

Printing Labels from Word

This document will explain how to download a list from cycle.net into an Excel file and then walk you through the steps of creating labels in Word.

Downloading a list from cycle.net's saved lists

There are two places in cycle.net where you can download a list of patients.

1. You can go into the reports section and click on the marketing list.



Marketing Lists

Report Type:

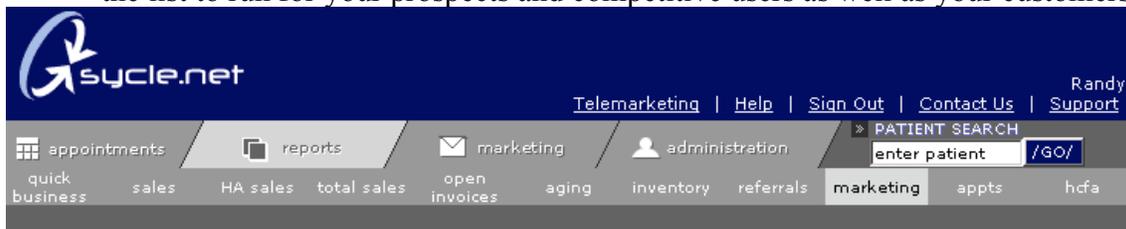
- Patient Summary
- Patient Summary
- Birthdates
- Purchase Dates
- Provider
- Zip Code
- Provider and Purchase Date
- Patient Type
- Tested not Sold
- Patients last seen
- Warranty Expiration
- Physician Referral

[View Report](#)

[Download](#)

	Current	Competitive	Prospect	TNS
All Clinics	778	9	592	152
Oakridge	691	6	450	132
Shady Oaks	25	0	28	4
Happy Valley	42	0	65	13
Maple View	20	3	49	3

2. Once you choose a report, it will ask you to clarify your search (i.e. do you want the list to run for your prospects and competitive users as well as your customers).



Marketing Lists

Report Type:

Birthdates

Patient Type:

Prospect

Current

Competitive

Parent Company: Test Company

Clinics: [select all](#) | [unselect all](#)

Oakridge

Shady Oaks

Happy Valley

Maple View

Select Birth Month: July

[View Report](#)

[Download](#)

[Create List](#)

3. Once you have this done, click on View Report to view the report on the screen or hit download to put it into an Excel file. You will be asked where you would like to save the report. I recommend saving it to your desktop because it's easy to find.

Downloading a list from cycle.net using your own criteria

If you would like to run a list outside of the lists that are saved in the Marketing Lists section, you will first need to create a list of your database.

1. To do this, go to the administration section and choose the Database Backup option.



2. Then you will need to select what you would like to download.

clinic download

Clinic:

patient download fields

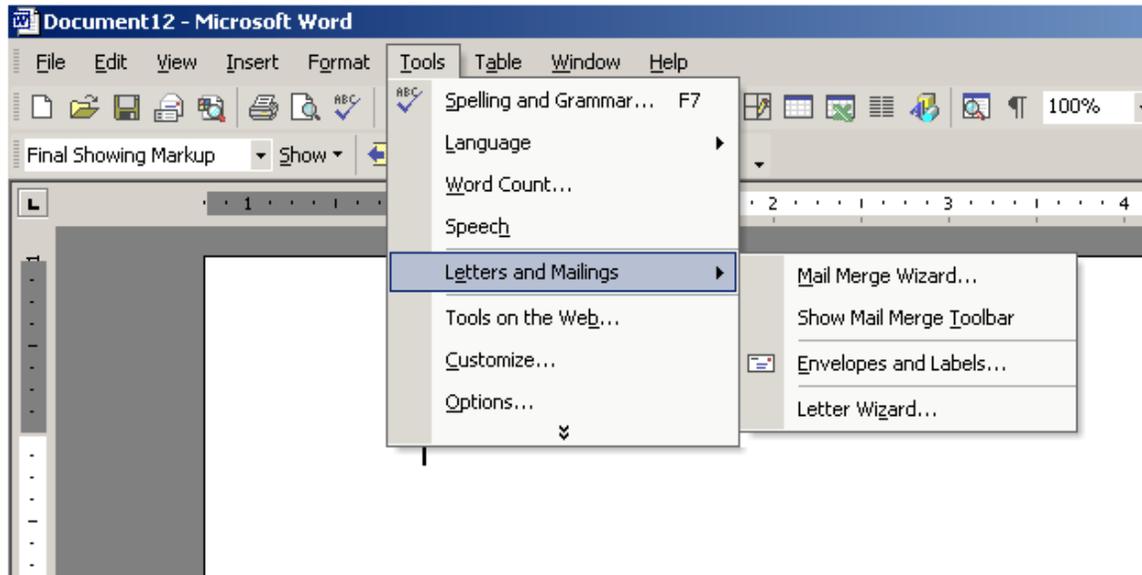
Fields:

