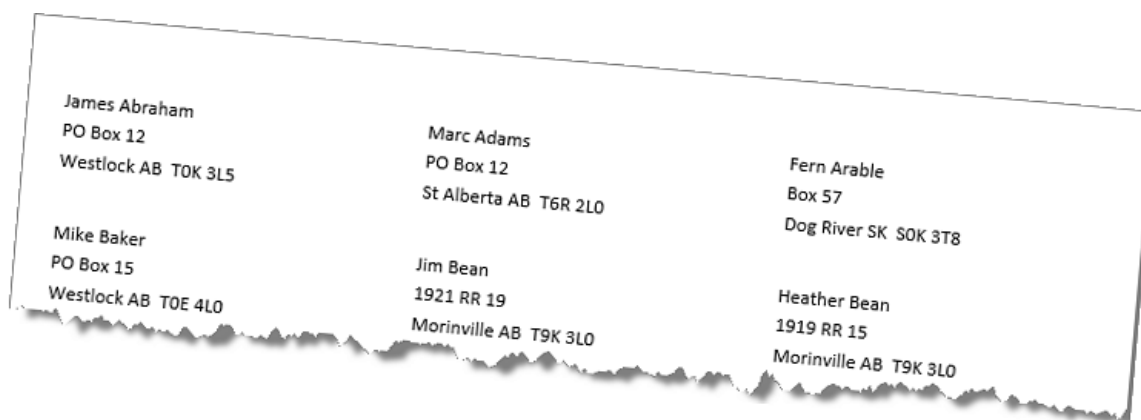


CREATING CUSTOMER MAILING LABELS

agrē has a built-in exports to make it easy to create a data file of customer address information, but how do you turn it into mailing labels? In this example you'll export customer information from agrē, then create mailing labels with Microsoft Word 2010 or 2013 (the steps are the same).



What you'll find:

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| From the Customer Mailing Label Export as an Excel file | 2 |
| Selecting the Destination Folder for XLS files | 3 |
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Exporting Customer Data from agrē

There are **two ways** to export customer address information to create mailing labels. You can use:

- the *Customer Mailing List* export
- or the *Manage Customers* export

Once you've created an export file, you can use it to create mailing labels in Microsoft Word, or in any other program that can read text or XLS files.

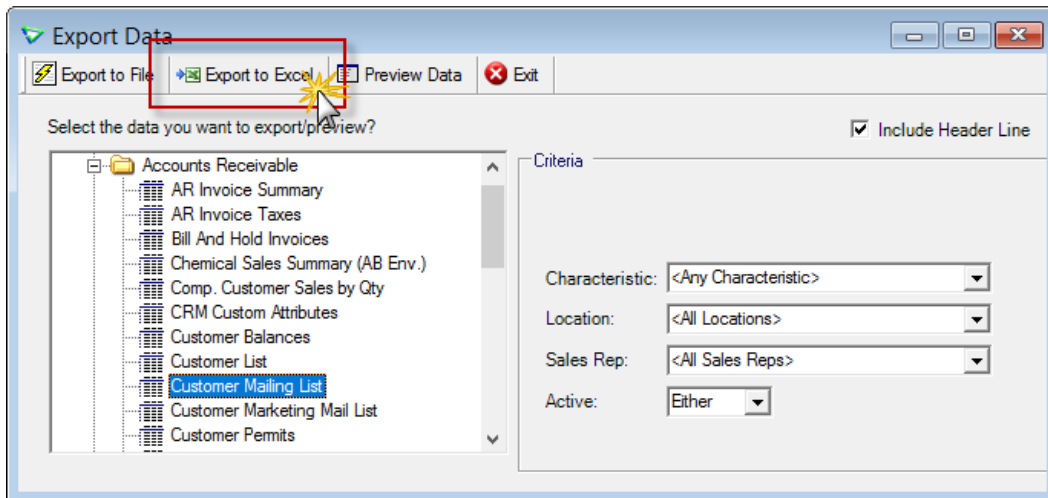
Note

If you are a hosted retailer and run agrē over the internet, please review the section on [Selecting a Destination for Exported Files](#) in online Help before exporting your data.

From the Customer Mailing Label Export as an Excel file

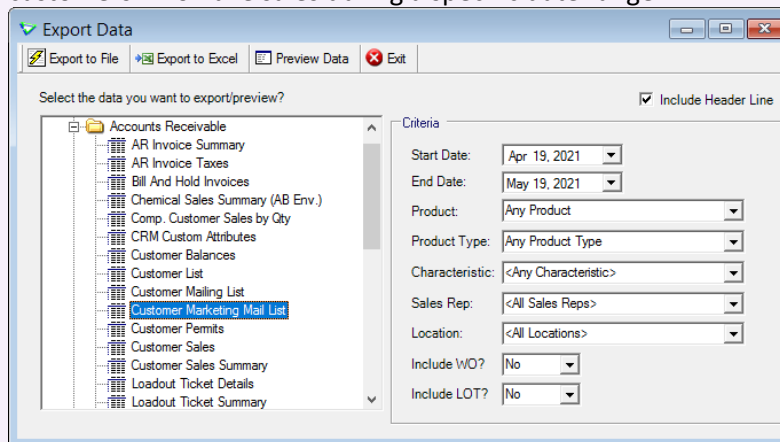
This is the easiest way to create an export file of customer names and addresses. The export file it creates can be opened directly in Microsoft Excel (or any other program that can read an .XLS file).

