

Fast•Class File

Client Data System

Volume 74: Exporting Labels

Information used to create labels in the Client Data System (CDS) can be exported out of CDS and used to create labels in Microsoft Word, making it possible to customize the font style, size, and color. For more information on creating labels in CDS, watch the [Letters, Labels, and Email Course Fast Class: Creating Labels](#).

To export data formatted for Avery® labels -

- From the print preview screen of a label setup in CDS, click the **Export** button.

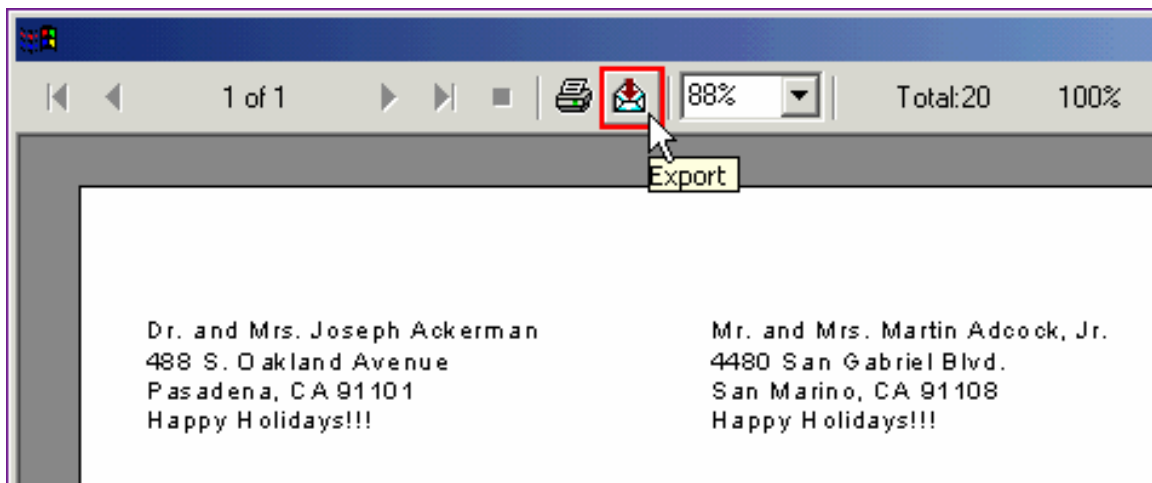


Figure 1: The Export button in the label print preview screen.

- In the **Format** drop-down field of the **Export** window select **Comma-separated values (CSV)**.

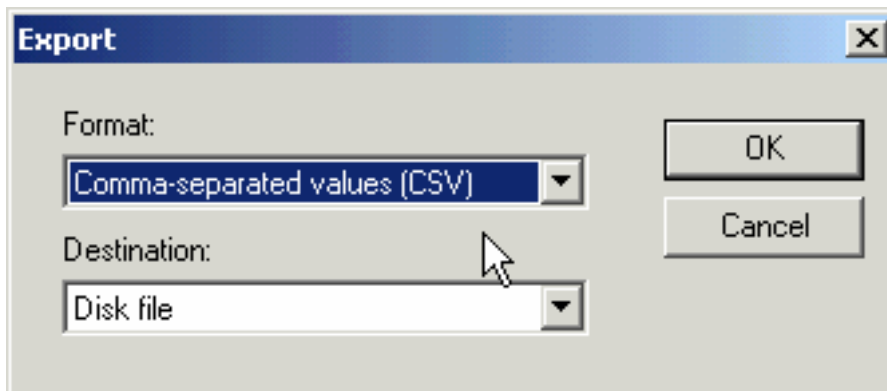


Figure 2: The Export screen (Comma-separated values (CSV) selected).

- In the **Destination** drop-down field of the **Export** window select **Disk file**.
- Click **OK**.

- In the Number and Date Format Dialog window, leave both options deselected and click **OK**.

