Setting up Custom Shipping Labels

BusinessWorks Gold does not have a utility that allows users to print shipping labels for sales orders or invoices. However, you can create a custom form to accomplish this task. After printing the sales order or invoice, you will use a form reprinting option to print shipping labels.

> When you select a form-printing option such as *Orders > Print Sales Orders* or *Invoices > Reprint Invoices*, BusinessWorks displays only those forms that are appropriate for that option. For example, BusinessWorks displays only *OE Sales Order* type forms when you select *Orders > Print Sales Orders*. For this reason, you will need to create separate forms if you wish to print shipping labels for both sales orders and invoices.

Overview

In a nutshell, here's what you will be doing (step-by-step instructions follow this section):

I. Create a new form using the *OE Invoices* or *OE Sales Orders* form type.

II. Remove the form's footer and compress the form's detail band.

III. Set the paper size for your shipping label.

IV. Select, resize, and align the shipping label fields and save the form.

V. Use a form printing option (for example, *Orders > Print Sales Orders* or *Invoices > Reprint Invoices*) to print the shipping labels.

I. Create a new form

1. Select *O/E Utilities > Maintain O/E Forms*. On the screen displayed, click *New…*. The form at right will display:

2. Type a form name that you will easily recognize as a label form.

3. Select the form type:

   - *OE Invoices* to print shipping labels for invoices

   - *OE Sales Orders* to print labels for sales orders

4. Click *OK*. The screen below will display. (If the *Preview* tab is on top, click the *Design* tab.)
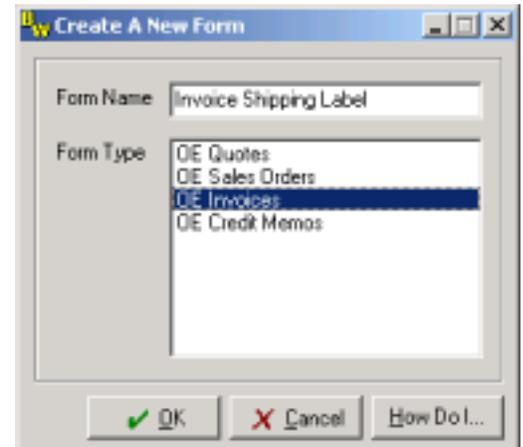
II. Remove the form's footer; move Detail band up

1. Select *Report* and deselect *Footer.*

2. Click and drag the gray **^Detail** band up as far as possible by holding down the left mouse key as you move the mouse up.
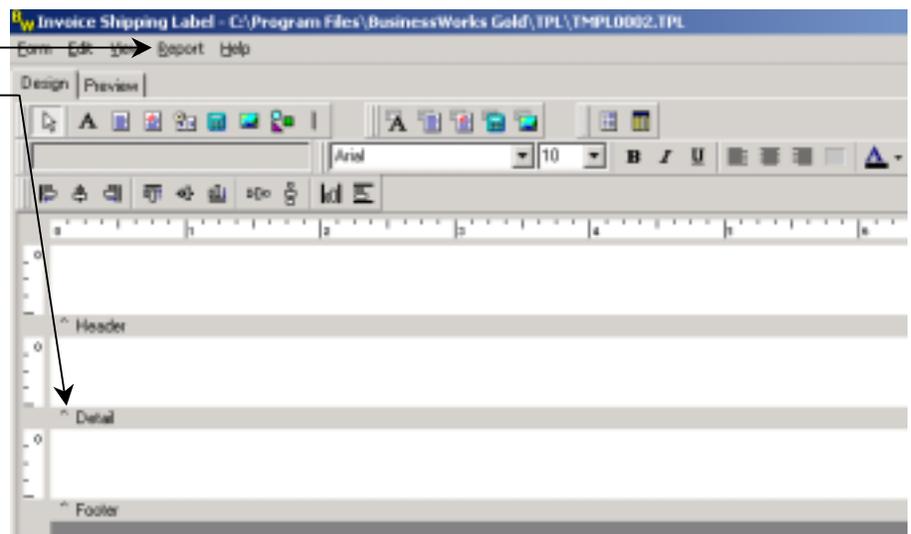
III. Set the paper size for your shipping label