- Navigate to **File > Exports > Data**
- Select **Customer Mailing List** from the drop down list
- Specify any **Criteria** to narrow down the list of exported addresses (you can always edit the list of names later to remove any extras)
- If you like, **Preview** the addresses that will be exported
- To export the names and addresses, click **Export to Excel**



Tip

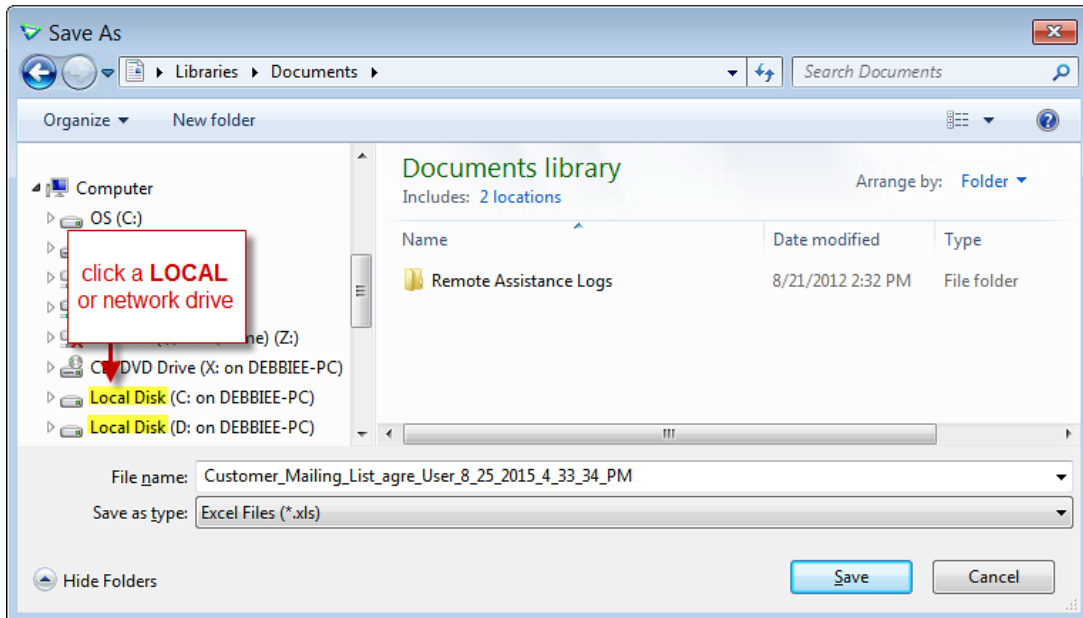
The **Customer Marketing Mail List** allows you to print labels only for customers who have sales during a specific date range



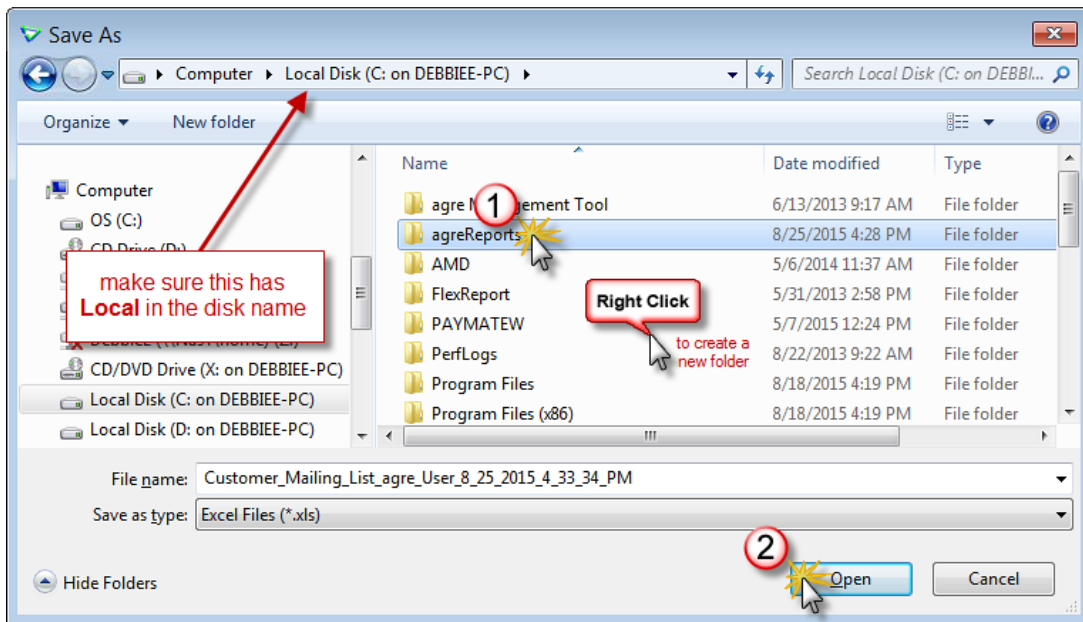
- Select where you want to save the export file

Selecting the Destination Folder for XLS files

- You want save the file on your *own* C: drive. Scroll down past the **Computer** link in the Folders pane to the list of all available network and local drives. Select your **Local Disk C:**.