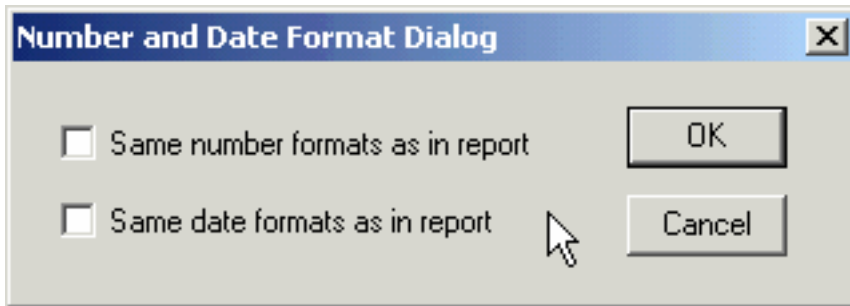


Figure 3: The Number and Date Format Dialog window.

*Note: When exporting data from a Crystal Report with dollar, percent, and/or dated information, you may want to select options in the **Number and Date Format Dialog** window for consistency in your export.*

- In the **Choose Export File** window, select a location to save the formatted label data in the **Save in** field.

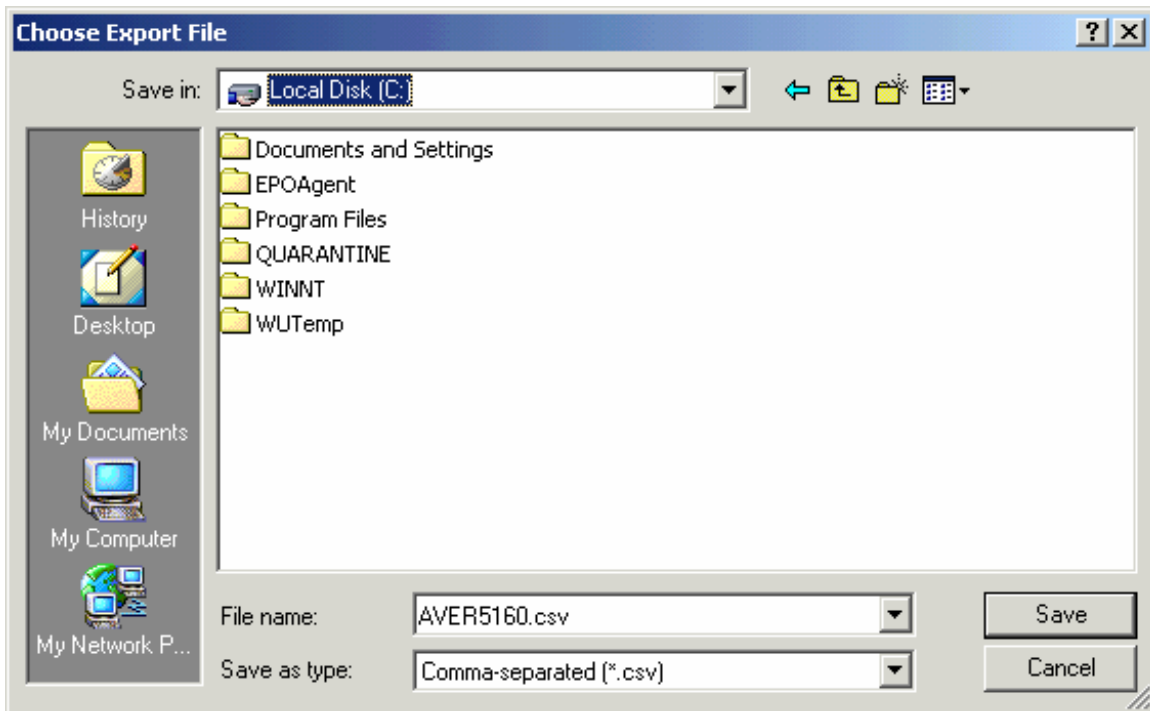


Figure 4: The Choose Export File window.

