



Creating Mailing Labels for your SWCS Customers

SWCS Tips and Tricks

2/14/2013

Using the SWCS 4.2 Export Utility and Microsoft Word, create mailing labels for the customers in your Solatech Window Covering Software.

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Overview

This article will step you through the process of exporting customers from your SWCS company database using the SWCS 4.2 Export Utility and then using that exported data as a data source for a mail merge in Microsoft Word.

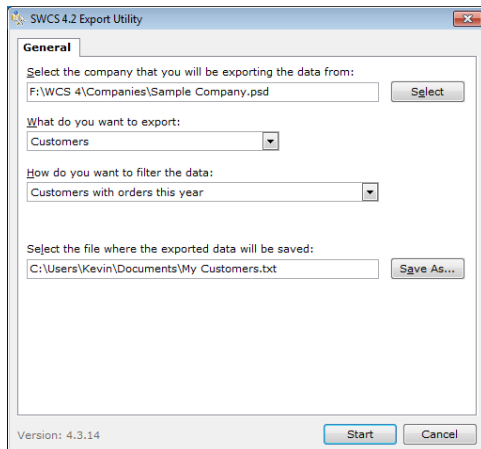
What you will need

- Solatech Window Covering Software 4.2, version 4.2.441 or higher
- SWCS 4.2 Export Utility
- Microsoft Word 2010 or higher

If you have not used the SWCS 4.2 Export Utility before then you should read over the SWCS 4.2 Export Utility User's Guide, which can be opened from within the software or downloaded from: <http://www.solatech.com/manuals/swcs42euuserguide.pdf>.

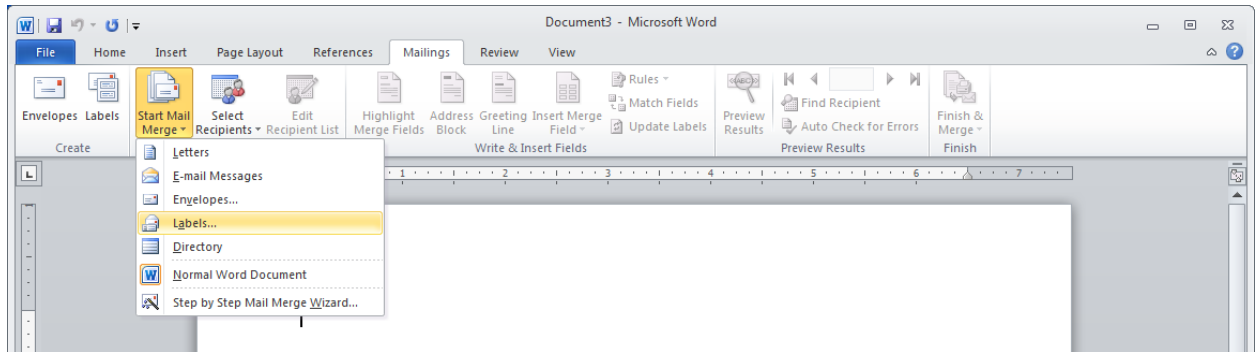
The Steps

1. Run the SWCS 4.2 Export Utility.
2. Click the Select button to select the SWCS company that contains the customers you want to create labels for.
3. Under *What do you want to export*, select Customers.
4. Under *How do you want to filter the data*, select how you want to filter the customers. For example if you only want customers that have placed orders with you (as opposed to those you have quoted for) you would select "Customers with orders this year".
5. Click Save As and select a file where the exported data will be saved. This file will be the file used as the data source for the mail merge.
6. The export utility should now look similar to this:

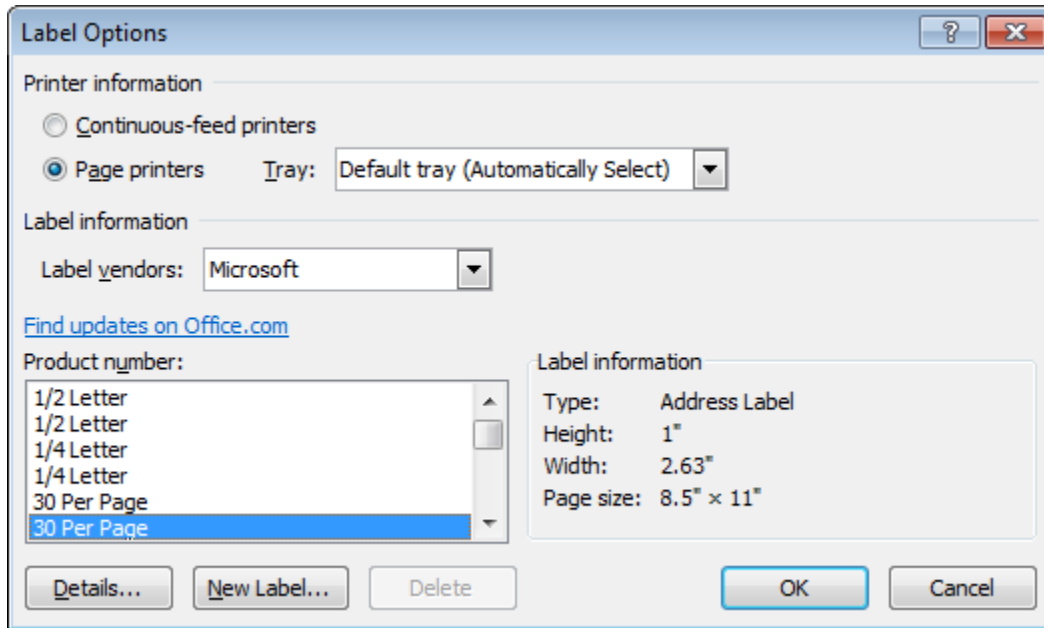


7. Click Start to export the customers. You may be prompted to login to the SWCS company.
8. Run Microsoft Word.

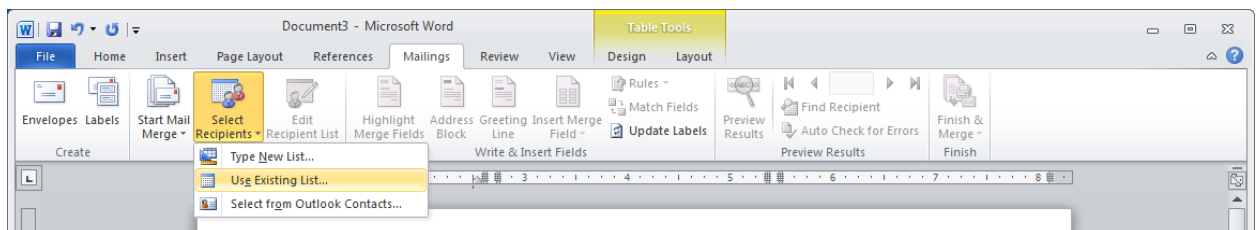
9. From the Mailings tab, click Start Mail Merge, Lables...



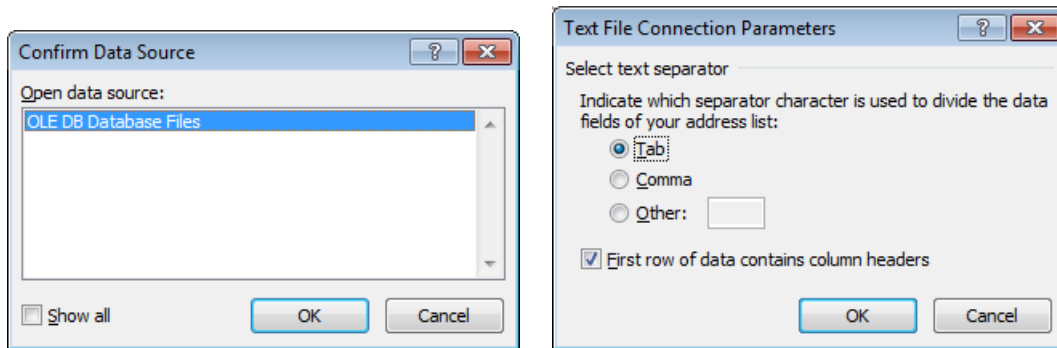
10. Select the label options that apply to the size and type of label you want to create. For this article we will be using sheet labels, 30 to a page.



