

## SELECTION 8 PRINT LETTERS AND LABELS

This option prints customer address labels or rolodex cards. The Rolodex card is the Customer/Mailing Label with the telephone number and taxes printed on it. You can even define the size of the label you are using.

Two selections under the 'Print Customer/Mailing Labels' option require a file to be created first using option 1 - Create Mailing/Delinquent List.

```
Petro Data Oil *** Letters and Labels *** 07/11/2005

1. Create Mailing/Delinquent List
2. Print Mailing List
3. Not Used
4. Print Customer/Mailing Labels
Q. Quit

Select an Option Q
```

**Menu Select:** From the Accounts Receivable Main menu, select 8 - *Letters and Labels*.

### 1. CREATE CUSTOMER MAILING/DELINQUENT LIST

This option creates a file which is used by Option 4 - *Print Customer/Mailing Labels*, selection 3 - *Mailing List* or selection 4 - *Tax List* only.

**\*\*To print a mailing list or labels by Customer Only, Customer and Taxes, and Exempt Customers only, proceed to menu Option 4. It is NOT necessary to 'create' the file first.\*\***

**Menu Select:** From the Letters and Labels Submenu, *select 1 - Create Mailing/Delinquent List*.

**Aging Date.** Enter the Date to use for aging the accounts. Today's date displays as a default. Press *enter* to accept the date or enter a date for aging.

**Option.** Select from the following options:

**1 - Delinquent Customers**

**2 - Selection Criteria**

**3 - All**

```
Petro Data Oil *** Create Customer Mailing/Delinquent List *** 07/21/2005
1=Delinquent Customers  2=Selection Criteria  3=All  Q=Quit  1
Enter the date to use for aging  07/21/2005
Select:  1=Over period 1 (30)  2=Period 2 (60)  3=Period 3 (90)  3
Aging periods:  Period 1  30  Period 2  60  Period 3  90
Age on which date?  1 = Due date  2 = Invoice date  2
Sort:  1=by Name  2=Alpha cust no.  3=Numeric cust no.  2
Is everything Ok? (Y/N/Q)  |
```

F7 to start over with options and F8 to quit to the menu are active.

Select *1 - Delinquent Customers*. Choose from the following delinquent periods:

**Enter the date to use for aging**

**Select: 1 - Over Period 1 (30)  
2 - Period 2 (60)  
3 - Period 3 (90)**

**Aging periods:** Define the aging periods to use for each period.

Example, **Period 1 10 Period 2 30 Period 3 45**

**Age on which date? 1 = Due date 2 = Invoice date**

**Sort: 1 = by Name  
2 = Alpha customer number  
3 = Numeric customer number**

**Is everything ok? (Y/N/Q)**

*A file is created but NOTHING prints.* The menu returns.

Select *2 - Selection Criteria*. Make you selection and then complete the options.

Select *3 - All*. All customers will be included. Complete the other options.

## PRINT MAILING LIST

This option prints a list of the information included in the file created by Option 1.

**Menu Select:** From the Letters and Labels Submenu, select 2 - *Print Mailing List*.

Select the desired output device:

- 1 **Print on Screen**
- 2 **Print on Printer** - Select a printer from the list
- Q **Quit to menu** - Nothing prints

F7 to start over with options and F8 to quit to the menu are active.

**Enter the report date.** The date does not affect the report.

- Sort:**
- 1 = by Name
  - 2 = Alpha customer number
  - 3 = Numeric customer number

**Is everything ok? (Y/N/Q)**

Print	Save	Exit	Enlarge	Reduce			
<p>Date: 07/21/2005                      Petro Data Oil                      Page No.  Time: 15:45:54                      Customer List For Mail Merge on 07/21/2005                      1</p>							
Cust No	Name	Cur Bal	Per1 Bal	Per2 Bal	Per3 Bal	Credit	Balance
BLUE	BLUE FARM	0.00	0.00	0.00	130.75	0.00	53610.50
JONES	JONES FARM	0.00	0.00	0.00	10.00	0.00	2139.00
JOHN	Johns Service S	0.00	0.00	0.00	10.00	0.00337084	03
KAIENI	KAIHY ENTERPRIS	0.00	0.00	0.00	101.00	0.00	101.00

Verify that the data on the report is what you intended to include on your labels or rolodex cards.

*Selection 3 to print delinquent letters is no longer available.*

## PRINT CUSTOMER/MAILING LABELS

**Menu Select:** From the Letters and Labels Submenu, select 4 - *Print Customer/Mailing Labels*.

Petro Data Oil \*\*\* Print Customer Mailing Labels \*\*\* 07/21/2005

NOTE: If you choose 3=Mailing list, then that means you ran the mailing list program and created a mailing list.  
 If you choose 4=Tax list, then that means you ran the tax exemption program and created a tax list.  
 Press enter to continue.

**Output to: P=Printer F=Text File Q=Quit**

The selected printer name displays. Complete the following options:

F7 to start over with options and F8 to quit to the menu are active.

