

Fast•Class File

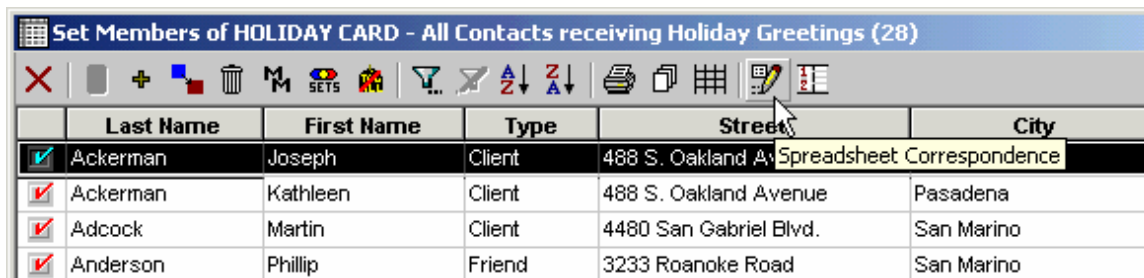
Client Data System

Volume 73: Creating 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 in the **Reports** menu.

To create labels using the Spreadsheet Correspondence button:

- Open any summary screen that has a **Spreadsheet Correspondence** button (e.g., the **Contact Summary** tab, **Set Membership** screens, **Dynamic Report** result screens, etc).
- Tag selected contacts then click the **Spreadsheet Correspondence** button.



Set Members of HOLIDAY CARD - All Contacts receiving Holiday Greetings (28)

	Last Name	First Name	Type	Street	City
<input checked="" type="checkbox"/>	Ackerman	Joseph	Client	488 S. Oakland A.	Spreadsheet Correspondence
<input checked="" type="checkbox"/>	Ackerman	Kathleen	Client	488 S. Oakland Avenue	Pasadena
<input checked="" type="checkbox"/>	Adcock	Martin	Client	4480 San Gabriel Blvd.	San Marino
<input checked="" type="checkbox"/>	Anderson	Phillip	Friend	3233 Roanoke Road	San Marino

Figure 1: The Spreadsheet Correspondence button in a Set Membership window.

- Select **Labels** in the **Spreadsheet Correspondence** window.

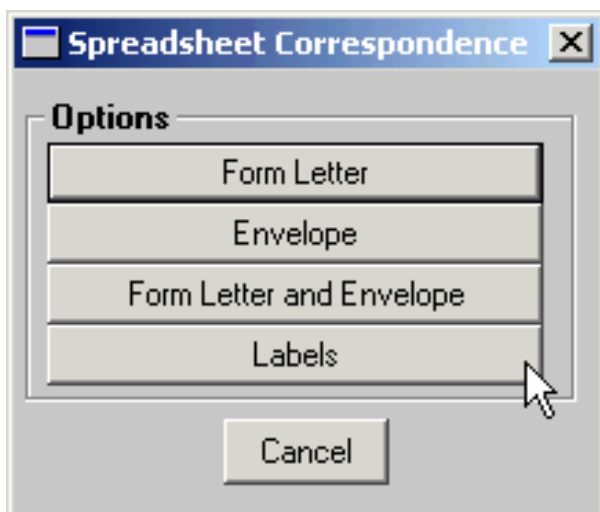


Figure 2: The Spreadsheet Correspondence window.

- In the **Label Setup** window, select the label setup with a **Label Report** that matches the labels to be used - Avery 5160, 5162, etc.

Label setups with a matching **Description** and **Label Report** are system label setups and can be used to create labels for virtually any grouping of contacts. System label setups are designed to populate the selected labels with a contact's full name and preferred address.

- Click on the **OK** (green check mark) button, to create labels.

Description	Label Report
Avery 5095, 5395, 5895 (2 x 4) Name Badge	Avery 5095, 5395, 5895 (2 x 4) Name Badge
Avery 5160, 5260, 5960 (3 x 10)	Avery 5160, 5260, 5920, 5960 (3 x 10)
Avery 5161, 5261, 5961 (2 x 10)	Avery 5161, 5261, 5961 (2 x 10)
Avery 5162, 5262, 5922, 5962 (2 x 7)	Avery 5162, 5262, 5922, 5962 (2 x 7)
Avery 5163, 5263, 5923, 5963 (2 x 5) Shipping Address	Avery 5163, 5263, 5923, 5963 (2 x 5) Shipping Address

Figure 3: The Select Label Setup screen.