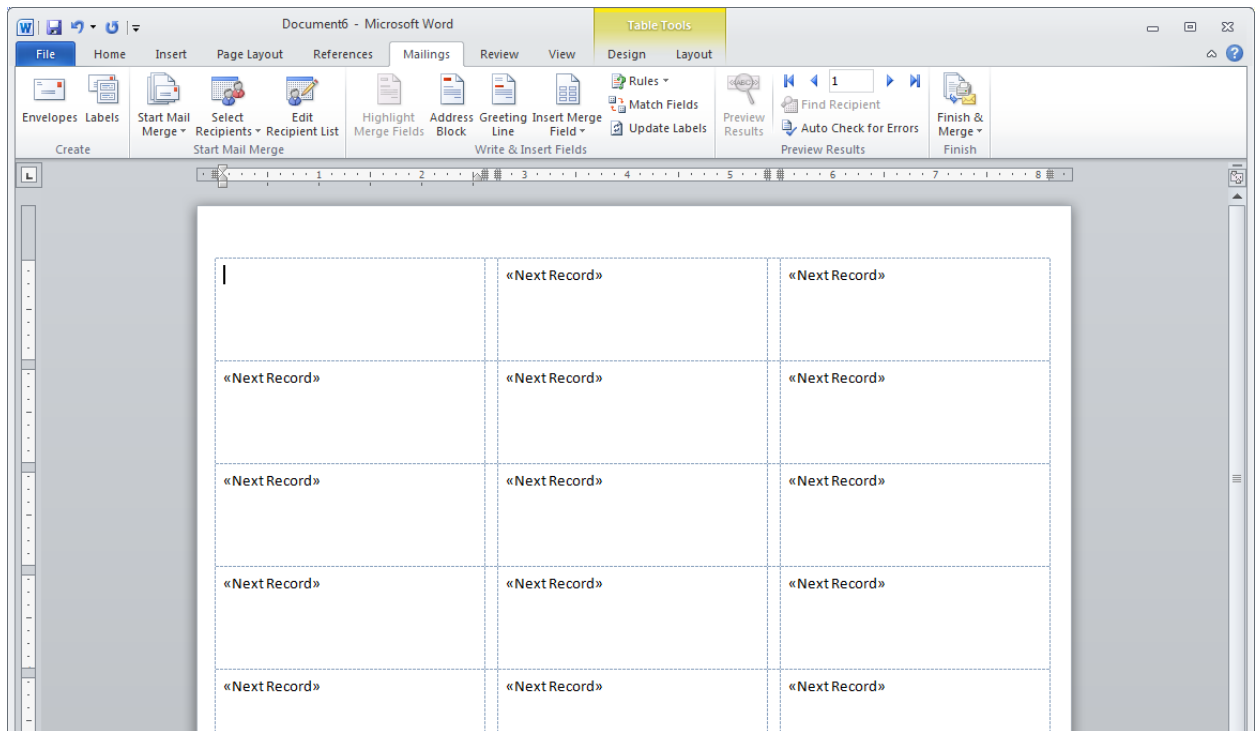
11. From the Mailings tab, click Select Recipients, Use Existing List...



12. Navigate to the export file you created. Select it and click Open. If you are prompted to confirm the data source click OK. If you are prompted to confirm the connection parameters click OK.