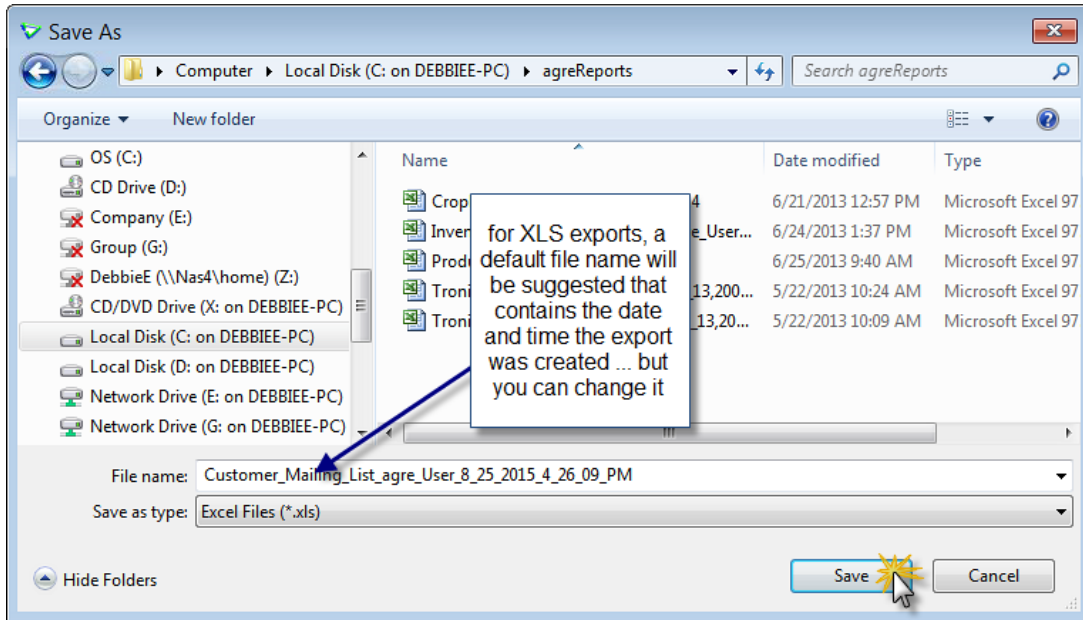


- Navigate to the folder where you usually save your agrē exports or reports and double click it (or select the folder and click the Open button).

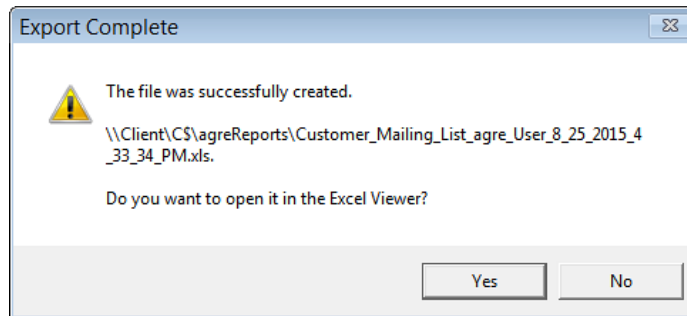


Tip: Citrix needs to save the export file in a folder, not at the root (main level) of the C: drive. If you don't have a folder, create a new one by right clicking on the white space and selecting New > Folder.

- Once you're happy with the export file name (you can edit the suggested one), click **Save**.



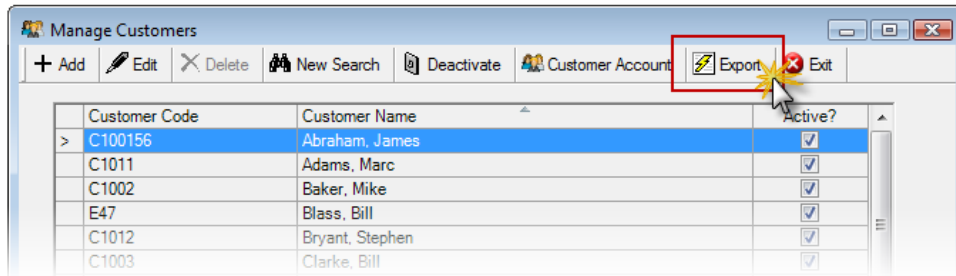
- agrē lets you know the export was successful and offers to open its Excel viewer if you'd like to see it.



From Manage Customers as a Text file

Exporting from the *Manage Customer* window offers more selection criteria to narrow down the list of exported addresses, but agrē won't offer to preview the export file once it's saved – you'll need to preview the results outside of agrē (Notepad or another text reader can open it, or you can import it manually into Excel).

- Navigate to *Accounts Receivable > Manage > Customers*
- Specify any *Criteria* to narrow down the list of exported addresses and click *Search* (you can always edit the list of names later to remove any extras)
- Click *Export* to create the data file



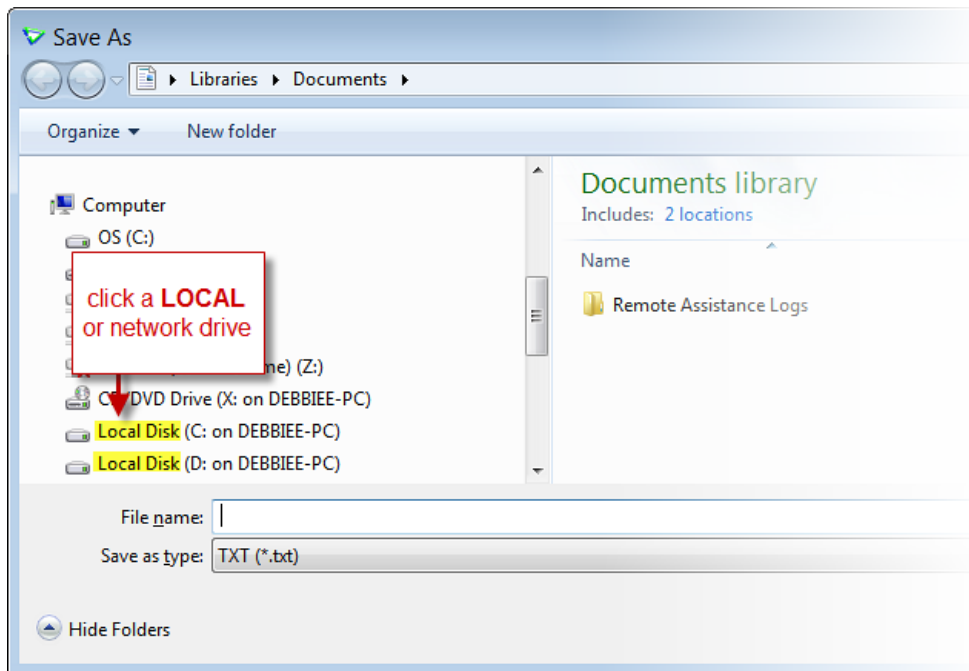
- Select where you want to save the export file

