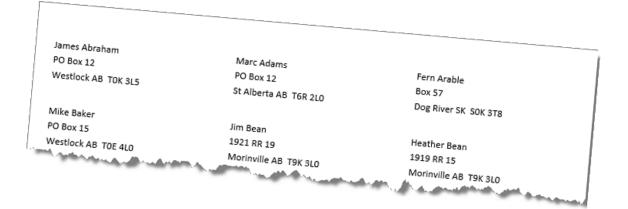




CREATING CUSTOMER MAILING LABELS

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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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*

🐦 Export Da ta	
Export to File Second to Excellent Preview Data	😵 Exit
Select the data you want to export/preview?	✓ Include Header Line
Accounts Receivable AR Invoice Summary AR Invoice Taxes AR Invoice Taxes Giff and Hold Invoices Chemical Sales Summary (AB Env.) Grem: Customer Sales by Qty Giff Customer Balances Gustomer Balances Gustomer List Gustomer List Gustomer Mailing List Gustomer Permits	Criteria Characteristic: <any characteristic=""> Location: <all locations=""> Sales Rep: <all reps="" sales=""> Active: Ether</all></all></any>

Tip

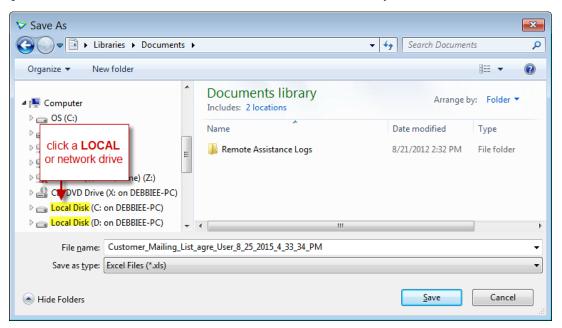
The *Customer Marketing Mail List* allows you to print labels only for customers who have sales during a specific date range

Export to File Report to Excel	a 🔇 E	kit		
Select the data you want to export/preview?				✓ Include Header Line
Accounts Receivable	^	Criteria		
AR Invoice Summary		Start Date:	Apr 19, 2021 💌	
Bill And Hold Invoices		End Date:	May 19, 2021 💌	
Chemical Sales Summary (AB Env.)		Product:	Any Product	T
CRM Custom Attributes		Product Type:	Any Product Type	•
Customer Balances				
Customer List		Characteristic:	<any characteristic=""></any>	-
Customer Mailing List		Sales Rep:	<all reps="" sales=""></all>	•
Customer Permits		Location:	<all locations=""></all>	•
Customer Sales		Include WO?	No 🔻	
Customer Sales Summary		include WO?		
Loadout Ticket Summary	~	Include LOT?	No 👻	

• 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).

🔽 Save As				×
🚱 🗢 🗢 🕨 Computer 🕨 Local Disl	(C: on DEBBIEE-PC) 🕨 👻 🚽	Search Local Dis	k (C: on DEBBI.	P
Organize 🔻 New folder				0
	Name	Date modified	Туре	-
Computer	🛯 🖉 agre I 🌒 ement Tool	6/13/2013 9:17 AM	File folder	E
G D Drive (D)	🔒 agreReports	8/25/2015 4:28 PM	File folder	
e i i i i i i i i i i i i i i i i i i i	AMD 43	5/6/2014 11:37 AM	File folder	
make sure this has Local in the disk name	FlexReport Right Click	5/31/2013 2:58 PM	File folder	
Local in the disk hame		5/7/2015 12:24 PM	File folder	
CD/DVD Drive (X: on DEBBIEE-PC)	PerfLogs to create a new folder	8/22/2013 9:22 AM	File folder	
	🌗 Program Files	8/18/2015 4:19 PM	File folder	
Local Disk (C: on DEBBIEE-PC)	Program Files (x86)	8/18/2015 4:19 PM	File folder	-
LOCALDISK (D: ON DEBBLEE-PC)	▼			P
File <u>n</u> ame: Customer_Mailing_L	ist_agre_User_8_25_2015_4_33_34_PM			•
Save as type: Excel Files (*.xls)		-		-
) Hide Folders	(2	2) <u> Open</u>	Cancel	

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**.