- Review the labels in the **Print Preview**.
- Load the label paper into the printer.
- Click the **Print** button in the print preview toolbar.

Dr. Joseph M. Ackerman Joseph M. Ackerman, M.D., Inc. 144 W ilshire Blvd., Suite 250 Los Angeles, CA 90007	Mrs. Kathleen Ackerman 488 S. Oakland Avenue Pasadena, CA 91101	Mr. Martin Adcock, Jr. Smith Industries, Inc. 4430 Pico Blvd. Los Angeles, CA 90002
Mr. Phillip Anderson 3233 Roanoke Road San Marino, CA 91108	Mr. David M. Ansong, Jr. 427 Namahana Street Honolulu, HI 96815	Mr. Brian Anthony 3333 San Pasqual Pasadena, CA 91107
Mr. Robert C. Antonsen Antonsen Development, Inc. 735 W. Duarte Rd. Suite 220 Arcadia, CA 91006	Mr. Michael J. Arrieta 9821 Ahmann Whittier, CA 90605	Mr. Frank J. Bartelo Barstein Co., Inc. 2415 Merced Ave. South El Monte, CA 91733
Mr. Stephen Bicosta 1779 East Walnut Street Pasadena, CA 91106	Dr. Carolina Christiansen 508 Mound Avenue South Pasadena, CA 91030	Mrs. Nancy Ericson 970 Pebble Creek Walnut, CA 91789

Figure 4: The Label Print Preview screen.

To create a custom Label Setup:

- Select **Reports** in the Main Menu then select **Print Labels**.

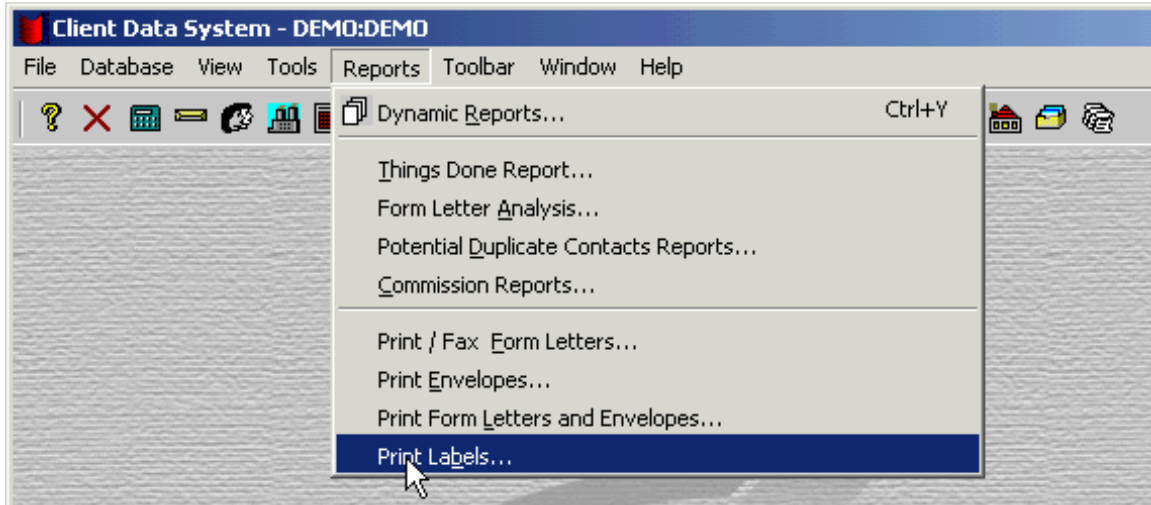


Figure 5: The Print Labels option in the Reports menu.

- In the **Label Setup** screen, click the **Add Record** button.
- In the first **Label Setup-New** screen, select the **Description** (Avery label template) of the label you will use.
- Click **Next**.

