

MDS Quick Tip – Creating Mailing Labels using MS office

Overview: Often we want to create a mailing label to send out information to our customers, using ODBC and your current MDS connection this is a simple and easy task.

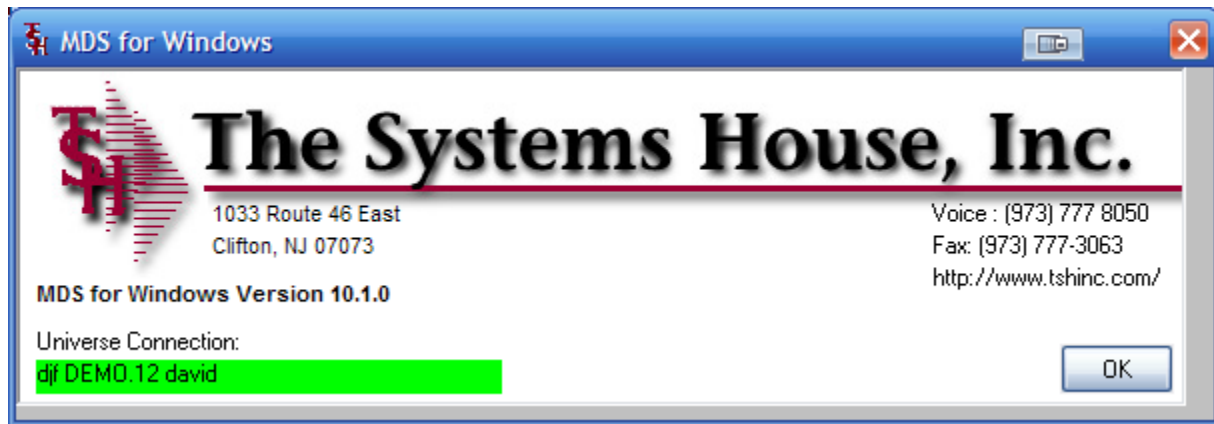
Step 1 – Login to MDS and version your ODBC connection is Active

The screenshot displays the MDS interface with the following components:

- Header:** local-Vmware - [djf-DEMO.12-MAIN.MENU]
- Menu:** djf-DEMO.12-MAIN.MENU with options: File, Edit, Settings, Reset, Tools, Mode, Standard Functions, Special Functions, Refresh Dashboard, Help.
- Shortcuts:** MDS Menu, Find
- Application List:**
 - Customer Service
 - Purchasing
 - Warehouse Management & Inventory
 - Sales Analysis
 - Sales Management Menu
 - Accounting Menu
 - File Maintenance
 - End of Period Processing
 - Utility Menu
 - Customer Special Programs
 - Optional Systems
- Tasks Table:**

Date	Time	Description
4/12/2013	01:00 am	Send Pharma Flyer to
5/9/2012	8:00am	Quoted need to spea
5/28/2012	8:00am	Followup on Backord
4/4/2013	8:00 am	Weekly Meeting
5/10/2013	12:00 am	Followup with AMRO
5/31/2013	12:30 am	Marketing updates d
- Charts:** Charts, Key Indicators. Includes a pie chart titled "Annual Sales by Custo" with segments: 15.1%, 1%, 40.9%, and 43%.
- Footer:** Navigation icons for Home, Back, Help, and various system functions like Contacts, Maint, Drill, Execinq, Reports, Capt Off, View, Help, Ok/End, Insert, Delete, Prev, Next, Inquiry, Can.

Once logged in go to help and About



As long as your connected it will show as Green.