- Title
- Last Name
- First Name
- Middle Name
- Pref Name
- Pref Lang
- Gender
- Date of Birth
- Street1
- Street2
- City
- State
- Zip
- Phone1
- Phone2
- Email
- Client Type
- Left Loss
- Right Loss
- Notes
- Last Hearing Aid Purchase(s)

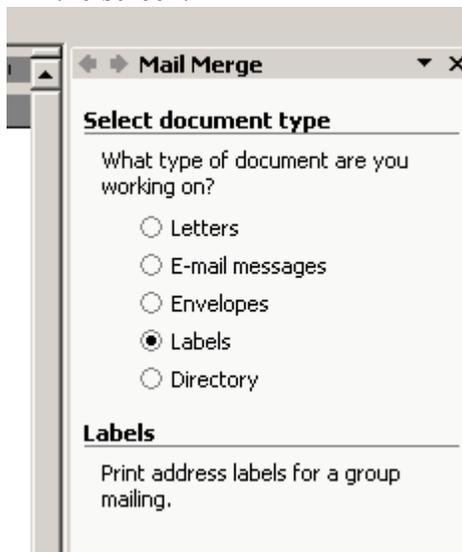
3. Once you have made your selections, you can hit the Download button. Again, you will be asked where you would like to save the Excel file. Again, I would recommend saving it to the desktop so that it is easy to find.

Creating Labels using Microsoft Word

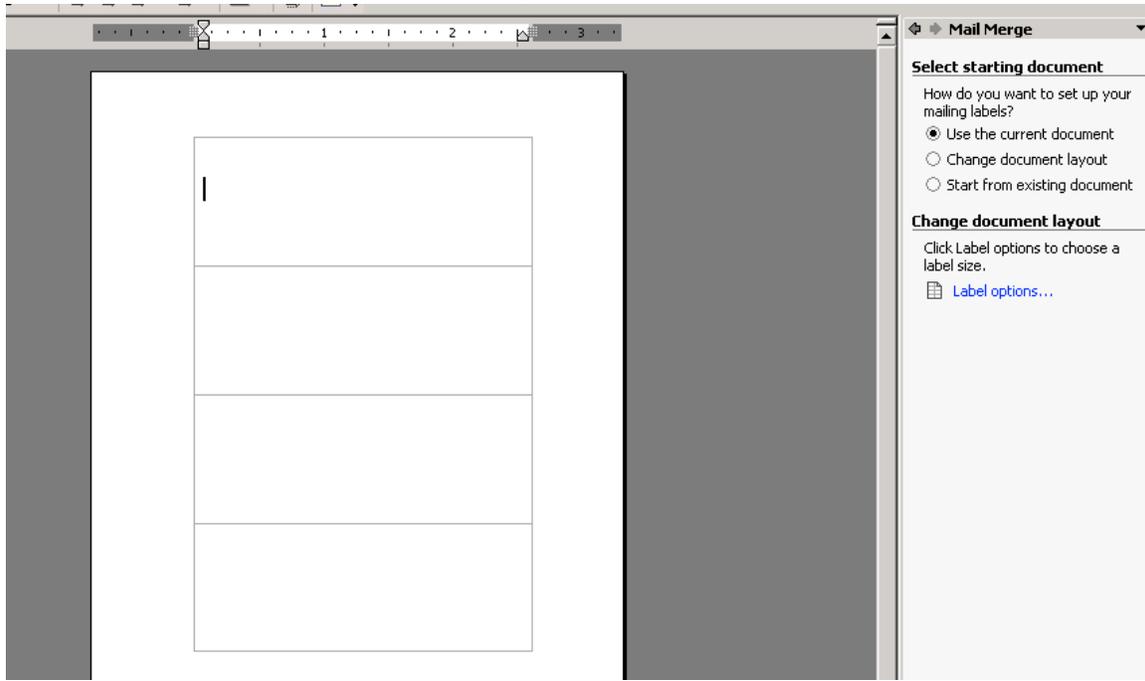
1. To create labels, open up Microsoft Word, go to the Tools Menu and choose the Letters and Mailings option. This will open up another menu and choose Mail Merge Wizard.



