Volume 106: Printing Envelopes	Phone Numbers
Fast Class File	SmartOffice® (526) 799-2951 Famories (210) 309-0948#152

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 Web Page Dialog 🛛 🛛 🔀					
Search Form Letters					
Title Keyword Purpose	All				
Created By					
Include These Document Types					
Form Letters Labels Templates	Headers/Footers				
Search © 2000-2006 E-Z Data	Add Close				

Click Search.

Figure 1: 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.



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

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.
 Click OK.

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

• 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.

- Click the Paper tab and select Custom Size in the Paper Size drop-down field.
- 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.

М	erge Code Browser					×				
Merge Code										
Г	Merge Code List		Table/Field Names							
	All	~	Account Master	~	F ACCT HOWHELD					
	Advisor		Advisor Add'l Info		F_ACCT_NAME					
	Advisor Request		Advisor Request		F_ACCT_NUMBER					
	Advisor Request Requirements		Business		F_ACCT_OWNER					
	Appointment		Business Custom		F_ACCT_TAXID					
	Call		Contact Contact Benefit		F_ACCT_TOTALVALUE F_ACCT_TYPE					
			Group AD&D		F_ACCI_ITPE					
	Contact		Group Dental							
	Date/Time		Group Life	-						
	Delivery Requirements		Group LTC							
	Delivery Requirements - Individual		Group LTD							
	Fulfillment		Group Medica							
	Household Head		Group Plan - ୟୁଟ୍ଟି&D							
	Intellisys		Group Plan - Dental							
	Office		Group Plan - Life Group Plan - LTC							
	POS Requirements		Group Plan - LTC							
	POS Requirements - Individual		Group Plan - STD							
	Policy / Pending Case Management		Group Plan - Vision							
	i oney / i chang case management	-	J		1					
				_		_				
	Select a merge code.									
Insert Close										
	Insert									

Figure 2: Merge Code Browser window



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.
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.
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.)

• 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 Envelope** option in 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.

• Click OK.

• Select any necessary options, including sort and exception options in the Letter **Option** 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.

• 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.

• 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.

• 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.

• 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.