By default, the export has the .csv file extension (for Comma-separated values) and the name of the label report used to create the labels in CDS. In this example, the file name is `AVER5160.csv`. Although a default file name is selected, the file name can be changed without making any changes to the data in the export.

- Click the **Save** button.
- The .csv file will be exported to the selected location.

- Open the .csv file in Excel to verify that the data is formatted as selected in the CDS.
- Add a row at the top of the spreadsheet.
- In each cell of the new row, type a description of the data stored in each column.

	A	B	C	D	E
1	Name	Street	City, State, Zip	Greeting	
2	Dr. and Mrs. Joseph Ackerman	488 S. Oakland Avenue	Pasadena, CA 91101	Happy Holidays!!!	
3	Mr. and Mrs. Martin Adcock, Jr.	4480 San Gabriel Blvd.	San Marino, CA 91108	Happy Holidays!!!	
4	Mr. and Mrs. Phillip Anderson	3233 Roanoke Road	San Marino, CA 91108	Happy Holidays!!!	

Figure 5: Aver5160.csv opened in Excel (description row added).

Important Note: When using a .csv file to create labels, Word will use the first row of data to create merge fields but will not create a label for the data entered in the first row. The new row of information will also provide a useful reference when creating merge fields in Word.

- Save and close the .csv file.

To create custom labels in Word using data in a .csv file based on formatted labels in CDS –

- Open Word.
- Select **Tools** from the main menu then select **Mail Merge**.

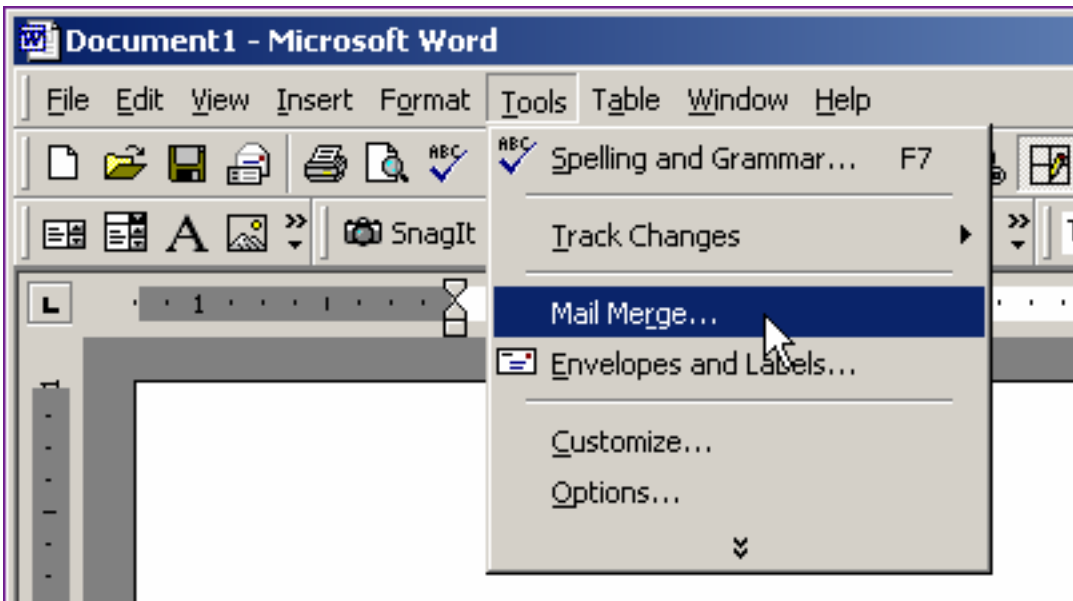


Figure 6: The Tools menu in Word (Mail Merge selected).

- In the **Mail Merge Helper**, select the **Create** button in **Step 1**.
- Select **Mailing Labels**.