Step 2. Open Word to bring your label – go to NEW → and choose labels on the left → for this example we will do business mailing labels

New Document

- Budgets
- Business cards
- Calendars
- Cards
- Certificates
- Charts and diagrams
- Contracts
- Envelopes
- Faxes
- Flyers
- Forms
- Inventories
- Invitations
- Invoices
- Job descriptions
- Labels**
- Letterhead
- Letters
- Lists and to-do checklists
- Memos
- Minutes
- Newsletters



Search Microsoft Office Online for a template



Labels

- Case inserts
- Gift labels
- Mailing and shipping labels
- Media labels
- Office labels
- Product labels
- Stickers
- Tags
- Other labels

New Document

Microsoft Office Online

- Featured
- Agendas
- Books
- Brochures and booklets
- Budgets
- Business cards
- Calendars
- Cards
- Certificates
- Charts and diagrams
- Contracts
- Envelopes
- Faxes
- Flyers
- Forms
- Inventories
- Invitations
- Invoices
- Job descriptions
- Labels**
- Letterhead

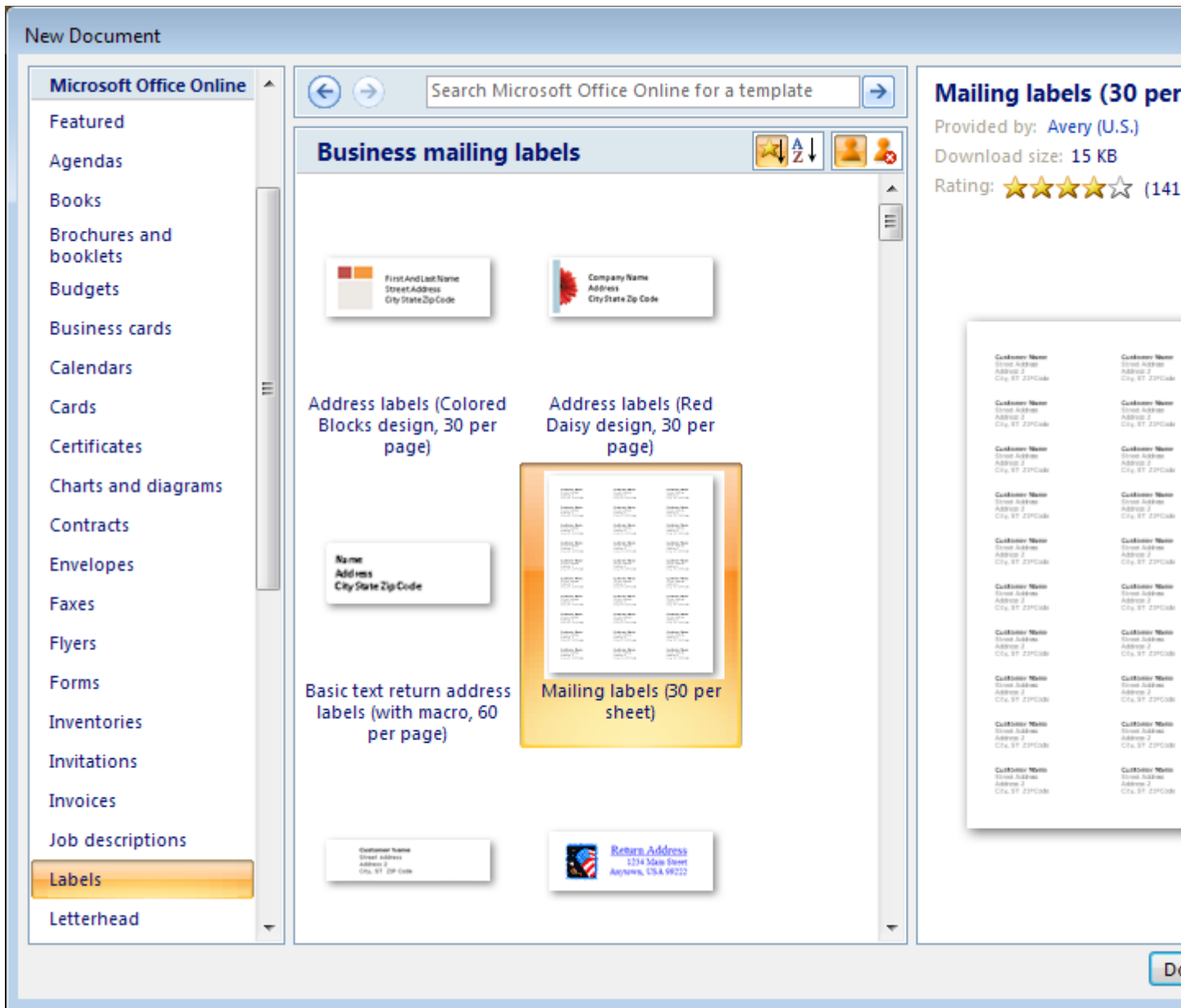


Search Microsoft Office Online for a template



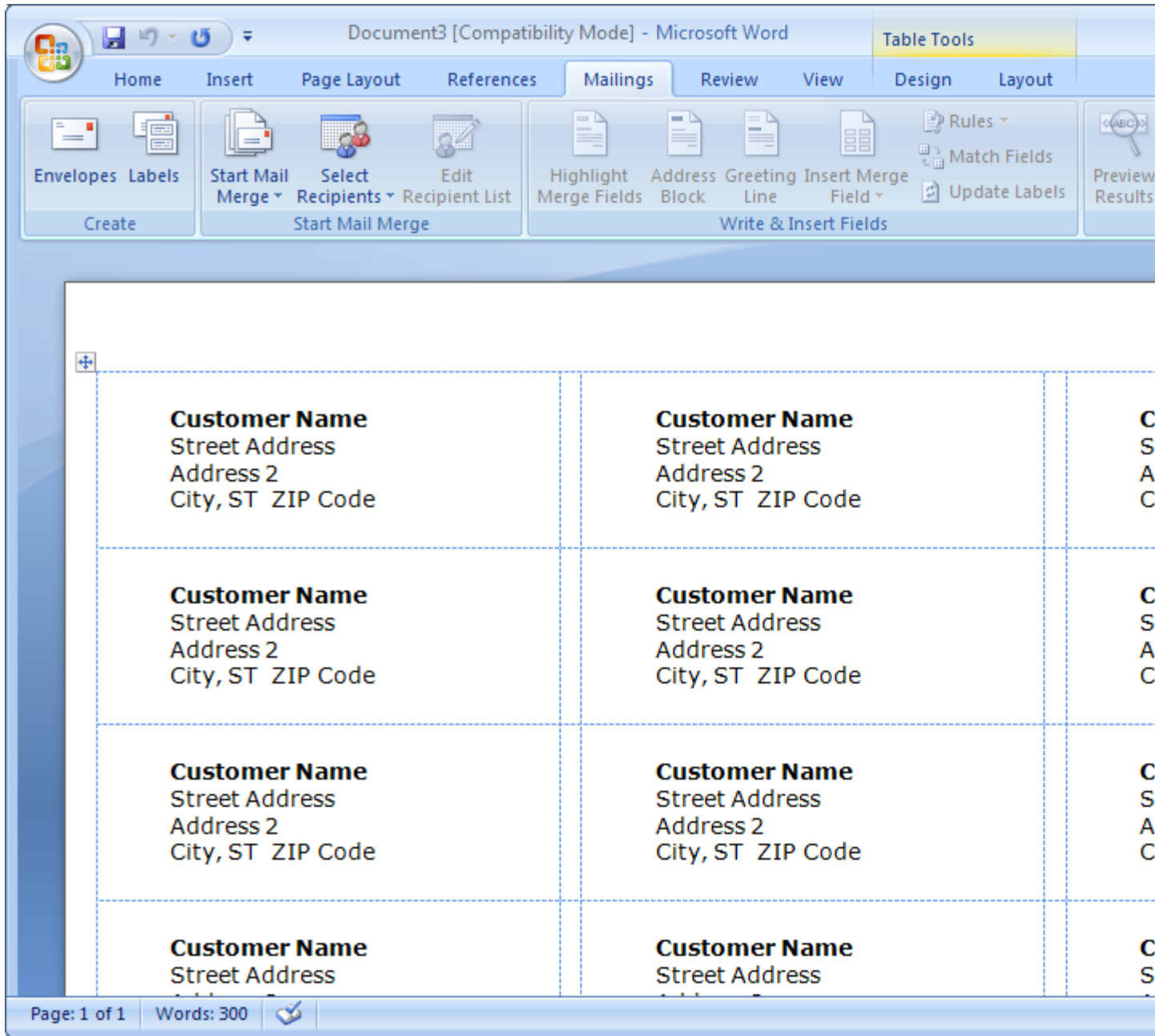
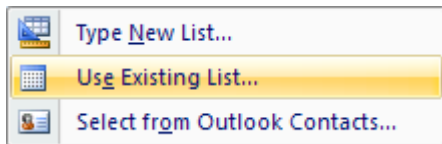
Mailing and shipping labels

- Business mailing labels
- Holiday mailing labels
- Home mailing labels



For Today's Example we used the Avery 30 Per page label option.

