

Avery Label Workaround for GoldMine

Copyright © 2004 FrontRange Solutions Inc.

Author: Beverly Albright

Department: Technical Support

Created: January 23, 2004

Last Updated: January 26, 2004

Copyright

Copyright © 2004 FrontRange Solutions Inc. All Rights Reserved. GoldMine,, HEAT and other FrontRange products and brands are registered trademarks or trademarks of FrontRange Solutions Inc. in the U.S. and/or other countries. Other products and brands are registered trademarks or trademarks of their respective owners/companies.

USE OF THE SOFTWARE DESCRIBED IN THIS PAPER AND ITS RELATED USER DOCUMENTATION ARE SUBJECT TO THE TERMS AND CONDITIONS OF THE APPLICABLE END-USER LICENSE AGREEMENT (EULA).

The information contained in this document is provided “as is” without warranty of any kind. To the maximum extent permitted by applicable law, FrontRange Solutions disclaims all warranties, either express or implied, including the warranties for merchantability and fitness for a particular purpose; and in no event shall FrontRange Solutions or its suppliers be liable for any damages whatsoever including direct, indirect, incidental, consequential, loss of business profits or special damages, even if advised of the possibility of such damages.

Table of Contents

COPYRIGHT 2

AVERY LABEL WORKAROUND FOR GOLDMINE 4

OVERVIEW 4

EXPORTING THE CONTACTS FROM GOLDMINE 4

MS WORD 97/2000 MAIL MERGE 8

MS WORD 2002 (XP) MAIL MERGE 14

MS WORD 2003 MAIL MERGE 25

Avery Label Workaround for GoldMine

Overview

In some instances, labels print incorrectly when using the Labels reports within GoldMine. This document will outline a workaround in which contacts are exported from GoldMine into a .dbf file, and then the mail merge function of MS Word is used to create the labels. Three sections are included:

- Exporting the contacts from GoldMine
- Using MS Word 97/2000 mail merge to create the labels
- Using MS Word 2002 (XP) mail merge to create the labels

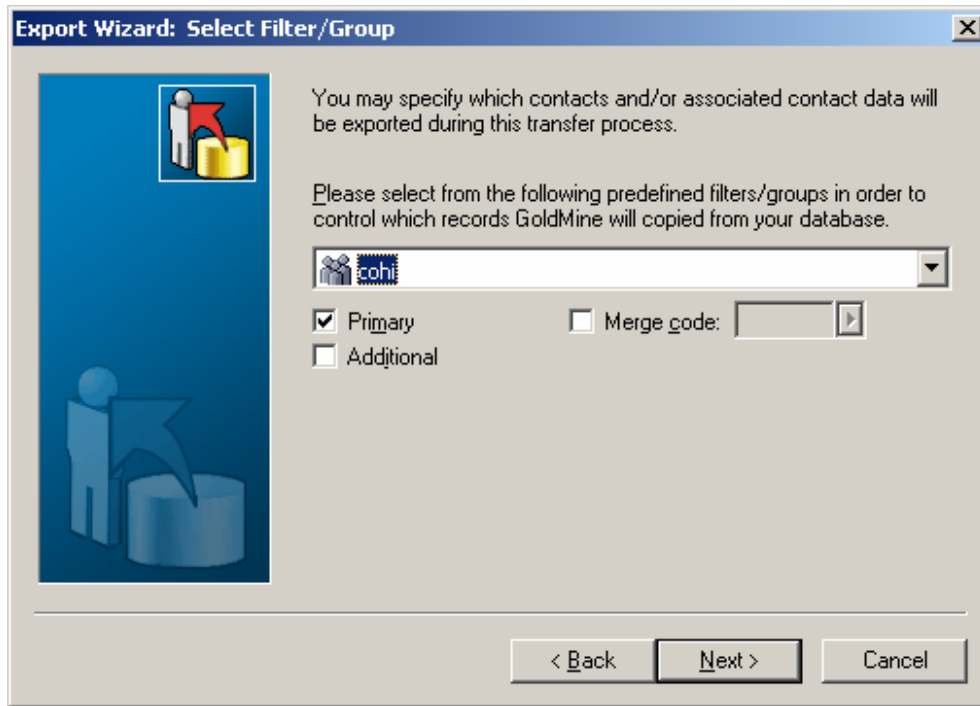
Exporting the Contacts from GoldMine

The contacts needed for the labels must first be exported from GoldMine. Note that this section was written using GoldMine 6.5; however, the same basic process applies to previous versions of GoldMine.

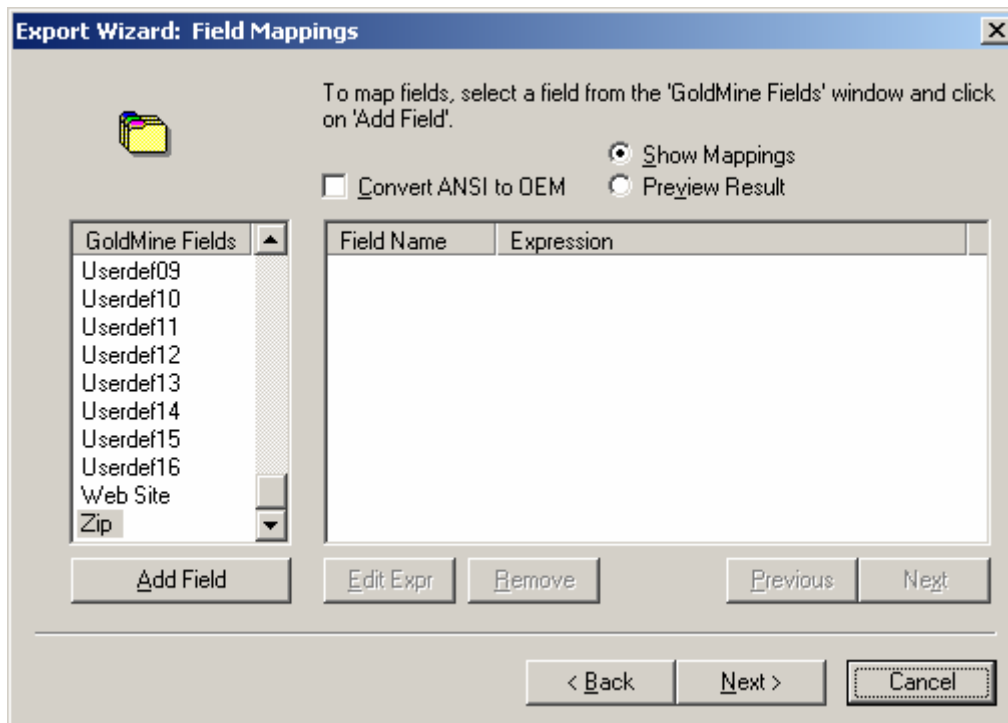
1. Create a filter or group of the contacts needed.
2. Select **Tools >> Import/Export wizard >> Export contact records**



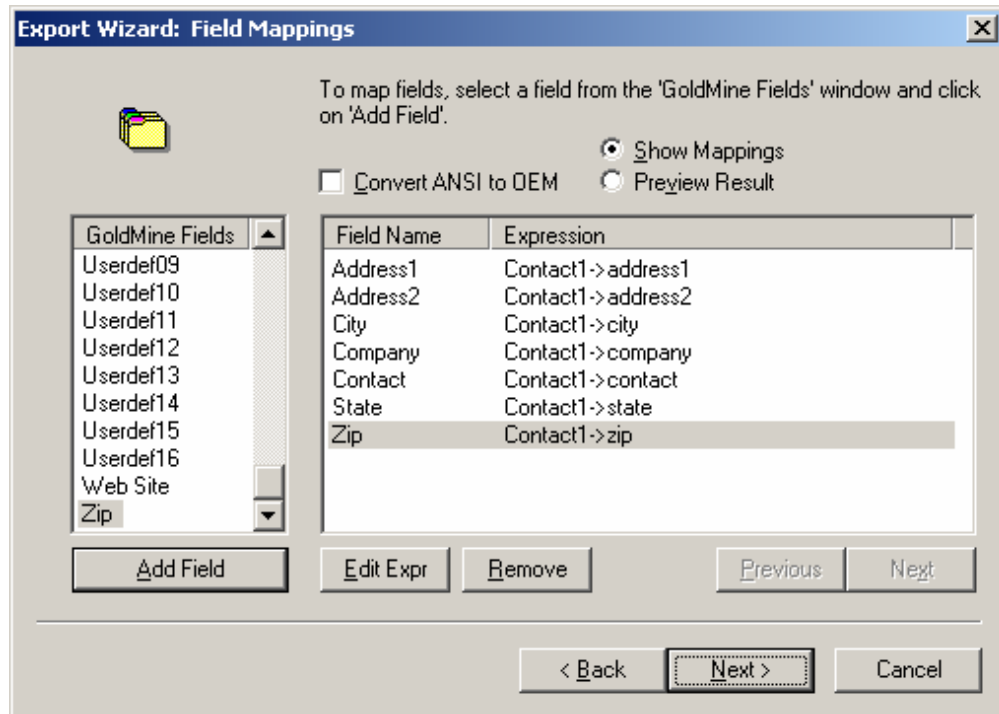
3. Select the options **Export to a new file** and **DBF File: dBase data files**.
4. Click **Next**.



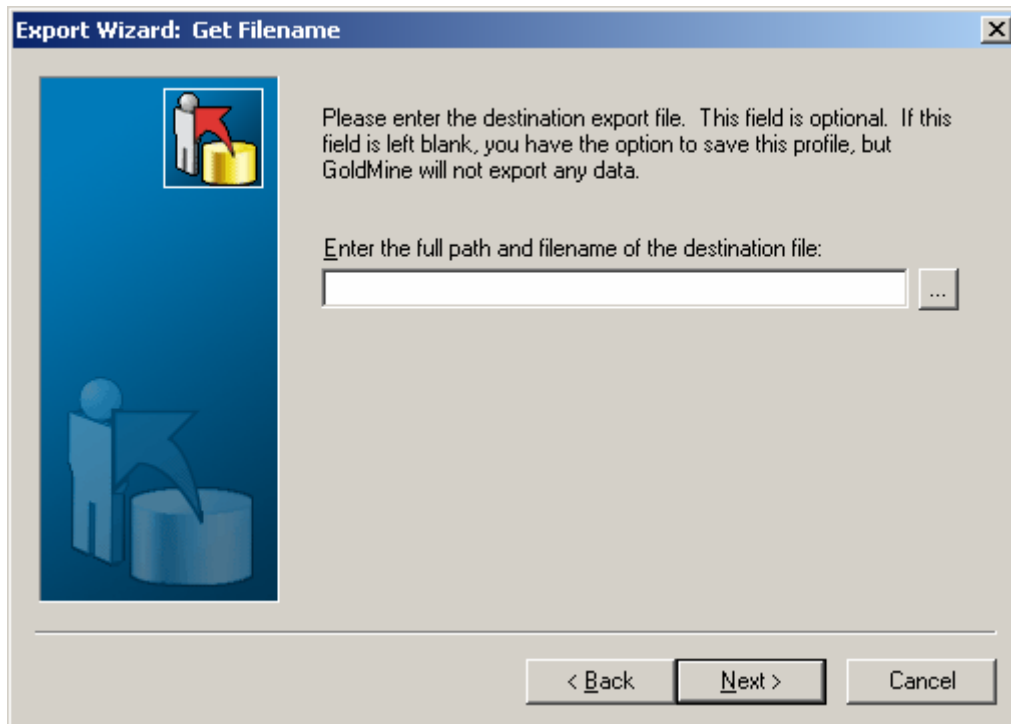
5. Select the filter or group to be exported from the drop down
6. Make other selections as desired.
7. Click **Next**.