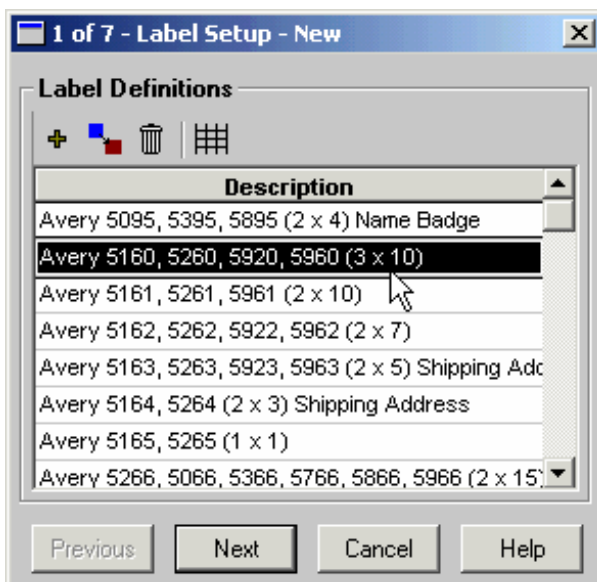


Figure 6: Label Setup-New screen 1 of 7.

- In the second **Label Setup-New** screen, 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.
- Delete any unwanted merge codes and add new merge codes by clicking the **Merge Code** button.

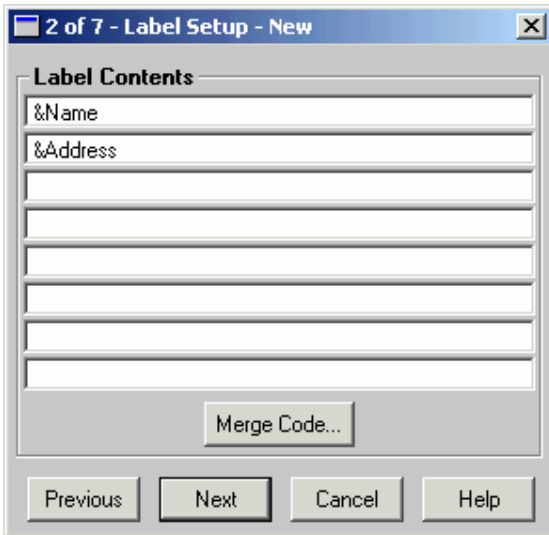


Figure 7: Label Setup-New screen 2 of 7.

- 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.

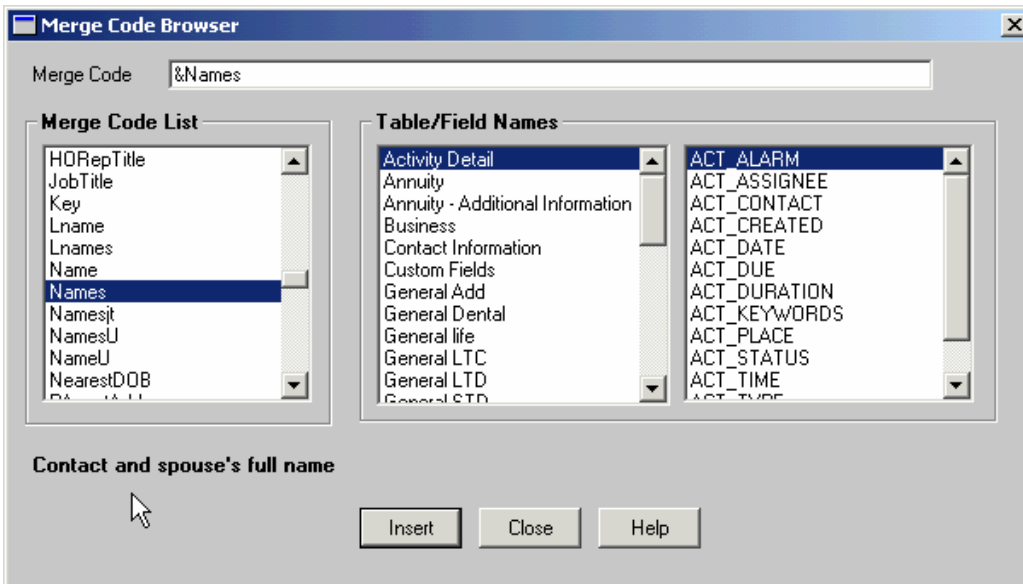


Figure 8: The Merge Code Browser.

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

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.

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-New** 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.

