

For this section, you will need both DiamondCounter and a copy of Microsoft Word installed on your PC. This procedure has been written and tested only in Microsoft Word 2000, so newer versions of Microsoft Word or alternate programs such as OpenOffice may be slightly different in their execution. Please be advised of this before continuing.

First, you must open DiamondCounter and logon by clicking the 'Logon' option and entering your username and password. Once these have been entered, you can start the procedure.

To begin, you must click on the 'Tools' menu, and then navigate down to 'Customer Tools & CRM', now you must select the 'Mailings (Thank-you notes, Occasions)' option of the software. Once here, the Customer Marketing – Thank You Notes & Occasions section opens and will allow you to enter search criteria

- Customer spent at least ... (\$) Totaling in sales in one month
- Do not consider individual sales of less than ... (\$)
- If necessary, limit the list to the top ... Customers
- Number of Addresses for sales 'Thank You' found:

These are the criteria available. For the first option, enter the minimum amount of sales that a person would have to spend in your store in one month to get on the mailing list. The second option deals with not considering sales that were under a certain value. The third option is to limit the number of entries. If you insert criteria that kicks back an excessive amount of clients, you can use the third option to narrow it to just a certain amount, and the fourth option displays how many clients match your criteria.

Once this process is complete, you can export the list by clicking on the 'Export Customers (Sales)' button, and then simply select a save location and enter a name to save the file as. The file will save as type .csv, which is a comma-delimited file type that can be opened in any spreadsheet program, like Microsoft Excel.

Now that we have our file, we can continue with printing our labels in Microsoft Word. To accomplish this, first you must open Microsoft Word. Once Word has loaded, you can select the 'Tools' menu, and then select the 'Mail Merge' option. Once this option has been selected, another window pops up asking you what type of document you'll be producing. Select the 'Mailing Labels' option and click Next.

Another box will open with two options in it, selectable by buttons. Click the second button that reads: 'Merge information from another type of file'. Navigate to where you saved the customer file you generated with DiamondCounter and select it. If you're having trouble finding your file, down near the bottom of this window there is an option that says 'Files of Type' and has a drop-down list. Click this drop-down list and select 'Text Files' from the list. Your file should now be visible. Select it and continue on.

At this point, several boxes will pop up in succession, with different options for your labels. The first box that appears will ask: 'Do you want to use entries in your first row of data as field names?' Select 'No' to this option. A new box will open, asking you which separator character your file uses. Select the 'comma' option and click 'OK'. The next box that appears will say 'Word needs to set up your merge document. Choose 'setup' button to finish setting up your document'. Click OK.

The Mail Merge Helper box now appears, with three (3) steps. Beside step one, there is a Setup... button. Click this button, and you're presented with the label setup options. For printer type, make sure 'laser and ink jet' is selected. For label type, enter the brand of label, and then select the product number of that brand in the box on the bottom-left corner. Once you have completed these steps, click OK.

Now click the Insert Merge field button, and select fields F3, F4, F5, F7, F8, and F9. Set them up in the following configuration:

```
<<F3>> <<F4>>  
<<F5>>  
<<F7>>, <<F8>>  
<<F9>>
```

This will display as follows on the label:

```
<first name> <last name>  
<street address>  
<city>, <state/prov>
```

<zip/postal code>

Once you have this configured, click OK.

Now, we can skip past Option 2 and move to Option 3. Click the 'Merge...' button. It will now ask you a few simple questions. You're going to merge to a new document, and make sure the option to 'Print blank lines when data fields are empty' option is selected. Once these options are selected, click the Merge button. Your data are now taken from your original file that you generated with DiamondCounter, merged into a Microsoft Word document and configured according to the label type you selected. Now simply load your labels in the printer correctly and print the document.