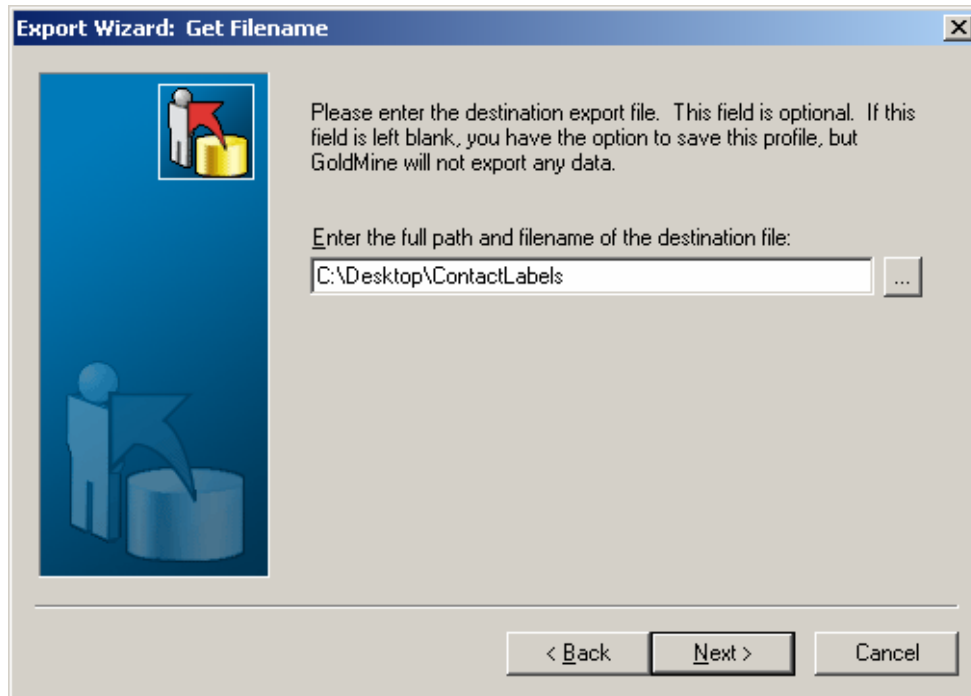
8. **Map the fields** (Company, Contact, Address 1, Address 2 (if needed) City, State, Zip)



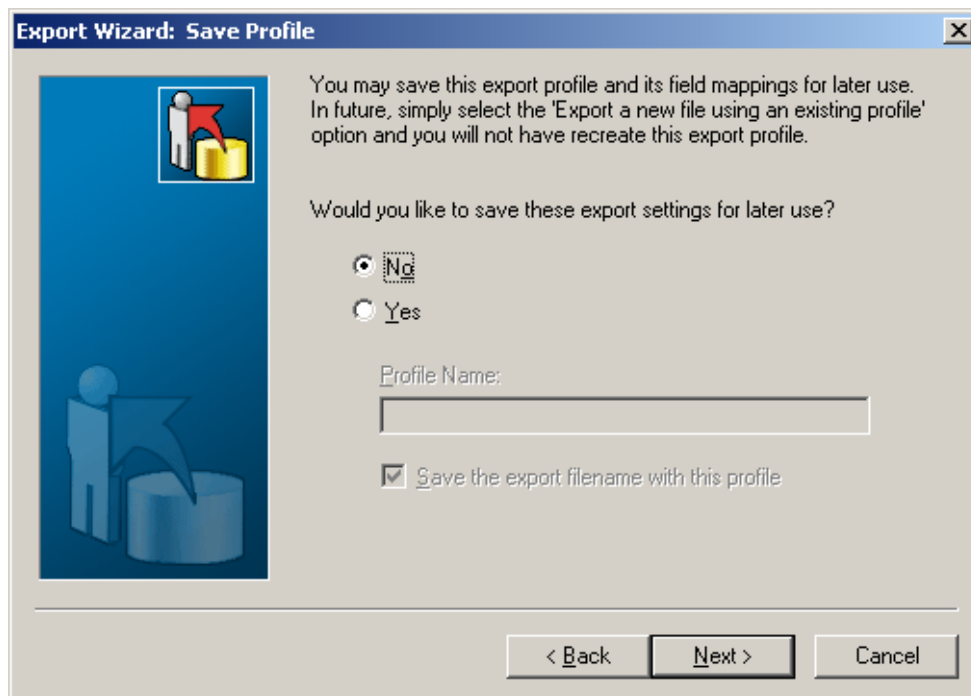
9. Click **Next**.



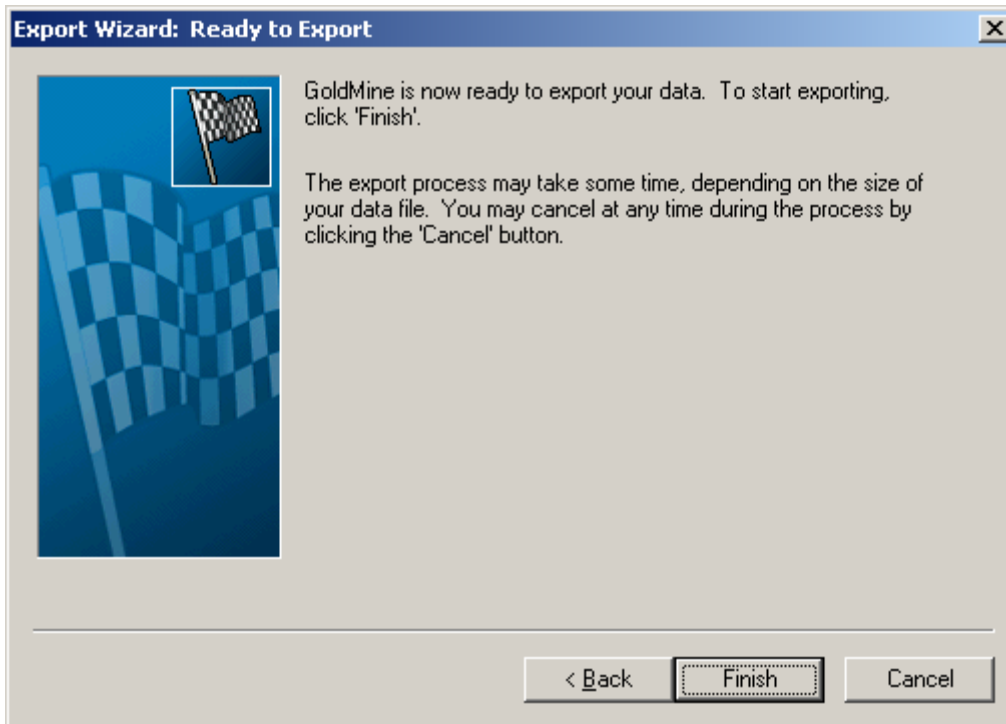
10. Type or browse to a destination for the exported file; be sure to include a file name. Do not include spaces in the file name or you can receive an error using this file with the merge from MS Word.



11. Click **Next**.



12. Save Profile for future use, if desired. Click **Next**.



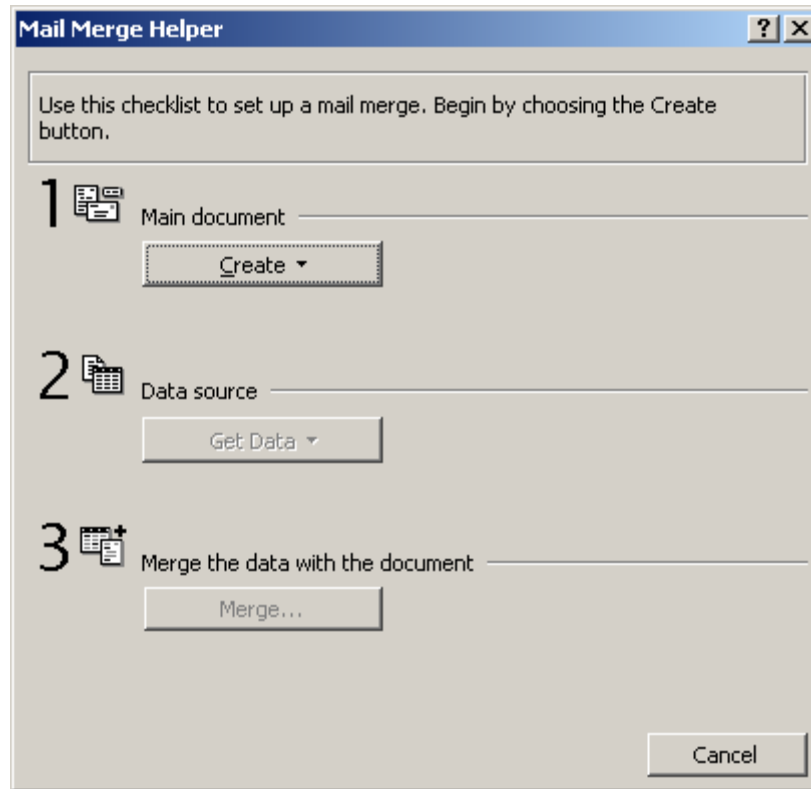
13. Click **Finish**.

14. The Process Monitor will open and indicate the number of records exported to the file.

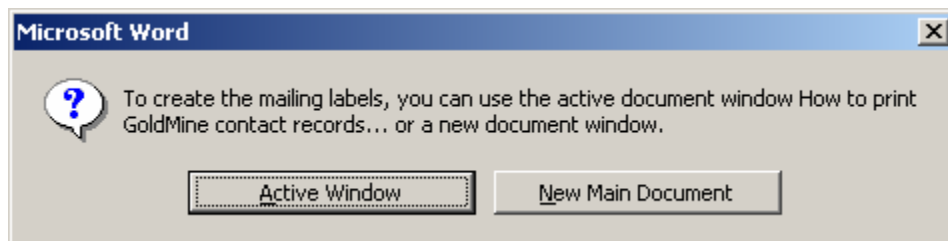
MS Word 97/2000 Mail Merge

The Mail Merge feature of MS Word can now be used to merge the contacts into the label of choice.