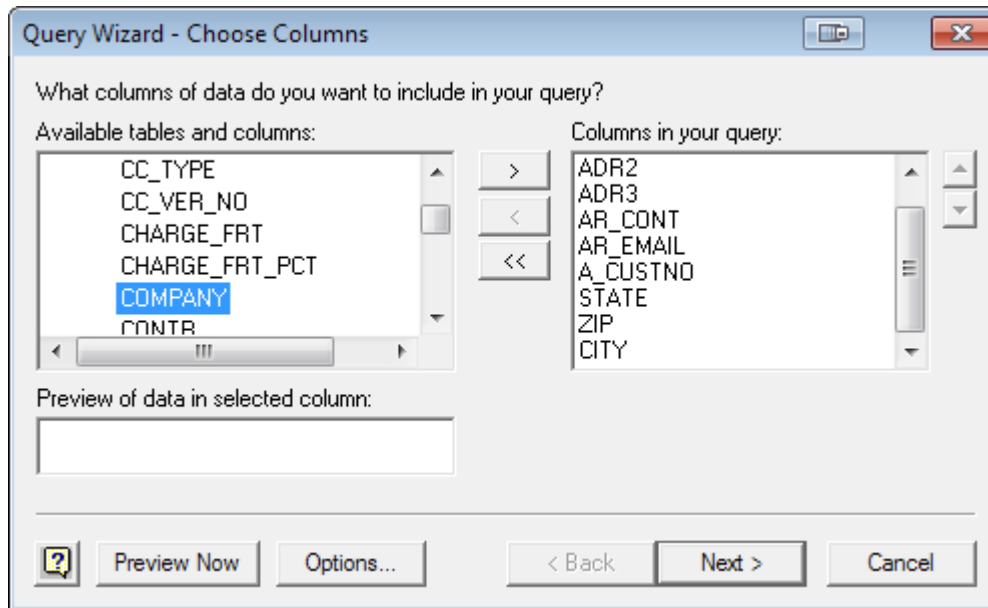
Step 3. Import your data – click on the mailings tab on the ribbon bar. Choose select recipients → use existing list



-Create your List in Excel by going into excel – choosing Data →Other Data and using the wizard to select the cust.mast table

By default MDS will create a DSN for you in your my documents\reports folder called MDS.ODBC.dsn

This will allow access to the MDS database. , Choose the fields you want in the wizard.



Book1 - Microsoft Excel

Table Tools: Design

Table Name: Table_Query_fro

Table Style Options:

