Mailing Labels in AMS 360

The steps below help expedite the process of creating mailing labels in AMS 360. This three-step process uses the **sales center** to create your list and merge it to labels.

Step One: Creating a target list of customers

1. Open the sales center. Note: authorization is required to see this center as a selection.
2. Actions, new target list.
3. Customer criteria—choose: customer, active. If your agency uses "Business with Agency" on the customer center, a selection from the available items can narrow the results.
4. Basic policy criteria: You may want to consider selecting "Only current policy terms."
5. Query information: save list as, 'Type,' a unique name for this target list. Uncheck "Include Policy Information" to not include this in your holiday mailings.
6. Click the run query box (looks like a gear).
7. Below the count results and total rows, select the "Fill Grid" icon to see the results, but only if the total row count is less than 2,500. This is to the left of "Map Location."
8. Save and close target list.

Step Two: Creating labels

1. Open form letters.
2. If you are purchasing or have purchased Avery 5160 standard address labels, select the labels category and the 5160 address labels document. Continue to step three, merging the target list to the labels.
3. Select the document library icon from the toolbar or from the file menu.
4. Select [New]
5. Choose category (usually labels), add a unique document name and select one of the available merge templates.
6. Use the "Launch Microsoft Word" hyperlink or the Microsoft Word icon from the toolbar to open Microsoft Word.
7. Within Microsoft Word: On the mail merge toolbar, locate main document setup (icon will look like a piece of paper and envelope).
8. Select labels, [OK].
9. Select your label product number, [OK].
10. Add merge fields to the top left label in the template using "Insert Merge Fields." Note: Once you have your selected merge fields, select the next record field located under insert word field.
11. Locate the "Propogate" icon on the mail merge toolbar. This fills in the remainder of the labels on the page.
12. Exit Microsoft Word. You will receive a message, "Do you want to save changes," select [Yes].
13. You will then return to the document library screen and receive a message box, "You've created or changed the mail merge main document. Please click [OK] to store your changes in the database or [Cancel] to leave the document as it was." Click [OK].
14. When the document save process has completed, a message in the bottom right corner will show in red text "Microsoft Word document editing complete." Select save and close.
15. The new label document is now ready for merging. Save and close document library.

Step Three: Merging the target list to the labels

1. Within form letters choose the category and document created from step two above.
2. Customer selection: change "Type" from customer to target list.
3. Use the "Select List" menu to choose the target list created in step one above.
4. Select one letter per customer created. This creates one label for each customer.
5. Activity options: decide if you will want to log an activity for each customer on the target list.
6. File, merge and view.
7. Prior to printing the entire list of labels, we recommend printing one page to check for alignment.