



# Meal Labels Tutorial

## On a MAC OS

Run meal labels report

Create a labels template

Import the data from Polixen

Set up labels

Preview Results

Save Template

Print Labels:

Import New Data

## On Windows PC

Run meal labels report

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Preview Results

Save Template

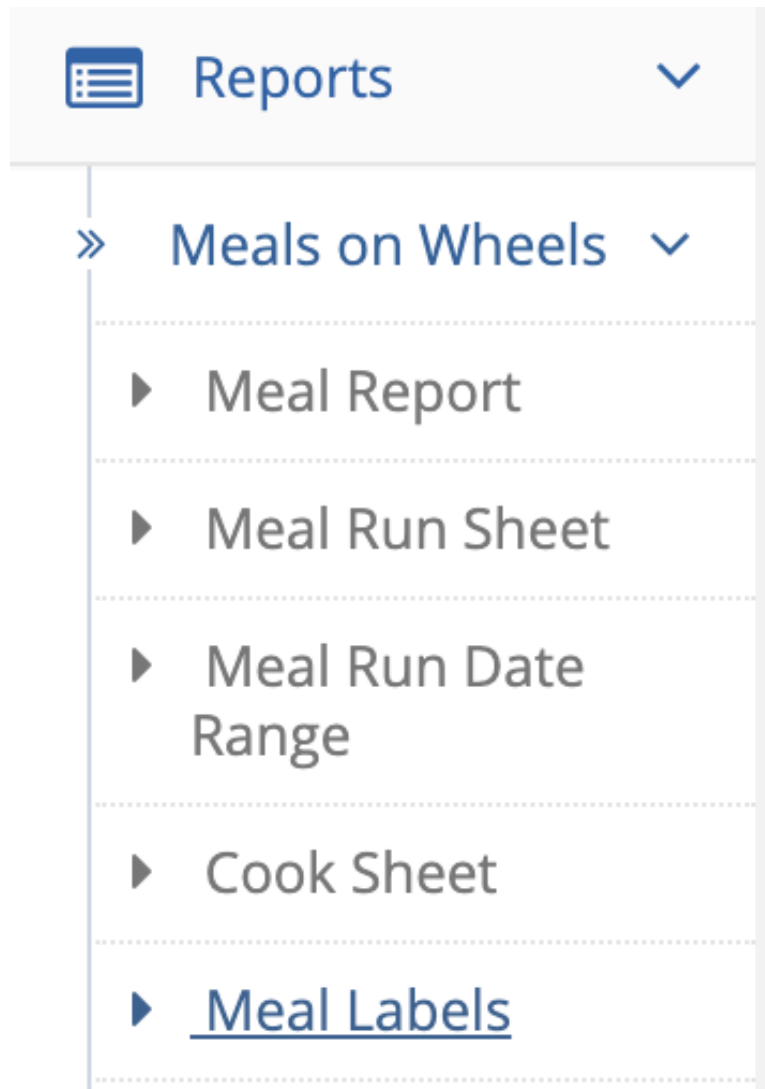
Print Labels:

Import New Data

## On a MAC OS

### Run meal labels report

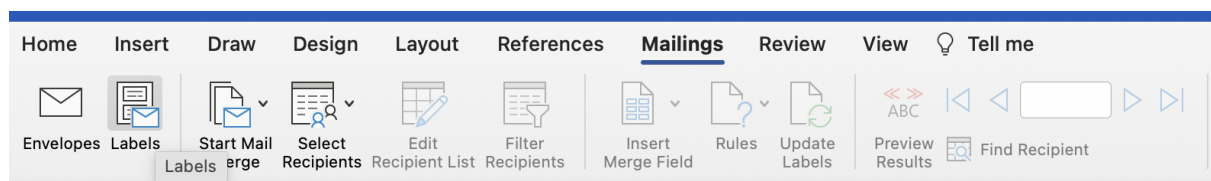
In your Polixen system: On the left-hand side menu, go to Reports > Meals on Wheels > Meal Labels. Then select the appropriate date and click Run Meal Labels Report. Download the resulting file.



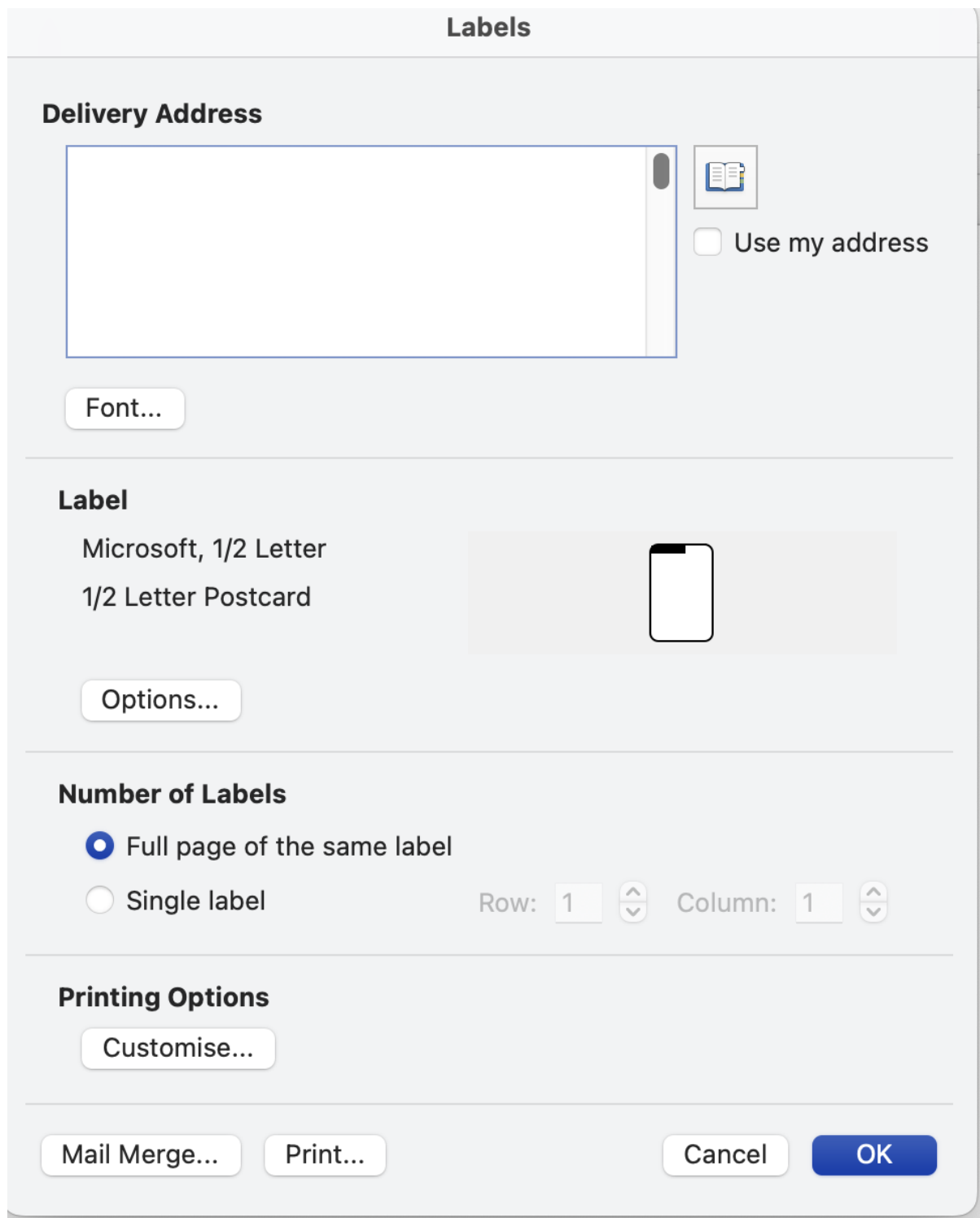
## **Create a labels template**

Note: this step only needs to be done once. Once the template has been set up for the meal labels, you can reuse it.