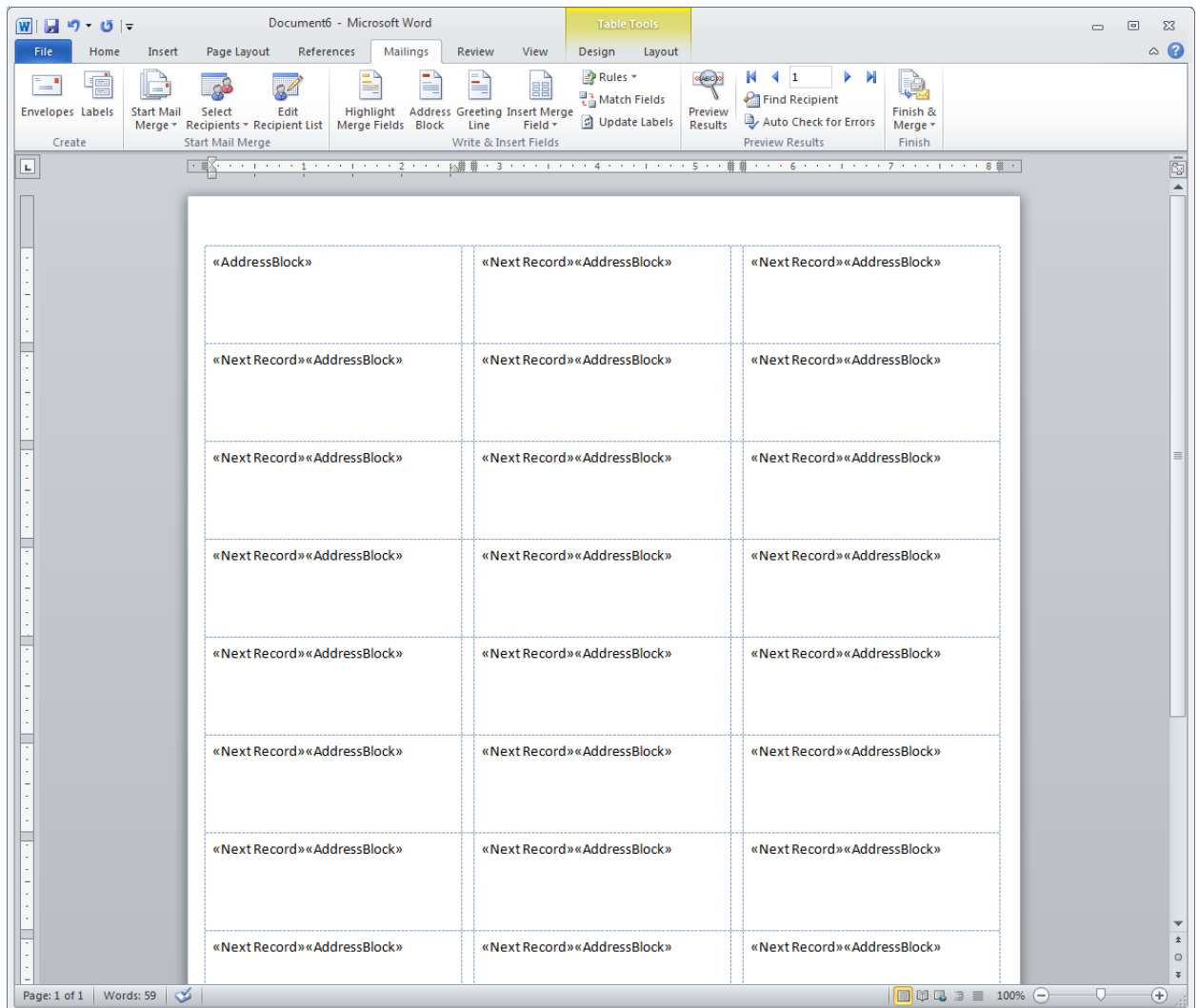


13. You should now have a page that looks like this:

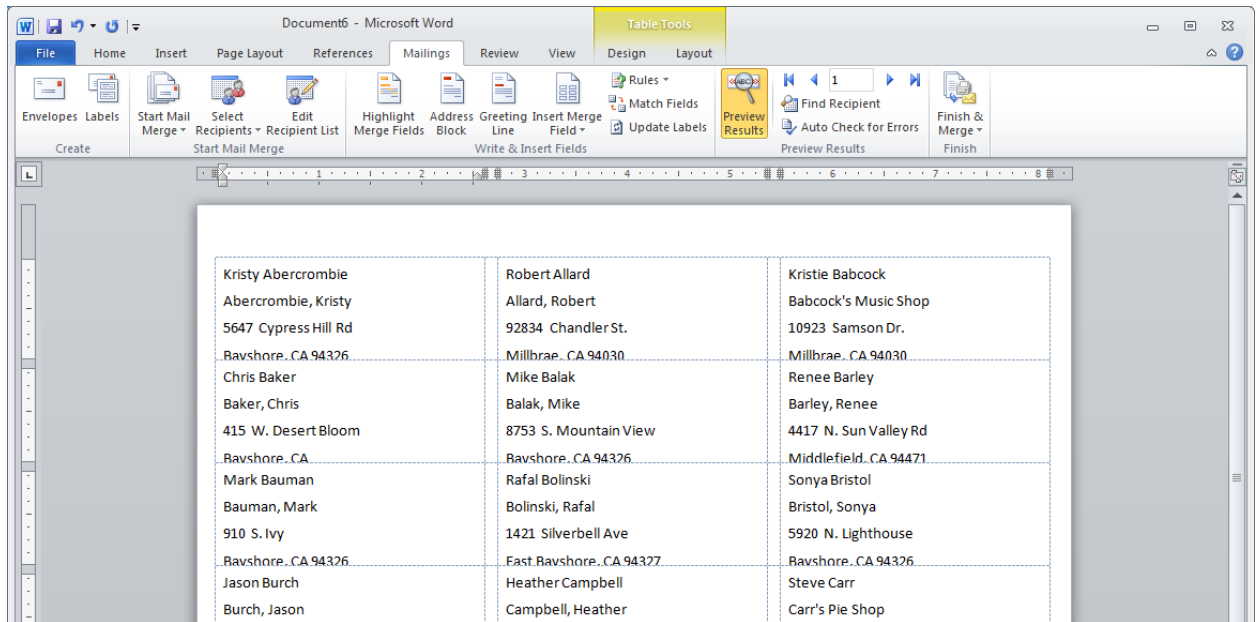


14. Make sure the cursor is in the first label. Select the Mailings tab and then click Address Block. Click the Match Fields button.
15. Make the following assignments:
- a. First name = Contact
If your customer name is always the same as the contact name you can leave this blank.
 - b. Company = CustomerName
 - c. Address 1 = BillToAddress1

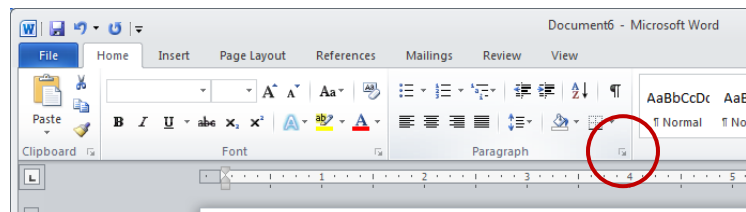
- d. Address 2 = BillToAddress2
 - e. City = BillToCity
 - f. State = BillToState
 - g. Postal Code = BillToZip
 - h. Country = BillToCountry
16. Change the entry *Unique Identifier* to (not matched).
 17. Click OK.
 18. If the preview of the address looks OK then click OK again.
 19. You should now have the words <<AddressBlock>> in the first label.
 20. From the Mailings tab, click Update Labels. This will add the address block to all the other labels.



21. If you want to see what the labels will look like, click the Preview button on the Mailings tab.
With our sample data this is what we have:



22. You may need to adjust the paragraph formatting to get the address to fit correctly on the label. It will depend on the size label you choose. If you need to adjust the formatting:
- Press CTRL + A to select all the text on the page.
 - Click on the Home tab and then click the Paragraph button on the ribbon.



- Change the *Spacing Before* to 1" and the *Line Spacing* to Single.
 - Click OK.
23. Make any further adjustments to the labels, such as font size and colors.
24. To finish the mail merge, click Finish & Merge on the Mailings tab and the select Print...