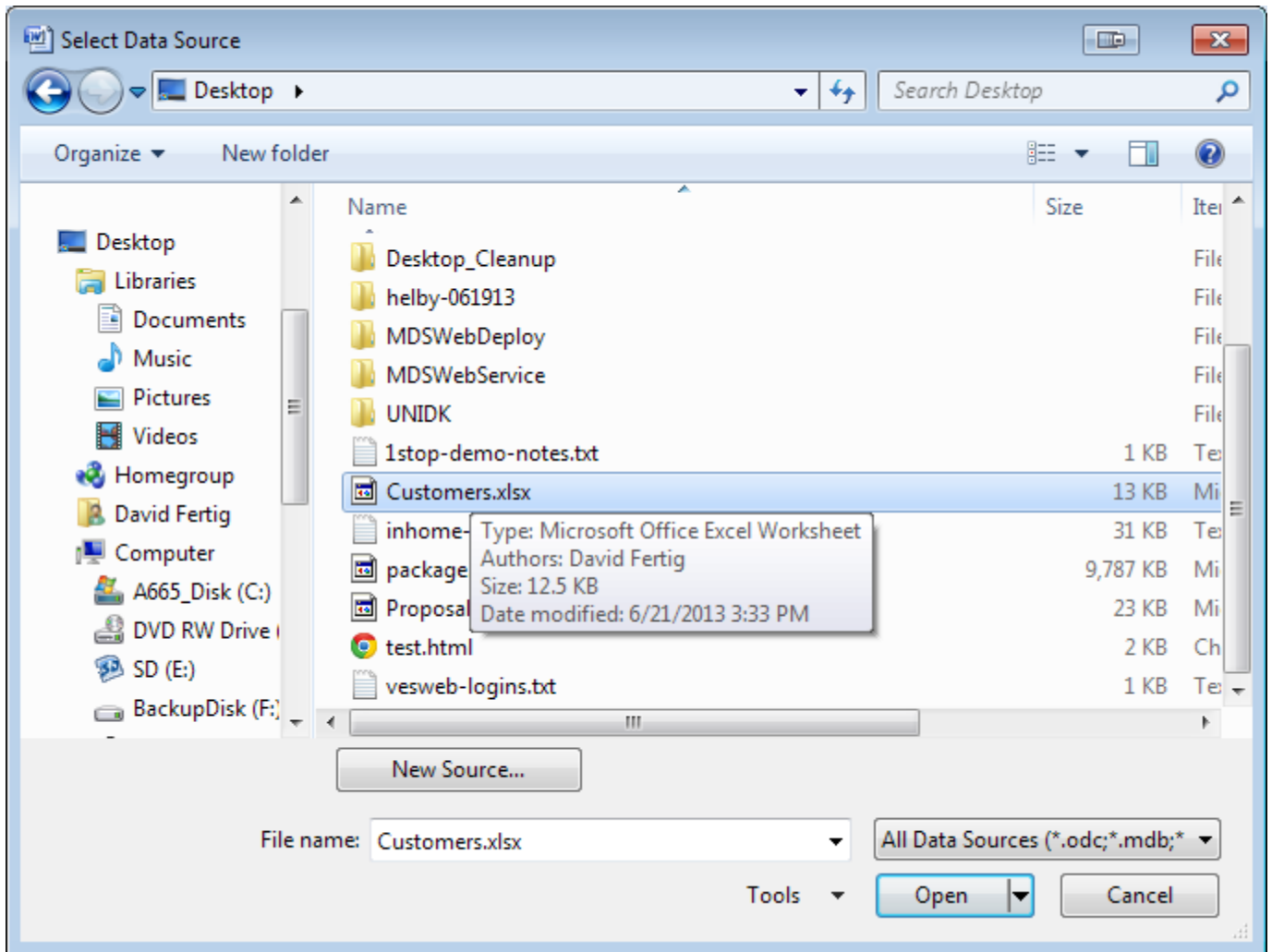
- Header Row
- First Column
- Total Row
- Last Column
- Banded Rows
- Banded Columns

	A	B	C	D	E
1	ADR1	ADR2	ADR3	AR CONT	AR EMAIL
2	ACCOUNTS PAYABLE/TRAVEL	400 BROADWAY AVE		SY FERTIG	sf@tshinc.com
3	503 3RD STREET	PO BOX 460			
4	1444 2ND AVENUE SE				
5	75 SHORT STREET NW				
6	1401 CREES STREET				
7	3933 MT VERNON RD SE				
8	3701 KATZ DRIVE			JOLEEN	
9	100 CENTRAL AVE				
10	INDEPENDENCE	1100 1ST STREET EAST			
11	1790 BLAIRSFERRY ROAD				
12	1 ST JOSEPH DRIVE				
13	519 UNIVERSITY AVENUE				
14	500 E MARKET STREET				
15	321 EAST MARKET STREET				
16	3701 1ST AVENUE SE				
17	2415 HEINZ ROAD				
18	RM 220 SSB 2540				
19	4360 KENNEDY BLVD				MM@MARKOWITZ.COM
20	2ND & MAIN				
21	100 MCCAULEY	1330 ELMHURST DR NE			
22	900 BANK COURT				
23	411 10TH STREET SE #2200				