1. From the *Form* menu, select *Page Setup*. Review the settings on <u>each tab. Set the</u> paper size, paper source, layout and margins for the labels you plan to use. If you plan to use a special printer for labels, select it on the **Printer** tab.
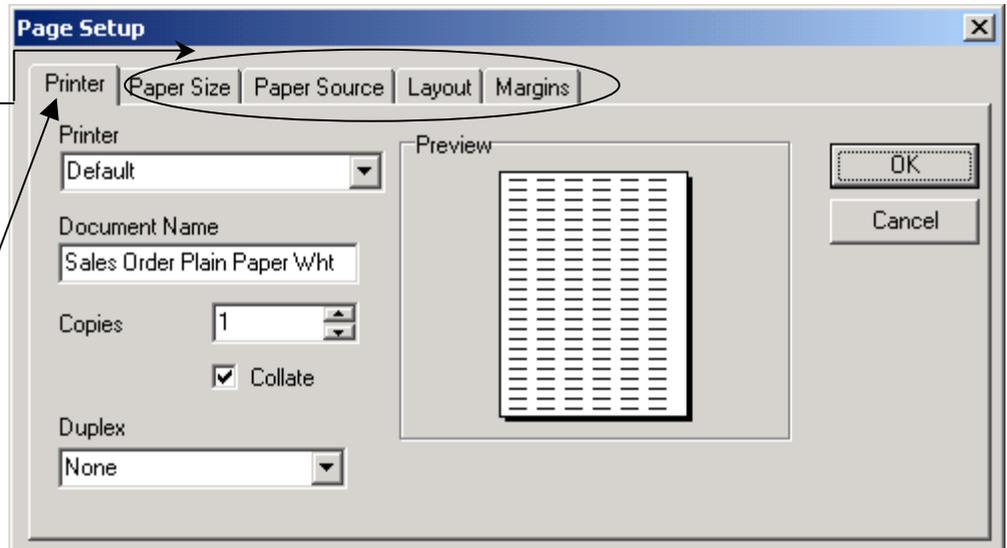
Example: On the **Paper Size** tab, set the width of the label to five inches and height to two inches. Leave the margins at .25 for top, bottom, left and right. After saving changes, the screen looks like this:

2. To increase the height of the label click and drag the **^ Header bar** <u>down until it is the size of your labels</u> minus top and bottom margins. (If you don't see a ruler at the left margin, select *View > Rulers.*)

You are now ready to place the fields on your label.
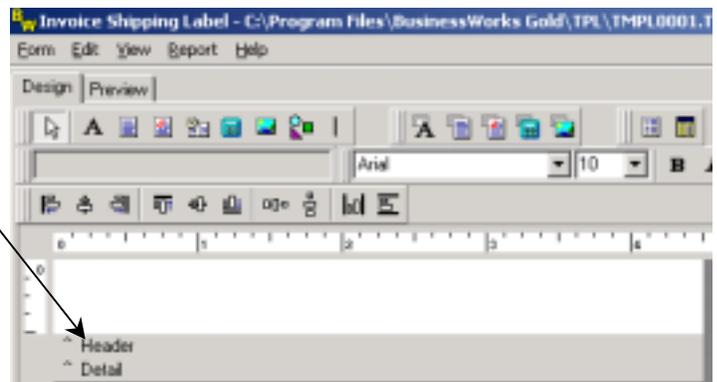
IV. Select, resize, and align the shipping label fields and save the form

1. Click the *DBText* icon. Then click in the window below. You should now see a box with squares around it and the text, "DBText1".

2. Click the arrow next to the *Data Field* drop-down box. Scroll <u>down to the</u> **Customer** or **Company** fields and select the field for the first line of your label.

3. Move the field to the left margin: Position the mouse in the middle of the field. Then, while holding down the left mouse button, drag the field to the desired location.

   Note: If you defined margins in Section III, above, you will probably want to position the field at the left edge of the form and drag it all the way to the right edge.
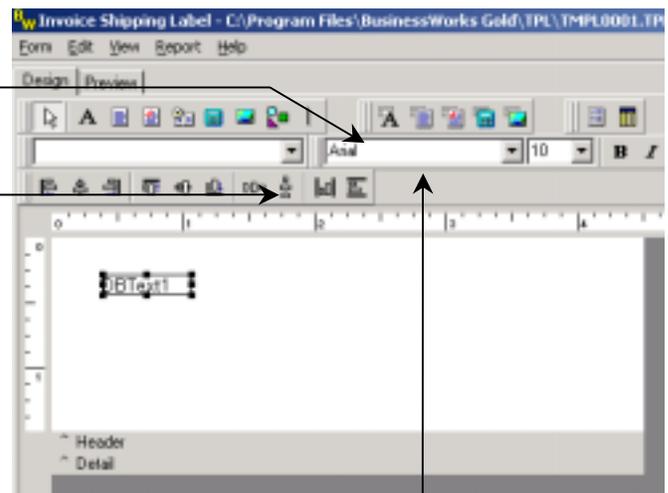
4. Lengthen the field to fill the label: Position the mouse over the middle-right square. Then, while holding down the left mouse button, drag the box to the right to enlarge it.

