

How to Create Mailing Labels Using EZ Labels

Description

Use this function to create mailing labels for Inquirers and Prospects. EZ Labels automatically filters Prospects with the Mailing Label Instructions: Do Not Mail, Prospect, and Inquirer. If left blank, the system will use both addresses. Mailing label instructions are set on the Prospect's profile page in the Mailing Labels section.



Step by Step

- 1 Navigate to the RHS Actions tab
- 2 Click **New**
- 3 Select *EZ Label* as the **Record Type of New Record**
- 4 Click **Continue**
- 5 Enter an **RHS Action**. This is a detailed description of the type of mailing labels you are creating, such as "Xmas Mail-Out"
- 6 Specify **From Initial Contact Date** and **To Initial Contact Date** if you would like to filter out only Prospects and Inquirers who contacted you in a given time frame
- 7 Enter **Task Subject** if you would like a task created in the Prospects' activity history
- 8 Verify **Community**. If incorrect, specify the correct **Community**.
- 9 Check the box to **Include Inquirers** on the mailing labels
- 10 Check the box to **Include Prospects** on the mailing labels
- 11 Check the applicable boxes for **Prospect Status**
- 12 Check the applicable boxes for **Sales Stage**
- 13 Verify the data and click **Save**

Create Mailing Labels

Information	
RHS Action	<input type="text" value="XMas Mail-Out"/>
EMxReport Owner	
From Initial Contact Date	<input type="text" value="11/4/2013"/>
Initial Contact Date	<input type="text" value="11/4/2013"/>
Specify Task Subject	<input type="text" value="XMas Mail-Out"/>
Community	<input type="text" value="iaRetirement - GTA"/>
Include Inquirers	<input checked="" type="checkbox"/>
Include Prospects	<input checked="" type="checkbox"/>
Report Trigger	<input type="text" value="RHSLabels"/>
Prospect Status	
Urgent Need ASAP	<input checked="" type="checkbox"/>
Special Need within the next 1 to 3 months	<input checked="" type="checkbox"/>
Final Decision Process Within 30 Days	<input checked="" type="checkbox"/>
RH Decision Made - 1 to 3 Months	<input checked="" type="checkbox"/>
Basic Interest 4 - 6 Months	<input type="checkbox"/>
Waiting to Sell Home 6 - 12 Months	<input type="checkbox"/>
Preliminary Search Not Ready Yet	<input type="checkbox"/>
Unqualified Unknown	<input type="checkbox"/>
Do Not Contact	<input type="checkbox"/>
Nurture Program	<input type="checkbox"/>
Resident	<input type="checkbox"/>
Temporary	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
Sales Stage	
Initial Call	<input checked="" type="checkbox"/>
Deposit	<input checked="" type="checkbox"/>
Lost	<input type="checkbox"/>
Moved-In	<input type="checkbox"/>
Wait List	<input type="checkbox"/>

- 14** Click **Generate**
- 15** Scroll down to the Custom Links section
- 16** You can see the number of Labels you will be printing. Click on the latest EMxHeader, which you have just generated.


Custom Links									
EMxHeader									
Action	EMxHeader Name	Community	Report Title	Created Date	From Date	To Date	Number of Lines	Owner Alias	
<input type="checkbox"/> Edit Del	EMx-0010288	iaRetirement - GTA		7/6/2013			28		
<input type="checkbox"/> Edit Del	EMx-0009737	iaRetirement - GTA		3/19/2013			29	LWies	
<input type="checkbox"/> Edit Del	EMx-0009626	iaRetirement - GTA		3/6/2013			8	LWies	

Note: If you would like to create a mailing list without creating the actual labels, skip to the next section (Optional: Export Mailing List to Excel or CSV)

17 Click **Launch**. Conga Mail Merge will open in a new window.


[EMxLines \[28\]](#)

EMxHeader Detail Edit Delete Clone Show Report


EMHeader Name	EMx-0010288
Community	iaRetirement .GTA
Launch	Launch 
Created By	Larry Wieskopf, 7/6/2013 3:51 PM

Edit Delete Clone Show Report

18 Click **Labels**. The labels will be downloaded.

 Conga Mail Merge

Step 7: Download what you've created

You're ready to download and print! Show Details... 


Click each button to download letters, labels and 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? One file (if possible, 40 Mb max.) Multiple files (zipped)
Documents only. [What's this?](#)



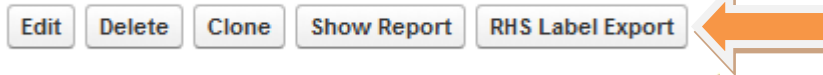
Note: At any time you can see your history and re-launch any report you have made in the past. To do this, simply scroll down to the bottom of the screen and find the list of your EMxHeaders – these are your previously generated label reports.

If mailing labels need to be regenerated in the future, remember to blank out the subject before clicking the Generate button, to avoid creating duplicate tasks in a prospect's record.

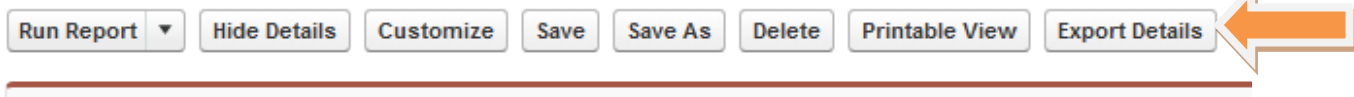
Optional: Export Mailing List to Excel or CSV

If you would like to create a mailing list without creating the actual labels, take the following steps after step #16 above:

- 1 Click the **RHS Label Export** button at the top (Do not click Launch)



- 2 A new screen will pop up. Click **Export Details**.



- 3 Select the **Export File Format**

- 4 Click **Export**

Export Report

Export File Encoding | Unicode (UTF-8) ▼

Export File Format | Excel Format .xls ▼

- Comma Delimited .csv
- Excel Format .xls

Export Done