# Knowledge Base Article

**Article ID:**      **4185**
**Subject:**      **How to Create and Print Letters and Labels in Pro Gold i2**
**Last Modified:**      **November 18, 2009**

**Applies to:**      **Pro Gold i2 3.xx**

**Purpose:**   Letters are created in Pro Gold i2 in a merge-style, where there are generic fields that are inserted into the letter template so that the letter will be personalized when sent. Those letters can be printed, with labels, to send to contacts or buyers and sellers in Pro Gold i2.

**Procedure:**   Actions required to create and print letters and labels:

- **Step 1: Create Letter Template**

    - **Main Menu** => **Lead Management** => **Marketing**
    - Click the **Manage Letters** icon.
    - Create a new letter
        - Click on the **New Letter** button
            - To modify an existing letter, select the letter from the **Find** drop-down at the top of the screen
        - Enter a name for the letter in the **Letter Name** field
        - Select **Letter Type** (i.e. Agents, Buyers, Contact Mgr. Pro., Customers, Employees, None, Properties, Sellers, or Vendors)
            - Selected "Letter Type" determines which data fields are available for the letter
            - **Note:** if "**None**" is selected, data fields are not inserted into the letter
        - Click the **Save Letter** button
    - The blue area is where the text of the letter is entered
        - Text can be pasted into the blue area by copying the text from another source, right-clicking in the blue screen, and selecting **Paste**
    - Insert data fields into the letter
        - Available data fields will be listed in the **Key List** next to the blue area
        - Highlight a data fields from the list
        - Place the cursor in the desired location (in blue area)
        - Left double-click to insert the field into the letter text
            - **Note:** "**$**" need to be placed into the letter text before dollar fields
    - Open the **Rich Text Editor** to edit the letter in word processing mode
        - Click the **Edit Letter** button at the bottom of the screen
        - Edit and format the letter as in a normal word processor (such as changing font options)
        - Click the red "**X**" to save changes and close the editor
    - Complete the letter and click **Save Letter** to save the letter and **Done** to return to the main menu

- **Step 2: Print Letters**

    - **Main Menu** => **Lead Management** => **Marketing**
    - Click the **Print Letters** icon
    - Select the desired letter from the **Select Letter** drop-down.
    - Select the appropriate **Category** from the available options. This will alter the contacts/prospects or buyers/sellers that appear in the **List**
        - The options available in the **Category** will change depending on the type of letter that was selected to print.

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- <u>Drop-down options at the top of the screen allow the contacts/prospects or buyers/sellers in the **List** column to be filtered</u>
- Select contacts/prospects from the **List** column by highlighting a name and clicking the small blue right-pointing arrow to move the name to the **Recipients** column
  - The entire **List** can be selected by clicking the large black right-pointing arrow. All of the names in the **List** column will move to the **Recipients** column
  - Names can be removed from the **Recipients** column by selecting a name and clicking the small blue left-pointing arrow
  - All of the names can also be removed from the **Recipients** column by clicking the large black left-pointing arrow
- Once the recipients are selected, click the **Print Preview** button to preview the letters and review for any errors
- Close the preview screen
- Click the **Print** button to print the letters

- **Step 3: Print Labels**

  - To print labels for the selected recipients, click **Preview Labels** button at the bottom of the **Print Letter Selection** screen
  - The preview screen will appear to show the labels that will be printed
    - **Avery 8160** is the style that labels are formatted in
    - If a selected recipient does not appear in the labels, <u>then there is not a complete address</u> (i.e., Name, Street Address, City, State and Zip) for that recipient in Pro Gold i2
  - From the preview screen, click the "**P**" key on the keyboard and the **Print Preview** screen will appear to select the printer options
  - Click "**Ok**" to print the labels
  - Close the label preview screen to return to the **Letter Print Selection** screen
  - Click the **Done** button to return to the menu

**References:** Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

http://secured.progoldi2.com/webcast.aspx

- The Enhancement HelpNet links are located on the right side of the web page.

**Related articles: N/A**

**Keywords:** Advertising, Contact, Create Letters, Leads, Marketing, Print Labels, Prospect, 4185