In Microsoft Word: Create a new document. Then select the Mailings tab at the top, and click the Labels button.



This will bring up a Labels dialogue box. This displays the kind of label the mail merge template will use.

The image shows a 'Labels' dialog box with a light gray background and rounded corners. It is divided into several sections by horizontal lines. The first section, 'Delivery Address', contains a large empty text box with a vertical scrollbar on the right, a small icon of a document with a checkmark, and a checkbox labeled 'Use my address'. Below this is a 'Font...' button. The second section, 'Label', shows the text 'Microsoft, 1/2 Letter' and '1/2 Letter Postcard' next to a small icon of a postcard. Below this is an 'Options...' button. The third section, 'Number of Labels', has two radio buttons: 'Full page of the same label' (which is selected) and 'Single label'. To the right of these are 'Row: 1' and 'Column: 1' with up/down arrows. The fourth section, 'Printing Options', contains a 'Customise...' button. At the bottom, there are four buttons: 'Mail Merge...', 'Print...', 'Cancel', and 'OK' (which is highlighted in blue).

Click the Options button under the Label heading to change it.

Label Options

Printer type:

☐ Dot matrix
☒ Laser and inkjet

Label products:

Microsoft

Product number:

1/2 Letter

1/2 Letter

1/4 Letter

1/4 Letter

30 Per Page

30 Per Page

A2 (Landscape)

Label information

Type: 1/2 Letter Postcard

Height: 21.59 cm

Width: 13.97 cm

Page size: 27.94 cm x 21.59 cm

Details...

New Label...

Delete

Cancel

OK

Select the appropriate label from the options provided. Most label brands and products are listed. If your label is not there, please contact Polixen for further instructions on creating the label template.

Once you've selected the label type, click the OK button to get back to the Labels dialogue box.

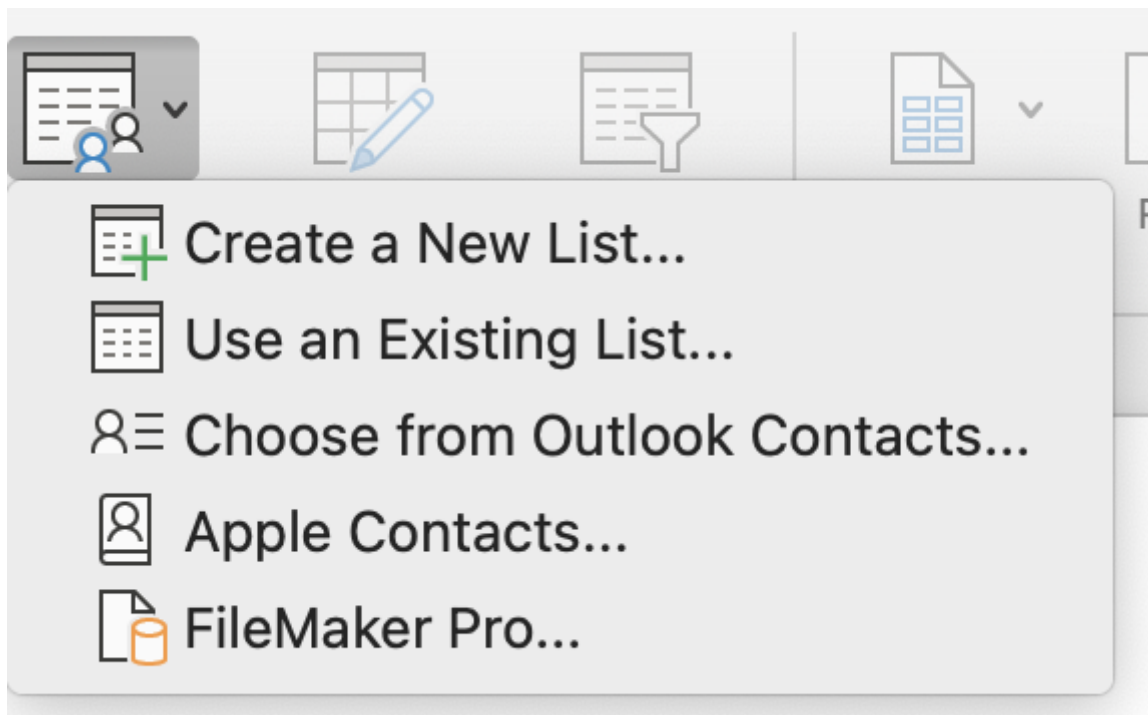
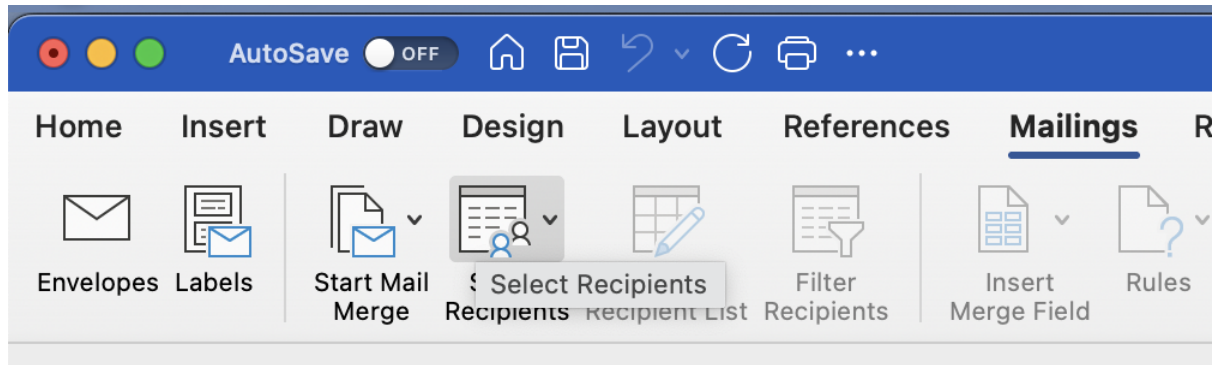
Click the OK button again to see a page of labels. This will show you how many labels you'll get per page, and how large they'll be.

Name  
Meal  
Address line 1  
Address line 2

Name  
Meal  
Address line 1  
Address line 2

## Import the data from Polixen

Go back to the Mailings tab, and click the Select Recipients button. Select the option “Use an Existing List” from the drop-down menu.



Navigate to where you downloaded the CSV file earlier. Select the file and click the Open button.



If a page like the following appears, just press the OK button to continue.

File Conversion - labels\_21-08-2023\_f4cec656c357e13825ccfea6ce7a8ab2.csv

Select the encoding that makes your document readable.