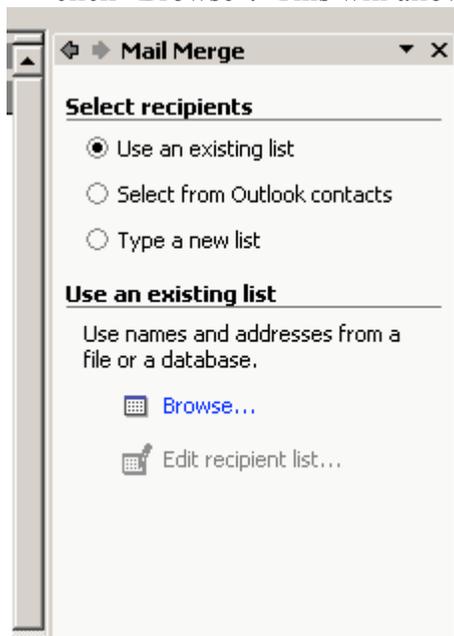
2. This will open up a wizard on the right hand side of your page that will walk you through creating your labels.
3. First, select that you would like to create labels and then hit next at the bottom of the screen.



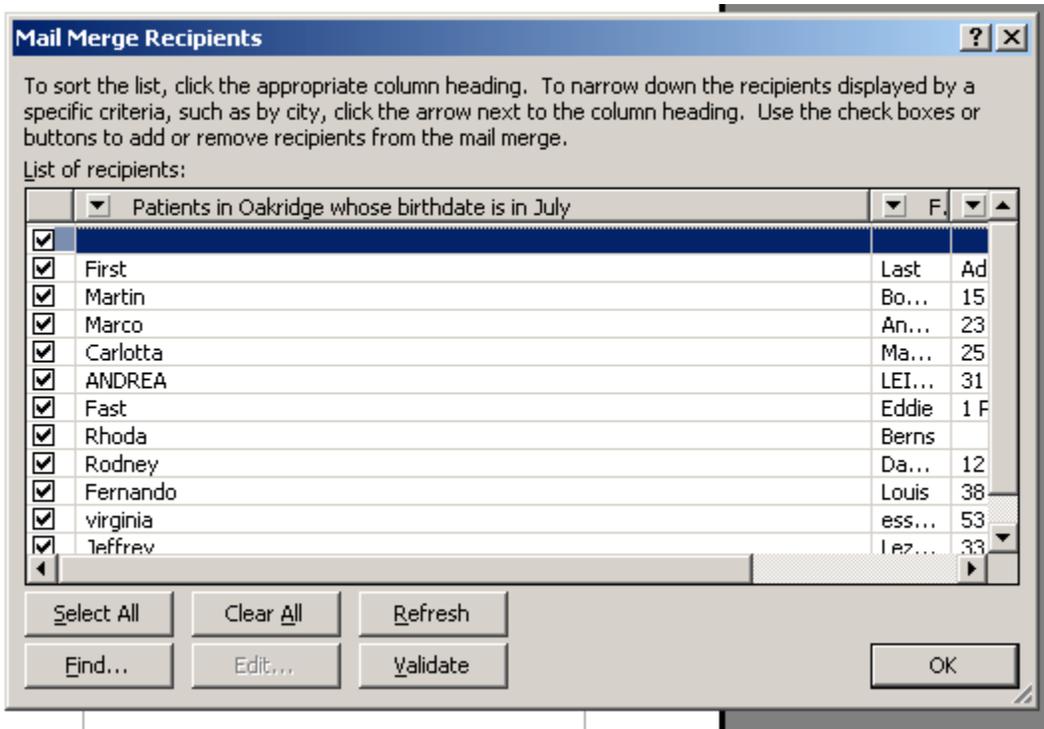
4. On the next screen, it will default to changing the document type. Click down below on the label options and select which labels you would like to print on. Once you have chosen your labels, you will now see those labels appear on the left hand side and now the “Use current document” option is selected. Go ahead and hit next at the bottom of the screen.