5. Repeat steps 1 through 4 for each field you wish to add to the label.

   Using the *Shipping: Address Block* or *Company: Address Block* field: You can add all address lines as one block of text, rather than using a separate line for each element of the address. To do this, first select the *DBMemo* icon, rather than the *DBText* icon. Then select **Shipping: Address Block** from the *Data Field* drop down list.

   Note: Whenever you wish to use a field that ends in the word "Block", you need to first select the *DBMemo* icon. If you use the *DBText* data type, the text, "Memo" will print in place of the field's contents.

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6. After you have selected all fields you wish to print on the shipping label, you can use the <u>alignment icons</u> to line them up. (Hover the mouse over each icon to see its function.)

   Note: If you don't see this toolbar, select *View > Toolbars > Align or Space* to display it.

   In the example at right, the fields need to be left aligned and spaced evenly vertically. To align the icons…

   a. Press Ctrl-A to select all the fields. (You should now see small gray squares around each field's box.)

   b. Click the *Align Left* icon. The left edge of each field should now be aligned.
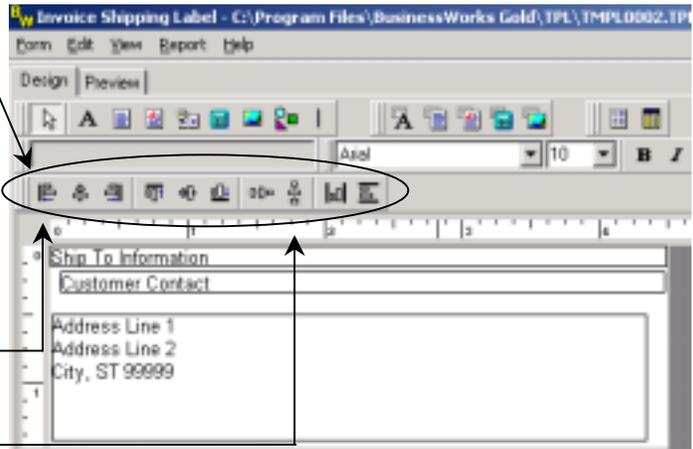
   c. Click the *Space Vertically* icon so that the vertical space between each field is the same.

   After completing the two alignment functions, the screen looks like this:

7. Click in a white space outside the field boxes to deselect all fields. (The gray boxes should disappear.) Then lengthen any fields if necessary.

8. Click the **Preview** tab to see what your form will look like. Return to the **Design** tab if you wish to make any final modifications.

9. When you have completed the form, select *Form > Save* to save your form.
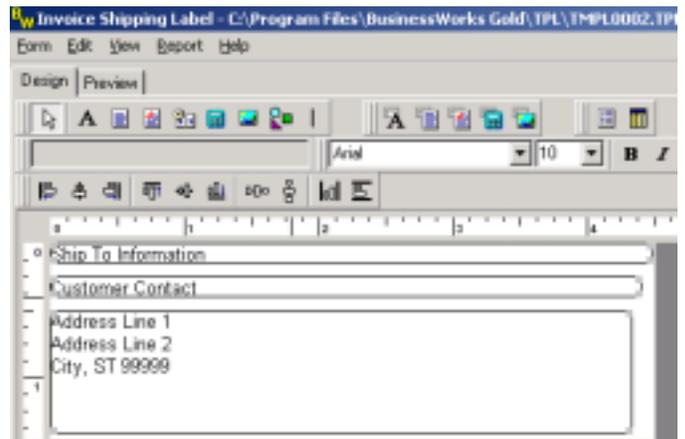
Note: If you need to print shipping labels for Sales Orders, repeat the steps above, selecting the *OE Sales Order* form type in Section I, step 3, above.
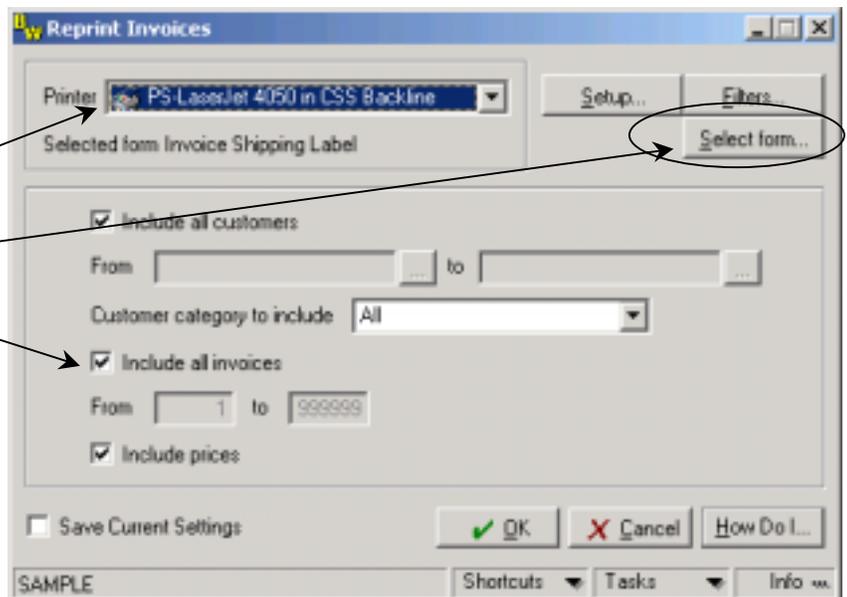
V. Use a form printing option to print the shipping labels