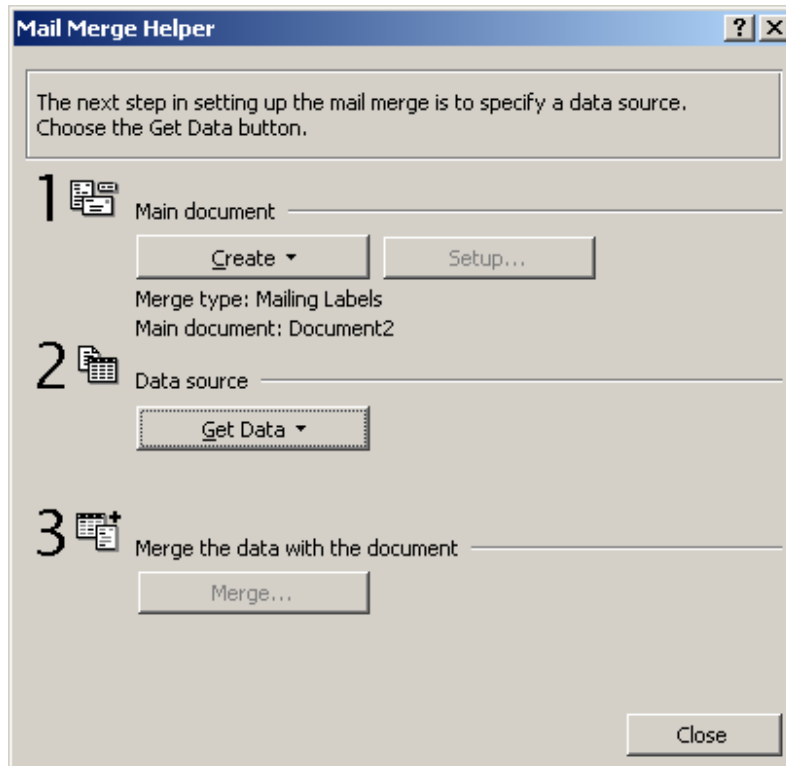
1. Launch MS Word.
2. Select **Tools >> Mail Merge**



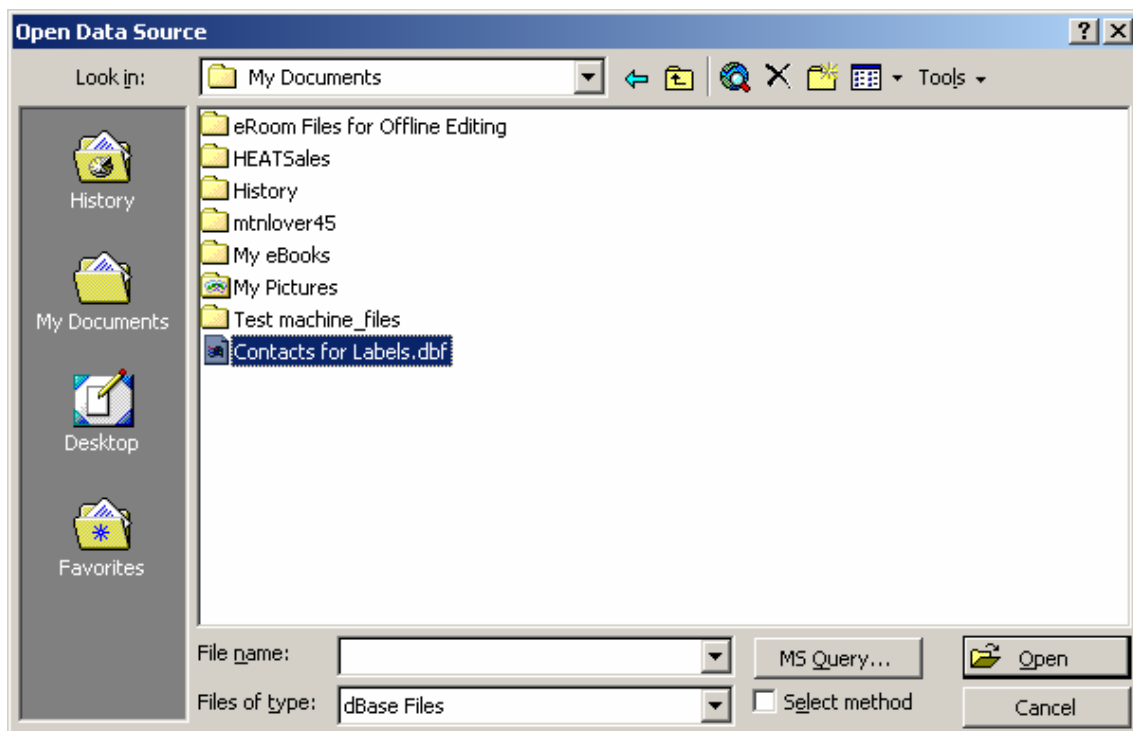
3. Click **Create** and then select **Mailing Labels** from the dropdown



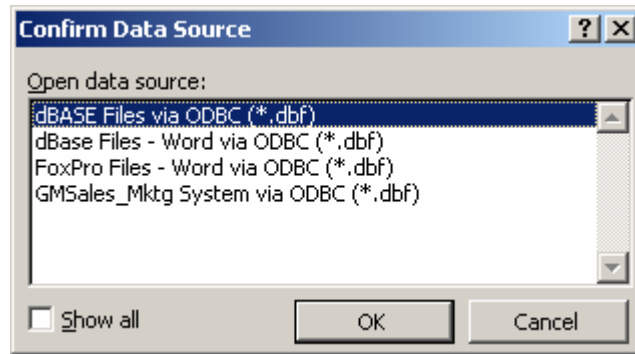
4. Click **Active Window**



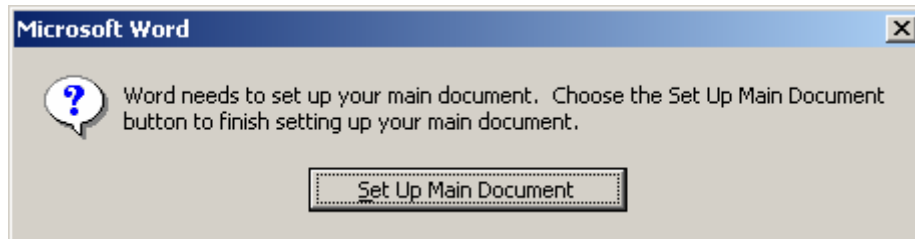
5. Click **Get Data** and select **Open Data Source**



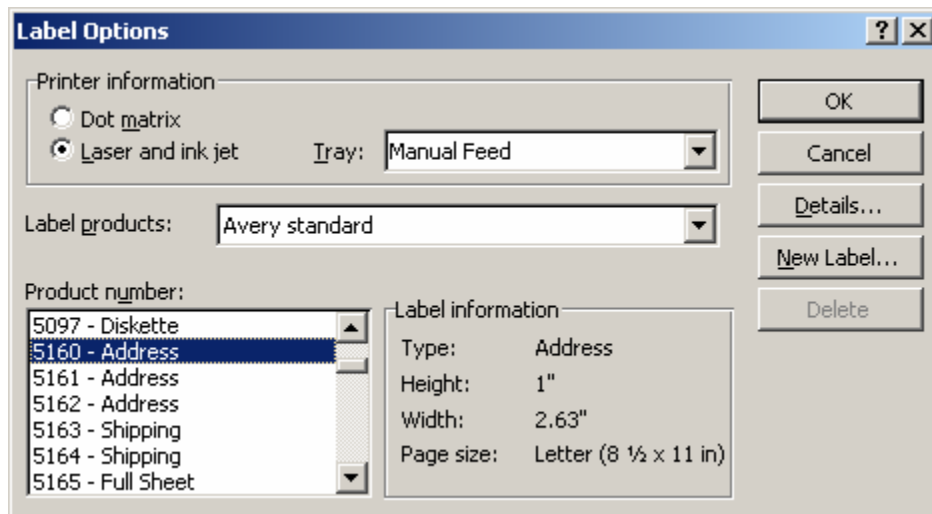
6. Change Files of Type: to dBase Files and navigate to the location of the exported *.DBF file; double click on the file name.



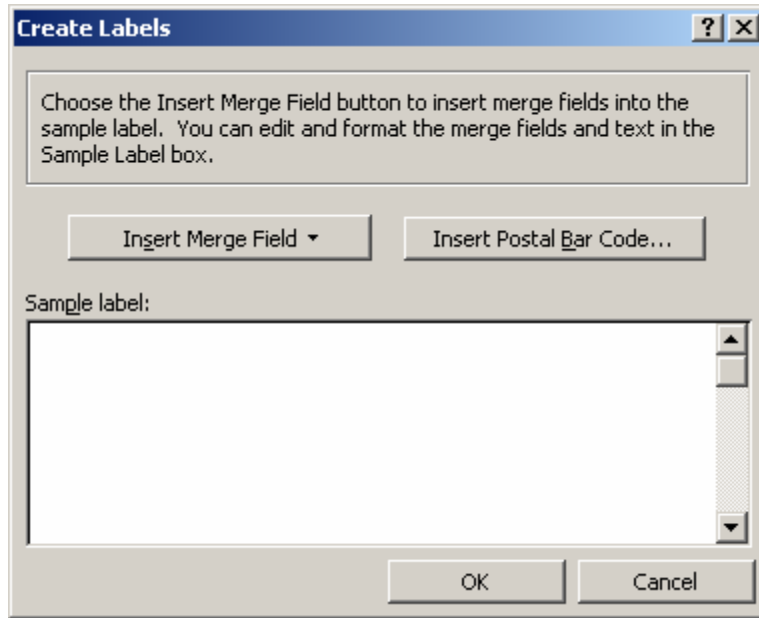
7. Be sure **dbase files via ODBC (*.dbf)** is highlighted and **click OK**. (If the file name included spaces, you will receive a message that the data source could not be opened.)



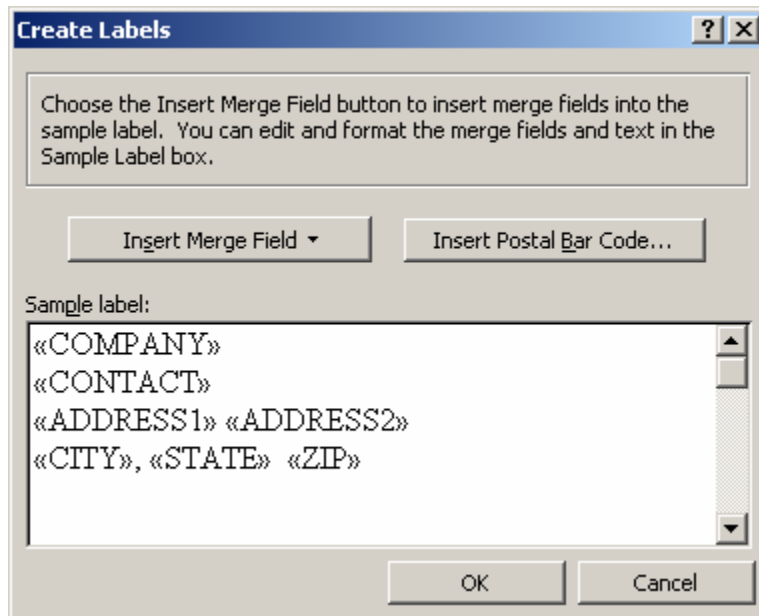
8. Click **Set Up Main Document**



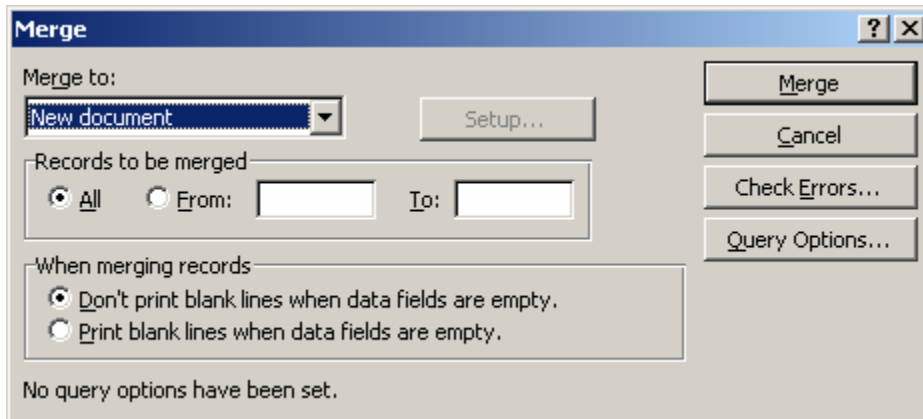
9. **Choose desired label** from the Product number dropdown and **click OK**.