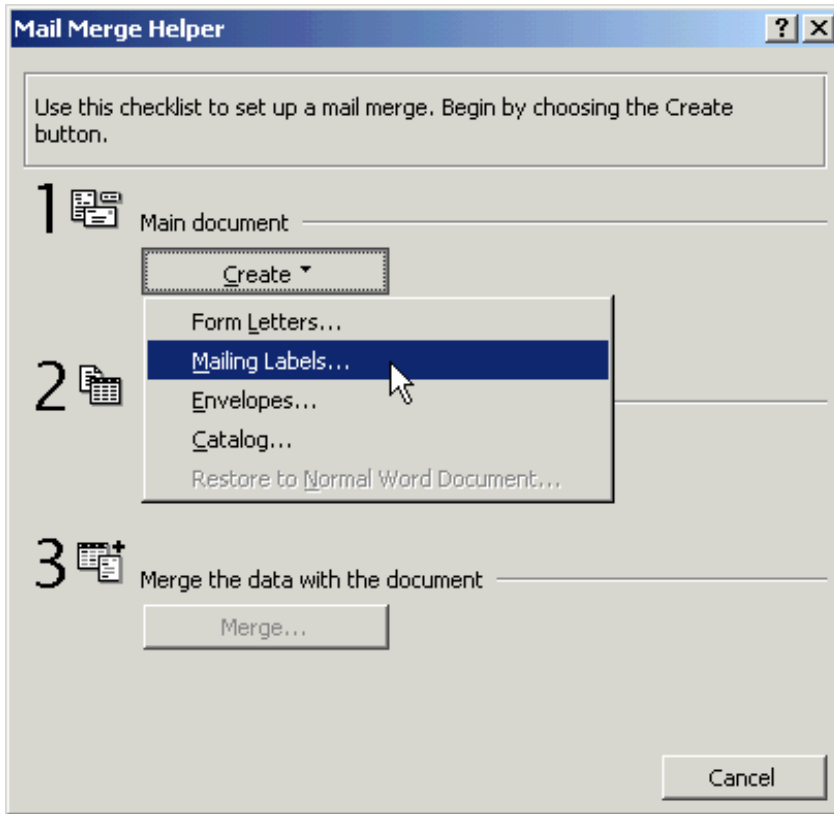


Figure 7: The Word Mail Merge Helper.

- In the **Word** dialogue window, select **Active Window**.
- Click the **Get Data** button in **Step 2** and select **Open Data Source**.
- Use the **Look in** drop-down field in the **Open Data Source** window to select the location of the label .csv file. If the .csv file is not visible with the correct location selected, select **Files (*.*)** in the **Files of Type** drop-down field.
- Select the label .csv file then click **Open**.
- In the **Word** dialogue window, click the **Set Up Main Document** button.
- In the **Label Options** window, select the type of printer to be used, how the paper will be loaded, and the type of label paper that will be used to create the labels.