Text encoding:

☒ Mac OS (Default)
☐ MS-DOS
☐ Other encoding:

Turkish (Windows Latin 5)
Unicode (UTF-16)
Unicode (UTF-16BE)
Unicode (UTF-8)
Western (ASCII)
Western (Mac OS Roman)

Options:

☐ Insert line breaks
☐ Allow character substitution
☐ Add bi-directional marks

End lines with:

Document direction:

☒ Left-to-right
☐ Right-to-left

Preview:

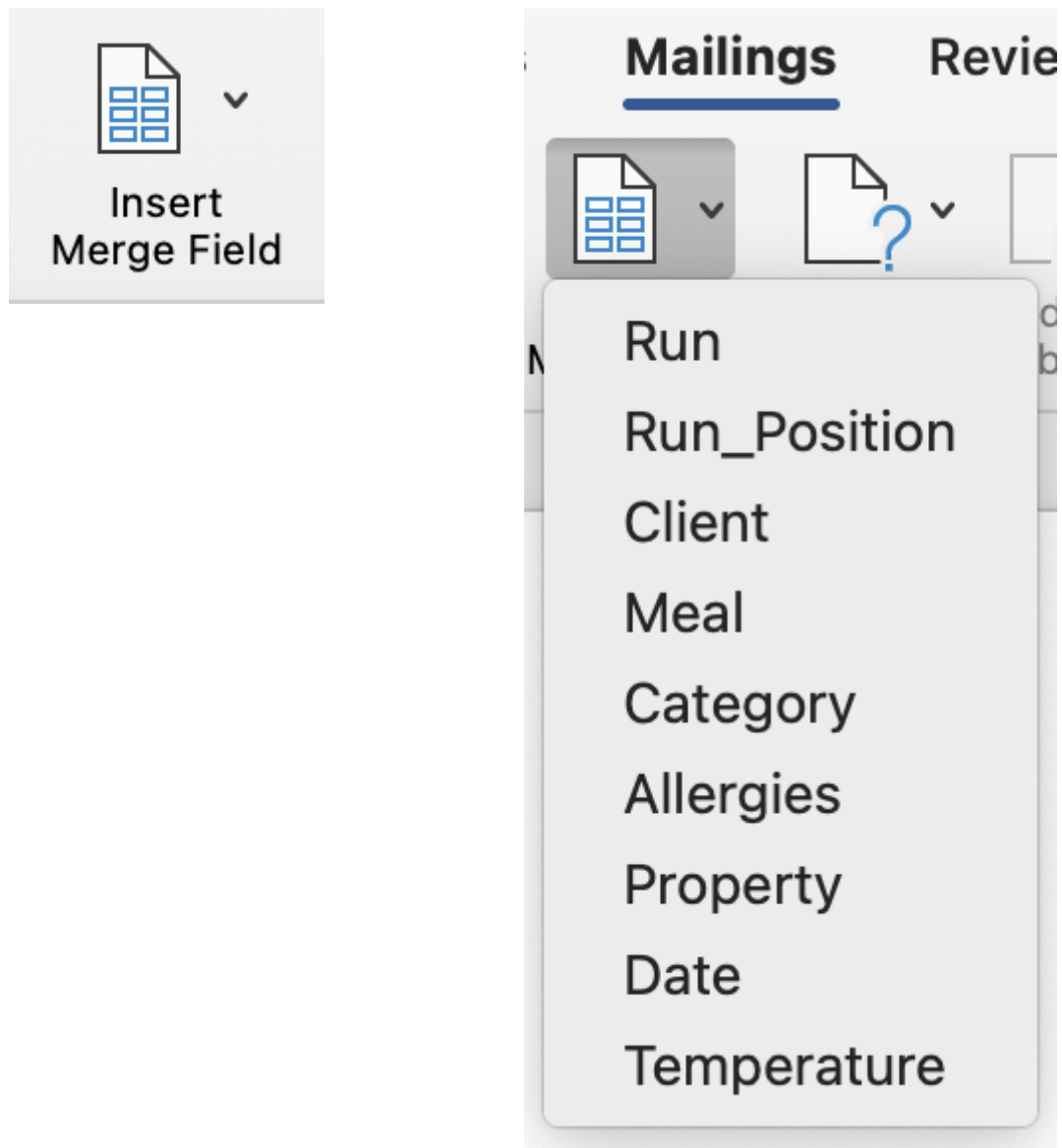
Run, "Run Position", Client, Meal, Category, Allergies, Property, Date, Temperature  
"Car A", 1, "Gregory Hicks", "Main MEal", "Hot Meals",,,,21/08/2023,Chilled

Text marked in red will not be saved correctly in the chosen encoding

Cancel
OK

## Set up labels

Select the fields from that CSV file that you'd like to appear on the labels by clicking on the Insert Merge Field button and selecting items from the dropdown list.



You can also type directly into the text box to have spaces and line breaks between the fields.

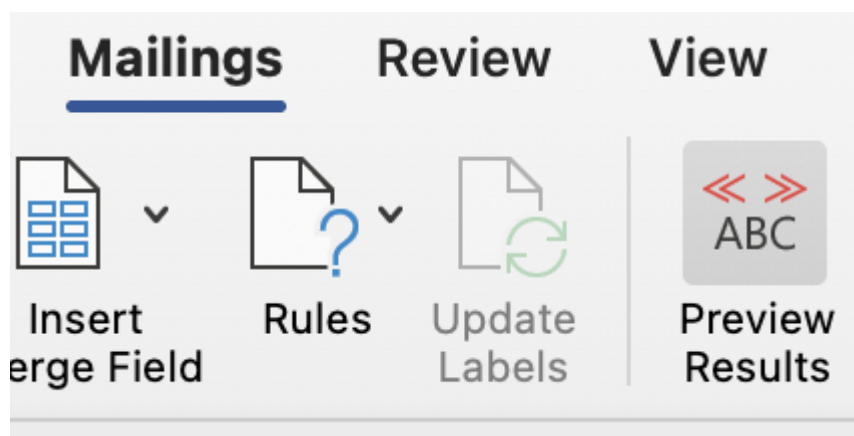
---

«Run»  
«Run\_Position»  
«Client»

---

### Preview Results

In the Mailings tab, click the Preview Results button to see what the labels will actually print out.



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Car A  
1  
Gregory Hicks|



If you want to edit the style of the labels (eg: change some words to bold, change the colour

of words, increase or decrease the size of the text), edit the first label directly.

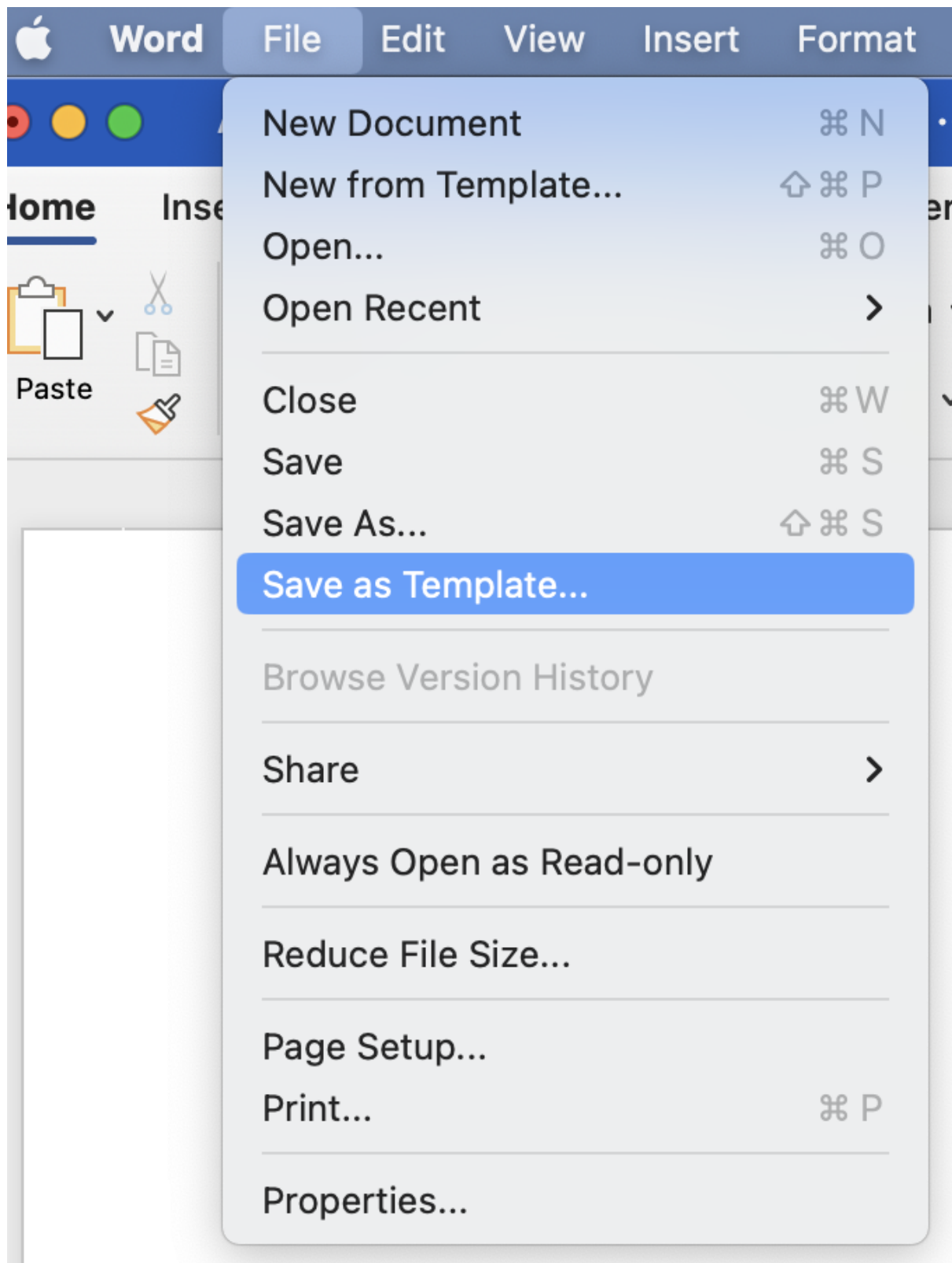
Then, in the Mailings tab, click the Update Labels button. This will edit every label to match the first label.

