

Fast Class File

Client Data System

Volume 124: Custom Labels

As shown in the Creating Labels Fast Class, there are two ways to create labels with CDS. You can use the **Spreadsheet Correspondence** button or use the **Print Labels** option to customize your label information in the **Reports** menu.

To create a custom Label Setup:

- Select **Reports** in the Main Menu then select **Print Labels**.
- In the **Label Setup** screen, click the **Add Record** button.

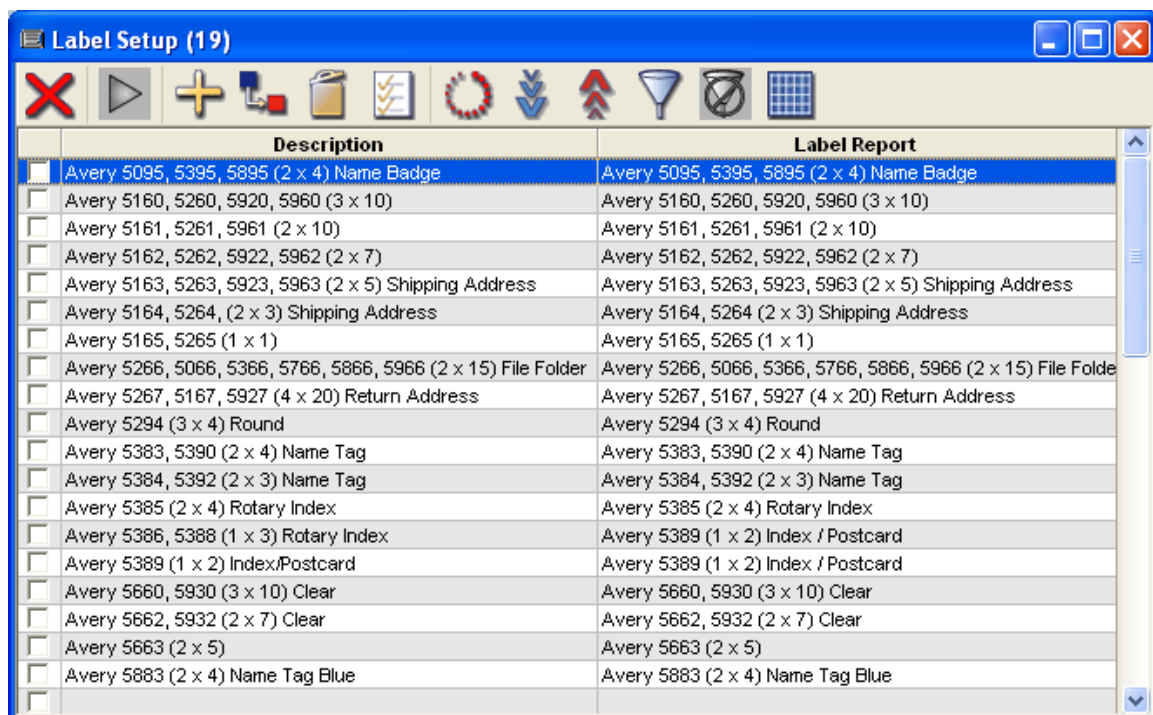


Figure 1: Label Setup window

- In the first **Label Setup** screen, select the **Description** (Avery label template) of the label you will use.
- Click **Next**.
- In Step 2, define the **Label Contents**. The default merge codes in the **Label Contents** (&Name and &Address) will populate the selected labels with a contact's full name and the address you specify in Step 6.



Figure 2: Label Setup: Step 2

- Delete any unwanted merge codes and add new merge codes by clicking the **Merge Code** button.
- In the **Merge Code Browser**, select from the list of merge codes in the **Merge Code List** or from the merge codes in the **Table/Field Names** section.

Note: Be sure an active cursor is in the field where you would like to add a merge code before clicking the Merge Code button to launch the Merge Code Browser.

- After selecting a merge code, click the **Insert** button. When you are finished click **Close**.

*Note: You can also add typewritten text in the **Label Contents**. Place an active cursor in the field where text is to be added. Type the text to be added to the label.*

- After defining **Label Contents**, click **Next**.
- In the third **Label Setup** screen, associate a group of contacts with a label setup by using a **Filter** or **Set**. Record selection based on a filter or set can be defined at run time by selecting the **Selection Criteria at run time** option.

*Note: Only filters built on the **Contact Record** table can be used in a label setup.*

- After you have defined the **Record Selection**, click **Next**.
- In the fourth **Label Setup** screen, select the **Sort Option**. Labels can be sorted by **Last Name**, **Zip/Postal Code**, or, using the **Ad hoc Sort** selection, by virtually any field on the **Contact** table. Sort selection can also be defined at run time by selecting the **Sort Selection at run time** option.
- After selecting **Sort Option**, click **Next**.
- In the fifth **Label Setup** screen, select miscellaneous **Options**:
 - Select the **Create Follow-up Activity** option to have CDS create followup activities for all contacts in the label setup when the setup is run.
 - Select the **Post description to Smartpad** option to have a Smartpad record created for all contacts in the label setup when the setup is run.
 - Select the **Print Bar Code** option to print bar codes on the labels.
 - Select the **Print One Label Per Family** option to eliminate duplicate mailings to a family if more than one contact from the same family has

been selected for label creation. All of the options in step 5 can be specified at run time by selecting the **Specify these options at run time** option.



Figure 3: Label Setup: Step 5

- After selecting **Options**, click **Next**.
 - In the sixth **Label Setup** screen, select the contact address to be used when creating labels. **Address Selection** can be specified at run time by selecting the **Address Selection at run time** option.
 - After defining **Address Selection**, click **Next**.
 - In the seventh **Label Setup** screen, give the custom label setup a unique name in the **Description** field. Add any keywords if desired.
 - After naming the label setup, click **Finish**.
- The custom label setup will appear in the **Label Setup** summary screen.

To print labels using the custom label setup:

- Select **Reports** in the Main Menu then select **Print Labels**.
- Tag the desired **Label Setup**.
- Click the **Run** button.
- Review the labels in the label print preview screen.
- Load the label paper into the printer.
- Click the **Print** button in the label print preview.