Printing Labels from Word

This document will explain how to download a list from sycle.net into an Excel file and then walk you through the steps of creating labels in Word.

Downloading a list from sycle.net's saved lists

There are two places in sycle.net where you can download a list of patients.

1. You can go into the reports section and click on the marketing list.

Sucle.net	Telem	narketing <u>Hel</u>	lp <u>Sign Out</u> <u>C</u>	Randy <u>contact Us</u> <u>Support</u>
appointments Image report	ts 🛛 🖂 marketing	🚨 administrat		IT SEARCH patient /GO/
quick sales HA sales to business	open aging otal sales invoices aging	inventory ref	errals marketing	appts hcfa

Marketing Lists

Report Type:				
Patient Summary 💽				
Patient Summarv Birthdates Purchase Dates Provider Zip Code Provider and Purchase Date Patient Type				View Report
Tested not Sold Patients last seen				
Warranty Expiration Physician Referral	Current	Competitive	Prospect	TNS
	778	9	592	152
Oakridge	691	6	450	132
Shady Oaks	25	0	28	4
Happy Valley	42	0	65	13
Maple View	20	3	49	3

2. Once you choose a report, it will ask you to clarify your search (i.e. do you want the list to run for your prospects and competitive users as well as your customers).

appointments quick sales HA sales total sales	<u>Telemarketing Help S</u> marketing administration open invoices aging inventory referrals	Randy ign Out <u>Contact Us</u> <u>Support</u> PATIENT SEARCH enter patient /GO/ marketing appts hcfa
Marketing Lists Report Type: Birthdates	Patient Type: Prospect Current Competitive	nt Company: Test Company Clinics: <u>select all</u> <u>unselect all</u> ♥ Oakridge □ Shady Oaks □ Happy Valley □ Maple View
Select Birth Month: July 💌		View Report Download Create List

3. Once you have this done, click on View Report to view the report on the screen or hit download to put it into an Excel file. You will be asked where you would like to save the report. I recommend saving it to your desktop because it's easy to find.

Downloading a list from sycle.net using your own criteria

If you would like to run a list outside of the lists that are saved in the Marketing Lists section, you will first need to create a list of your database.

1. To do this, go to the administration section and choose the Database Backup option.

administration
Appointment Types
Discount Types
Warranty/Service Plans
Service Types
Accessory Types
Earmold Types
Repair Types
Referral Sources
Referral Subcategories
Insurance Companies
Physician Backfill
Hearing Aid Prices
Database Backup
Telemarketing Admin
Do Not Call List
Invoice Numbers
Staff PIN and GRP

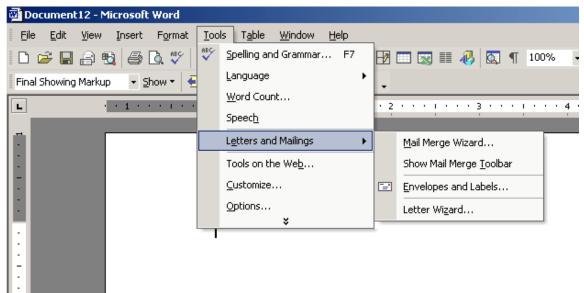
2. Then you will need to select what you would like to download.

clinic		download
	Clinic: Oakridge	
atient do	wnload fields	
June ne uo	Fields: 🔽 Title	
	☑ Last Name	
	First Name	
	Middle Name	
	Pref Name	
	Pref Lang	
	Gender	
	☑ Date of Birth	
	Street1	
	Street2	
	City	
	State	
	☑ zip	
	Phone 1	
	Phone 2	
	Email	
	Client Type	
	☑ Left Loss	
	Right Loss	
	Votes	
	Last Hearing Aid Purchase(s)	

3. Once you have made your selections, you can hit the Download button. Again, you will be asked where you would like to save the Excel file. Again, I would recommend saving it to the desktop so that it is easy to find.

Creating Labels using Microsoft Word

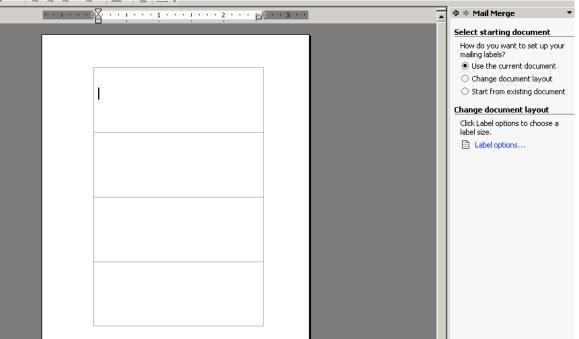
1. To create labels, open up Microsoft Word, go to the Tools Menu and choose the Letters and Mailings option. This will open up another menu and choose Mail Merge Wizard.