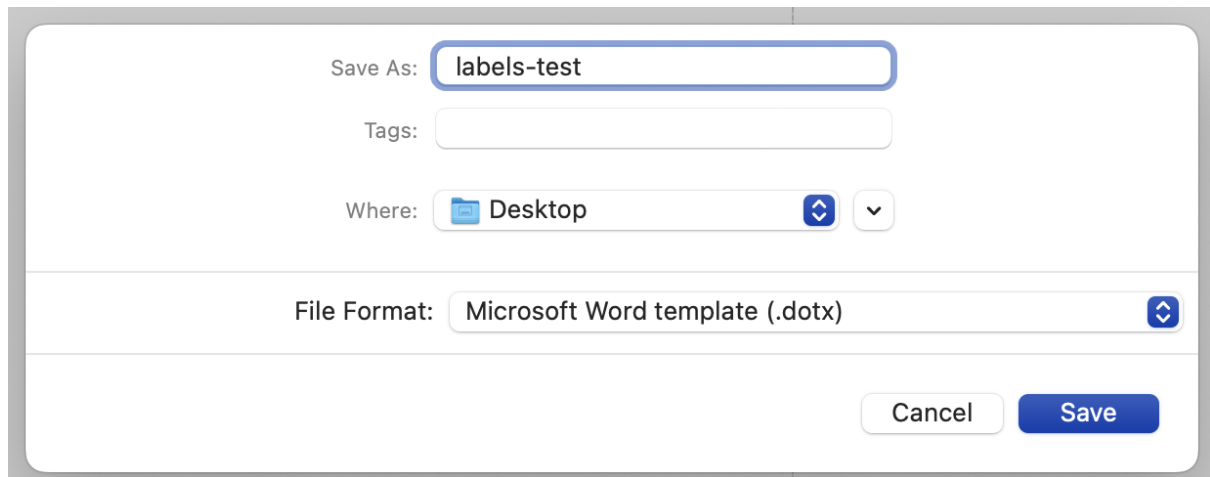
## **Save Template**

Once you're happy with the label template, you should save it as a Word Template.

This

way, you won't have to set up another template later when you want to print out more labels. To do that, go to "File" > "Save as template". Save it to an easy-to-access folder on your computer.





Save As: labels-test

Tags:

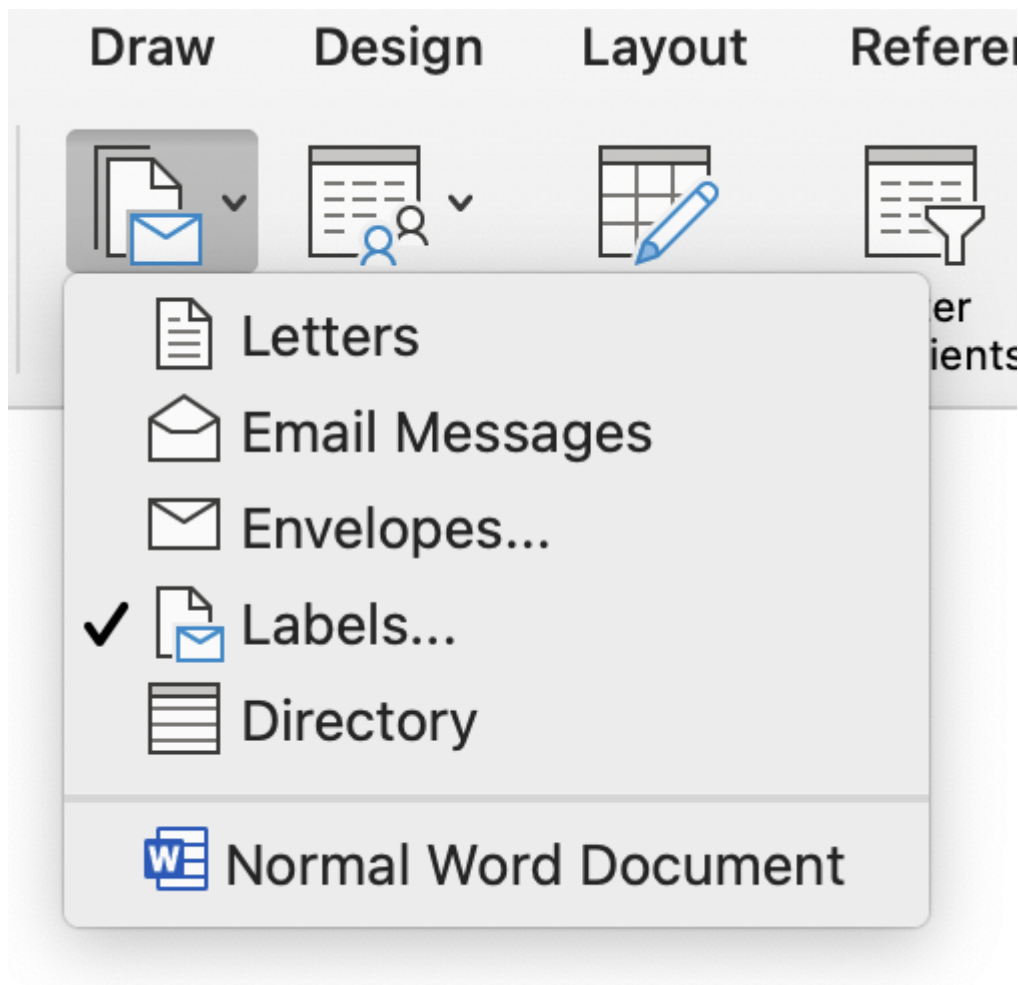
Where: Desktop

File Format: Microsoft Word template (.dotx)

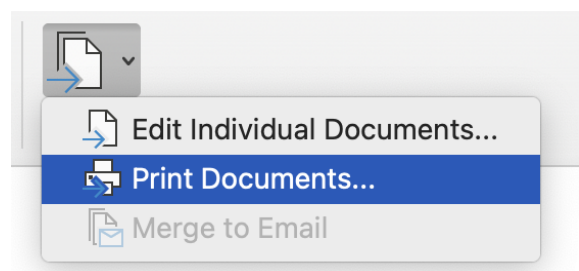
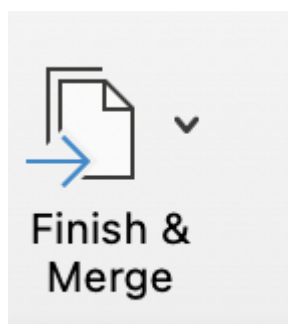
Cancel Save

## **Print Labels:**

To print your labels, simply go to the Mailings tab, click the 'Start Mail Merge' button, and select the Labels option.