Selecting the Destination Folder for TXT files

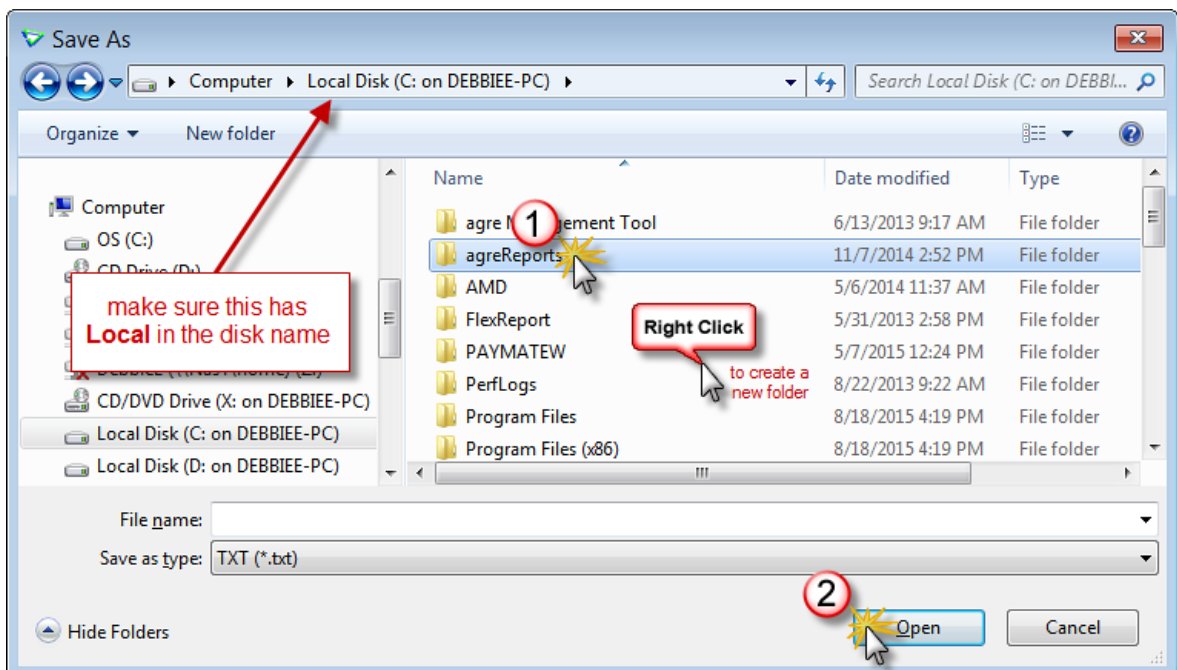
- To choose where agrē will save the exported data file, click the *Browse Folder* button.



- You want save the file on your *own* C: drive. Scroll down past the **Computer** link in the Folders pane to the list of all available network and local drives. Select your **Local Disk C:**.