- 2. This will open up a wizard on the right hand side of your page that will walk you through creating your labels.
- 3. First, select that you would like to create labels and then hit next at the bottom of the screen.



4. On the next screen, it will default to changing the document type. Click down below on the label options and select which labels you would like to print on. Once you have chosen your labels, you will now see those labels appear on the left hand side and now the "Use current document" option is selected. Go ahead and hit next at the bottom of the screen.



5. On the third screen, you now can indicate that you would like to use the list you downloaded from sycle.net. Leave the selection as "Use an existing list" and click "Browse". This will allow you to go find the list you downloaded.



6. If you haven't already sorted the list in Excel, you have the option of sorting the list by clicking on any of the column headings. You can also uncheck records that you don't want to print a mailing label for.

To sort the list, click the appropriate column heading. To narrow down the recipients dis specific criteria, such as by city, click the arrow next to the column heading. Use the chubuttons to add or remove recipients from the mail merge. List of recipients: Patients in Oakridge whose birthdate is in July				
	▼ F.			
✓ First	Last	Ad		
Martin	Bo	15		
 ✓ Marco ✓ Carlotta 	An	23		
🗹 Carlotta	Ma	25		
ANDREA	LEI	31		
 ✓ ANDREA ✓ Fast ✓ Rhoda 	Eddie	1 F		
🗹 Rhoda	Berns			
Rodney	Da	12		
 ✓ Rodney ✓ Fernando 	Louis	38-		
Virginia	ess	53		
✓ leffrev	Lez	33		
Select All Clear <u>A</u> ll <u>R</u> efresh				
Eind Edit, Validate	Ok			

7. The next section allows you to set up how you would like the label to appear. Go ahead and hit the Address block option. In the window that comes up, pick the Match Fields button in the bottom left hand corner.

Insert Address Block			
Specify address elements			
Insert recipient's name in this format:			
Joshua Joshua Randall Jr. Joshua Q. Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Joshua 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: 			
Preview			
Mr. Joshua Randall Jr. Blue Sky Airlines 1 Airport Way Kitty Hawk, NC 27700			
Match Fields OK Cancel			

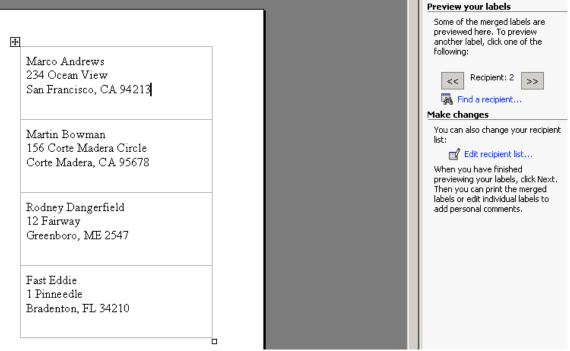
8. Now you will need to assign fields to each of the corresponding address fields (last name, first name, etc...). You can get the field names from the same screen where you sort your list (see screenshot w/ instruction #6 above). Once you have done that, go ahead and hit OK.

insert Address Block	? ×
Match Fields	<u>? ×</u>
Mail Merge has special features for easily worki field components to simplify address insertion.	ng with addresses. Please specify address
Required information	
Last Name	F2 🔹
First Name	Patients in Oakridge whose birthd 🗸
Courtesy Title	(not available)
Company	(not available)
Address 1	F3 💽
City	F4
State	F5 🗾
Postal Code	F6
Spouse First Name	Patients in Oakridge whose birth
Optional information	F2
Middle Name	F3 💽 🚽
Suffix	_ F4
Use the drop-down lists to choose the field fror address information Mail Merge expects (listed	
address initorniation Mail Merge expects (listed	C F6 (not available)
	OK Cancel
Match Fields OK	Cancel

9. You label area should now look like this:

 A	·	♦ Mail Merge ▼ >
		Arrange your labels
		If you have not already done so, lay out your label using the first label on the sheet.
««AddressBlock»»		To add recipient information to your label, click a location in the first label, and then click one of the items below.
		Address block
		Greeting line
«Next Record»		Electronic postage
		Postal bar code
		More items
«Next Record»		When you have finished arranging your label, dick Next. Then you can preview each recipient's label and make any individual changes.
		Replicate labels
«Next Record»		You can copy the layout of the fir label to the other labels on the page by clicking the button below Update all labels

- 10. Go ahead and click on the Update all labels button in the Replicate labels area to copy that same address block throughout your labels.
- 11. Click on Next: Preview you labels at the bottom of the page to see the labels as they will appear. You can page through them one at a time using the forward and forward and back arrows under the Preview your Labels heading if you would like. If you need to edit or remove any labels you missed, just click on the link "Edit recipient list" on the right hand side.



12. Click on the Next: Complete the Merge link at the bottom of the page to merge the data with the label template. You then have the option to begin printing or to again view the labels before you print them.