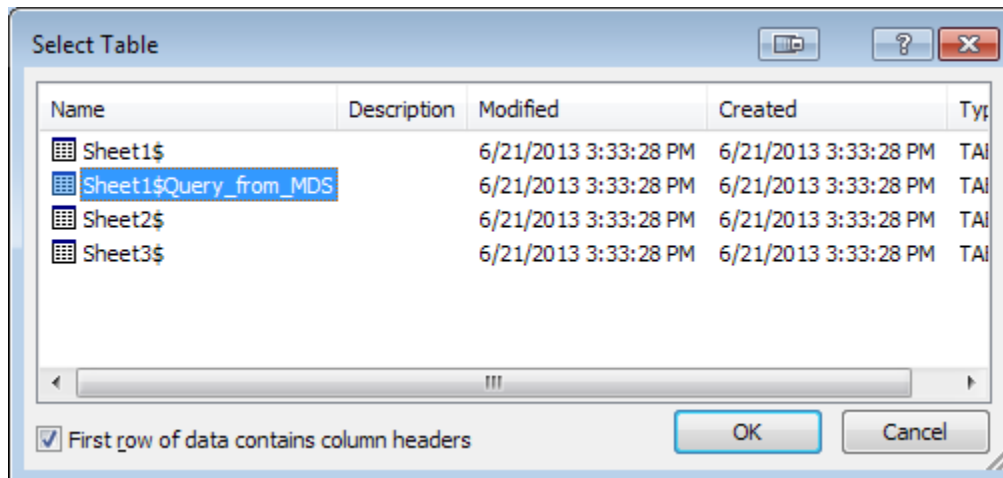
Ready

And then save your spreadsheet as Customers.xlsx on your desktop .