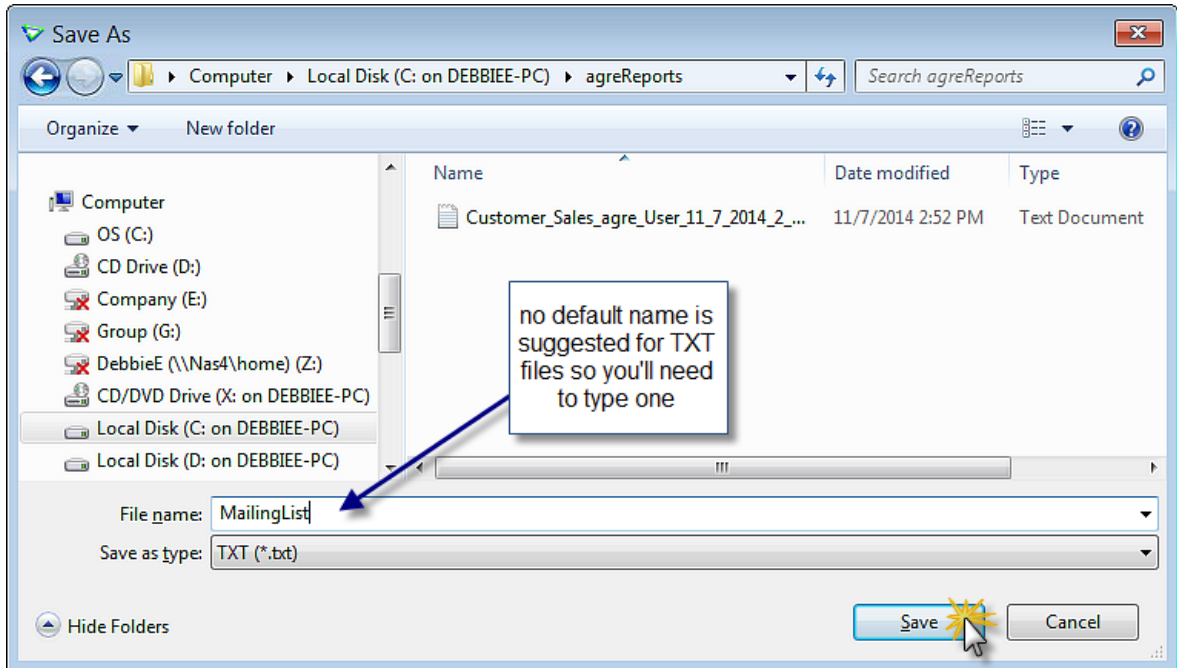


- Navigate to the folder where you usually save your agrē exports or reports and double click it (or select the folder and click the Open button).

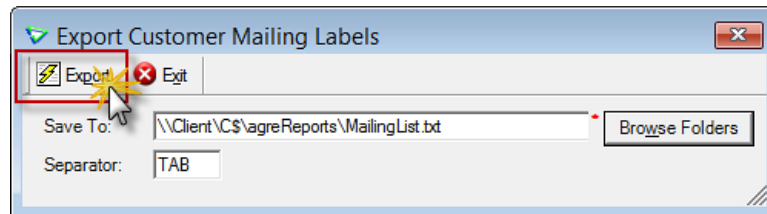


Tip: Citrix needs to save the export file in a folder, not at the root (main level) of the C: drive. If you don't have a folder, create a new one by right clicking on the white space and selecting New > Folder.

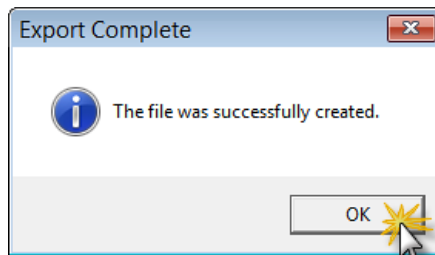
- Type a **name** for the export file (no default name is suggested for TXT export files) and click **Save**.



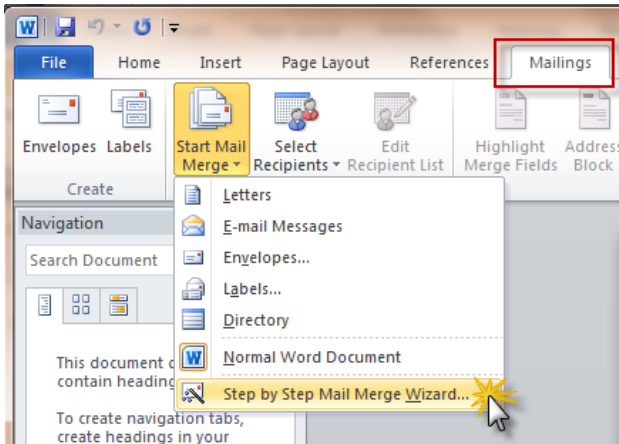
- Click the **Export** button to generate the data file.



- agrē lets you know the export was successful. Click **OK** to continue.

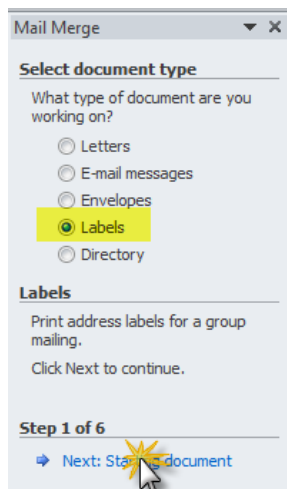


Create the Mailing Labels in Microsoft Word

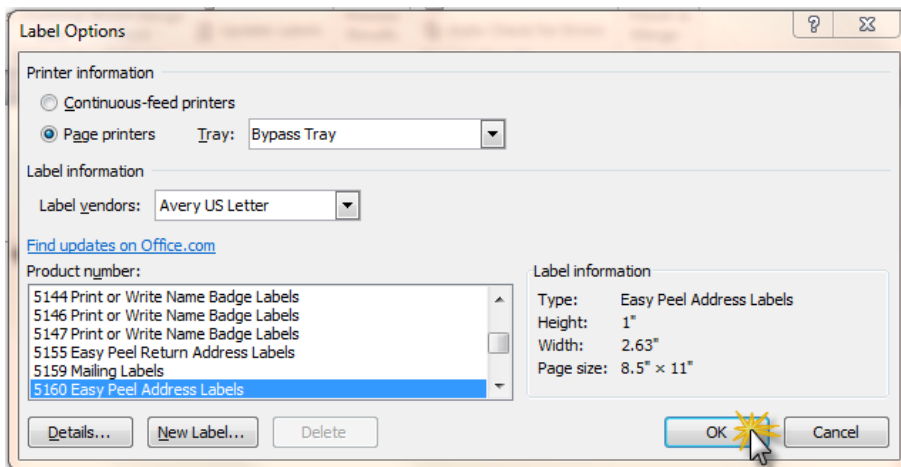
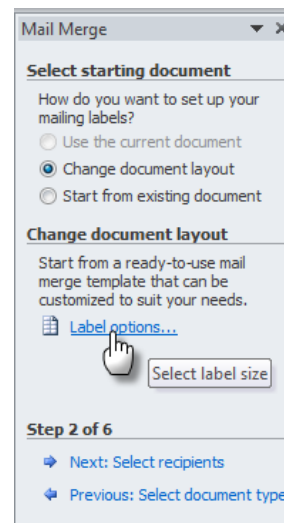


