

Mailing Labels is a two part process:

- 1) Generate & review your mailing label report to confirm the filters you are using to run the report
- 2) Generate the labels

Generate & Review

From the **Reports** tab find and start Prospect 4.0 Mailing Label. Click **Edit** beside 'Filtered by:' to edit your filters to match what you are sending:

Prospect 4.0 Mailing Label

Report Generation Status: The report returned no results.

Report Options:

Summarize information by: --None-- Show: All prospects

Time Frame: Date Field: Anticipated Move-in Date Range: Custom From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Filtered by: [Edit](#)
CommunityFilter equals "Lost,Moved-In"
AND Status not equal to "Lost,Moved-In"
AND Mailing Label Instructions equals "Inquirer,Prospect" [Clear](#)

Prospect Name	Inquirer's Street 1	Inquirer's Street 2	Inquirer City Prov Zip	Inquirer First Name	Inquirer Full Name	Mailing Label Instructions	Prospect's Street 1	Prospect's Street 2	Prospect City State Zip	Prospect's Full Name	Prospect ID
Grand Totals (0 records)											

Confidential Information - Do Not Distribute

Typical ones are the Community, Status, Prospect Status, if the Inquirer Address is blank etc.

Report Type: Prospects

Prospect 4.0 Mailing Label

Save Save As Close Report Properties Run Report

Fields: All #

Quick Find

Drag and drop to add fields to the report.

Bucket Fields: Add Bucket Field

Prospect: Info: Prospect: ID, Prospect: Name, Age Range, Amenities, Amenities - PL, # Amount, Anticipated Move-in Date, Assessment Date

Filters: Add

Show: All prospects

Date Field: Anticipated Move-in Date Range: All Time From: To:

CommunityFilter equals ""
AND Status not equal to "Lost,Moved-In"
AND Mailing Label Instructions equals "Inquirer,Prospect"

Preview: Tabular Format Show Remove All Columns

Prospect Name	Inquirer's Street 1	Inquirer's Street 2	Inquirer City Prov Zip	Inquirer First Name	Inquirer Full Name
Grand Totals (0 records)					

No data was returned. Check report filters.

NOTE: This current label works off of the Inquirer address.

Confirm your total count then make sure to click **Save** or **Save as** (depending on your privileges, you may only have the **Save as** button. This will just create another copy with your desired filters. Make sure to choose the appropriate copy in the next step.)

Tip: Although we recommend reviewing the report each time, once you have saved the report it will save your filters for next time. Just make sure to choose the corresponding report when prompted.

Generate the labels


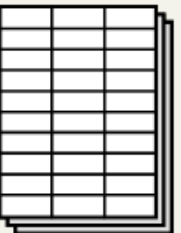

Start Conga Mail Merge either from your tab menu or the +

Make sure only **Labels** is checked off & click **Next**.

Step 1: Select what you'd like to create

Welcome to Conga Mail Merge

Conga Mail Merge can easily generate batches of letters, documents, labels and envelopes, but it's only half the story. Conga Composer, Conga QuickMerge and other features are also included, but you'll need a little help to enable them. See the Conga Customization Guide, below, for details.

<input type="checkbox"/> Letters/Documents 	<input checked="" type="checkbox"/> Labels 	<input type="checkbox"/> Envelopes 
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New to Conga Mail Merge or Conga Composer?

Check out the [Conga presentation](#) to learn about its features!
Download the [Getting Started Guide](#).

Select **Reports** & the **Prospect 4.0 Mailing Label** report (or replacement if you created your own).

Step 2: Enter your search criteria

Select a data source:
Source: Contacts Leads Accounts Campaigns Reports

Conga Reports:
Billing Mass Merge
Prospect 4.0 Mailing Label
Resident Names

Refresh

Reports listed here are retrieved from the Conga Reports folder in Salesforce.com. Generally, the report should include an ID column, like Contact ID. Please see the Conga Configuration Guide for details on how to create the folder and for specific requirements for reports to function with Conga.