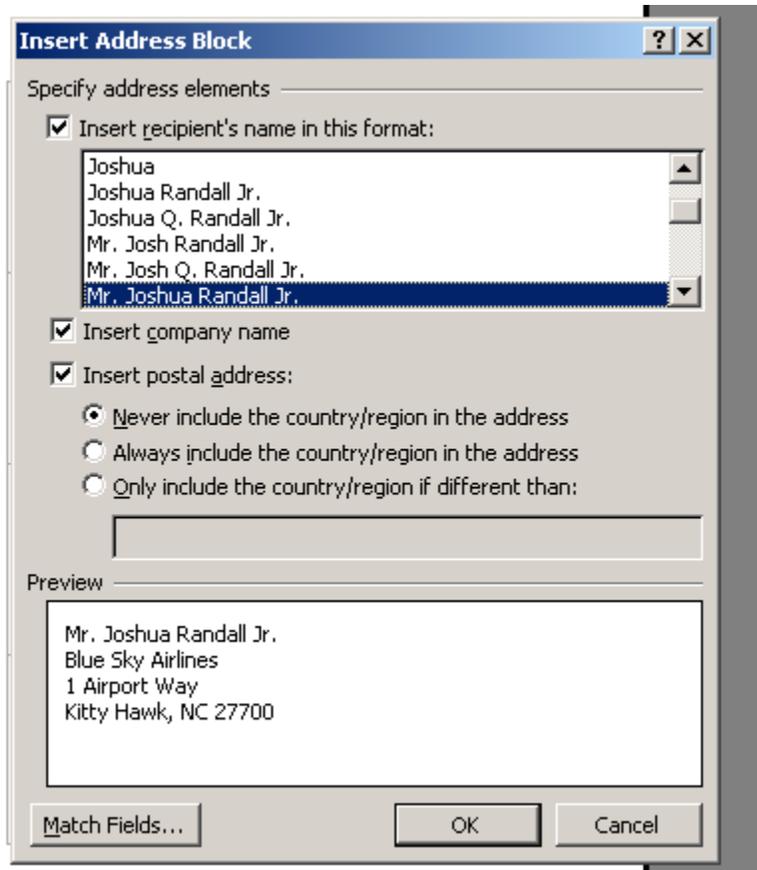
5. On the third screen, you now can indicate that you would like to use the list you downloaded from sycle.net. Leave the selection as “Use an existing list” and click “Browse”. This will allow you to go find the list you downloaded.



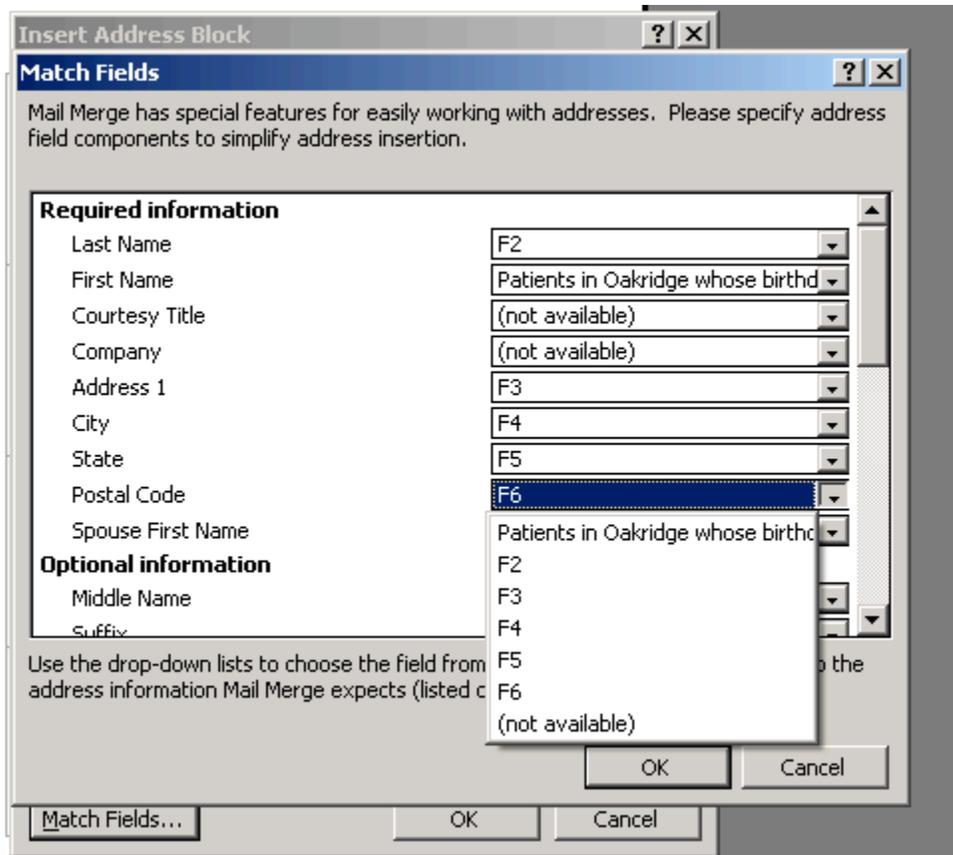
- If you haven't already sorted the list in Excel, you have the option of sorting the list by clicking on any of the column headings. You can also uncheck records that you don't want to print a mailing label for.