Once that is done, click on 'Finish & Merge' and select 'Print documents'.



## Import New Data

Next time you want to print labels, just open up the Word Template you saved.

Dialogue boxes

may pop up if the original CSV file has been moved or deleted, like the File

Conversion box

from earlier, but unless it says there's an error, you should be able to simply click OK to

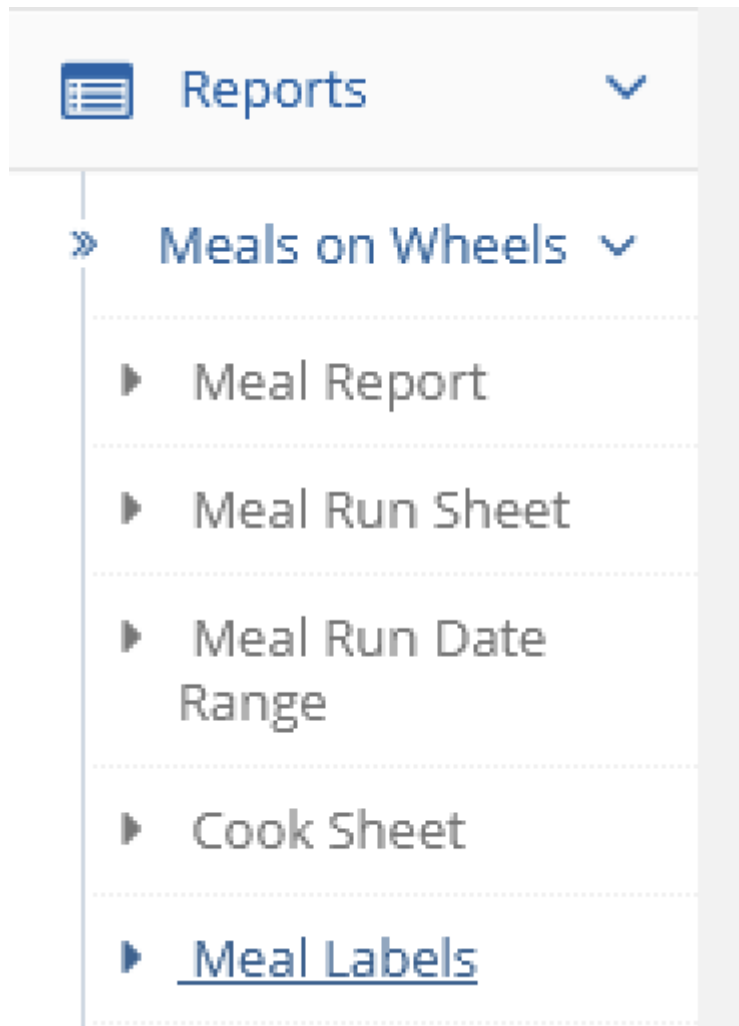
continue.

Repeat the process above.

## **On Windows PC**

### **Run meal labels report**

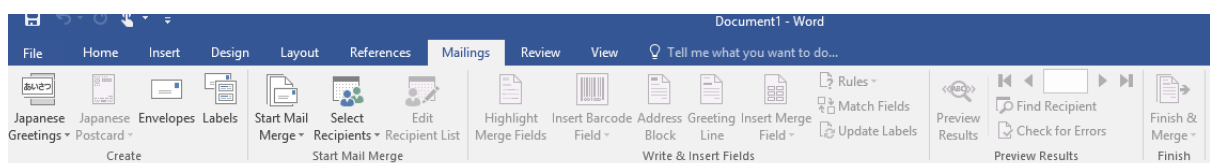
In your Polixen system: On the left-hand side menu, go to Reports > Meals on Wheels > Meal Labels. Then select the appropriate date and click Run Meal Labels Report. Download the resulting file.



## Create a labels template

Note: this step only needs to be done once. Once the template has been set up for the meal labels, you can reuse it.

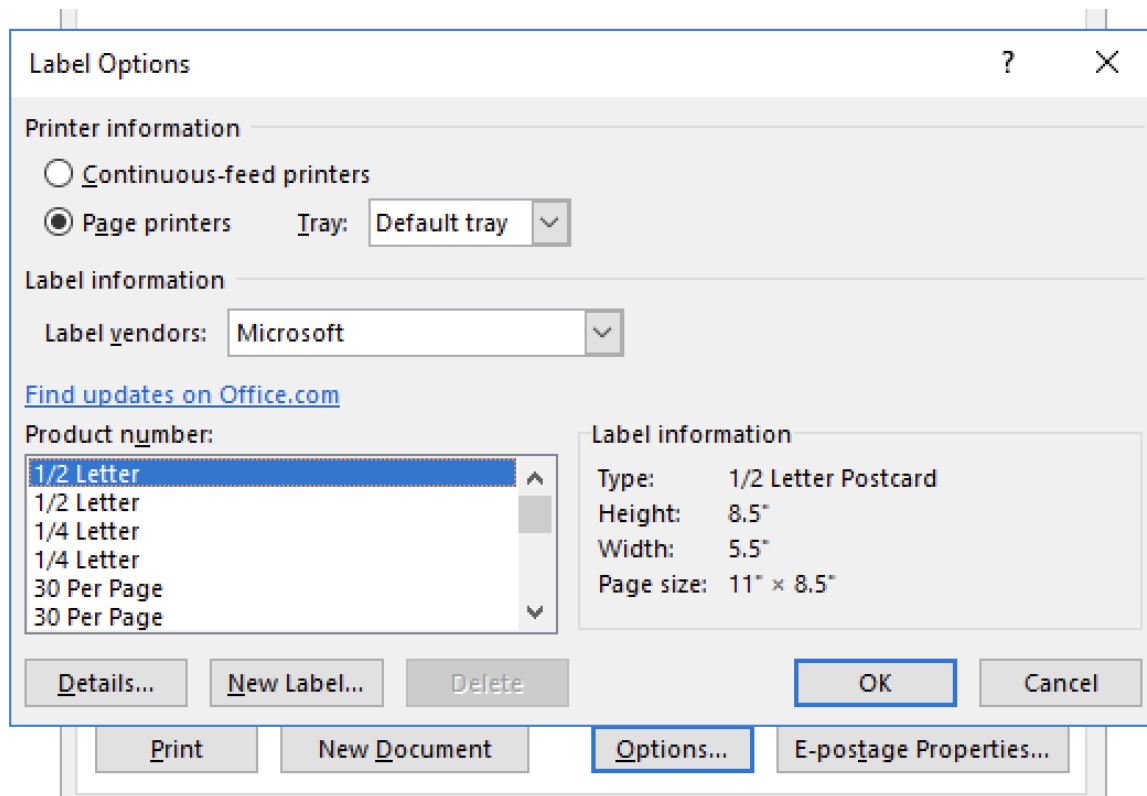
In Microsoft Word: Create a new document. Then select the Mailings tab at the top, and click the Labels button.



This will bring up a Labels dialogue box. This displays the kind of label the mail merge template will use.

The screenshot shows the 'Envelopes and Labels' dialog box with the 'Labels' tab active. The 'Address' field is empty. The 'Print' section has 'Full page of the same label' selected. The 'Label' section shows 'Microsoft, 1/2 Letter 1/2 Letter Postcard' with a corresponding label icon. Buttons at the bottom include 'Print', 'New Document', 'Options...', 'E-postage Properties...', and 'Cancel'.

Click the Options button under the Label heading to change it.