- open Microsoft Word 2010 or 2013
- click on the **Mailings** tab
- start the **Step by Step Mail Merge Wizard**

- select **Labels** as the document type
- click **Next**

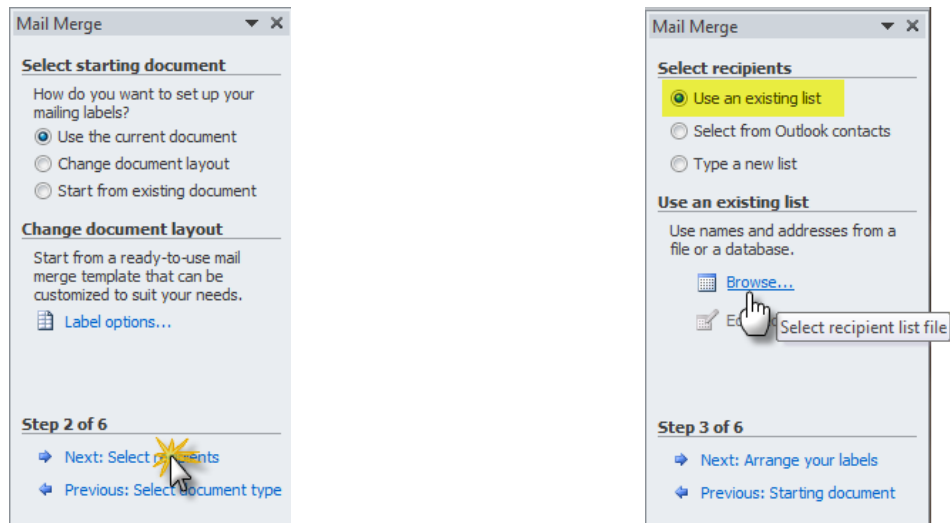


- select **Change document layout**
- click **Label options**

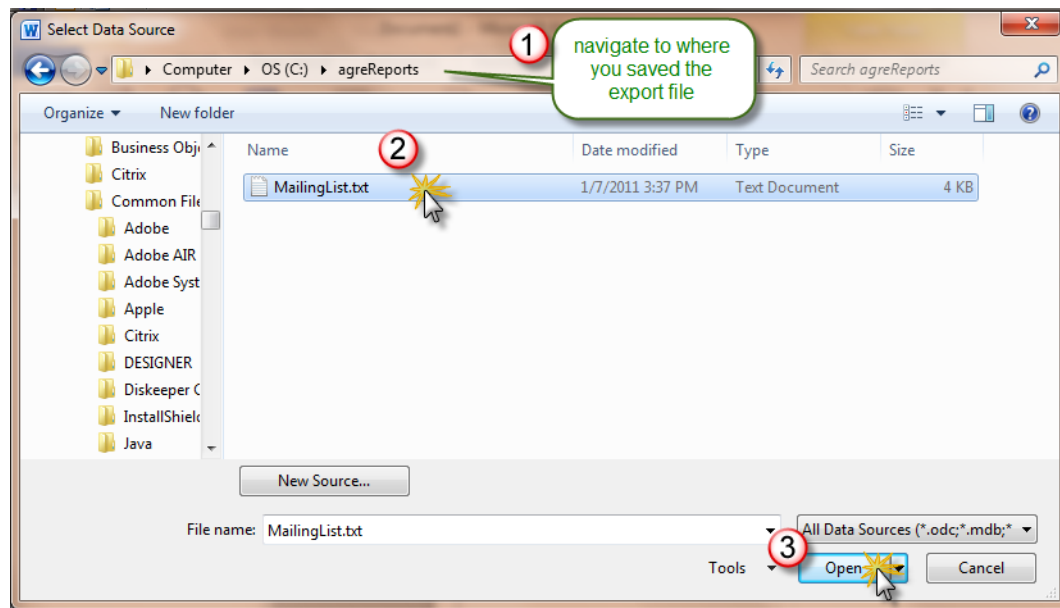


- select your label & printing options
- if your **label vendor** is not listed, the label box should specify equivalents
- click **OK**

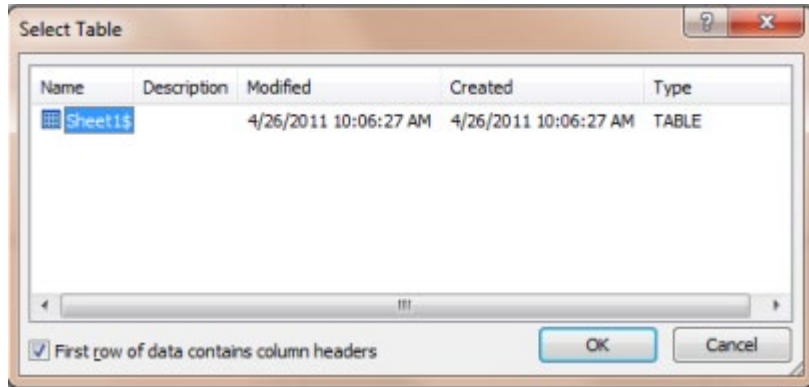
- click **Next: Select Recipients**
- select **Use an existing list** since you've already got a file of the customer addresses from agrē
- click **Browse** to find and select the data file