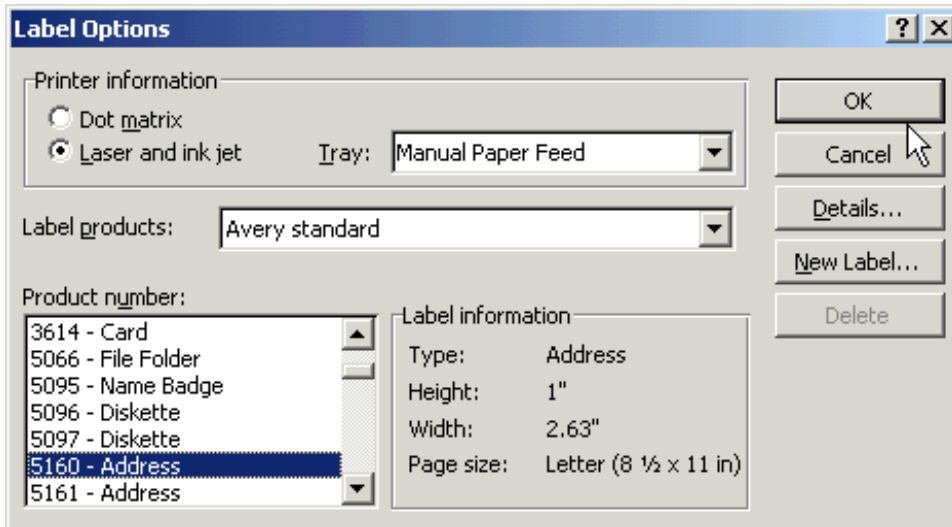


Figure 8: The Label Options window.

*Note: You can create custom label dimensions by clicking on the **New Label** button.*

- After selecting label options, click **OK**.
- In the **Create Labels** window, click the **Insert Merge Field** button.
- Select the **Name** entry with a left click.

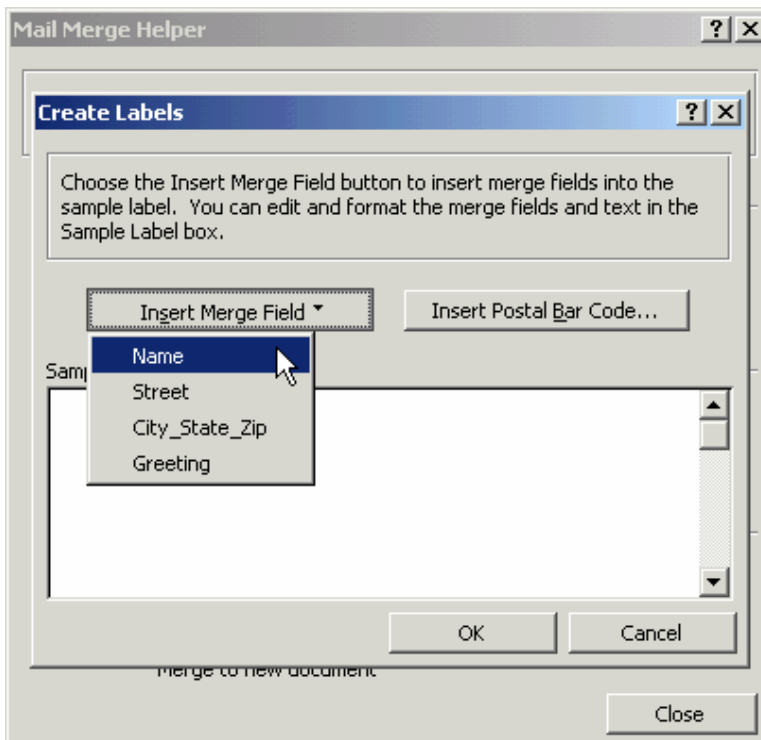


Figure 9: The Create Labels window (Insert Merge Field button active.)

- The **Name** merge field will appear in the **Sample** preview pane.
- Before adding the next field, press the **Enter** key on the keyboard to move the active cursor to the next row of the label.

- Repeat the process to bring the rest of the merge fields into the preview pane.

After inserting merge fields, changes can be made to the font style, size, and color.

To customize the label font –

- Highlight the merge field(s) to be customized and right click.
- Select **Font** in the context menu.

