Creating Client Labels in Microsoft Word for Bulk Mailers

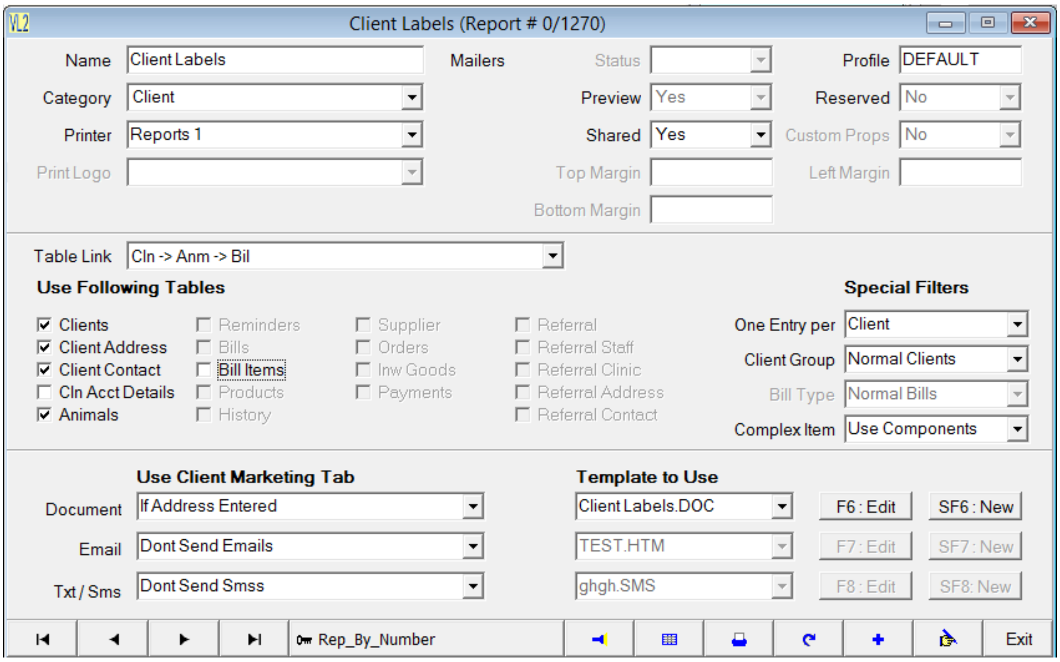
Client Labels can be printed from **Reports | Report / Lists | Client | Client Address Labels** or from **Bulk mailers** or **Reminders / Recalls** by clicking on the **Labels** button. The template used from these locations is a set template that prints to pre-cut labels available for purchase from VetlinkSQL. It cannot be adjusted.

To print to labels purchased from third party retailers, or change the label text to include things such as animal name you can create a template in **Bulk Mailers** or **Reminders / Recalls** using the Mail

Merge setting in Microsoft Word. To set this up follow the steps below.

Set up Bulk mailers or Reminders/Recalls Template

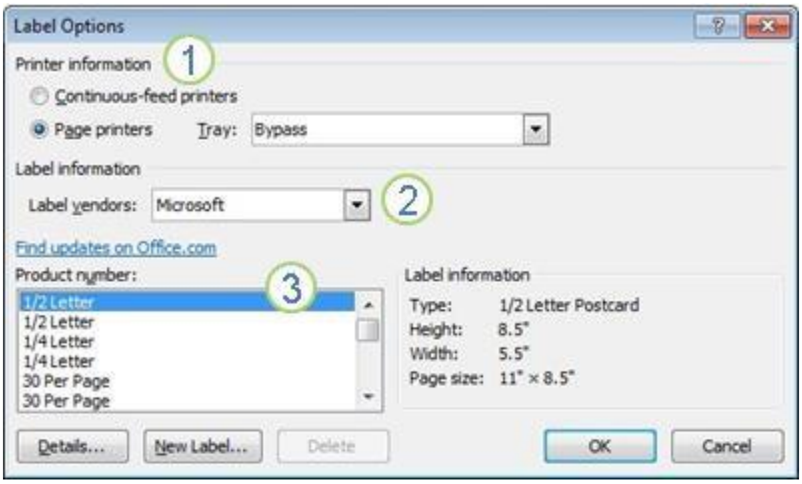
1. Go to **Reports -> Bulk Mailers -> Add New**
2. Select **Yes** to **Design new Report**
3. Select the Properties for the Bulk Mailer
    a. Give the labels a **Name**
    b. Select **Category** in bulk mailers to assign template to, eg **Client**
    c. Select **Printer**. Usually **Reports1** for A4 printing.
    d. Select **Table Link**. **Cln -> Anm -> Bil** works best for most situations
    e. Tick tables to use under **Use Following Tables**. **Clients**, **Client Address**, **Client Contact** and **Animals** works best for most situation. You can tick the **Bill** and **Product** fields if you want to filter by those fields as well however the search may take longer.
    f. Set **One Entry per** to **Client** if you require one label per client or **Animal** if you require one entry per animal.
    g. Under **Use Client Marketing** tab drop down the list next to **Document** and select **If Address entered** if you want to print a label if they have an address. If you are using the **Send By Mail** flags under the **Marketing tab** of the client record then select **If Mailers Chkbox ticked in By Post.**
    h. Click **SF6: New** to create the label template.
    i. For **Document Template** choose **Word Document Blank** and give enter a **Filename**. This could be the same as the bulk mailer name.
    j. Click **Accept** Word will open.



Create Label Template in Microsoft Word

Chances are that you already have a package of label sheets from one of the label sheet suppliers, such as Avery, AOne, or Formtec. Each sheet is a certain size and contains a certain number of labels with specific dimensions. To set up the label main document, you need to match the dimensions of that document with the dimensions of the labels on the sheets that you have on hand.

1. Make sure you are on the Mailings tab.
2. In the Start Mail Merge section, click **Start Mail Merge**.
3. Click **Labels**.
4. In the **Label Options** dialog box, you have several choices to make.
   a. The type of printer that you are using to print labels
   b. The supplier that produced your label sheets
   c. The number that corresponds to the product number listed on your package of label sheets.



5. Under **Printer information**, click the type of printer that you will use to print the labels.
6. In the **Label vendors** list, click the name of the company that made the label sheets that you are using.
7. In the **Product number** list, click the product number that is listed on the box of label sheets.
8. If the product number for my label sheets doesn't match any of the choices in the **Label Options** dialog box you can still print your labels. You just have to do some customizing.
   a. After measuring the labels and counting the number that fit onto one sheet just choose a similar template and use that.
   b. If the dimensions and layout do not match yours, click **New Label.**
      i. Type a name in the **Label name** box, select the height, width, margins, and other options for your label, and then click **OK**.
      ii. The new label appears in the **Other/Custom** category. The next time you create custom labels you can use that.
9. After you select the label options that you want, click **OK**.
10. Word will create a document that contains the sheet of labels. Word uses a table to lay out the labels. If you don't see lines separating the labels, click the **Layout** tab under **Table Tools**, and then in the **Table group**, click **View Gridlines**.
11. Set up your label by typing the text you want in the first label box. You can add mail merge variables by clicking on the Insert **Merge Field** Button.
12. To copy detail to other labels click the **Update Labels** button. A <> mailmerge item will be placed on top each label so word knows to select the next client / animal record when merging details.
13. **Save** and exit the template