10. Click the **Insert Merge Field** button to insert each of the fields from the exported file; format accordingly with returns, commas, etc. Once the fields are inserted, the window should look something like this:

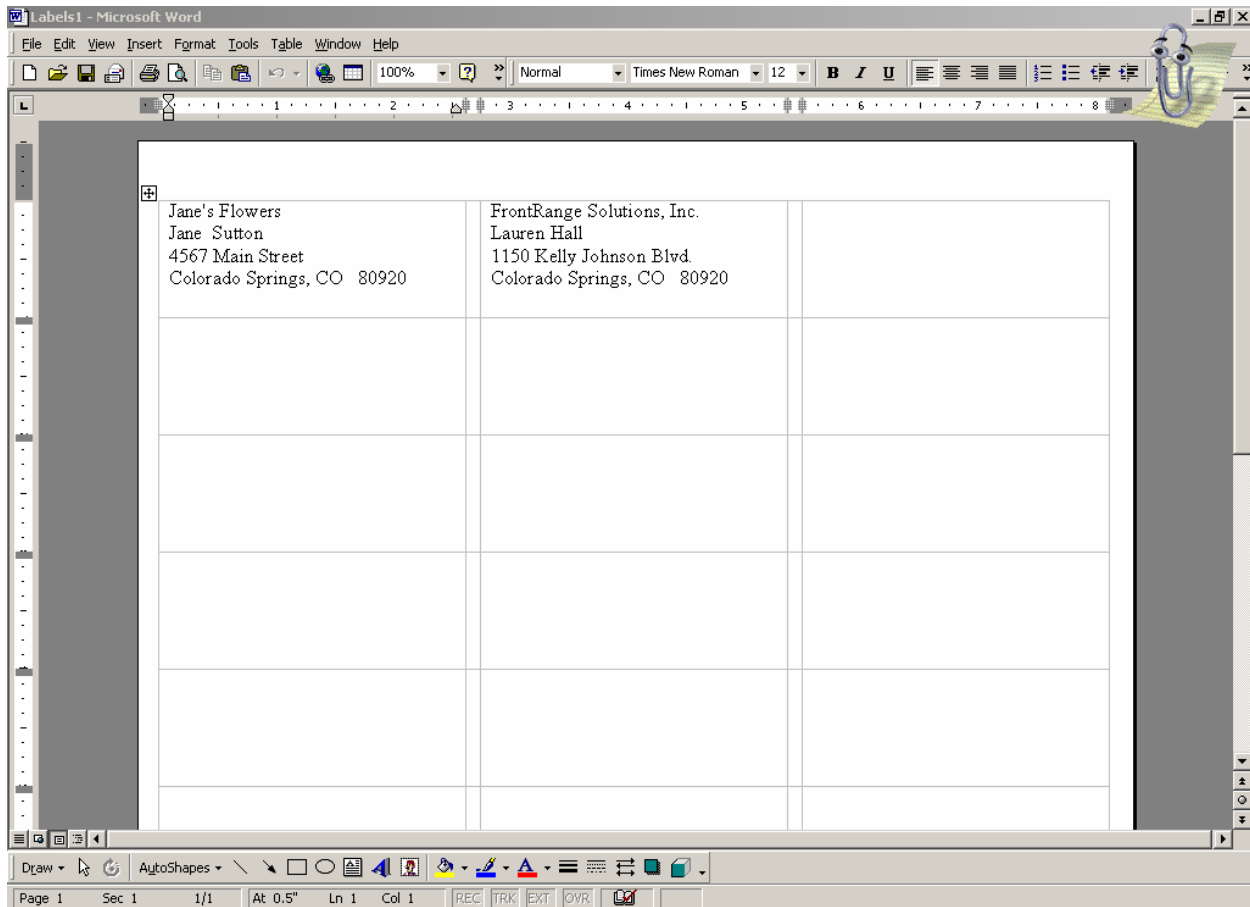


11. Click **OK**
12. Click **Merge**.



13. Make desired changes here regarding records to be merged and blank lines, then **click Merge**.

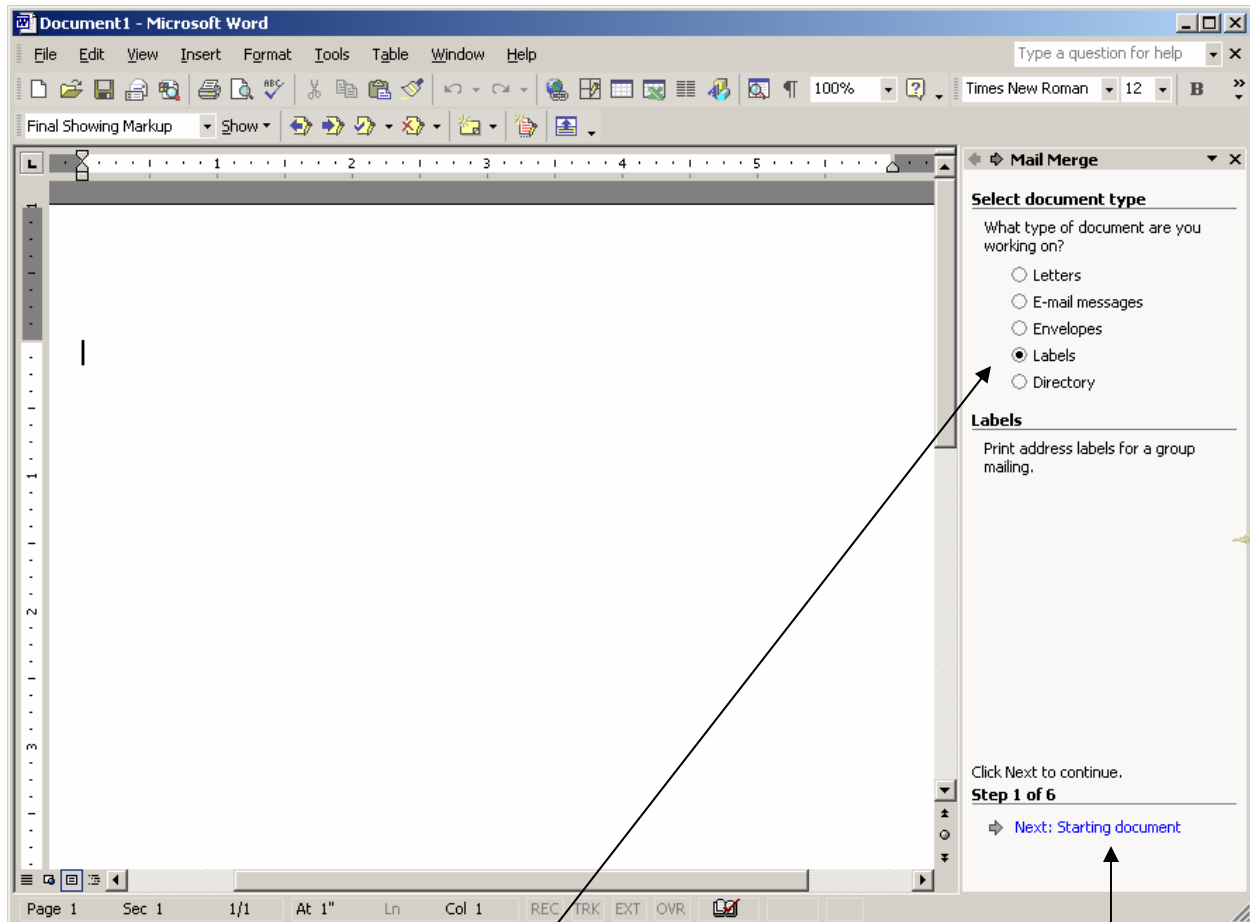
14. The merged document will then open in MS Word and can be printed.