♥ Save As						×
🔾 🗢 📕 🕨 Computer 🕨 Local Dis	ik (C	: on DEBBIEI	E-PC) 🕨 agreReports	•	✓ Search agreRepart	rts 🔎
Organize 🔻 New folder						::: • 🕡
👝 OS (C:)	*	Name	<u>^</u>		Date modified	Туре
CD Drive (D:)		🕙 Crop		4	6/21/2013 12:57 PM	Microsoft Excel 97
Group (G:)		🖳 Inver	for XLS exports, a	e_User	6/24/2013 1:37 PM	Microsoft Excel 97
DebbieE (\\Nas4\home) (Z:)		🕙 Prod			6/25/2013 9:40 AM	Microsoft Excel 97
CD/DVD Drive (X: on DEBBIEE-PC)	Ξ	🕙 Troni	contains the date	13,200		Microsoft Excel 97
Local Disk (C: on DEBBIEE-PC)		🖳 Troni	and time the export	_13,20	5/22/2013 10:09 AM	Microsoft Excel 97
Local Disk (D: on DEBBIEE-PC)			was created but			
🚍 Network Drive (E: on DEBBIEE-PC)			you can change it			
👷 Network Drive (G: on DEBBIEE-PC)	-		III			۱
File name: Customer_Mailing_	List_	agre_User_8	_25_2015_4_26_09_PM			
Save as type: Excel Files (*.xls)						•
) Hide Folders					Save	Cancel

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

Export C	Complete	83
<u>^</u>	The file was successfully created. \\Client\C\$\agreReports\Customer_Mailing_List_agre_User_8_25_2015_4 _33_34_PM.xls. Do you want to open it in the Excel Viewer?	
	Yes No	

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

Ad	d 🖋 Edit 🔀 Delete 🕅	New Search 🗕 Deactivate 👫 Customer Account 📝 Expo	ort 🙆 Exit
Г	Customer Code	Customer Name	Active?
>	C100156	Abraham, James	
	C1011	Adams, Marc	
	C1002	Baker, Mike	
	E47	Blass, Bill	V
	C1012	Bryant, Stephen	
	C1003	Clarke, Bill	

• 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.

🔯 Export C	ustomer Mailing Labels	×
🗲 Export	😢 E <u>x</u> it	
Save To: Separator:	ТАВ	Browse Fold

• 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:**.

Save As	
↓ Libraries → Documents →	
Organize 🔻 New folder	
Computer	Documents library Includes: 2 locations
 OS (C:) Click a LOCAL or network drive CVDVD Drive (X: on DEBBIEE-PC) Local Disk (C: on DEBBIEE-PC) Local Disk (D: on DEBBIEE-PC) 	Name Remote Assistance Logs
File <u>n</u> ame: Save as <u>typ</u> e: TXT (*.txt)	
) Hide Folders	

• 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).

👽 Save As					×
🕞 🕞 🗢 🕞 Computer 🕨 Local Dis	sk (C:	on DEBBIEE-PC) 🕨 👻	✓ Search Local Dis.	k (C: on DEBB	I 🔎
Organize 🔻 New folder				-	0
	*	Name	Date modified	Туре	^
Computer		\mu agre I 🌒 ement Tool	6/13/2013 9:17 AM	File folder	Ξ
G CD Drive (D)		🕕 agreReports	11/7/2014 2:52 PM	File folder	
4		📕 AMD 🗸	5/6/2014 11:37 AM	File folder	
make sure this has Local in the disk name	Ξ	FlexReport Right Click	5/31/2013 2:58 PM	File folder	
		🐌 РАУМАТЕМ	5/7/2015 12:24 PM	File folder	
CD/DVD Drive (X: on DEBBIEE-PC)		PerfLogs to create a new folder		File folder	
Local Disk (C: on DEBBIEE-PC)		🌗 Program Files	8/18/2015 4:19 PM	File folder	
Local Disk (D: on DEBBIEE-PC)		Program Files (x86)	8/18/2015 4:19 PM	File folder	-
Elocal Disk (D. off DEbblee-PC)	T				•
File <u>n</u> ame:					-
Save as type: TXT (*.txt)					-
Hide Folders			2 <u> <u> <u> </u> <u> </u></u></u>	Cancel	

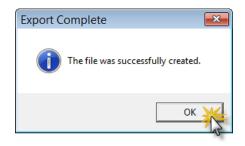
Tip:Citrix needs to save the export file in a folder, not at the root (main level) of
the C: drive. If you don't have a folder, create a new one by right clicking on
the white space and selecting New > Folder.