How you will print shipping labels depends on the option you used to print invoices or sales orders. The sections below provide step-by-step instructions for printing shipping labels after printing sales orders or invoices using the option named in the heading.

Invoices > Print and Post Invoices

Follow these steps after using the *Print and Post Invoices* option to print a batch of invoices.
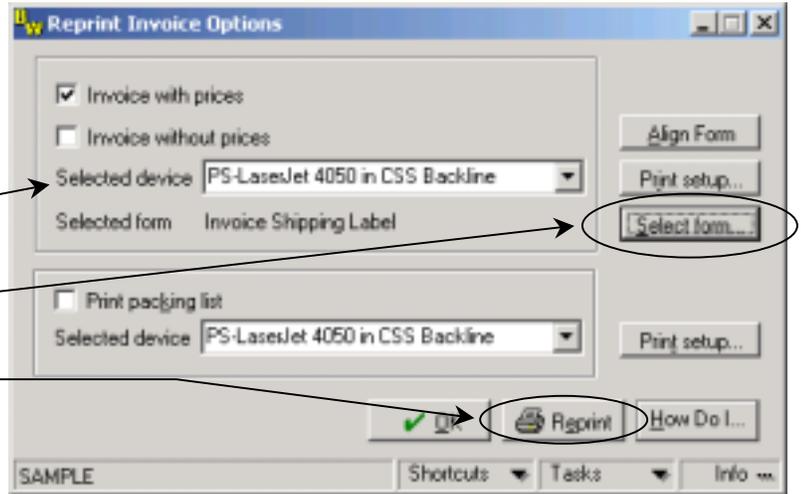
1. Select *Invoices > Reprint Invoices*.

2. Select the <u>printer</u> from which you wish to print shipping labels.

3. Click *Select Form* and select the shipping label form you created above.

4. Uncheck <u>Include all invoices</u> and enter the range of invoices you just printed.

5. Click *OK*. BusinessWorks will now print shipping labels for the range of invoices you specified.

Invoices > Direct Invoicing

Use this option if you are using the *Direct Invoicing* option to print a single invoice.

1. After posting and printing the invoice, the screen at right displays:

2. Select the printer from which you wish to print shipping labels.

3. Click *Select Form* to select the shipping label form you created above.

4. Click *Reprint*. The shipping label for the invoice you just created will print.

Orders > Maintain Sales Orders

Use this option if you wish to print a shipping label for a sales order currently selected in *Maintain Sales Orders*.

1. In *Maintain Sales Orders*, click the *Print* icon at bottom right. The screen at right displays.

2. Select the printer from which you wish to print shipping labels.

3. Click *Select Form* to select the shipping label form you created above.

4. Click *Print*. The shipping label you created will now print for the selected sales order.
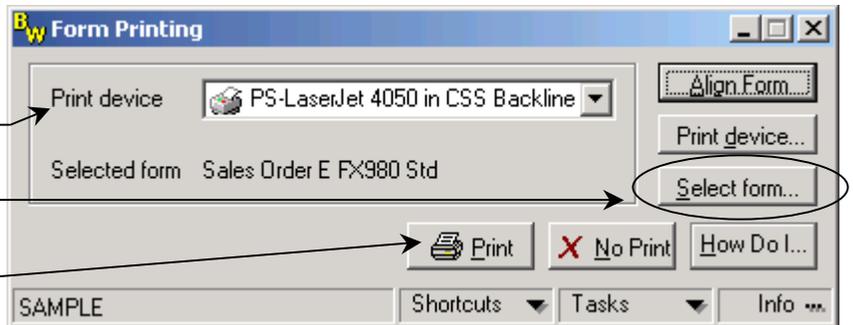
Orders > Print Sales Orders

Use this option to print shipping labels for a range of sales orders.

1. Select the printer from which you wish to print shipping labels.

2. Click *Select Form* and select the shipping label form you created above.

3. Uncheck *Include all orders* and enter the range of sales orders for which you need shipping labels.

4. Click *OK*. BusinessWorks will now print shipping labels for the range of sales orders you selected.