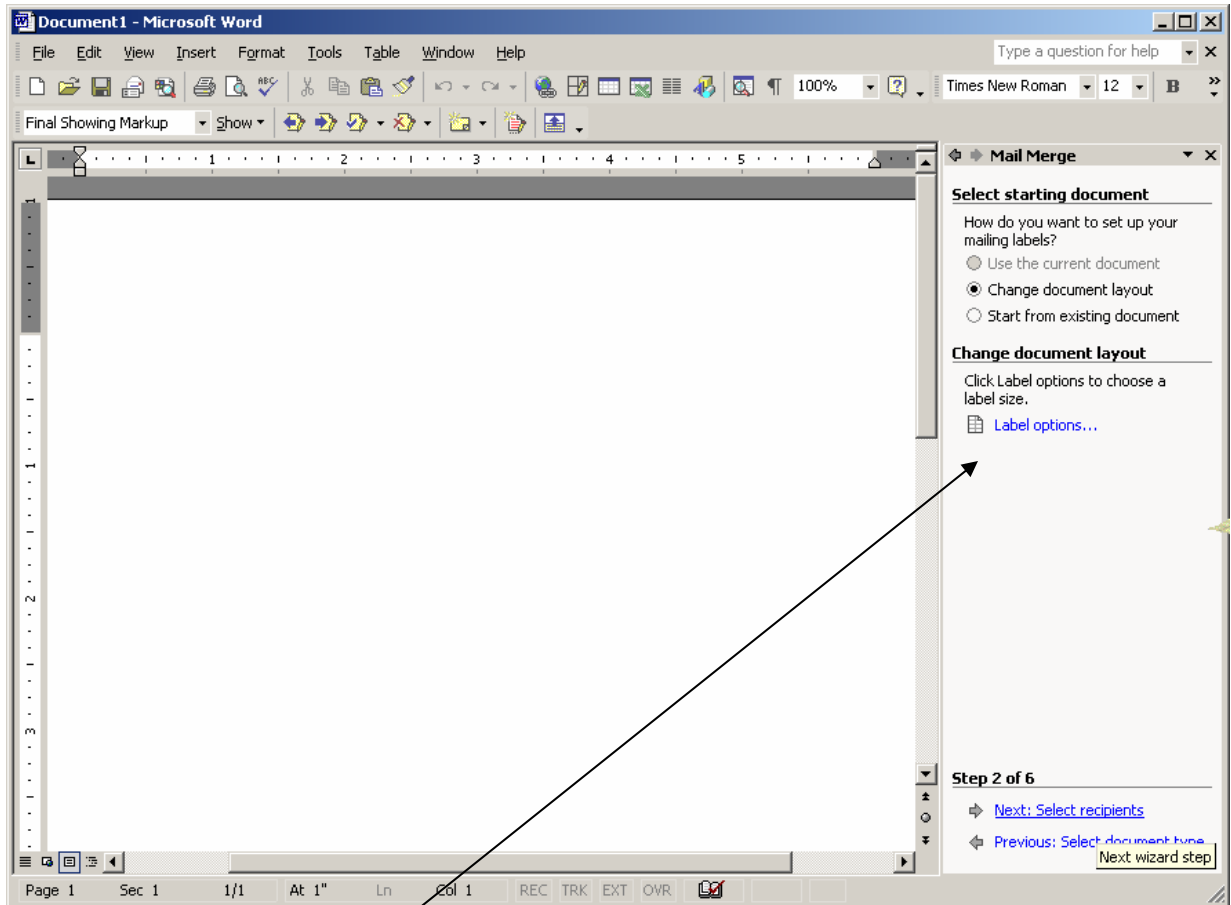
MS Word 2002 (XP) Mail Merge

The Mail Merge feature of MS Word 2002 (XP) varies considerably from that of MS Word 2000. The following steps can be used for MS Word 2002:

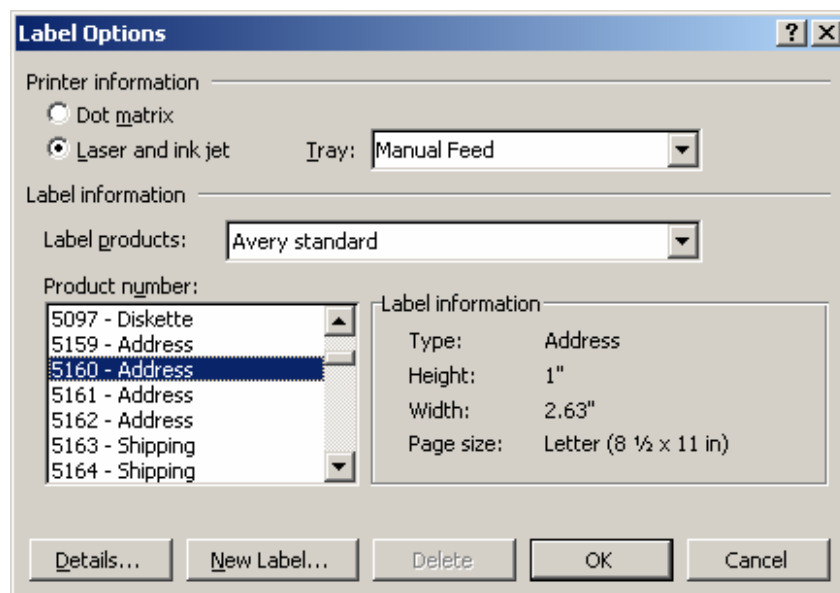
1. Launch MS Word.
2. Select **Tools >>Letters and Mailings>>Mail Merge Wizard**. Mail Merge tool bar appears on the right side of the document.



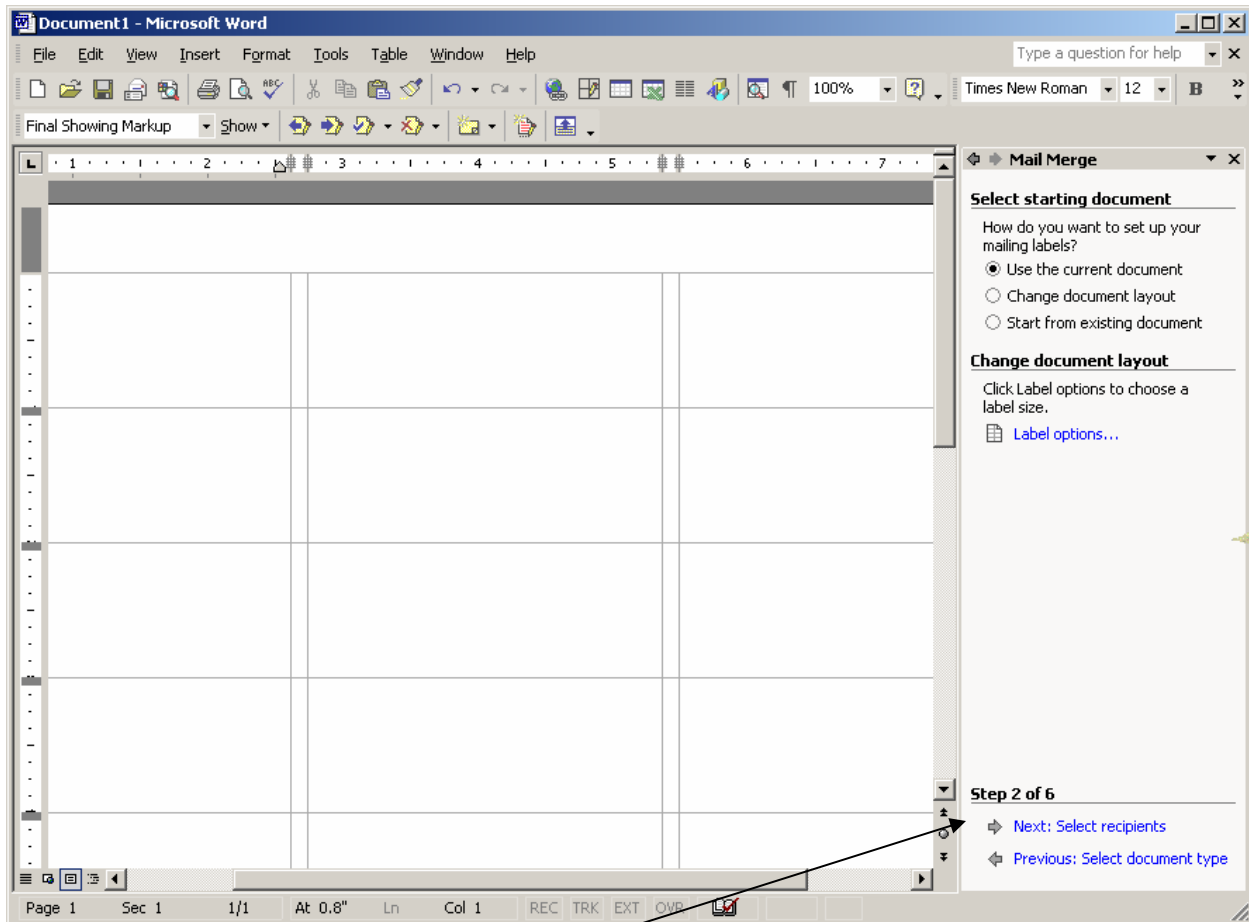
3. Select document type **Labels**
4. Towards the bottom of the Mail Merge tool bar click **Next: Starting Document**.