- 🔯 Save As × Computer > Local Disk (C: on DEBBIEE-PC) > agreReports ✓ ✓
 Search agreReports ρ 2 New folder 800 T Organize 🔻 . Name Date modified Type 👰 Computer Customer_Sales_agre_User_11_7_2014_2_... 11/7/2014 2:52 PM Text Document 👝 OS (C:) 🔮 CD Drive (D:) 🙀 Company (E:) Ε no default name is Group (G:) suggested for TXT DebbieE (\\Nas4\home) (Z:) files so you'll need CD/DVD Drive (X: on DEBBIEE-PC) to type one 👝 Local Disk (C: on DEBBIEE-PC) Local Disk (D: on DEBBIEE-PC) 111 File name: MailingList • Save as type: TXT (*.txt) Ŧ Cancel Save A Hide Folders
- Type a **name** for the export file (no default name is suggested for TXT export files) and click **Save**.

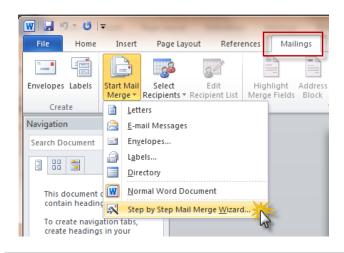
• Click the *Export* button to generate the data file.

😺 Export C	ustomer Mailing Labels	×
	3 E <u>v</u> it	
Save To:	\\Client\C\$\agreReports\MailingList.txt	Browse Folders
Separator:	TAB	
		///

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



Create the Mailing Labels in Microsoft Word



- select Labels as the document type
- click Next

Label Options

Printer information

Page printers

Label information

Product number:

5159 Mailing Labels

Creating Customer Mailing Labels

Continuous-feed printers

Label vendors: Avery US Letter

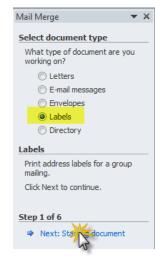
5144 Print or Write Name Badge Labels

5146 Print or Write Name Badge Labels

5147 Print or Write Name Badge Labels

5155 Easy Peel Return Address Labels

Find updates on Office.com



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

- select Change document layout
- click Label options

? XX

Cancel

Mail Merge 🛛 🔻 🗙
Select starting document
How do you want to set up your mailing labels?
O Use the current document
Change document layout
Start from existing document
Change document layout
Start from a ready-to-use mail merge template that can be customized to suit your needs.
Eabel options Select label size
Step 2 of 6
Next: Select recipients
Previous: Select document type

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

Tray: Bypass Tray

•

•

*

Label information

1"

Page size: 8.5" × 11"

2.63

Type:

Height:

Width:

Easy Peel Address Labels

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

Mail Merge 🗸 🗙	Mail Merge
Select starting document	Select recipients
How do you want to set up your mailing labels?	Use an existing list
Output State St	Select from Outlook contact
Change document layout	🔘 Type a new list
\bigcirc Start from existing document	Use an existing list
Change document layout	Use names and addresses from
Start from a ready-to-use mail merge template that can be customized to suit your needs.	file or a database.
Label options	Select recipie
Step 2 of 6	Step 3 of 6
Next: Select Prents	Next: Arrange your labels
Previous: Select Vocument type	Previous: Starting docume

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

	OS (C:) + agreReports	navigate to where you saved the export file		greReports	× (
Organize 🔻 New folder				!≡ ▼ □	0
	ame (2)	Date modified	Туре	Size	
Citrix	MailingList.txt	1/7/2011 3:37 PM	Text Document	4 KB	
Common File	2				
📕 Adobe AIR					
🌗 Adobe Syst					
🌗 Apple					
Citrix DESIGNER					
Diskeeper C					
📗 InstallShiek					
🍶 Java 🚽					
	New Source				
				/* I * II	_
File name:	MailingList.txt		(3)	urces (*.odc;*.mdb	\equiv
		To	ools Open	Cance	ال

• 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.

Name	Description	Modified	Created	Type
III Sheet1	\$	4/26/2011 10:06:27 AM	4/26/2011 10:06:27 AM	TABLE
4				,

• 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.

