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## SmartScan Label Link 3.0 for QuickBooks

### 1. Introduction to SmartScan Label Link 3.0

SmartScan Label Link gives the user the ability to print labels with barcodes and other data based on specified QuickBooks Items. Items can be selected individually or on a transaction-level basis, adding Items from a given Purchase Order, Sales Order, or Invoice for printing. Label Link sends these items to label template software such as BarTender, to print data exactly how the user desires. The user can create multiple label templates and specify how the formatted data appears on the printed labels using the label template software, before printing out a label that matches the needs of the company more closely than ever before.

**What's new in Label Link 3?** Label Link 3 allows transaction data to be included on the label such as customer/vendor information, date, transaction number, and edited item information. Label Link 3 can also print a Packing Slip type label. By including multiple different Items on one label, and by customizing the Fields that appear on that label, as well as the appearance of the label itself, it is now possible to create custom Packing Slips as part of the shipping process.

#### Getting Started

Make sure you have the following:

- SmartScan Label Link CD
- Mouse
- Label template software such as BarTender
- Printer
- (Optional): A custom field assigned in QuickBooks (see p. 4) for the barcode number (SmartScan Custom Field Manager – installation and instructions are on the Label Link CD – can expedite the process of assigning barcode numbers to the Items once this field is created).

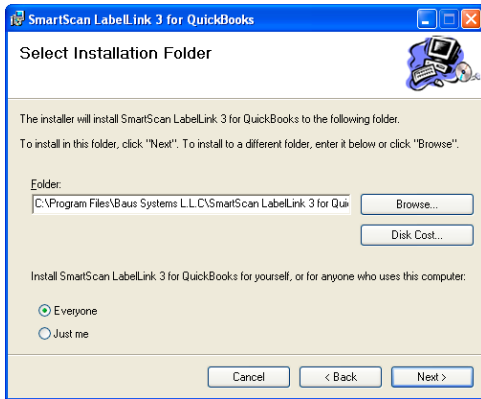
#### Startup Checklist

- Install SmartScan Label Link (p. 3)
- Set up QuickBooks permissions (p. 4)
- Connect to Company File (p. 4)
- Edit Label (p. 6)
- Edit Fields (p. 8)
- Add Items to List (p. 12)
- Edit Label file in label template software (p. 14, 17)

## SmartScan Label Link 3.0 for QuickBooks

### Installing SmartScan Label Link

Contact Baus Systems for software download instructions or insert the SmartScan Label Link CD into the computer CD drive. The SmartScan Label Link Setup Wizard will appear. Follow the screens and use the default settings, except change the installation to “Everyone”.



### Registering SmartScan Label Link

Whenever SmartScan Label Link is opened prior to being registered, the “Register with Baus Systems, L.L.C.” window appears. **Clicking “Skip Registration” will proceed with the demo installation**, but to continue past the trial period, the program will need to be registered:

1. Enter your company name and the copy number you received on the CD cover.
2. Click Register Now.
3. When the Registration Information window appears, send the Key1 and Key2 information to Baus Systems, L.L.C.
4. A copy of this information can be printed out by pressing the Print button.
5. Enter the Activation Code given to you by Baus Systems, L.L.C.
6. Click “Done” to close the Registration Information dialog box.
7. Verify that your copy is now registered. The message should say “Registered to: (your company)”
8. Click “Done.”









## SmartScan Label Link 3.0 for QuickBooks

### Working with QuickBooks

SmartScan Label Link connects with the QuickBooks Company file to get transaction and Item information. If a separate barcode field is needed, then the Company file must have a custom field specified for this purpose. Also, QuickBooks must be configured to grant permission for SmartScan Label Link to access the Company file.

### Adding a Barcode Field to QuickBooks

To add a barcode/scan code field to QuickBooks:

1. Start QuickBooks and log in as “Admin” in Single User Mode.
2. Click the Item List Icon. 
3. Double click any Item. 
4. Click .
5. Click  in the popup.
6. Enter a name for your barcode/scan code field in one of the unused text boxes.
7. Check the check box next to the name you just entered: 
8. Click .
9. Enter the barcode numbers in the barcode/scan code field.
10. Click .
11. Click .
12. Repeat steps 3, 4, and 9-11 for each Item in the list.