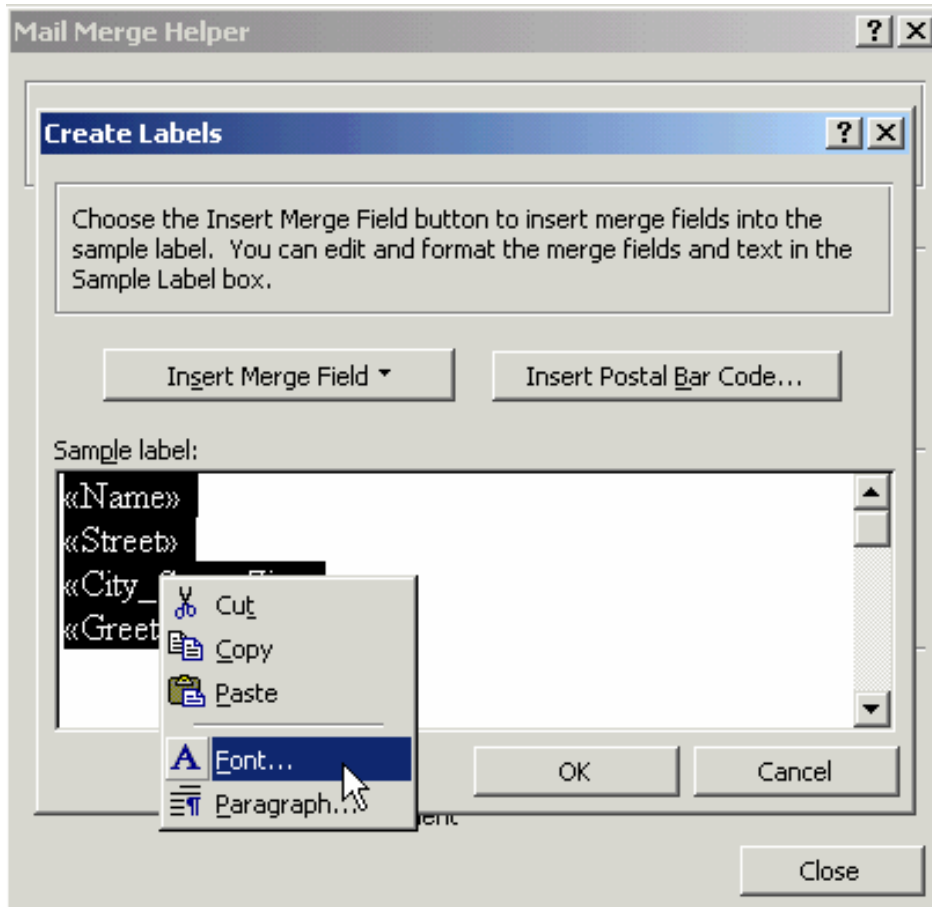


Figure 10: The Create Labels window (Font context menu).

- Make changes to the font in the appropriate sections of the **Font** window.