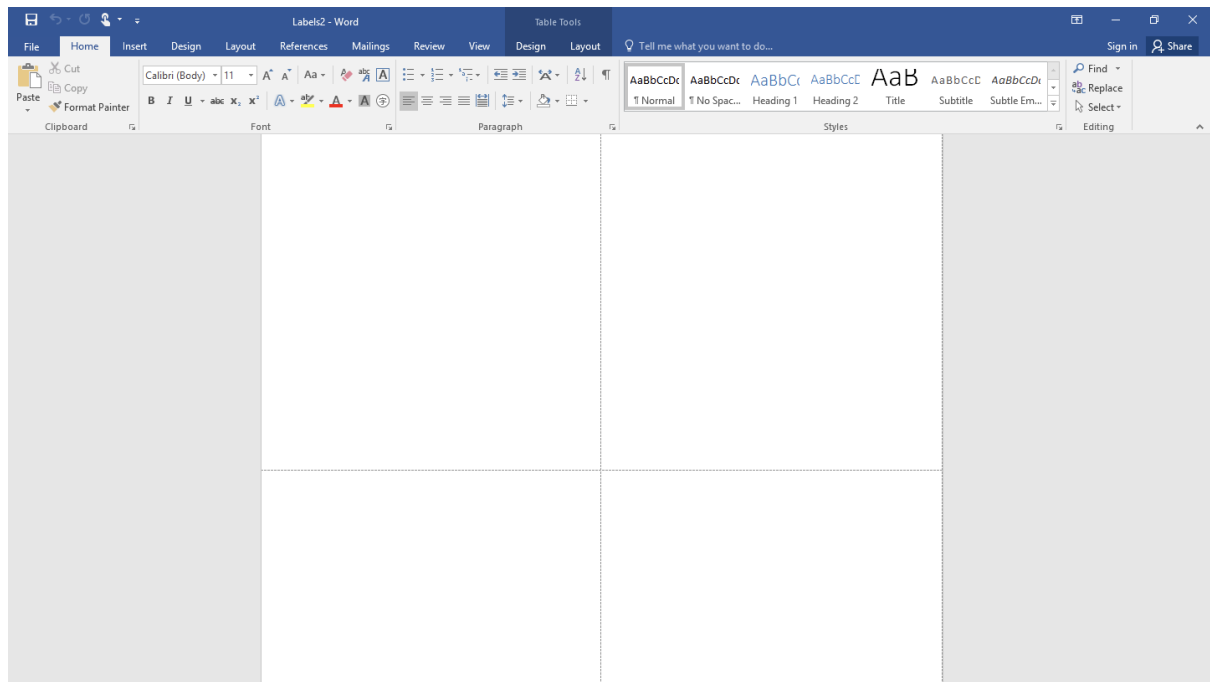


Select the appropriate label from the options provided. Most label brands and products are listed. If your label is not there, please contact Polixen for further instructions on creating the label template.

Once you've selected the label type, click the OK button to get back to the Labels dialogue box.

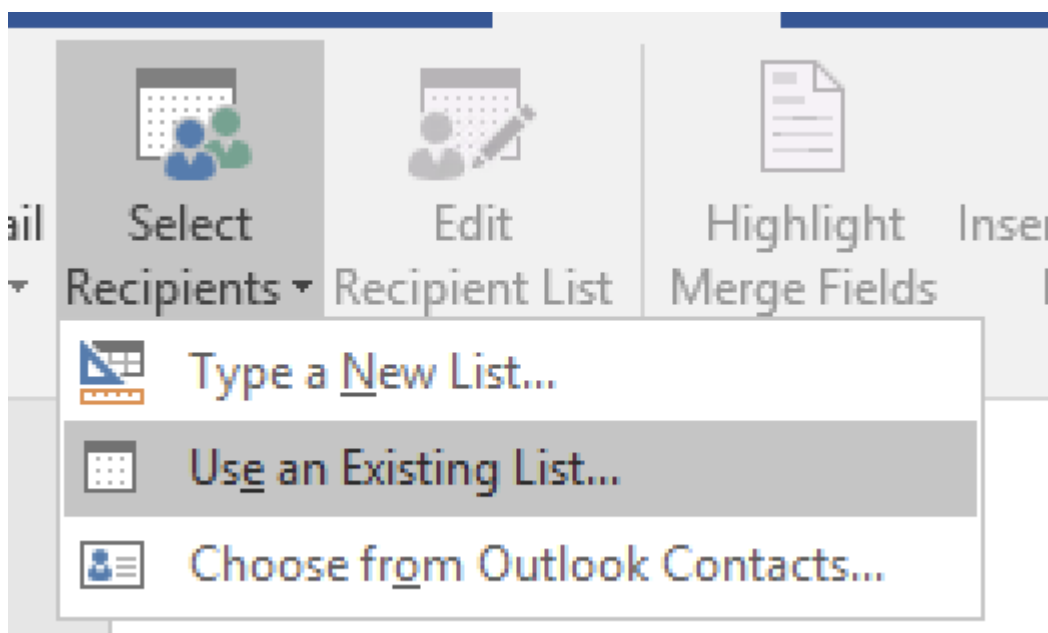
Click the OK button again to see a page of labels. This will show you how many labels you'll get per page, and how large they'll be.





## Import the data from Polixen

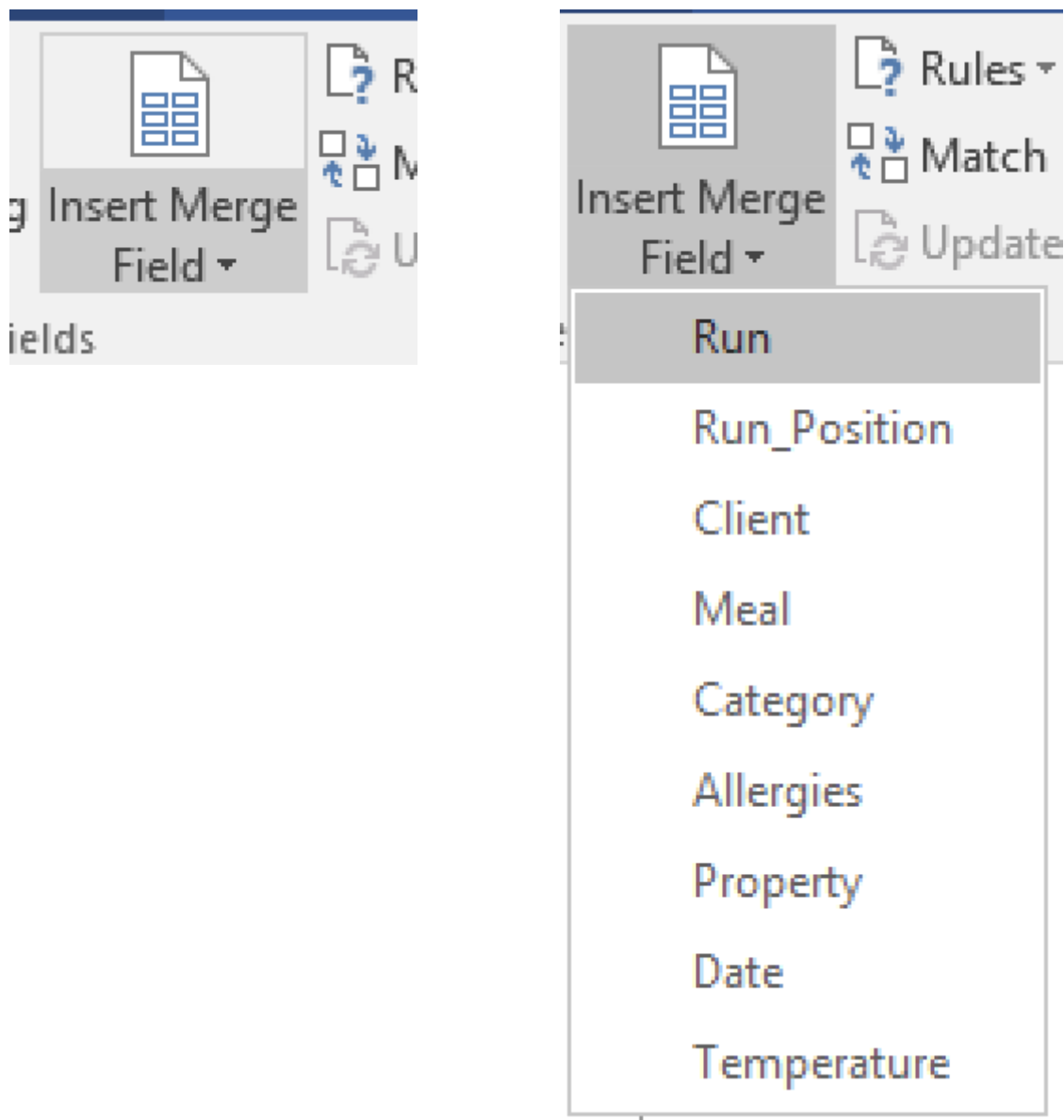
Go back to the Mailings tab, and click the Select Recipients button. Select the option “Use an Existing List” from the drop-down menu.