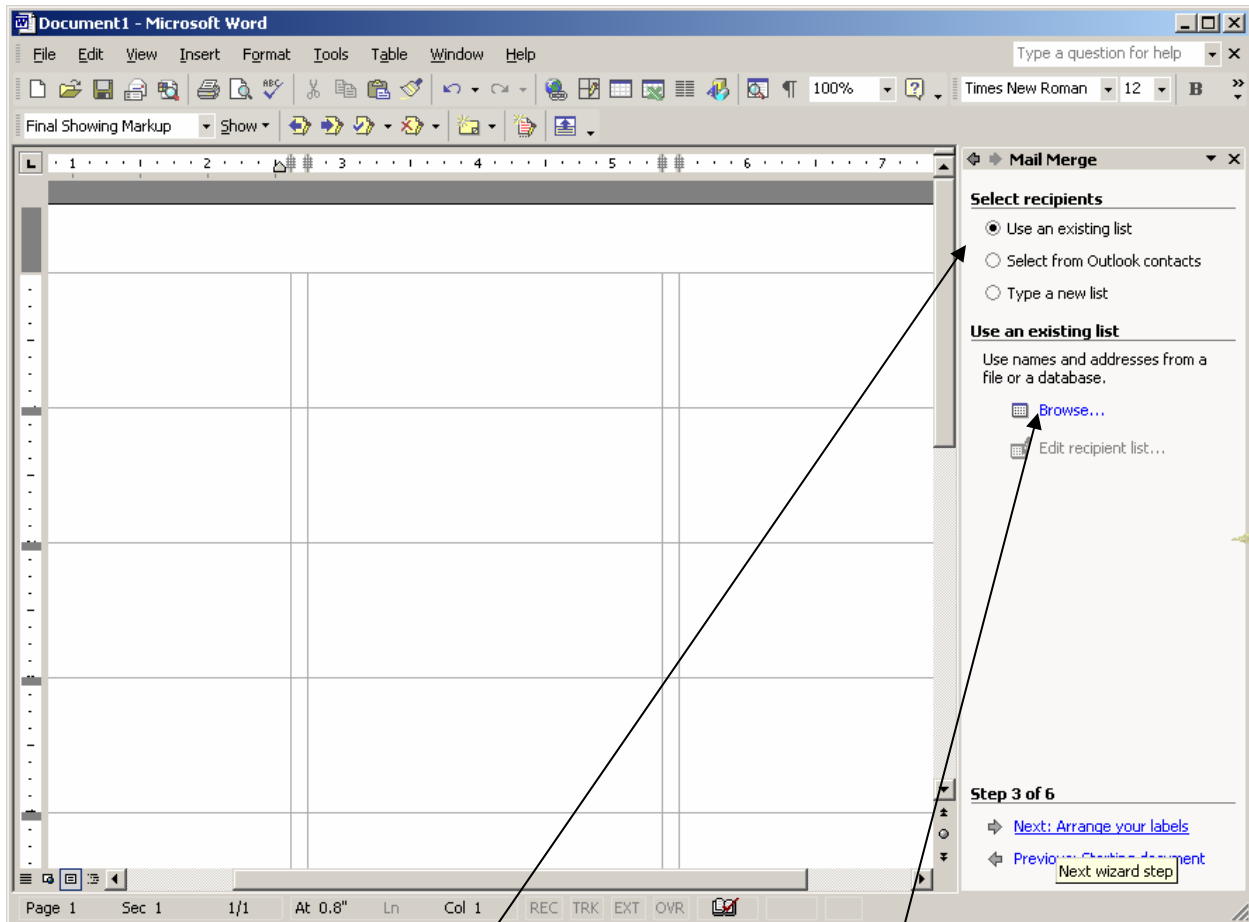
5. Click **Label options**



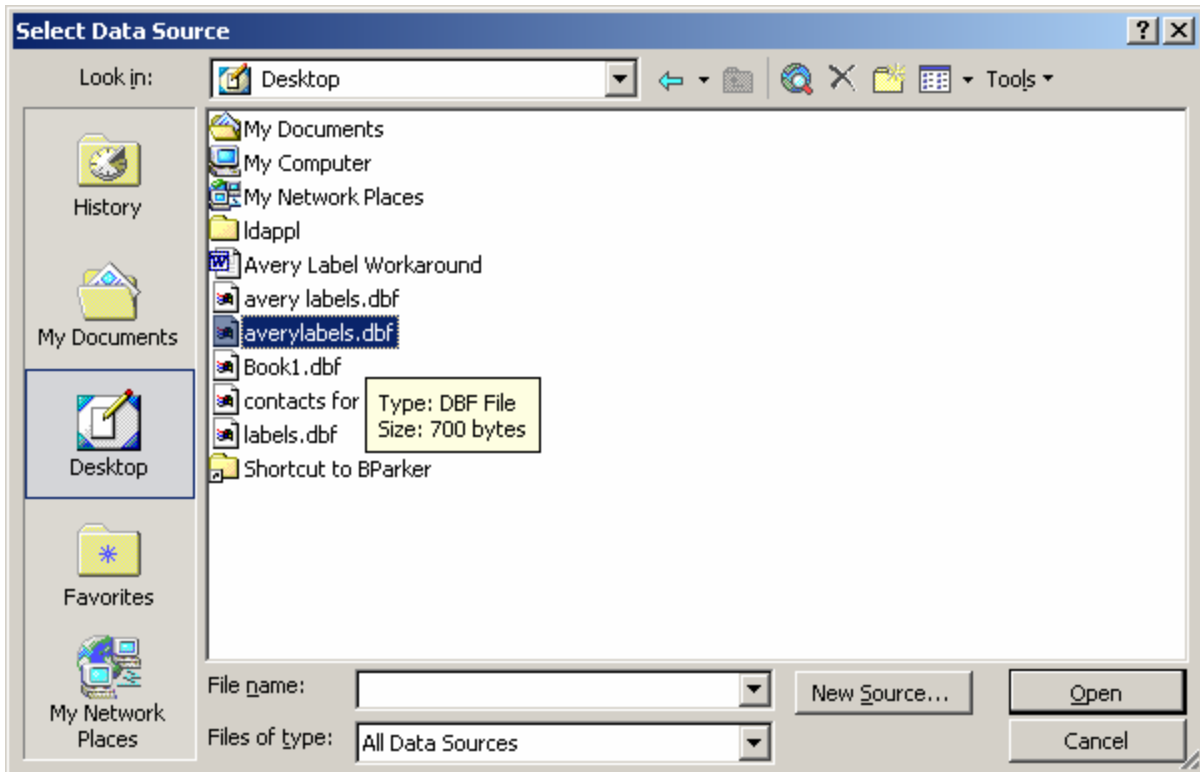
6. Choose desired label and click **OK**.



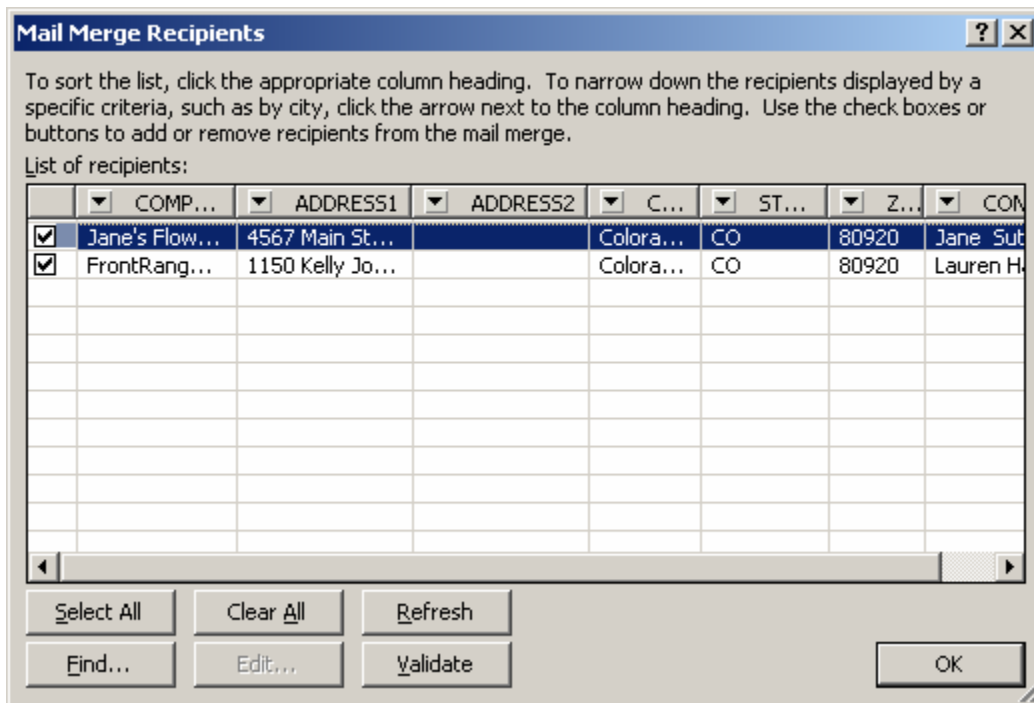
7. Click **Next: Select recipients.**



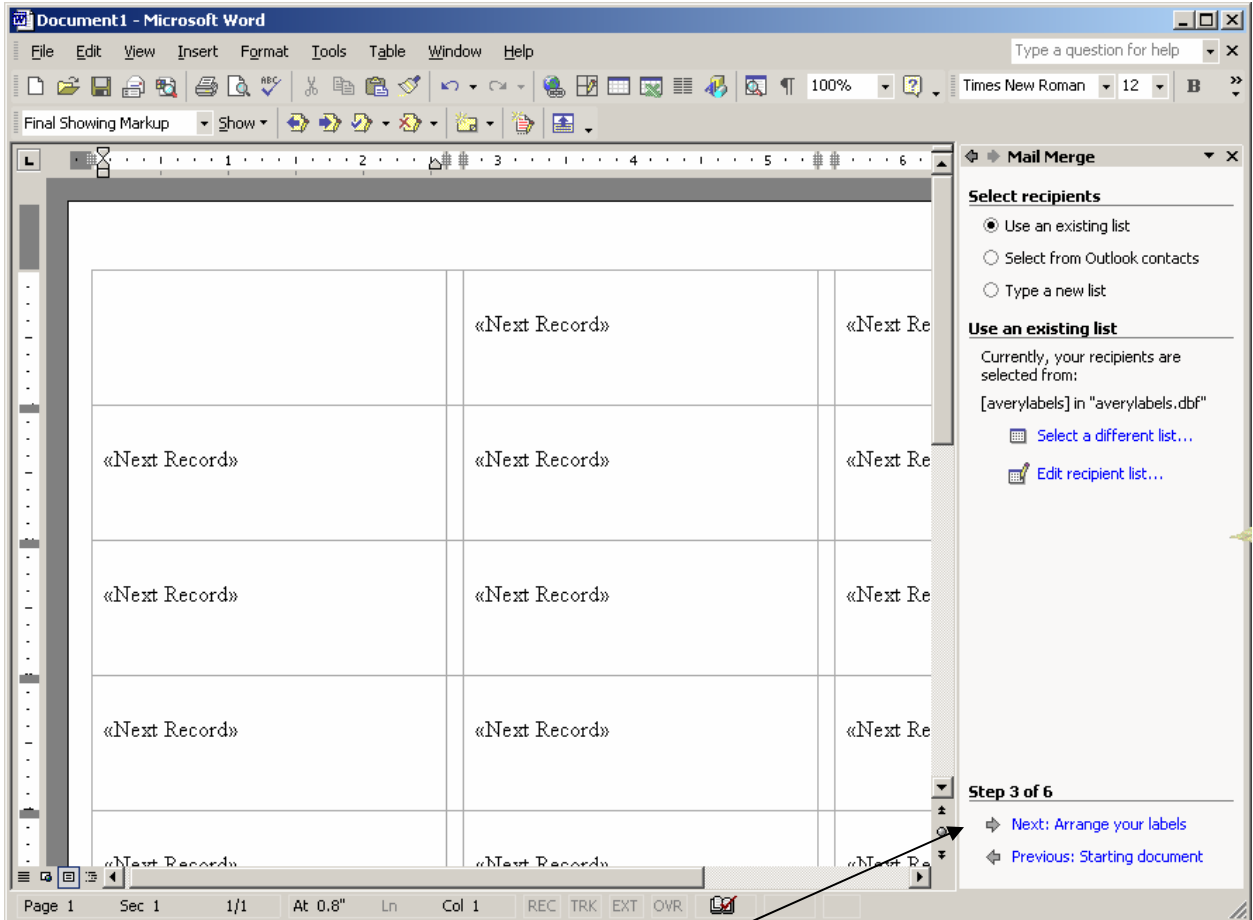
8. Make sure **Use an existing list** is selected; then click **Browse**.



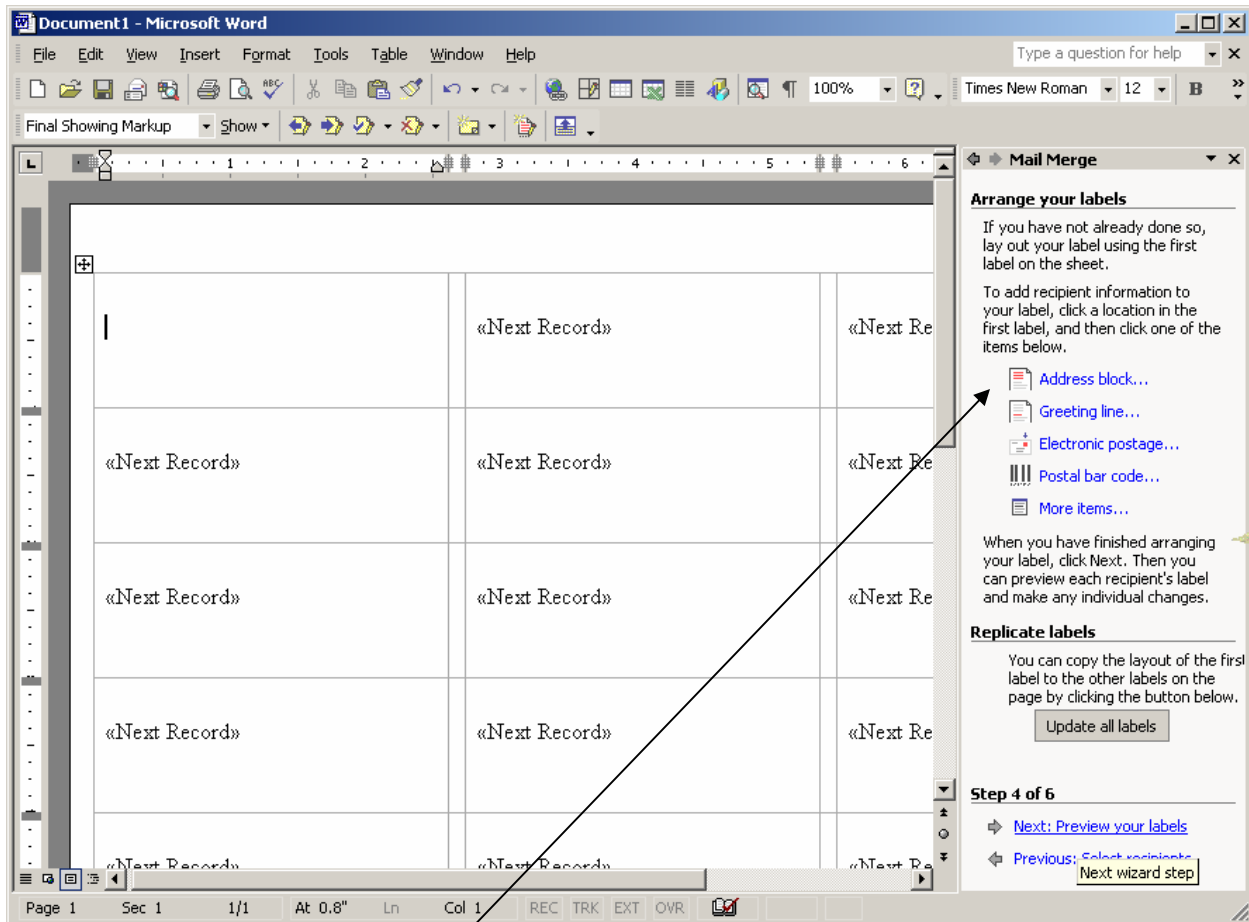
9. Browse to the location of the exported .dbf file and double click on the filename. (Note: There does not appear to be an issue with spaces in file names in this version of MS Word.)
10. The Mail Merge Recipients window opens.