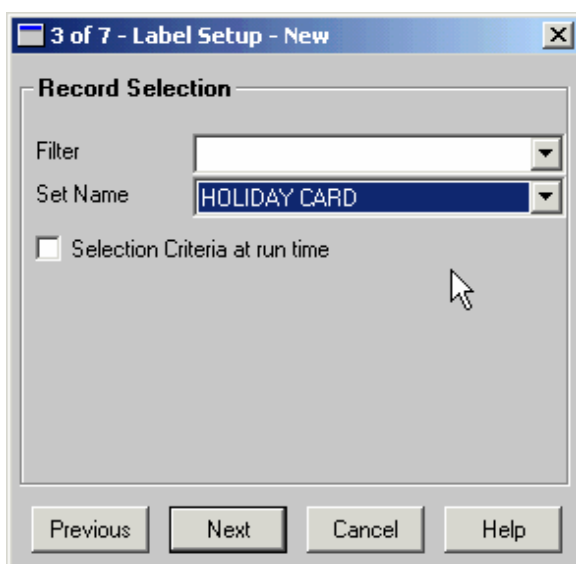


Figure 9: Label Setup-New screen 3 of 7.

*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-New** 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.

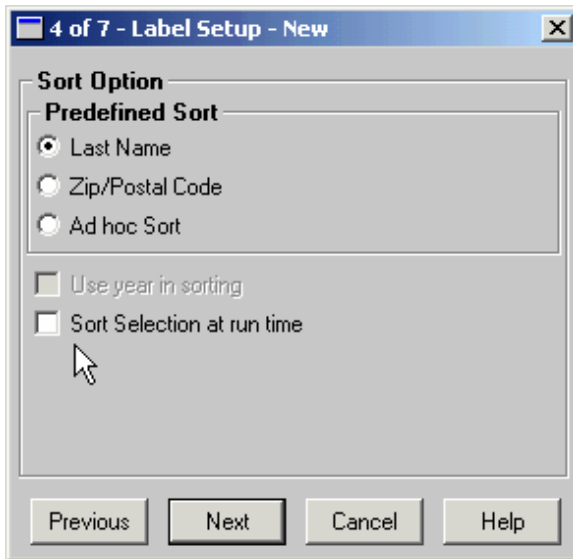


Figure 10: Label Setup-New screen 4 of 7.

- After selecting **Sort Option**, click **Next**.
- In the fifth **Label Setup-New** screen, select miscellaneous **Options** -
 - Select the **Create Follow-up Activity** option to have CDS create follow-up 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.

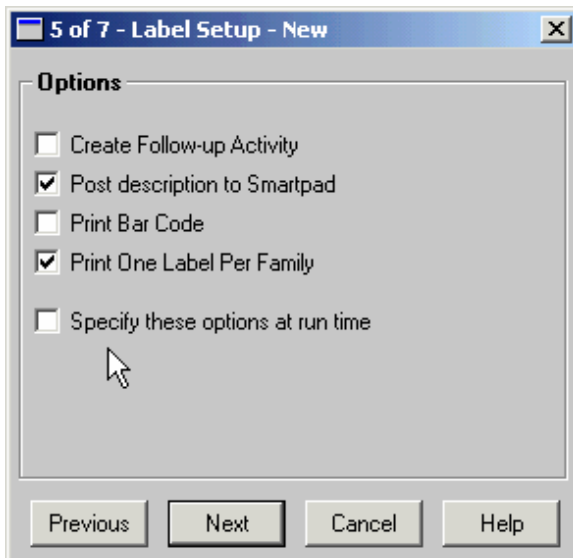


Figure 11: Label Setup-New screen 5 of 7.

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

- After selecting **Options**, click **Next**.
- In the sixth **Label Setup-New** 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.

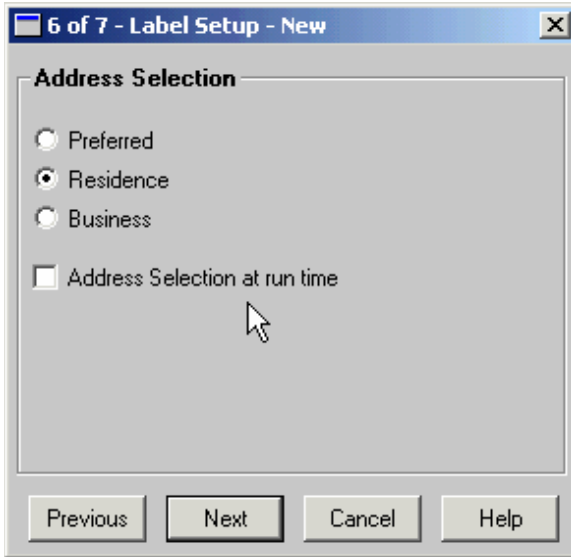


Figure 12: Label Setup-New screen 6 of 7.