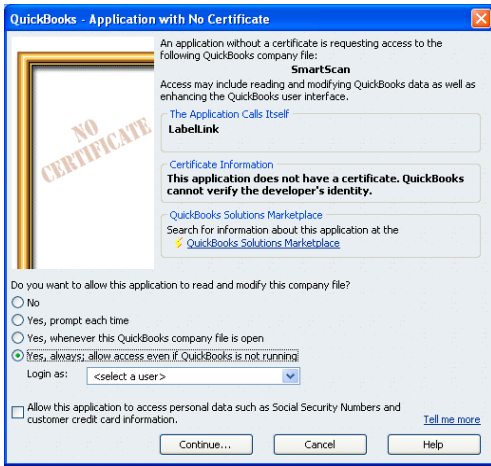
### Decreasing QuickBooks Access Time

You can decrease QuickBooks access time by having your QuickBooks Company file open on the computer on which you are running SmartScan Label Link.

### Setup Permissions in QuickBooks

**Log into QuickBooks in Single User Mode as “Admin”** to set permissions for SmartScan Label Link to access the Company file. In Label Link, select from the menu: File ► Open New Label Company. The following message will appear in QuickBooks for you to grant access permission for Label Link:

## SmartScan Label Link 3.0 for QuickBooks



1. Choose “Yes, always; allow access even if QuickBooks is not running” and set “Login as:” to Admin if this option is available (if it is not available, skip to step 4). Click Continue.
2. Confirm to Proceed: “Are you sure you want to allow this access?” Click Yes.
3. Access Confirmation: Click Done
4. Label Link will now bring up a dialog box asking if you want to update your lists now. Click Yes to import your Item and Transaction data to Label Link.
5. In QuickBooks, select the menu item Company ► Modify Service Access. If this option is not available, select Edit ► Preferences instead.
6. Selected Integrated Applications from the manu on the left and switch to the Company tab.
7. Select LabelLink and click Properties.
8. Check the boxes that allow the application to access QuickBooks and auto-login as Admin.
9. Click OK, then OK again. When this is complete, you may log out of Single User Mode or close QuickBooks.

### ***Setting New Company File***

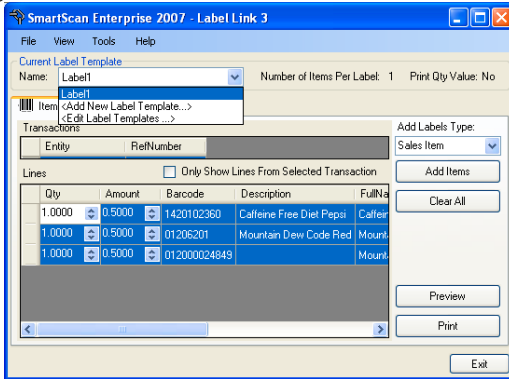
If at any time Label Link is not connected to the current Company file, the Company file currently open in QuickBooks can be accessed as follows:

1. Open the Company File in QuickBooks
2. In LabelLink, select File ► Open New Company.
3. Click OK.

## 2. Using SmartScan Label Link

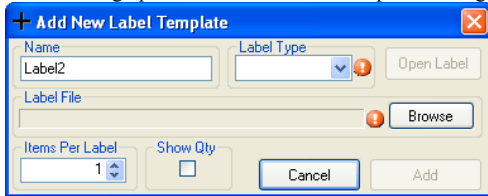
### Working with Label templates

Before printing any labels, you need to select a Label template from the Current Label Template drop-down menu for Label Link to use when printing labels.