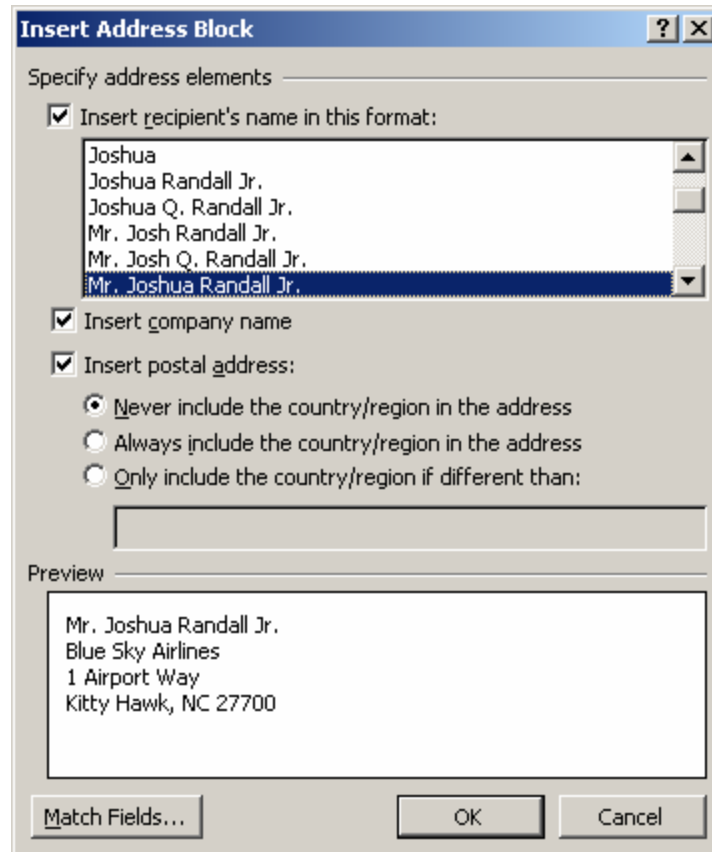
11. The records with a check mark in the first column are those that will be merged. You may deselect individual records, clear all, or select all if none are checked. **When the list is as desired, click OK.**



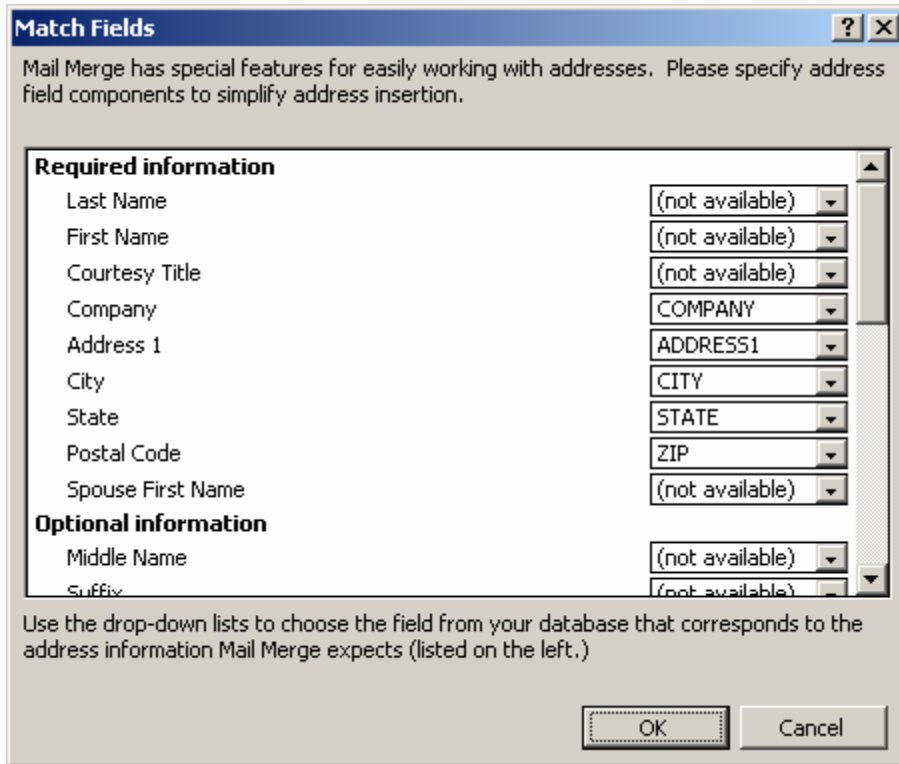
12. Click on **Next: Arrange your labels.**



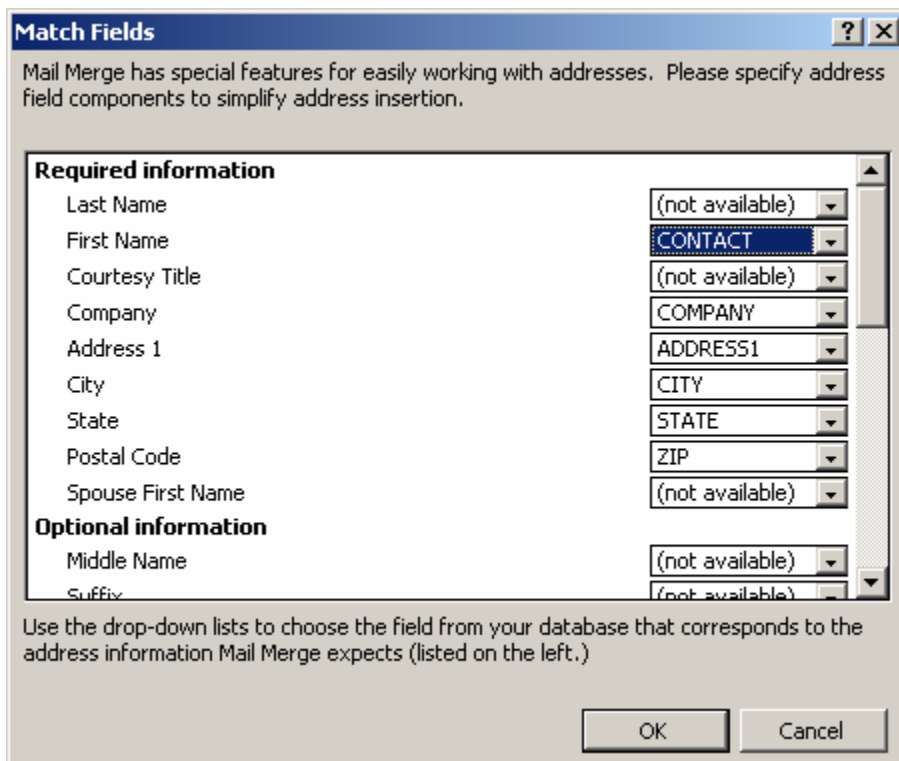
13. Click **Address block...**



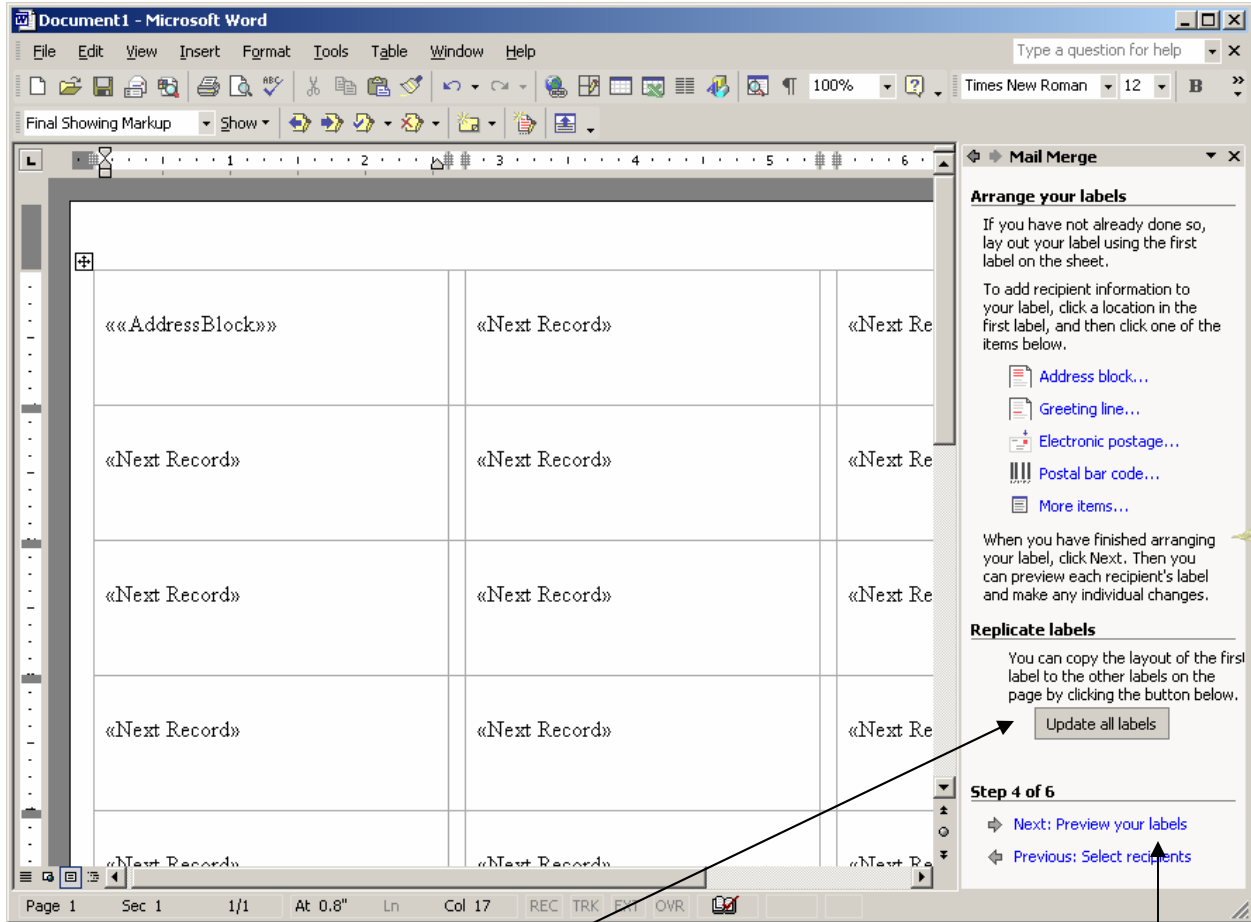
14. Click **Match Fields...**



15. Note that fields are mapped correctly, with the exception of the Contact Name. **Click the dropdown for First Name and select CONTACT.** The Match Fields window should now look like this:



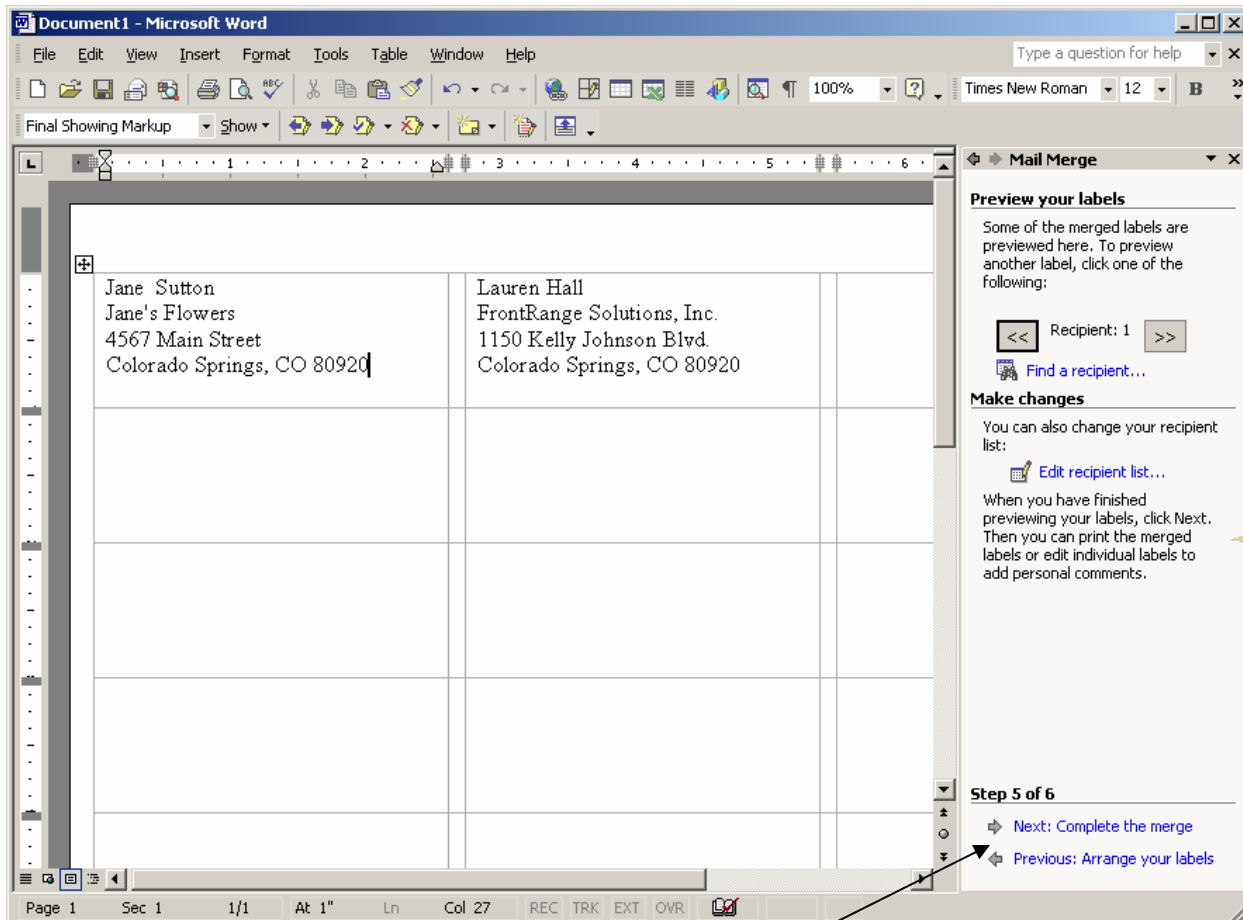
16. Click **OK**, then **OK** again.



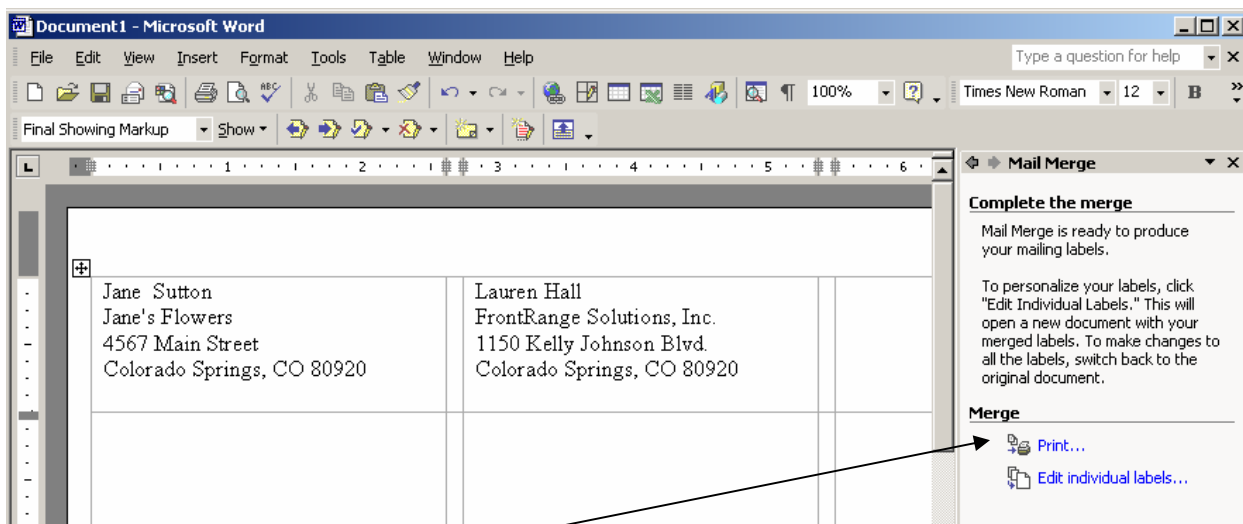
17. Click **Update all labels**.

18. This will add the <<AddressBlock>> information to each record section.

19. Click **Next: Preview your labels**.



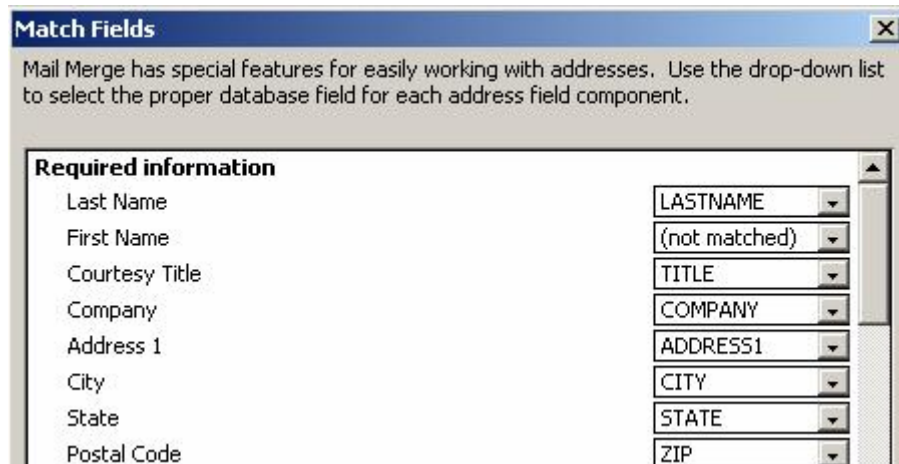
20. The document now reflects the contacts merged into the label form.
 21. Click **Next: Complete the merge**



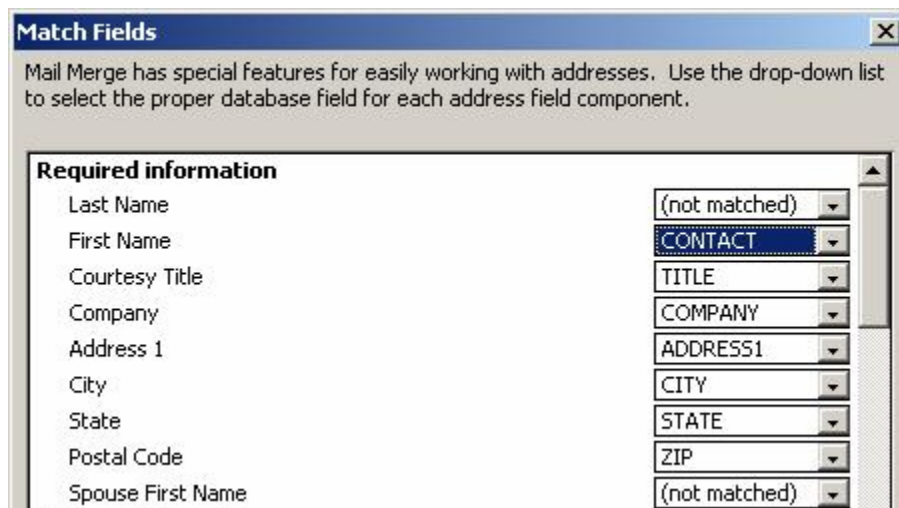
22. Click **Print**.

MS Word 2003 Mail Merge

The Mail Merge for MS Word 2003 with an exported set of GoldMine contacts is identical to the steps outlined previously for MS Word 2002 (XP) **with one exception**. When the Match Fields window opens, the Last Name field will show LASTNAME and First Name will show (not matched), as shown in the following figure.



1. **Select the dropdown for Last Name and change to (not matched).**
2. **Select the dropdown for First Name and change to CONTACT.**
3. The result should be as shown below:



4. The remaining steps are unchanged. Refer to the section for MS Word 2002 (XP) to complete the merge.