- After defining **Address Selection**, click **Next**.
- In the seventh **Label Setup-New** screen, give the custom label setup a unique name in the **Description** field. Add any keywords if desired.

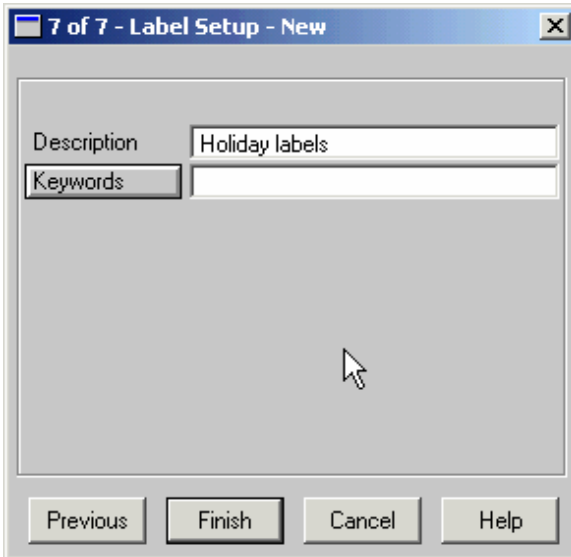


Figure 13: Label Setup-New screen 7 of 7.

- 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.

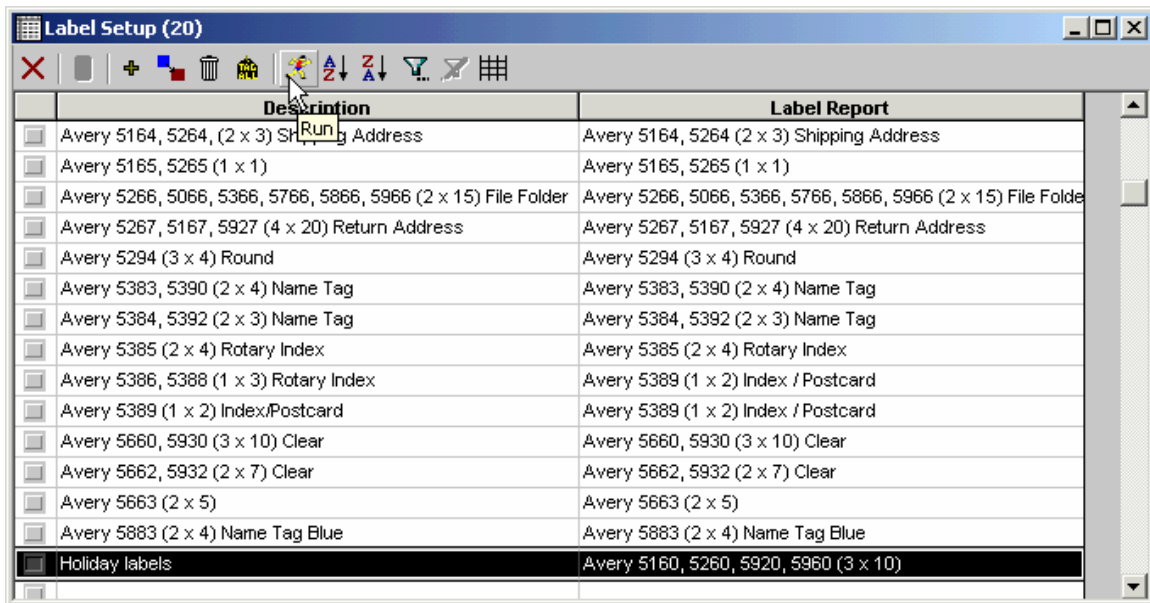


Figure 14: The Run button in the Label Setup screen.

- 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.