### Adding a Label template

If there are no Label templates on this list, or if you have a new template that needs to be added to the list, select the <Add New Label Template....> option. This will bring up the "Add New Label Template" dialog box:

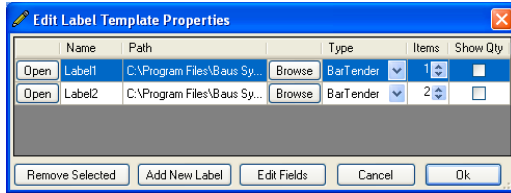


This dialog provides options for naming the label, selecting whether the label is a BarTender or Wasp label, opening the label template in the associated Labeler, setting the number of Items that will be printed in each label, and specifying whether Items with more than one quantity selected will be printed out multiple times, or just once with a quantity specified. Clicking the Browse button will allow you to browse for the desired label template to associate with Label Link. When all the options are properly configured, click the Add button to add the template to the list.

## SmartScan Label Link 3.0 for QuickBooks

### *Editing Label Templates*

If a label that is already on the list needs to be modified, this can be done by selecting the <Edit Label Templates...> option from the Current Label Template drop-down menu, which will bring up the “Edit Label Template Properties” window:



The “Edit Label Template Properties” window is the main launching point for doing most activities involving the Label templates. In addition to providing a way to change the settings that were originally set through the “Add New Label Template” dialog box, this window allows access to Field Editor, discussed in the next section. You can also add and delete Label templates through this dialog.

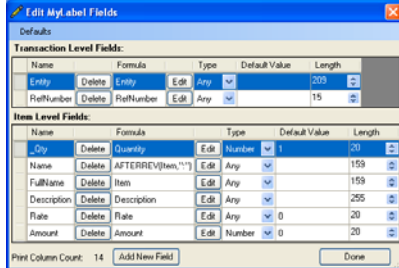
## SmartScan Label Link 3.0 for QuickBooks

### Working with Fields

SmartScan Label Link 3 provides a much more robust Field Editor than previous releases of Label Link. It is now possible to define any number of specialty Fields for inclusion in custom Labels. This section will contain a brief discussion of some of the basic features of the Field Editor, but the user is encouraged to experiment with our numerous options to find a style most suited to the task at hand. For an example, we will walk the user through the creation of a Barcode Field.

### Accessing the Field Editor

To access the Field Editor, select <Edit Label Templates...> from the Current Label Template drop-down menu. Select a Label template on the Label list, and then click the Edit Fields button. This will bring up the "Edit (MyLabel) Fields" window:



This window has two lists of fields: Transaction level Fields, which use data drawn from the Transaction (i.e., Invoice, Sales Order, or Purchase Order) which adds a given Item to the list of Items to be printed; and Item level Fields, which use data from the Item itself. There are five columns in a Field row which can be changed in this window:

1. Fields can be deleted by clicking the Delete button in the Field's row.
2. The Type can be modified by the drop-down menu in the Type column, which allows the Field to be specified as a Number, Date, or Boolean (true/false value) type, or specified as Any, which means that the Field could be any of the above.
3. The Edit button brings up the Formula Editor, which is discussed below.
4. The Default Value (what appears in a Field if it has no value) can be changed by clicking on the Default Value column for the Field and entering a value.
5. The Length (the maximum number of characters that can appear in the Field) can be changed by clicking on the up/down arrows in the Length column.

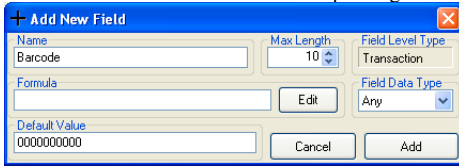
For now, click on the Add New Field button at the bottom of the window to bring up the Add New Field dialog box.



## SmartScan Label Link 3.0 for QuickBooks

### Add New Field

The Add New Field dialog box allows the user to name and define a new Field for use in the Label Link database for label printing.

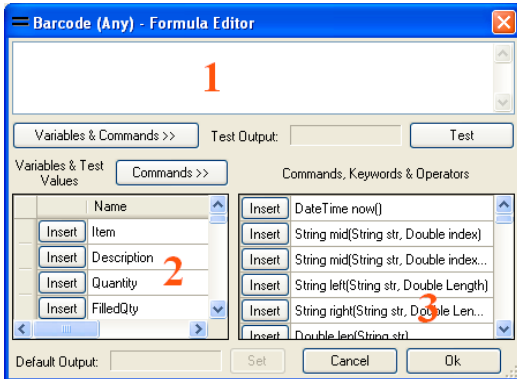


For our Barcode field, change the name of the field to Barcode, and set the Max Length to 10 – we don't want to have too many characters showing up in the barcode, after all. Set the Default Value to "0000000000" so you can easily tell if a barcode is invalid. Then change the Field Data Type to Any. It might seem more natural to set it to Number, but we actually want the barcode to be a sequence of characters, since that's how it will be treated by the barcode printer. If you're not sure what type to make a Field, you can still edit the Formula in the Formula Editor, and then Label Link will decide what type the Field is.