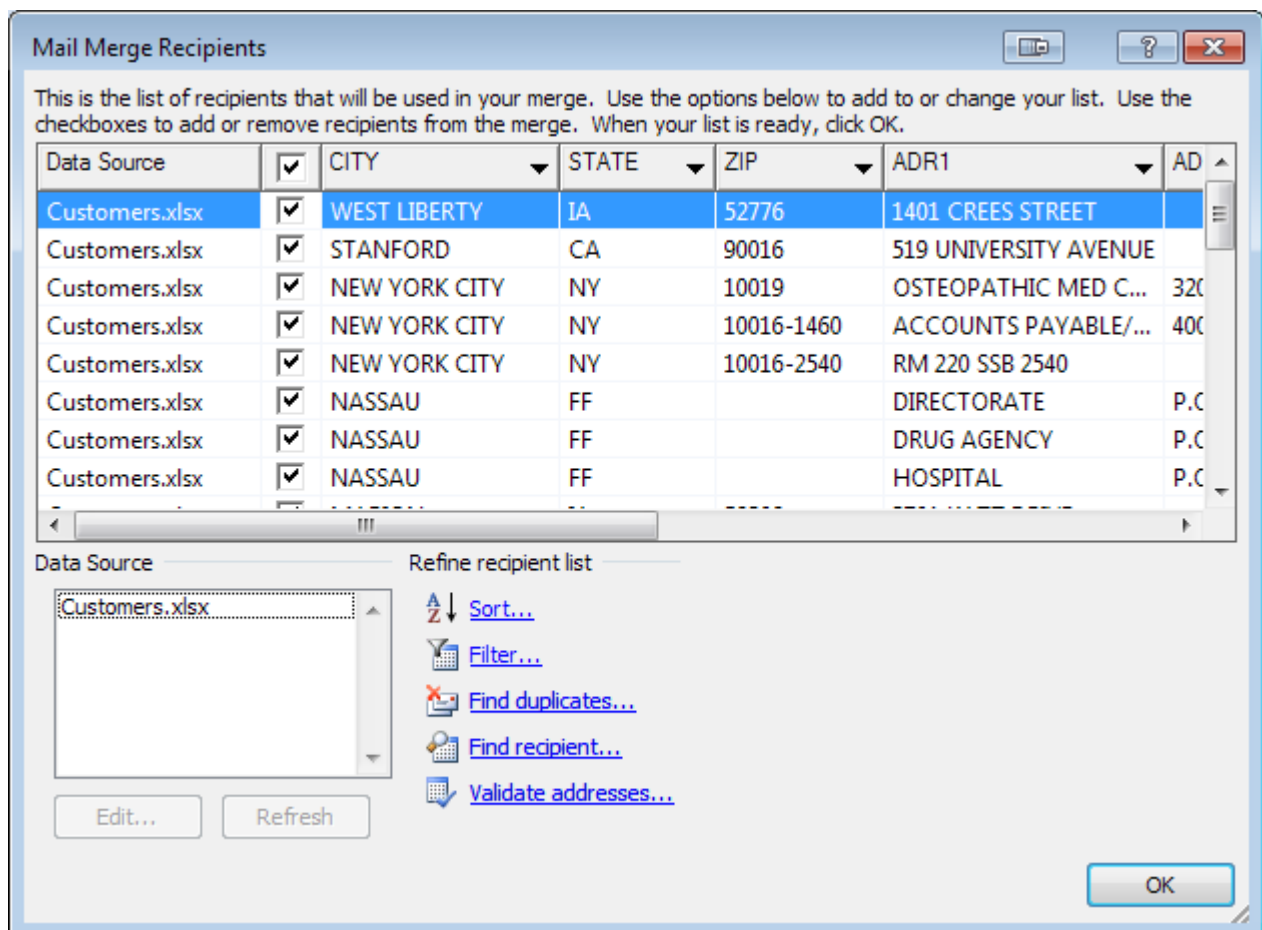
Select your spreadsheet in Word



Choose Query from MDS on Sheet 1



You can then view the information in word by clicking edit recipient list



To map your fields click on the match fields link on the toolbar

ADR1
ADR2
ADR3
AR_CONT
AR_EMAIL
A_CUSTNO
STATE
ZIP
CITY

Document3 [Compatibility Mode] - Microsoft Word

Table Tools

Home Insert Page Layout References Mailings Review View Design Layout

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Rules Match Fields Update Labels Preview Results

Create Start Mail Merge Write & Insert Fields

<p>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>
<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>
<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>
<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>	<p><<Next Record>>Customer Name Street Address Address 2 City, ST ZIP Code</p>

Page: 1 of 1 Words: 329

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Middle Name	(not matched)
Last Name	(not matched)
Suffix	(not matched)
Nickname	(not matched)
Job Title	(not matched)
Company	(not matched)
Address 1	ADR 1
Address 2	ADR 2
City	CITY
State	STATE
Postal Code	ZIP
Country or Region	(not matched)
Business Phone	(not matched)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

Remember this matching for this set of data sources on this computer

OK Cancel

Go to your first label and click Address Block

Insert Address Block

Specify address elements

- Insert recipient's name in this format:
 - Josh
 - Josh Randall Jr.
 - Josh Q. Randall Jr.
 - Joshua
 - Joshua Randall Jr.**
 - Joshua Q. Randall Jr.
- Insert company name
- Insert postal address:
 - Never include the country/region in the address
 - Always include the country/region in the address
 - Only include the country/region if different than:
 - United States
- Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

