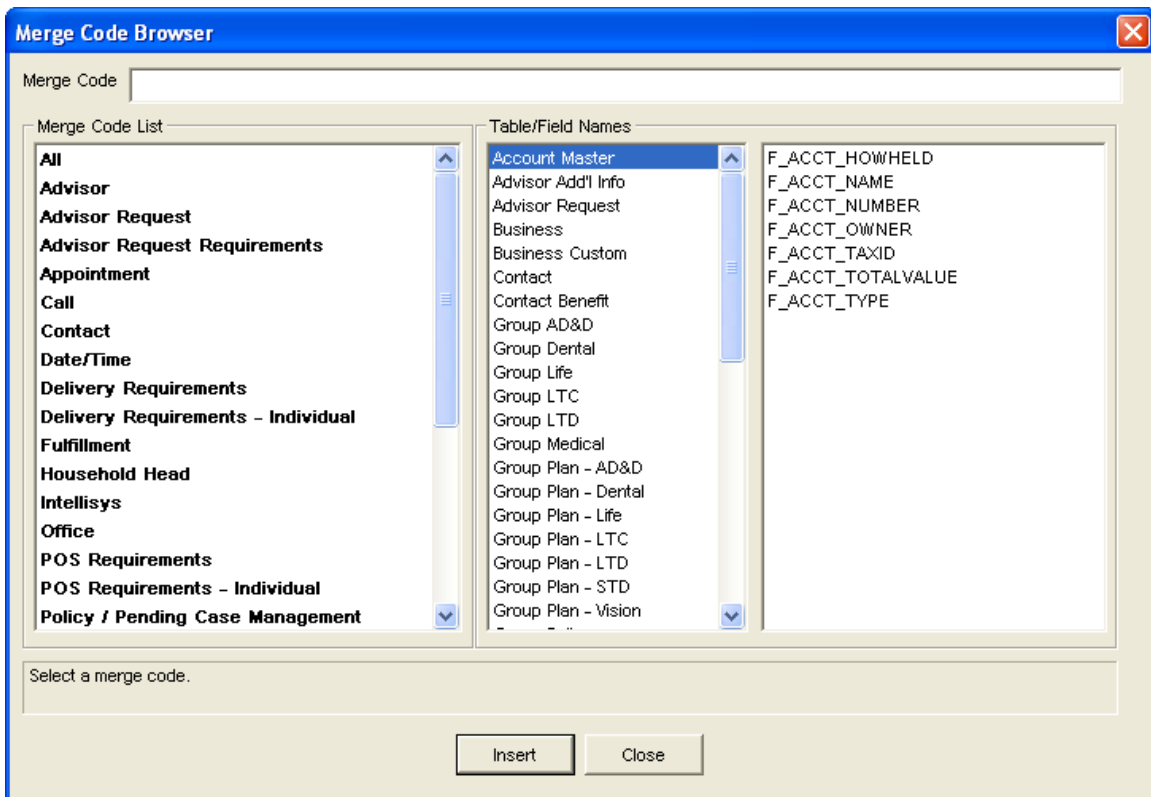


Figure 1: Merge Code Browser window

- 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.
- 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.
- 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.)

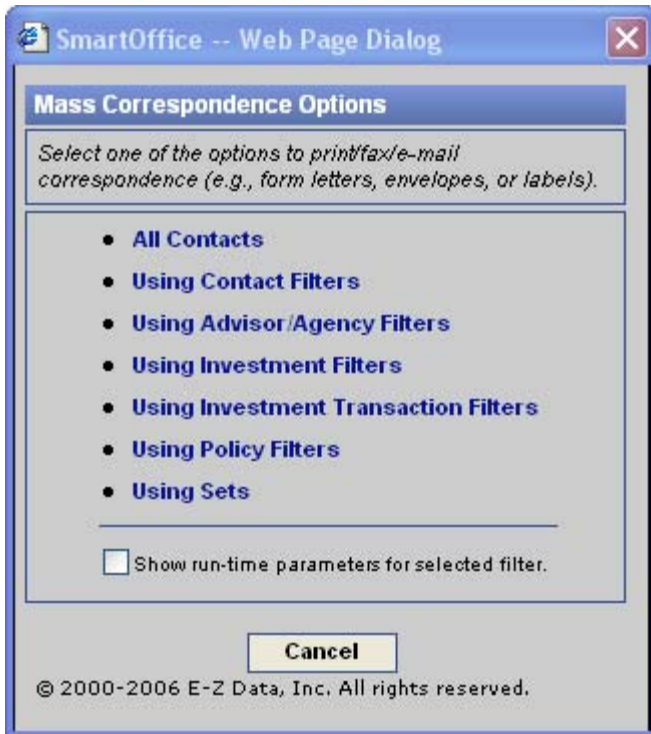


Figure 2: Mass Correspondence Options window

- Enter the name of the set (or filter, depending on mass correspondence option selection.)
- Select the correct set in the **Set Summary** screen.
- Select the **Print Label** option in 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.
- Click **OK**.
- Select any necessary options, including sort and exception options in the **Letter Option** 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.
- 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.



- 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.