Finally, click the Edit button after the Formula text box. This will bring up the Formula Editor, where you can choose the pieces of the Formula from a list. When you close the Formula Editor, your Formula will be automatically inserted into the Formula text box.

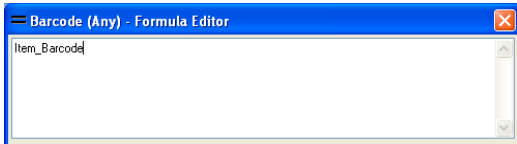
### The Formula Editor

The Formula Editor provides an interface for creating and editing the Formulas that are used to generate Field values. The Formula Editor window consists of three main areas: The Formula definition area, the Variables & Test Values area, and the Commands, Keywords & Operators area.



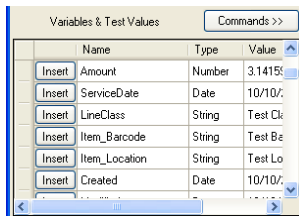
## SmartScan Label Link 3.0 for QuickBooks

### The Formula definition area



The Formula definition area shows the current text of the Formula you are editing. Typing is enabled in this area, so if you know how you want to define the Formula, you can type it in directly, and you can change/remove mistakes.

### The Variables & Test Values area

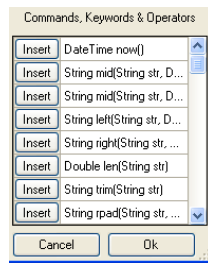


The Variables & Test Values area consists of a wide assortment of Fields imported from QuickBooks that can be added to the Formula. When you click the Insert button next to a variable, the name of the variable is inserted into the Formula definition area at the cursor position. Test

values for the variable can be modified by editing the entry in the Value column for the variable. This affects what appears in the Test area when the Test button is clicked while the variable is included in the Formula (the Formula Editor doesn't have access to any data imported from QuickBooks, so this feature is important in making sure your Formula works the way you expect it to).

### The Commands, Keywords & Operators area

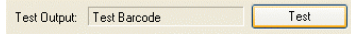
The Commands, Keywords & Operators area contains functions and operators that allow the user to modify what appears as a result of using the Formula. This includes such operations as performing mathematical operations on numbers, inserting the current Date/Time, simplifying, altering, or combining strings of text, and having the Formula choose what to display based on what is contained in variables. Clicking the Insert button next to an item inserts that item into the Formula definition area at the cursor position (additionally, if there is a block of text selected in the Formula definition area and the parentheses or quotation operators are selected, then the parentheses/quotes are inserted around the selected text). For information about what a given item does, hover the mouse pointer over the item.



## SmartScan Label Link 3.0 for QuickBooks

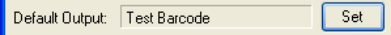
### Other areas

The Test area is also of note.



This area, situated just under the Formula definition area, allows you to test whether the Formula you have entered is working the way you expect it to. To test your Formula, click Test. The Formula Editor will then parse the Formula using whatever values you have specified as test values for the variables you are using.

The final area of note is the Default Output area. It is possible that, in the processing of a Formula, one of the inputs to the Formula might be invalid and cause the Formula to fail. In this case, the Formula will return the value specified by the Default Output. To change this output, input a Formula that gives the output you want to be the default and click Test. When the outcome appears in the Test area, click the Set button, and the



Default Output value will be set to the value in the Test area.