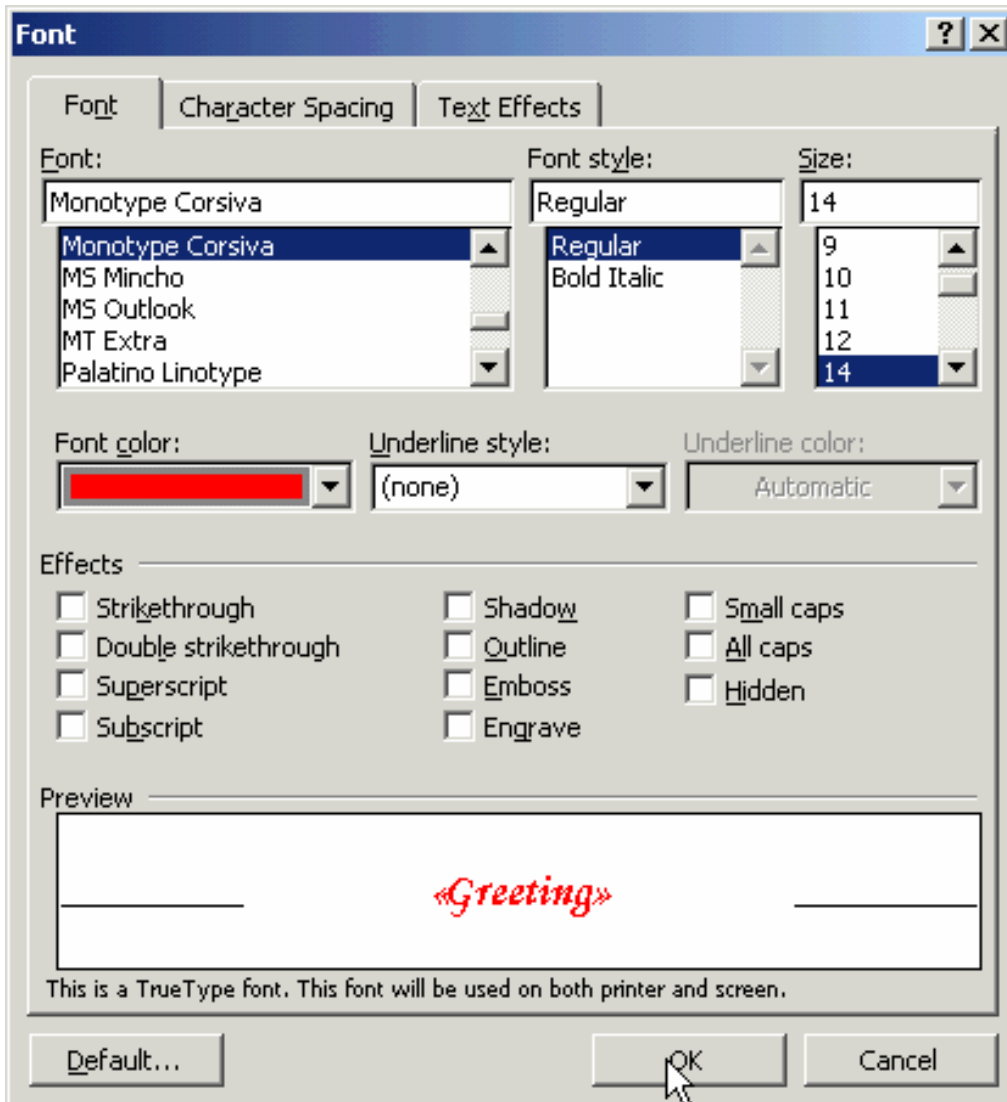


Figure 11: The Font window.

Changes made to the font will be reflected in the preview pane at the bottom of the **Font** window.

- After selecting font choices, click **OK**.

Font choices will also be reflected in the **Create Labels** window. As in the example, you can make unique font choices for each merge field.

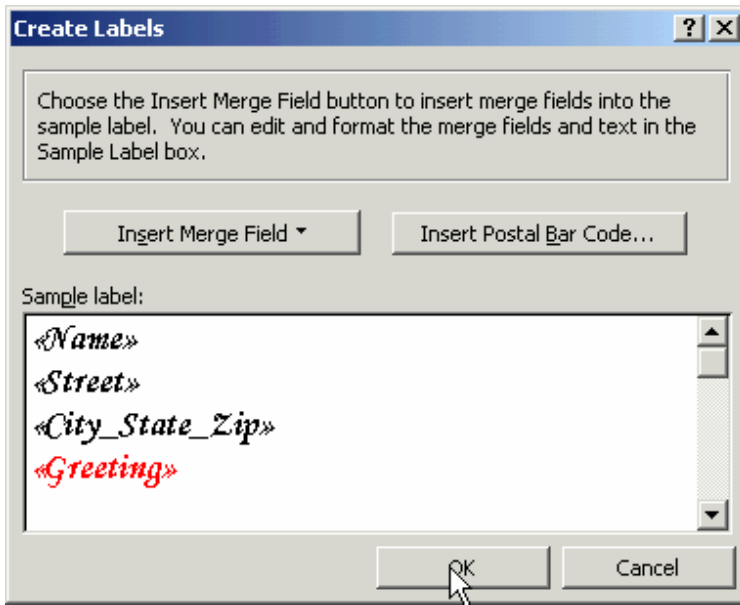


Figure 12: The Create Labels window displaying custom changes to font.

- When font customization is complete, click **OK**.
- In **Step 3** of the **Mail Merge Helper**, merge the .csv file to create new labels by clicking the **Merge** button or preview the label merge document by clicking the **Close** button.