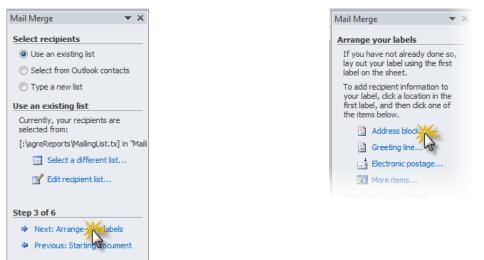
Mail Merge Recipients					? ×
		at will be used in your merge recipients from the merge.		v to add to or change your lis , click OK.	t. Use the
Data Source		Last_Name 🗸	First_Name 🚽	Address_Line_1 🚽	Address_Li
C:\agreReports\M	v	Abraham	James	PO Box 118	Rural Rou
C:\agreReports\M	\checkmark	Adams	Sue	12505 125 Street	
C:\agreReports\M	\checkmark	Amidala	Padme		-
C:\agreReports\M	\checkmark	Amithest	Mari		
C:\agreReports\M	\checkmark	Bean Family Farms		PO Box 18	
C:\agreReports\M	\checkmark	Bean	Heather	1919 RR 15	
C:\agreReports\M	\checkmark	Bean	Jim	1857 RR 15	Lot 12
C:\agreReports\M		Calrissian	Lando		
•		Mir Contraction			+
Data Source		fine recinient list			
C: \agreReports \Mailin	ngLi	deselect names th don't need a labe			
		Find duplicat	<u>t</u>		
Edit	lefres	n			ОК

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.

Insert Add	ress Block	click Next and Previous arrows to preview labels for other customers	? ×
specify address elements	Preview		
✓ Insert recipient's name in this format:	Here is a p	review from your recipient list:	
Josh Josh Randall Jr. Josh Q. Randall Jr. Joshua Randall Jr. Joshua Q. Randall Jr.	James Al PO Box T Westloct		
✓ Insert postal <u>a</u> ddress: ○ Never include the country/region in the address			
Always include the country/region in the address			
 <u>Only</u> include the country/region if different than: 	Correct Pro	blems	
		your address block are missing o	
Canada ✓ ✓ Format address according to the <u>d</u> estination country/region	Match Fiel your mailir	ds to identify the correct addressing list.	Match Fields
		ОК	Cancel

In order to use special featur which fields in your recipient l Use the drop-down list to sele field for each address field co	ist match to the required act the appropriate recipi	fields.
Required for Address Blo	ock	
First Name	First_Name	
Last Name	Last_Name	
Suffix	(not matched)	
Company	(not matched)	-
Address 1	Address_Line_1	-
Address 2	Address_Line_2	
City	City	-
State	Province	-
Postal Code	Postal_Code	-
Country or Region	Country	-
Optional information		_
Unique Identifier	(not matched)	-
Use the drop-down lists to dh that corresponds to the addrespects (listed on the left.) Remember this matching f this computer	ess information Mail Merg	e

- 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**.

Insert Address Block	? ×
Specify address elements Insert recipient's name in this format: Josh Josh Randall Jr. Joshua Randall Jr. Joshua Q. Randall Jr. Joshua Q. Randall Jr. Insert company name Insert postal address:	Preview Here is a preview from your recipient list: I I James Abraham PO Box 118 Rural Route 15 Camrose AB TOE 9K0
Never include the country/region in the address Always include the country/region in the address Qnly include the country/region if different than: Canada Format address according to the <u>d</u> estination country/region	Correct Problems If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. Match Fields OK Cancel

- 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**

Mail I	Merge 🔻
Prev	iew your labels
pre and	ne of the merged labels are viewed here. To preview ther label, dick one of the owing:
(<< Recipient: 1 >>
-	Find a recipient
Mak	e changes
	ı can also change your pient list:
	📝 Edit recipient list
pre The labe	en you have finished viewing your labels, dick Next. In you can print the merged els or edit individual labels to I personal comments.
Step	5 of 6
	Next: Complete the

- Mail Merge ***** × Complete the merge Mail Merge is ready to produce your mailing labels. To personalize your labels, dick "Edit Individual Labels." This will Click Print to open a new document with your merged labels. To make changes send straight to the printer to all the labels, switch back to the original document. Merge Derint... Edit individual labels. Click Edit if you want to preview Step 6 of 6 before printing Previous: Preview your labels
- 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