To continue our barcode Field example, scroll down in the Variables & Test Values area until you get to Item\_[Your Barcode Custom Field] (if you can't see the Variables & Test values area, click the button "<< Variables & Commands" to show it). Click the Insert button in the barcode row to insert the variable's name into the Formula definition area. Click Test, and the Test value for the barcode will appear in the Test area. Click Ok when you're done to finish.

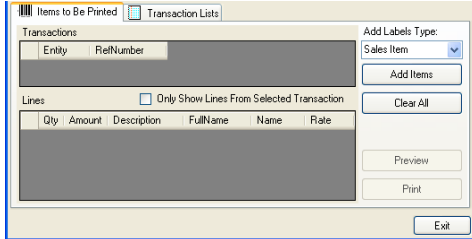
## SmartScan Label Link 3.0 for QuickBooks

### Printing Labels

When Label Link is connected to the QuickBooks Company file and a Label Template is selected for printing, you are now ready to add Items to the list of Items to be printed. There are two ways to do this: you can add Items individually, or from QuickBooks Transactions.

### Adding Items Individually

To add Items individually, first make sure you are on the “Items to Be Printed” tab of the main window.



In the Add Labels Type dropdown menu, select either Sales Item or Purchase Item. This affects what Fields are imported for prices and descriptions of the Items, and whether the Item will be associated with a Customer or a Vendor. Click Add Items to bring up the Add Items window.

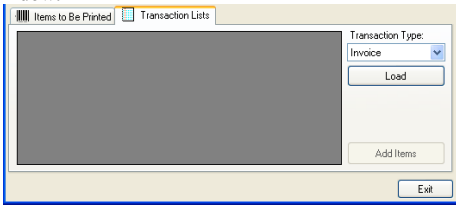


This window contains a list of all the Items imported from QuickBooks, with their Description and the quantity to be printed. The quantity to be printed starts at 0 for all Items. You can change the number of labels to be printed for an Item by typing in the quantity in the Qty column, or by clicking the Up/Down arrows next to the Qty column. You can also associate all the Items entered here with a particular Customer/Vendor by selecting the desired Customer/Vendor from the dropdown menu at the top of the window.

## SmartScan Label Link 3.0 for QuickBooks

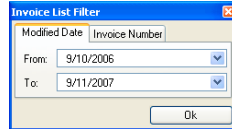
### *Adding Items from Transactions*

To add Items from Transactions, first go to the “Transaction Lists” tab of the main window.

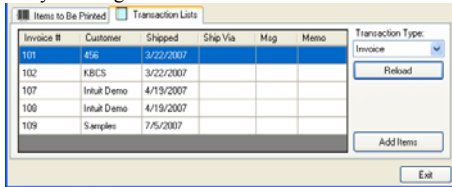


Select from the Transaction Type dropdown menu the type of QuickBooks transaction you want to load Items from – either Invoice, PO (Purchase Order), or SO (Sales Order). Then click the Load button to import the Transaction data from QuickBooks.

This will bring up the Transaction List Filter dialog box, which allows you to specify either a date range for Transactions to import, or a particular Transaction number to import. Select the Modified Date tab to enter a date range, or select the Invoice Number tab to enter a specific Invoice Number. Click Ok when finished to import the Transaction list.



The list of Transactions will now be populated with Transactions of the specified type. If there is any problem with the imported list, you can reload the list by clicking the Reload button



To add all the Items from a Transaction to the list of Items to be printed, select the Transaction and click the Add Items button. This will send all of the Items in the selected Transaction to the print list, and transfer the view to the “Items to Be Printed” tab.

