

How do I use Alternate Billing Address on letters and labels?

Version 4.0

Please note that Alternate Billing Address is only available for contacts that have memberships. Once you've entered Alternate Billing Address information for a contact, you'll need to modify your letters and labels to use that information.

To set a letter to use the Alternate Billing Address:

1. From the Main Menu, go to Setup | Contacts | Mail-merge Letters.
2. Select the letter you would like to edit.
3. Click "Compose Letter."
4. Remove any address fields (Name_&_Title, Company, Address1, Address2, City, State, Zip, etc.).
5. Insert the <Bill_Add_selectable> field.
 - a. Click the down-arrow next to "Select field from list."
 - b. Select the "Bill_Add_selectable" field from the list.
 - c. Position your cursor where you want the address block to be.
 - d. Click "Insert field."
6. Insert the <Dear_selectable> field.
 - a. Select the "Dear_selectable" field from the list.
 - b. Position your cursor where you want the address block to be.
 - c. Click "Insert field."
7. You can make changes to the positioning and font as usual but please do not edit the text of the mail merge field, including the brackets on either side.
8. Click "Save" at the top of the screen.
9. Click "Exit."

To set labels to use the Alternate Billing Address:

1. From the Main Menu, click on "Reports".
2. Click "Contacts" under Report Categories.
3. Select the Contact Labels Style you would like to edit.
Note: Contacts Labels Styles #4, #5 and #6 will automatically use a contact's Alternate Billing Address if available.
4. Click "Modify Report Layout."
5. Click "Modify Custom Layout."
6. Remove any address or name fields that appear on the label.
7. Click "Field" (ab|) in the Report Controls Toolbar.
8. Click where you want the field to appear.
9. In the window that appears, type getbilladdress() into the Expression field.
10. Click "OK."
11. You can make changes to the positioning and font.
 - a. To change the font, go to Format | Font.
 - b. To increase the size of the box, click and drag the black dot in the bottom center of the box when the box is selected.
 - c. To move the box, use the arrow keys on your keyboard.

12. Click File | Save.
13. Click File | Close.
14. Put the radio button next to “Custom Layout” to ensure that when you run the report the changes you made will be used.

If you have any questions, please contact our Support Office at 1-800-562-6080 or email support@museumsoftware.com. Thank you for using PastPerfect!