If the option to preview the label merge document is selected, the .csv file can be merged to create new labels by clicking on the **Merge** button in the toolbar.

- Selecting the **Merge** button in the **Mail Merge Helper** or in the label preview will launch the **Merge** window.
- In the **Merge** window, select **New document** in the **Merge to** drop-down field.
- Select the **All** option in the **Records to be merged** section.
- Select the **Don't print blank lines when data fields are empty** option in the **When merging records** section.
- Click **Merge**.

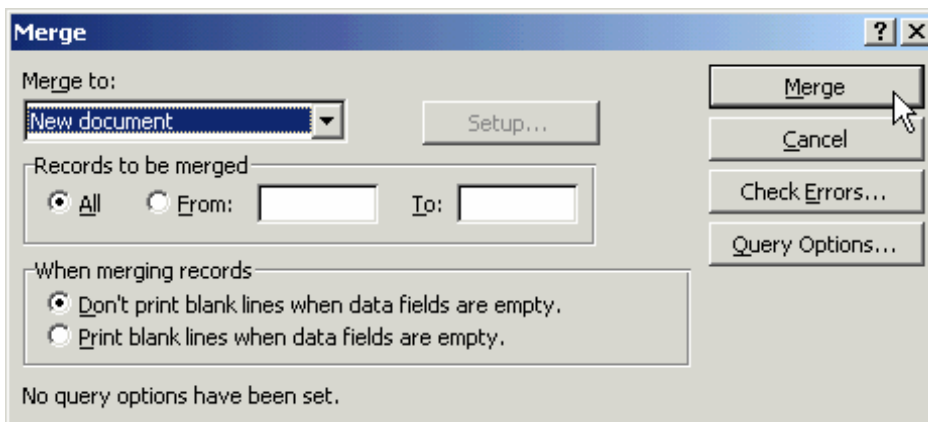


Figure 13: The Merge window.

Word will merge the main merge document with the data in the .csv file according to the merge fields used in the **Create Label** section of the **Mail Merge Helper**.

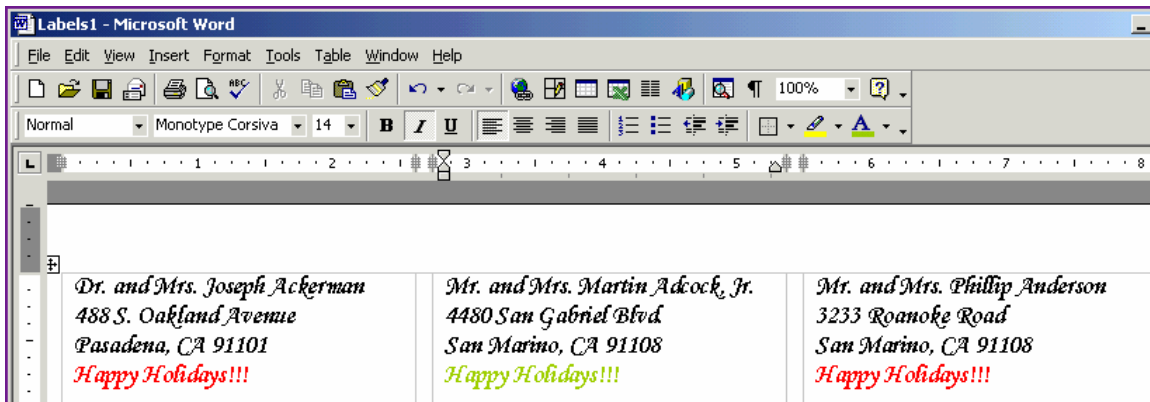


Figure 14: Custom Labels created in Word using a .csv file based on formatted label data from CDS.

If needed, more changes can be made to the labels before printing.

- After reviewing the customized label document, load the appropriate label paper in the printer and select **Print**.