Creating Mailing Labels
with Sage BusinessWorks Exports

Please note:

These instructions were created *as an example* for use with Microsoft Office 2003. If you are using a different version of Microsoft Office, please refer to that product's Help for instructions. For further assistance, please contact Microsoft's technical support department. As a reminder, Sage Software cannot assist you with the use of non-Sage products such as Microsoft Word or Excel

Section 1: Exporting Customer List

The first step in creating mailing labels is to export the data from Sage BusinessWorks Accounting.

This example illustrates steps to export customer address information by exporting a list of customers.

1. Open Sage BusinessWorks.
2. Select **Accounts Receivable** / **Customers** / **Maintain Customers**. Click the 'Lookup' button, and click the '**Power Search'** tab.
3. Clear the '**Show 400 records**' check box, and click the '**Find Now**' button.
4. Click the '**Export**' button to send the list to Microsoft Excel.
5. Edit or sort the information, if necessary.
6. Select **File / Save** and record the name and location of the file being saved.

Section 2: Export the data with Custom Exports

This example illustrates steps to export customer address information using Custom Exports.

1. Open Sage BusinessWorks.
2. Select **Accounts Receivable** / **Transfer** / **Custom Exports**.
3. Click the '**New**' button. In the 'Template Name' field, enter a unique name that reflects the type of information exported (for example, Customer Address Labels). Click the '**Next**' button.
4. In the 'Data Source' drop-down box, select the type of information required. To create customer mailing labels, select "**AR Customers**". Click 'Next'.
5. In the 'Select' window, add all fields appropriate for mailing labels:
   - To select fields individually: From the 'Available' list, select a field one-at-a-time by double-clicking the field or click the field once and select 'Add'.
   - To select a range of fields: Click the first field in the range, press SHIFT and click the last field in the range. Click 'Add'.
   - Select multiple fields outside a range: To select multiple fields outside a range, press CTRL and click each of the fields to be included. Click 'Add'.
     Note: The order that you select fields is unimportant. You can reorganize the fields later when the information is imported into Microsoft Word.
6. Click '**Next**'. To skip the 'Set Sort By' window, click '**Next**'. The information can be sorted later in Word.
7. To filter the exported data, select the criteria in the 'Set Filters' window. Click '**Done**'.
8. The 'Custom Exports' window displays a list of templates. Select the template created in step 3, and click the '**Export**' button.
9. In the 'Please choose an Export Format' drop-down box, select "**Microsoft Excel**". Select the '**Export To File**' radio button, and click '**OK**'.
10. Select and record the location and name of the file saved: _____

On filtering…

You can filter on any information in the Sage BusinessWorks record, even if that field is not included in the export outline. For example, when exporting customer information, you can filter data based on customer current balance, open deposit balance, or nearly 100 other fields. Although you can assign filters later in Word, the filter is limited to the exported fields.

Section 3: Modifying the file in Microsoft Excel

Note: If a Customer List was exported, continue to Section 4.

To facilitate a smooth import into Microsoft Word, use Microsoft Excel to modify the exported information:

1. Open Microsoft Excel. Select **File** / **Open**. When prompted for the directory and file name, use the information recorded in step 10. Click '**Open**'.
2. Sage BusinessWorks Custom Exports automatically inserts a worksheet heading with the file creation date and headings for each column. For the column headings to be useful in later steps, the headings must be in row 1 of the worksheet. **Delete the rows above the column headings.** Select each row number (in this example, rows 1 and 2), and select Edit / Delete. For more information on deleting columns and rows in a spreadsheet, see Help in Microsoft Excel.
3. Select **File** / **Save**, and select the file name and location. Close Microsoft Excel. If you receive a message that the file was created with an older version of Microsoft Excel, select "Yes" to overwrite it with the latest version.
4. Close Microsoft Excel.

Section 4: Create mailing labels in Microsoft Word

To import the Sage BusinessWorks information into Microsoft Word 2003:

1. Open Microsoft Word.
2. Define the document type and main document:
    a. Select **File** / **New**, and click '**Blank document**'.
    b. Select **Tools** / **Letters and Mailings** / **Mail Merge**.
    c. In the 'Select document type' area, click the '**Labels**' radio button.
    d. Click the '**Next: Starting document**' link.
    e. Click the '**Change document layout**' radio button, and click '**Label options**'. Select the label product and product number.
3. Connect to a data file and select recipients:
    a. Click the '**Next: Select recipients**' link. Click the '**Use an existing list**' radio button, and click '**Browse**'. In the 'Files of type' drop-down box, select "**Excel Files (*.xls)**". If 'Excel Files (*.xls)' or 'All Files (*.*)' is not selected, the spreadsheet does not display. Select the export file (see the last step in sections 1 or 2), and click '**OK**'.
    b. In 'Select Table' window, click '**OK**'.
    c. In the 'Mail Merge Recipients' window, the list can be sorted and recipients selected. Click '**OK**'.
4. Arrange your labels and insert merge fields:
    a. Click the '**Next: Arrange your labels**' link, and click '**More items**' to insert the merge fields. Select each field you want displayed and position the fields on the label.
    b. Click the '**Update all labels**' button.
5. Click '**Next: Preview your labels**'.
6. Click '**Next: Complete the merge**'.
7. Select '**Print**' or '**Edit individual labels**'.