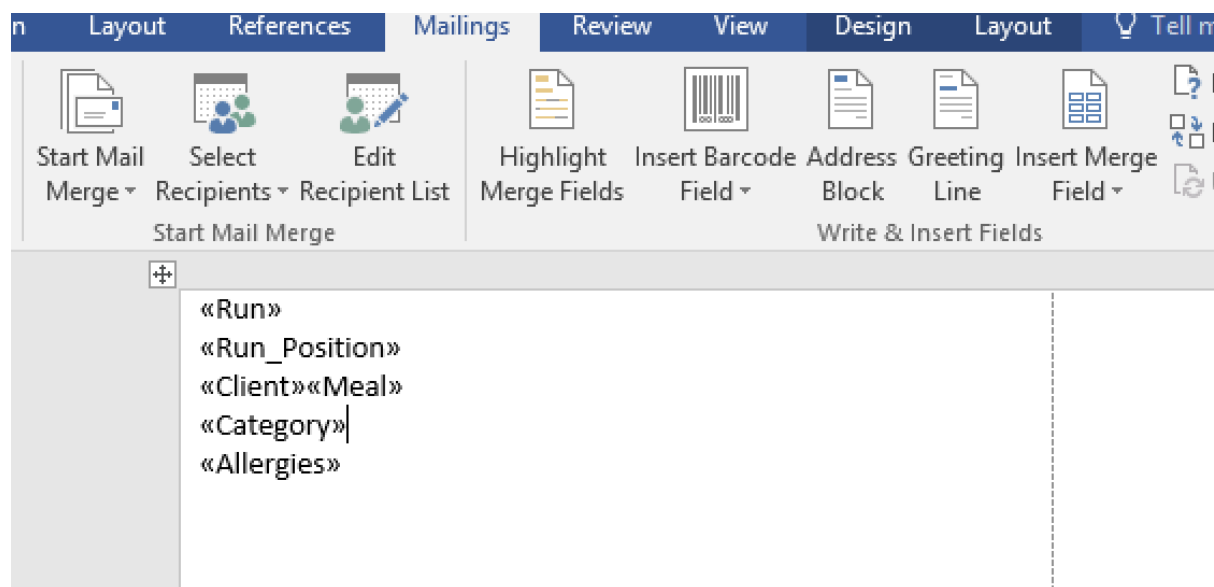
Navigate to where you downloaded the CSV file earlier. Select the file and click the Open button.

## **Set up labels**

Select the fields from that CSV file that you'd like to appear on the labels by clicking on the Insert Merge Field button and selecting items from the dropdown list.

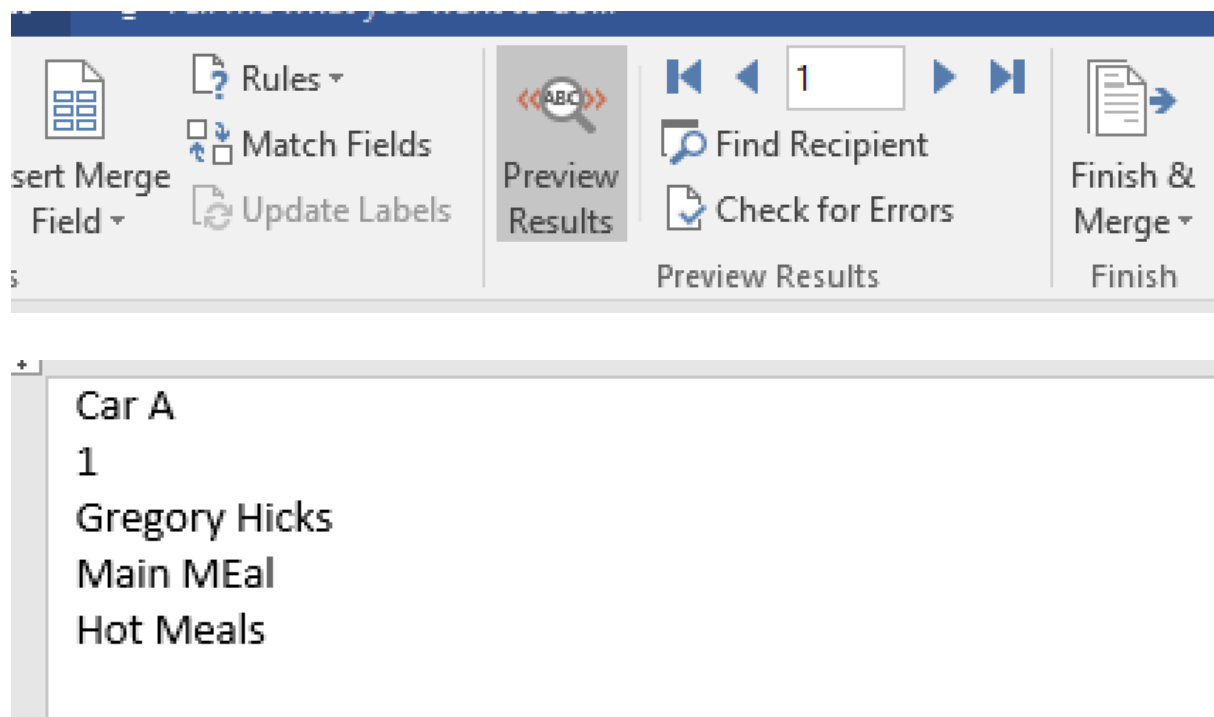


You can also type directly into the text box to have spaces and line breaks between the fields.



## Preview Results

In the Mailings tab, click the Preview Results button to see what the labels will actually print out.



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colour

of words, increase or decrease the size of the text), edit the first label directly.

Then, in the Mailings tab, click the Update Labels button. This will edit every label to match the first label.