Report columns are accessible as Merge Fields in Word Mail Merge Templates.

To access data not in Contacts, Leads, Accounts or Campaigns, create a Report.
Data sets of more than 1,000 contacts or data elements may significantly extend processing time.

View Report Next

Check to make sure your quantity is correct. You can unflag any here as well, but it is usually better if the report filter is used on the report, as a change here won't be remembered for next time.

Step 3: Review the search results

Review the search results:
Data shown on this page does not include all columns that may be available for merging. To view the complete set of data, click the View Data button, located in the lower-right corner.

Master Records found: 42
Detail Records found: 42

Select All Deselect All
Selected: 0

	Include?	ID	Name
1	<input checked="" type="checkbox"/>	a19d0000000V6feAAC	Stanton, Dean (Dean & June)
2	<input checked="" type="checkbox"/>	a19d0000000V6fZAAS	Ellis, Stephanie
3	<input checked="" type="checkbox"/>	a19d0000000V6bXAAS	Dunn, Ester (Ester Dunn)
4	<input checked="" type="checkbox"/>	a19d0000000V6gXAAS	Johnson, Janet
5	<input checked="" type="checkbox"/>	a19d0000000V6gSAAS	Clayton, Katherine
6	<input checked="" type="checkbox"/>	a19d0000000V6z2AAC	Robinson, Dorothy (Dorothy Robinson)
7	<input checked="" type="checkbox"/>	a19d0000000V6yxAAC	Fondario, Laura (Kay Fondario)
8	<input checked="" type="checkbox"/>	a19d0000000V6fKAAS	Jones, Chantelta (Chantelta Jones)
9	<input checked="" type="checkbox"/>	a19d0000000V6rDAAS	Curry, Jacqueline (Jacqueline & LaRue)
10	<input checked="" type="checkbox"/>	a19d0000000V5oxAAC	Jefferson, Kamera (Hubert & Frances)
11	<input checked="" type="checkbox"/>	a19d0000000V5saAAC	Hess, Mary (Mary Hess)
12	<input checked="" type="checkbox"/>	a19d0000000V5tOAAS	Hatcher, James (Jovce Redfern)

Click **Next**.

Tip: **Next** is always on the right hand side, usually on the top and bottom. If you don't see one it is usually off your screen so just scroll down to the bottom.



Step 5: Choose your label details

Select your label style:

- Choose a standard label size and layout
- Choose a label template from Salesforce.com
- Choose a label template from your local computer

Select a Word template for labels from your computer:

Select 'Choose a label template from your local computer' and find the file using the **Browse** button. Once you are satisfied with the label it can be added as a template. Click **Next**.

Select Labels and then open the resulting word document.

Step 7: Download what you've created

You're ready to download and print!

Show Details...

Click each button to download letters, labels and/or envelopes. After you've downloaded a file, open it in Microsoft Word (or Adobe Acrobat) and print it.

Download and Print:

Letters/Documents

Labels

Envelopes

File Type:

- Microsoft Word
- Adobe Acrobat PDF

Multiple files?

Documents only. [What's this?](#)

- One file (if possible, 40 Mb max.)
- Multiple files (zipped)

Log Activities:

Log Activities

Include body of the letter?

- Yes
- No (saves space)

Activity Subject (Optional):

Create a Follow-Up Task for this date:

Open the document, verify the labels, and print from Word.

VERY IMPORTANT: ALWAYS TEST one page on the label to ensure your printer aligns properly. Make sure you do not choose a quick print as that will result in all pages being printed.

Use the official Conga plugin user guide for help in extensive options, with a Table of Contents. Take advantage of the *Ctrl+F* search function to quickly find support within the User Guide.

Conga Mail Merge User Guide:

http://home.appextremes.com/Documentation/CongaMailMerge/Conga_Mail_Merge_Getting_Started.pdf