### *Printing Labels*

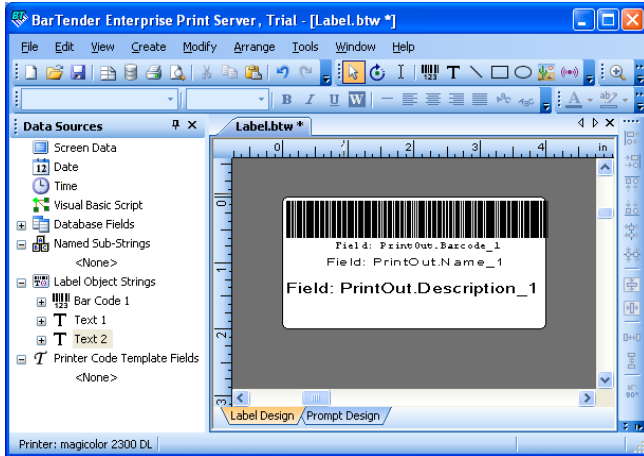
Once the list of Items to be printed has Items in it, you can print by clicking the Print button. Alternately, you can click the Preview button to launch the labeler software that uses the Label file associated with the Current Label Template. From within the labeler software, you can modify the Label file to display the Fields you have specified in Label Link at the locations you want on the labels.

### 3. Using the Labeler Software

SmartScan Label Link currently supports two label printing programs: BarTender and Wasp Labeler. In this section, we will discuss how to perform some commonly used tasks in each of these programs.

#### BarTender

When Print Preview is selected in Label Link with a BarTender label file linked with the Current Label Template, Label Link will launch BarTender with the current Item data. The window that first appears contains the template that BarTender uses for generating labels, **not one of the labels that will be printed**. It is on this template that you can select what data from Label Link is used to generate labels, as well as where it will appear on the labels.



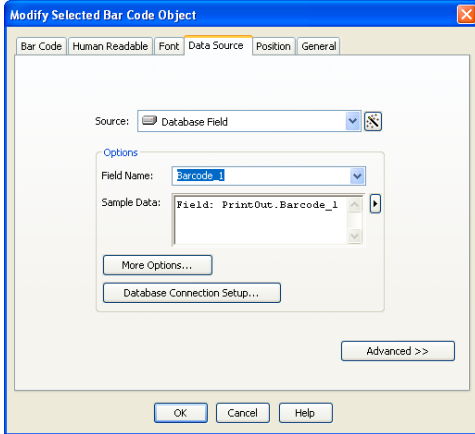
#### Creating Objects

Objects are what BarTender uses to display text, barcodes, and graphics on labels. To create an Object, right-click on an empty area on the label template, select Create, and click the Object you want to create. This will place a new Object of the specified on the label template at the location you clicked. Barcode and Text Objects can be assigned constant data by clicking on them and typing in the specified text, or they can be assigned data from the Label Link database as described below.

## SmartScan Label Link 3.0 for QuickBooks

### *Modifying Barcode and Text Objects*

Barcode and Text Objects can be modified to display data drawn from the Label Link database, as well as static data that will display the same regardless of the database contents. To connect a Barcode or Text Object with the Label Link database, double-click on the Object to bring up the Modify Selected Object dialog box. Select the Data Source tab, and then select "Database Field" in the Source dropdown menu. This will add the Field Name dropdown menu to the Options section of the dialog box. Select the Label Link Field you want this Object to display.



If the Object you are modifying is a Barcode Object, then the Human Readable tab is also available. This tab contains options to specify whether a translation of the barcode will appear with the barcode, as well as where this translation will appear with respect to the barcode. To show Human Readable text along with the barcode, go to the Human Readable tab and select the Full option under Visibility. You can then change the Placement of this text to be either above or below the barcode, and change the Alignment of the text to Left, Right, or Center Aligned, or Aligned to have each character directly under the bars that translate to that character (Bar Density). Other options might also be available for certain barcode symbologies, which can be selected on the Bar Code tab.

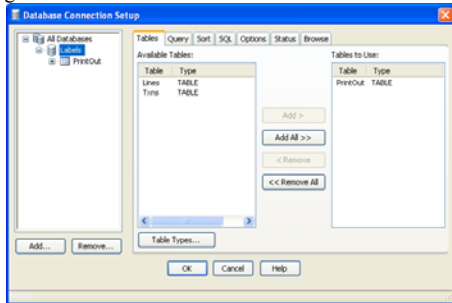
Other tabs in the Modify Selected Object dialog allow you to change the Font and text size for the selected Object; manually change the position and rotation of the Object; modify the Object's name; and specify whether or not the Object is to be included when labels are printed or viewed in the Print Preview. Feel free to experiment with the various different settings exposed through this dialog box to get the labels looking the way you want.