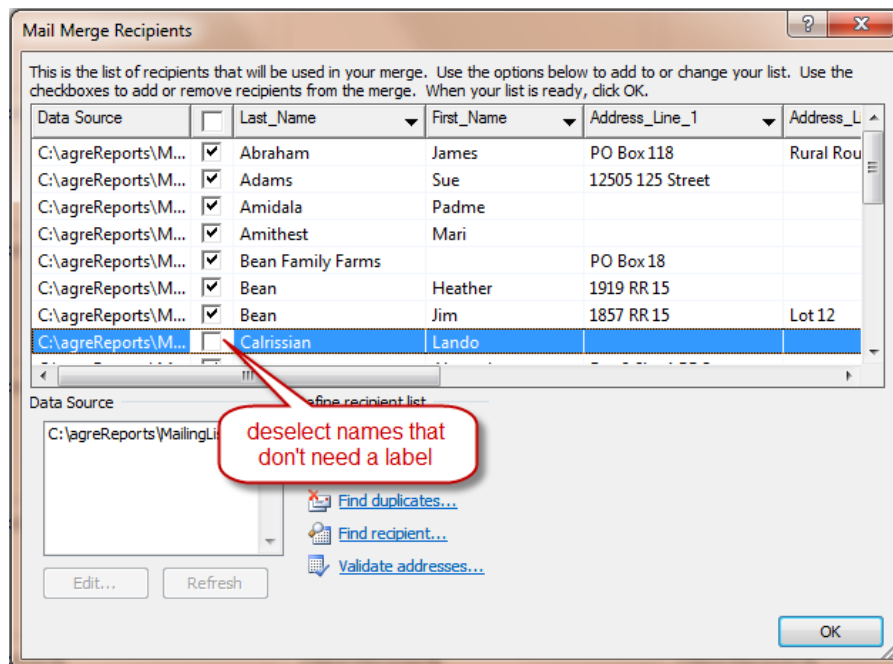
- Use the Folder pane to navigate to the file location of where you saved the agrē export, select the file, and click **Open**.



- If you've saved the export file in an Excel format, you may see a message asking you to verify that the "First row of data contains column headers". agrē does export a header row, so click **OK** to confirm.



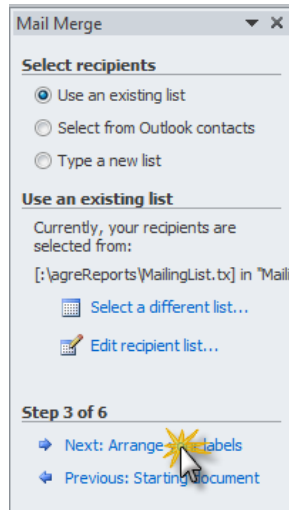
- If you know that there are customers listed that won't need a label, you can deselect them here. Of course, you can leave all customers selected and print a label for everyone but just not use them all. Click **OK** to continue.



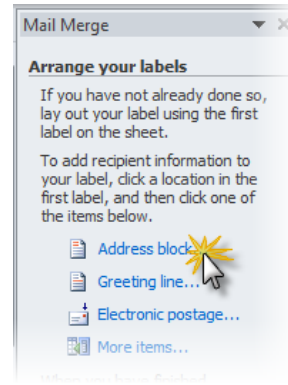
Tip

A shortcut to sorting data in a column is to click on its header. Click again to sort the other way.

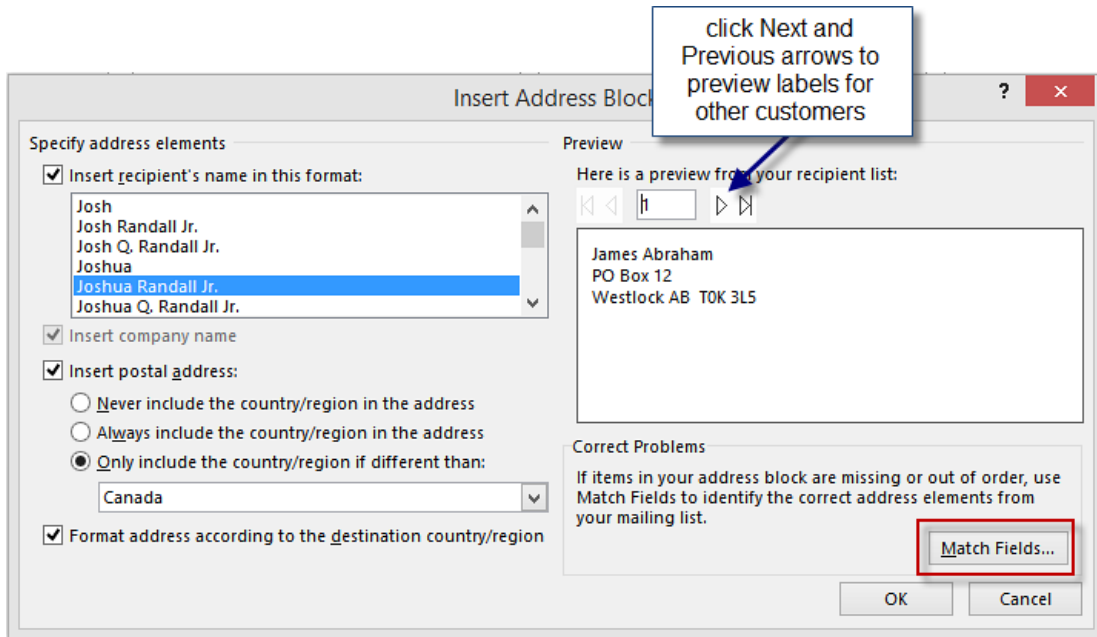
- click **Next** to format the Word document as address labels