SY FERTIG
ACCOUNTS PAYABLE/TRAVEL
400 BROADWAY AVE
NEW YORK CITY, NY 10016-1460

Correct Problems

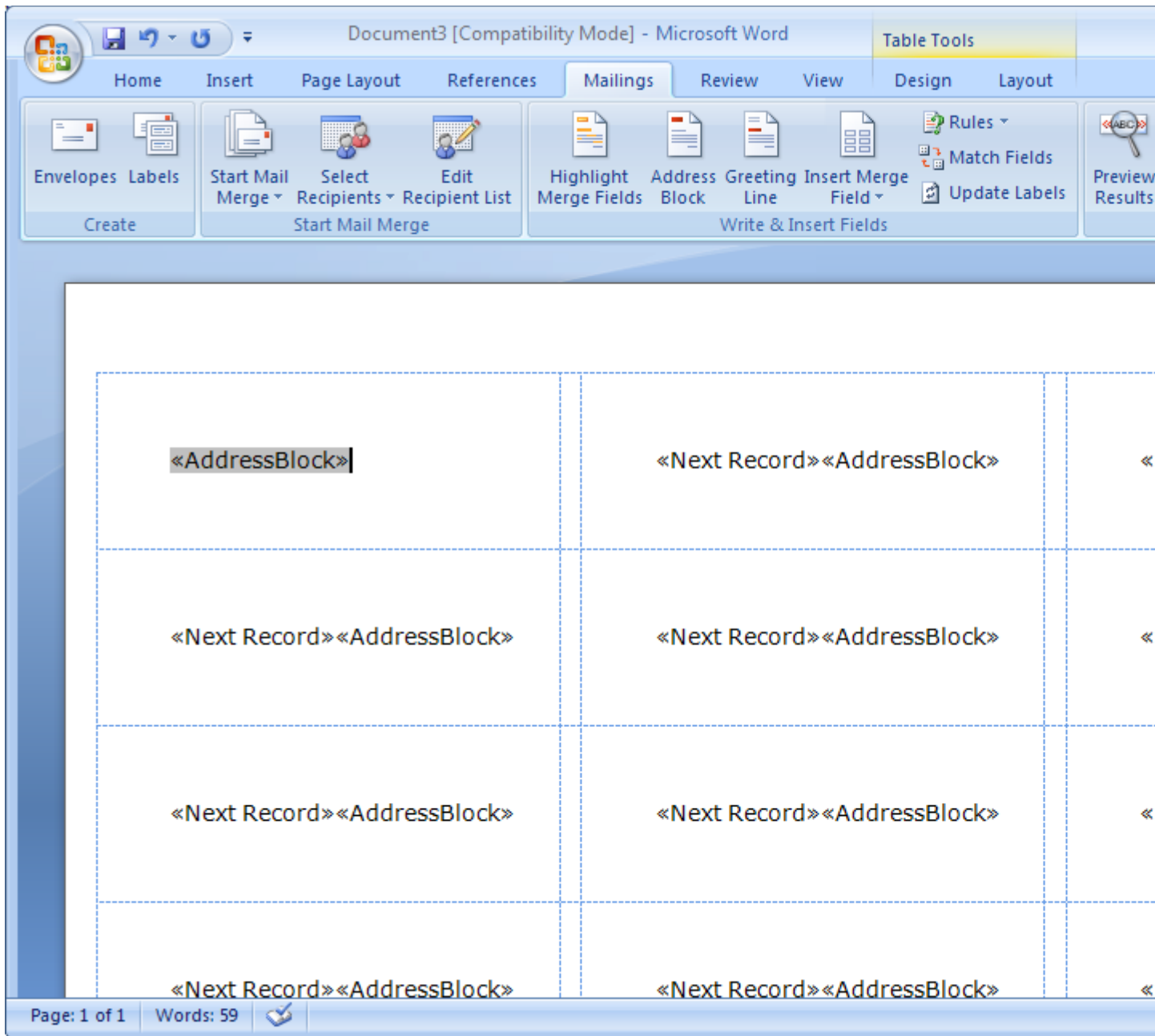
If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

Format your fields as needed and review the preview.

Clicks update Labels



Then click Preview Results

Document3 [Compatibility Mode] - Microsoft Word

Table Tools

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Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Rules Match Fields Update Labels Preview Results

Create Start Mail Merge Write & Insert Fields

SY FERTIG ACCOUNTS PAYABLE/TRAVEL 400 BROADWAY AVE NEW YORK CITY, NY 10016-1460	503 3RD STREET PO BOX 460 KALONA, IA 52247	1 C
75 SHORT STREET NW CEDAR RAPIDS, IA 52405	1401 CREES STREET WEST LIBERTY, IA 52776	3 C
JOLEEN 3701 KATZ DRIVE MARION, IA 52302	100 CENTRAL AVE EAST ORANGE, NJ 07002	1 1 1
1790 BLAIRSFERRY ROAD	1 ST JOSEPH DRIVE	5

Page: 1 of 1 Words: 226

Once you are happy with your results –

Click start Mail Merge and print your labels