## SmartScan Label Link 3.0 for QuickBooks

### *Connecting to the Label Link database*

SmartScan Label Link comes with pre-made label files, already configured to retrieve information from the Label Link database. However, it is possible that these files could accidentally be deleted or modified to no longer access the Label Link database correctly. If this happens, it will become necessary to reconnect to the database manually.

To connect to the Label Link database, open the File menu and select Database Connection Setup. This will open the Database Connection Setup dialog box:



If there are any entries under the All Databases entry in the box on the left of the Database Connection Setup dialog box, select them and click the Remove button to remove them from the list, until only the All Databases entry remains. Then click the Add button to bring up the Add Database Connection Wizard.

The first screen of the Add Database Connection Wizard requests a Database Platform. Select Microsoft Access, and then click Next. The next screen requests a database name. Click the Browse button to open the Browse window and browse to the Label Link database location. The location of the Label Link database depends on whether you are using Windows XP or Windows Vista.

Windows XP: `Documents and Settings\All Users\Application Data\LabelLink3\Labels.mdb`

Windows Vista: `(Current User)\AppData\Local\VirtualStore\ProgramData\LabelLink3\Labels.mdb`

Note: If any of the folders in Vista don't appear, you might need to set your Folder View settings to Show Hidden Files & Folders. To do this, open the Start Menu and select the Control Panel, then open Folder Options. Select the View tab, and change the "Hidden files and folders" setting to "Show hidden files and folders."

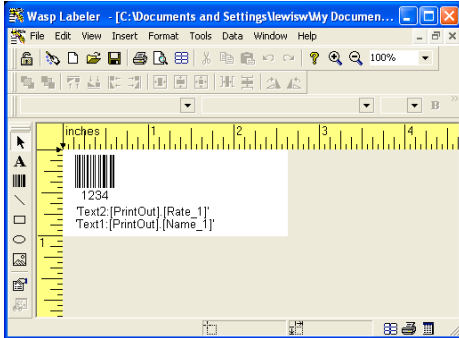
Click Next. On the next screen, select the PrintOut table from the list on the left, and then click the Add button to add it to the list on the right. Click Finish to return to the Database Connection Setup dialog box, and then click OK to return to the main window.



## SmartScan Label Link 3.0 for QuickBooks

### Wasp Labeler

When Print Preview is selected in Label Link with a Wasp label file linked with the Current Label Template, Label Link will launch Wasp with the current Item data. The window that first appears contains the template that Wasp uses for generating labels, **not one of the labels that will be printed**. It is on this template that you can select what data from Label Link is used to generate labels, as well as where it will appear on the labels.

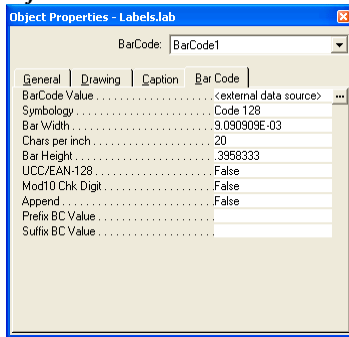


### Creating Objects

Objects are what Wasp uses to display text, barcodes, and graphics on labels. To create an Object, select the Object type you want to create from the Object toolbar on the left of the working area, and then click on the label where you want the Object to appear. This will create the specified Object where you click, and open the Object Properties window so that you can edit the Object.

### Modifying Barcode and Text Objects

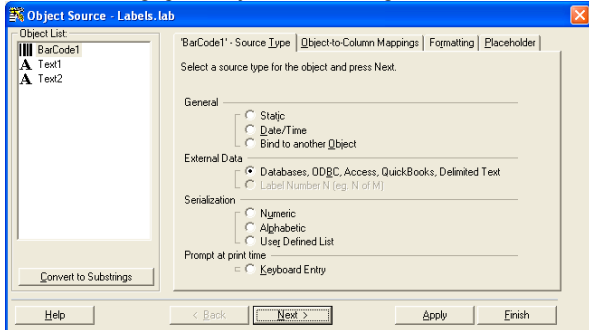
Barcode and Text Objects can be modified to display data drawn from the Label Link database, as well as static data that will display the same regardless of the database contents. To connect a Barcode or Text Object with the Label Link database, double-click on the Object to bring up the Object Properties dialog. This dialog allows you to make modifications to what is displayed in the selected Object.