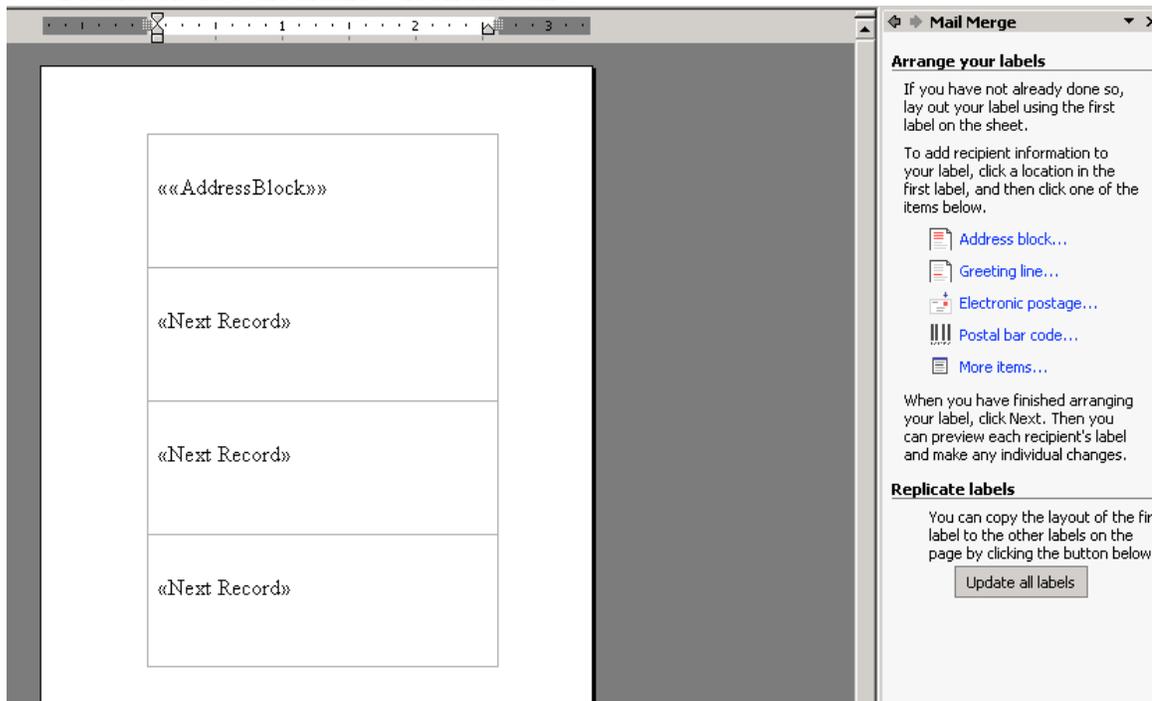
- The next section allows you to set up how you would like the label to appear. Go ahead and hit the Address block option. In the window that comes up, pick the Match Fields button in the bottom left hand corner.



8. Now you will need to assign fields to each of the corresponding address fields (last name, first name, etc...). You can get the field names from the same screen where you sort your list (see screenshot w/ instruction #6 above). Once you have done that, go ahead and hit OK.



9. Your label area should now look like this:



10. Go ahead and click on the Update all labels button in the Replicate labels area to copy that same address block throughout your labels.
11. Click on Next: Preview you labels at the bottom of the page to see the labels as they will appear. You can page through them one at a time using the forward and forward and back arrows under the Preview your Labels heading if you would like. If you need to edit or remove any labels you missed, just click on the link “Edit recipient list” on the right hand side.

Marco Andrews 234 Ocean View San Francisco, CA 94213
Martin Bowman 156 Corte Madera Circle Corte Madera, CA 95678
Rodney Dangerfield 12 Fairway Greenboro, ME 2547
Fast Eddie 1 Pinneedle Bradenton, FL 34210

Preview your labels

Some of the merged labels are previewed here. To preview another label, click one of the following:

<< Recipient: 2 >>

[Find a recipient...](#)

Make changes

You can also change your recipient list:

[Edit recipient list...](#)

When you have finished previewing your labels, click Next. Then you can print the merged labels or edit individual labels to add personal comments.

12. Click on the Next: Complete the Merge link at the bottom of the page to merge the data with the label template. You then have the option to begin printing or to again view the labels before you print them.

Mail Merge

Complete the merge

Mail Merge is ready to produce your mailing labels.

To personalize your labels, click "Edit Individual Labels." This will open a new document with your merged labels. To make changes to all the labels, switch back to the original document.

Merge

[Print...](#)

[Edit individual labels...](#)