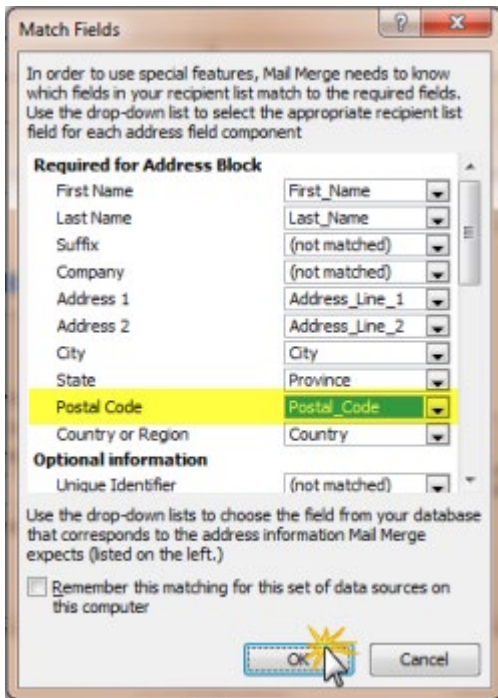


- click **Address block**



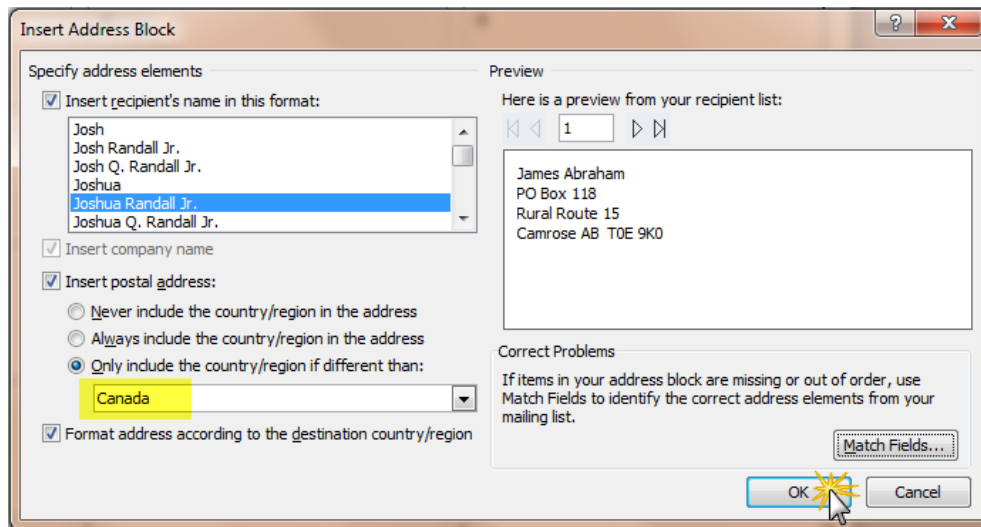
- Most of the time, Word will recognize the names and addresses and assign them to the proper data fields, but if the label preview is missing fields, click the **Match Fields** button and manually assign them.



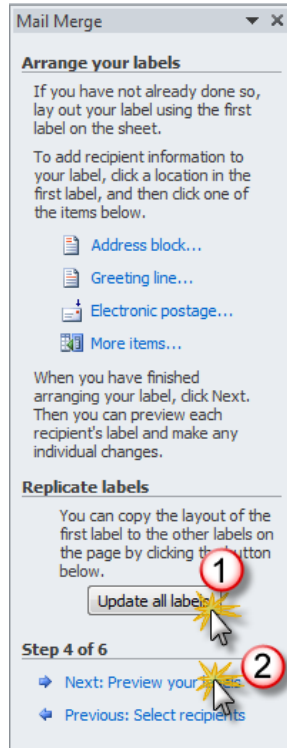


- for example, match the **Postal Code** field in Word to the **Postal_Code** field in the export file
- click **OK**

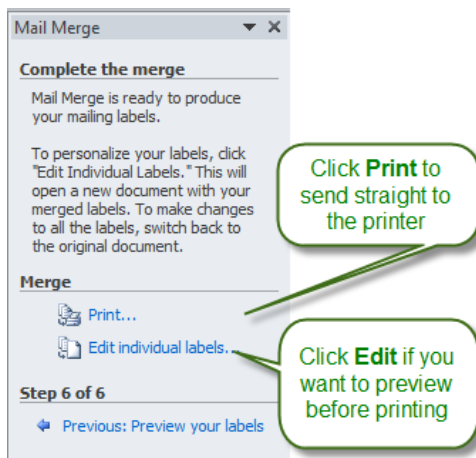
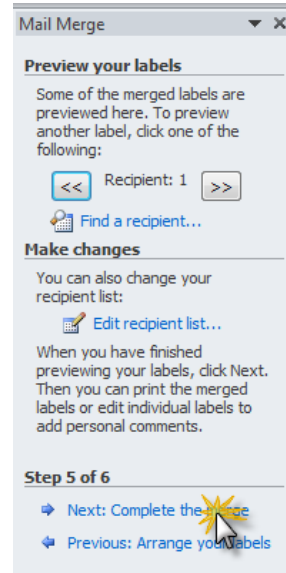
-
- If “Canada” appears on each label and doesn’t need to be there, **change the exclusion** from the United States **to Canada**.
 - When the preview looks like how you want the labels to print, click **OK**.



- click **Update all labels** to copy the same address block format to each label
- click **Next** to see a preview of all labels



- if you need to make any changes, click **Edit recipient list** or **Previous** to go back
- when everything looks how you want it to, click **Next**



- click **Print** to send the labels directly to the printer
- click **Edit** if you'd like to preview (and optionally make changes to) your labels before printing