Petro Data Oil \*\*\* Print Customer Mailing Labels \*\*\* 07/21/2005

Printer selected was Samsung ML-1430 Series Port LPT1:

Select: 1=Customer only      2=Customer and taxes      3=Mailing list  
          4=Tax list              5=Exempt customers only      5

Print telephone number and credit limit? (Y/N) N

Print customer number on label? (Y/N) N

Enter a customer number. Blank=All S=Start with a customer

Input selection criteria? N

Select label size: 1=1 by 1 Matrix      2=1 by 3 Laser      3=1 by 2 Folders      2

Enter the number of labels per customer 1

Sort by: 1=Name      2=Alpha cust #      3=Numeric cust #      4=Alphasort      2

Is everything ok? (Y/N/P=Printer/Q=Quit) |Y

- Select: 1 = Customer only**  
**2 = Customer and taxes** (rolodex cards are printed using this option)  
**3 = Mailing list** (must be calculated first)  
**4 = Tax list** (must be calculated first)  
**5 = Exempt customers only**

**Print telephone number and credit limit.**  
 Y - print Telephone Numbers and Credit Limits on the list  
 N - do not print phone numbers and credit limits  
 (This option is skipped on Opt 3 the calculated mailing list)

**Print customer number on label.**

- Y - print Customer Numbers on the labels
- N - do not print customer numbers

**Enter a customer number - print labels for ONE customer**

- Blank = All** - print labels for ALL selected customers
- S = Start with a customer** - start at a certain customer in the list  
Enter the customer number to begin with in the window.

**Input selection criteria.**

- Y - input selection criteria (such as zip code or territory)
- N - do not input selection criteria

**Select label size:**

- 1 = 1 by 1 Matrix**
- 2 = 1 by 3 Laser** (Avery 5660 or any 1" X 2 5/8" - 3 across)
- 3 = 1 by 2 Folders**

**Enter the number of labels per customer.** Enter 1 or the number to print for each customer.

**Sort by:**

- 1 = Name** - print alphabetically using the NAME field in customer file
- 2 = Alpha Customer number** - use if you have ALPHA customer codes
- 3 = Numeric Customer number** - use if you have NUMERIC codes
- 4 = Alphasort** - to use the ALPHASORT field in the customer file

**Is everything OK? (Y/N/P=Printer/Q=Quit)**

- Enter **Y** if the selected options are correct.
- Enter **N** or press **F7** to reenter the options.
- Enter **P** to change print options or selected printer.
- Enter **Q** or **F8** to quit without printing.

```

Petro Data Oil *** Print Customer Mailing Labels *** 07/21/2005

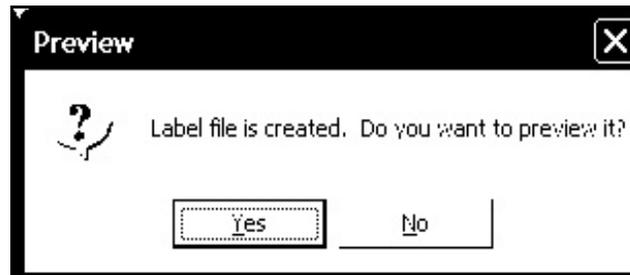
*** LABEL ALIGNMENT TEST ***

Enter or verify the left margin                0

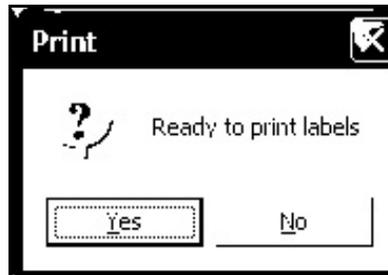
Do you want to do an alignment test? (Y/N/Q)  Y
    
```

Verify the **left margin** adjust a character or 2 if necessary.

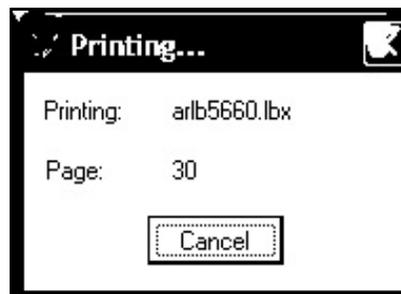
Load labels in printer and print an **Alignment test** if desired. ONE page of labels will print.



Y - a list of the selected labels displays on the screen for preview.  
N - do not display a preview.



Y - print labels  
N - quit without printing



As the labels print, the screen displays the progress.

ACME Acme	BIGGAS NAME
CALTOM Tommy Callahan	CASH CASH
GOLROB Robert Q. Golden	JOHN Johns Service Station
JONES JONES FARM	LOU LOU'S GASOLINE STATION

SAMPLE LABELS

**2 - 1 X 3 Laser**

Acme P O Box 2525 SAN ANTONIO, TX 78247	NAME 5682 Smith Street San Antonio, TX 78247	Tommy Callahan Jasper, Tx 75951
CASH CASTROVILLE,	Robert Q. Golden P.O. Box 685 Spurger, Tx 77660	Johns Service Station 12434 Broadway San Antonio, Tx 78265
JONES FARM Suite 2000 Four Civic Center SAN ANTONIO, TX 78222	LOU'S GASOLINE STATION Main Offices 2241 Polygon Drive San Antonio, TX 78245	

**3 - 1 X 2 Folders**