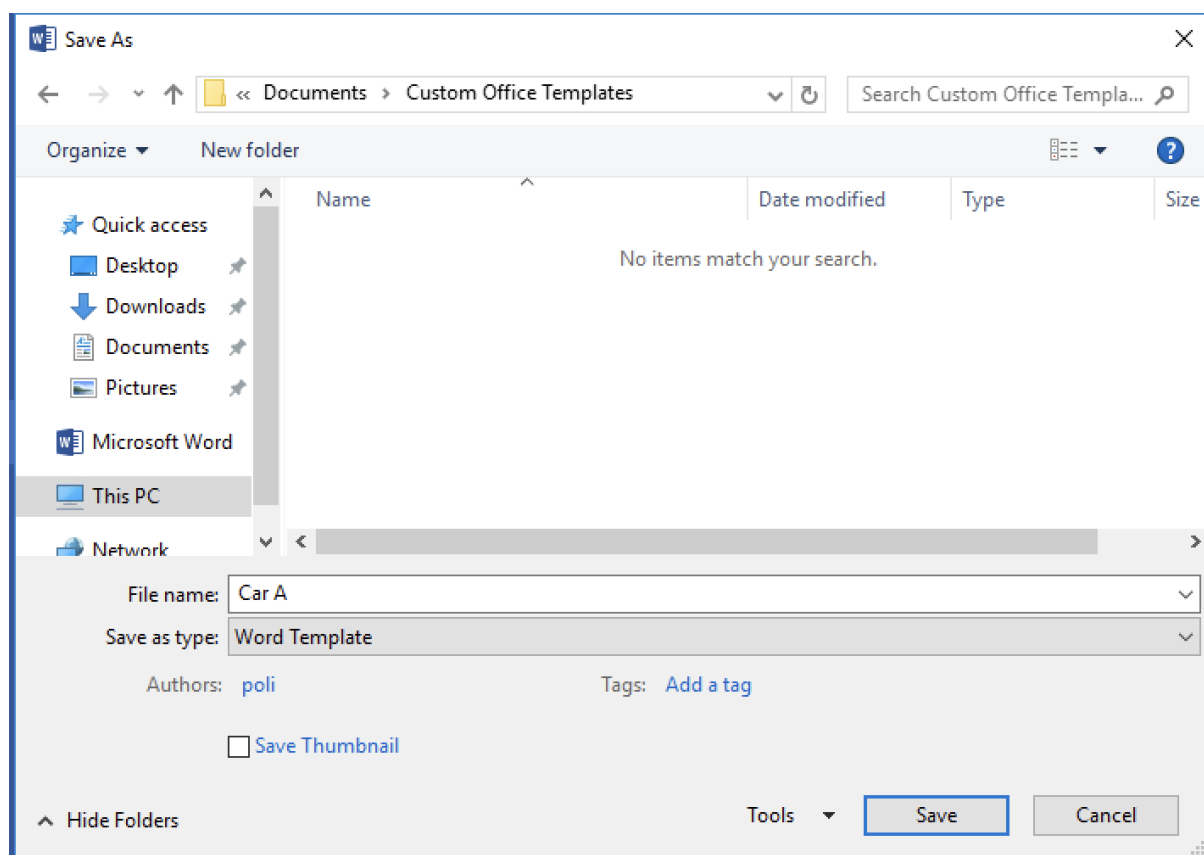
## Save Template

Once you're happy with the label template, you should save it as a Word Template.

This

way, you won't have to set up another template later when you want to print out more labels. To do that, go to "File" > "Save as". Choose "word template" as a file type.

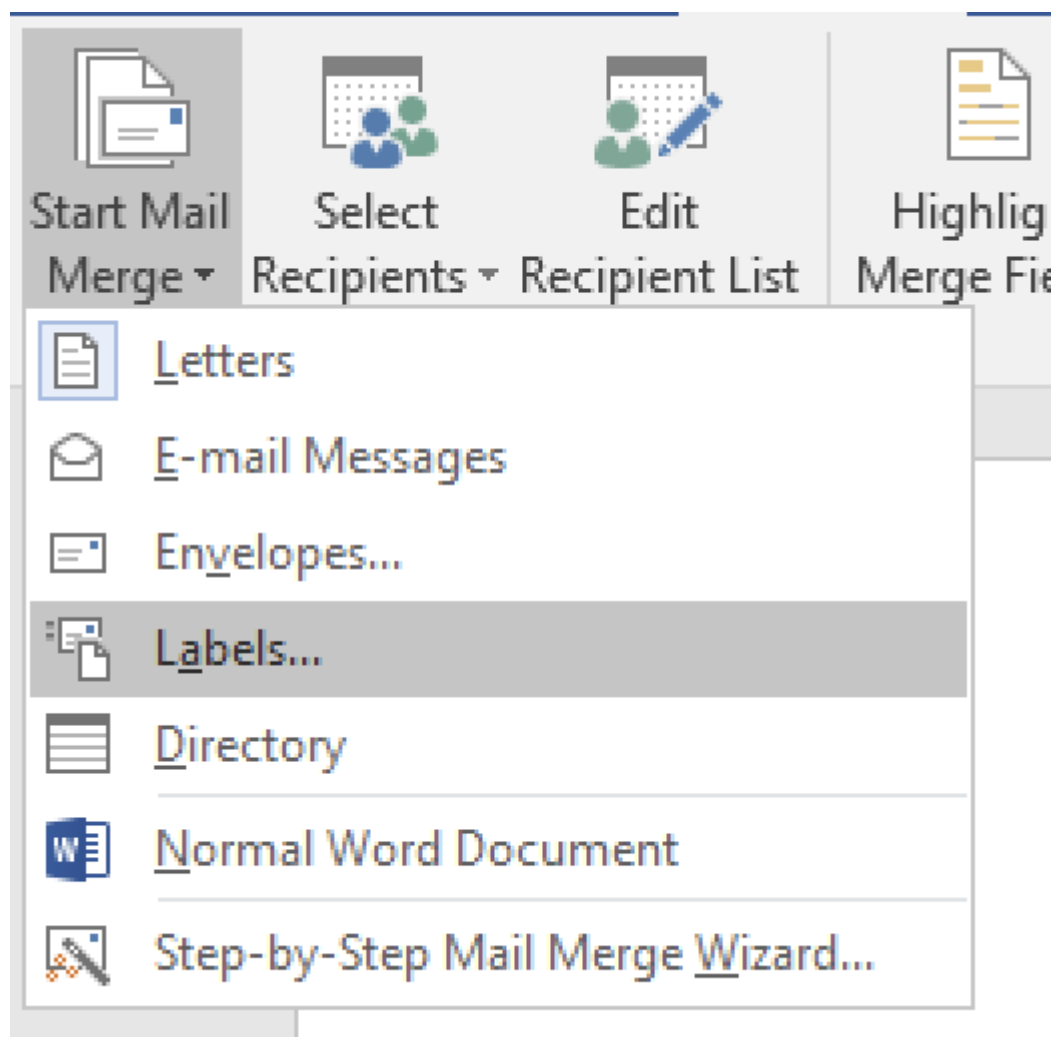
Save it to an easy-to-access folder on your computer.



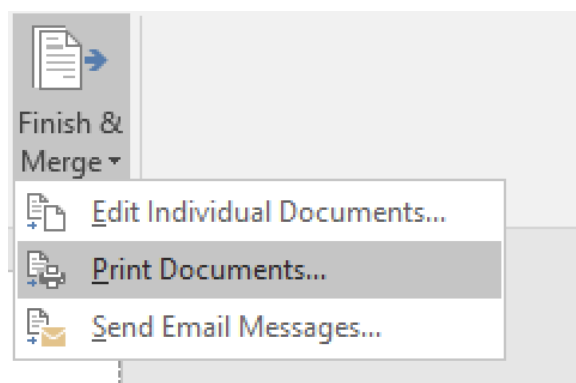
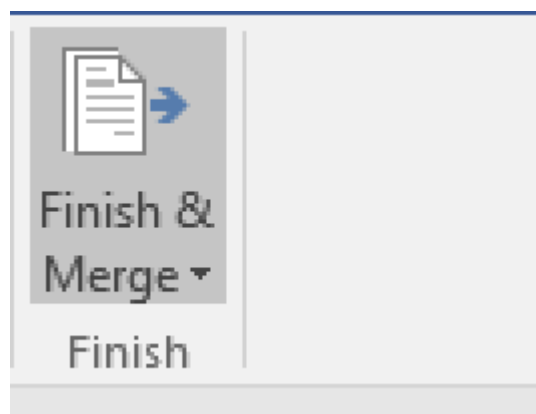
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