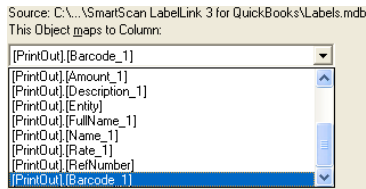
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The content of the selected Object can be changed on the Bar Code/Text tab of the Object Properties dialog. To set a constant value for what appears in the Object, click in the Barcode/Text Value text box and type in what you want to appear on the label. This value will then appear on every label that is printed, exactly as you type it in here.

To set an Object to get data from the Label Link database, click in the Barcode/Text Value text box and then click the “...” button after the text box. This will bring up the Object Source dialog.



Select the Databases option on the Source Type tab, then click Next to go to the Object-to-Column Mappings tab. This tab contains a dropdown menu that lists the Fields available from the Label Link database. Select the Field you want to appear in this Object from the dropdown menu. If the Label Link Fields are not listed, you might need to reconnect the label file to the Label Link database (p. 19).



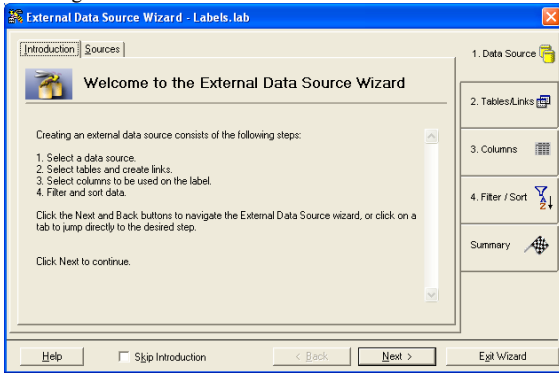
Other options on the Object Properties dialog allow you to specify different options relating to how the content of the Object is displayed. Both Text and Barcode Objects contain options for specifying the size and location of the Object, and there are also options that are specific to the type of Object. Text Objects allow you to specify the Font and Size of the text, as well as whether or not the text should be all on one line or multiple lines. Barcode Objects allow you to specify the symbology, format, and compression of the barcode, as well as whether and how human readable text should be displayed. Feel free to experiment with different settings for each Object type.

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### *Connecting to the Label Link database*

SmartScan Label Link comes with pre-made label files, already configured to retrieve information from the Label Link database. However, it is possible that these files could accidentally be deleted or modified to no longer access the Label Link database correctly. If this happens, it will become necessary to reconnect to the database manually.

To connect to the Label Link database, open the Data menu and select External Data Source Wizard. This will open the External Data Source Wizard dialog.



Click Next to go to the Sources tab, then select Access from the Source Type dropdown menu. Click the Browse button to open the Browse window, and browse to the Label Link database location. The location of the Label Link database depends on whether you are using Windows XP or Windows Vista.

Windows XP: Documents and Settings\All Users\Application Data\LabelLink3\Labels.mdb

Windows Vista: (Current User)\AppData\Local\VirtualStore\ProgramData\LabelLink3\Labels.mdb

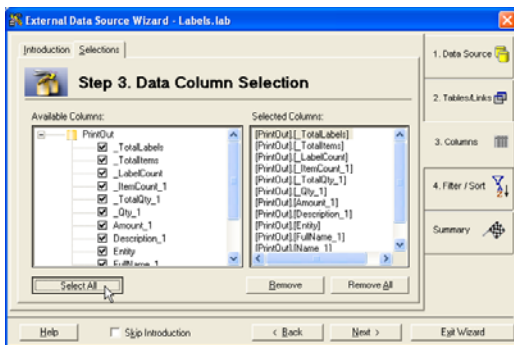
Note: If any of the folders in Vista don't appear, you might need to set your Folder View settings to Show Hidden Files & Folders. To do this, open the Start Menu and select the Control Panel, then open Folder Options. Select the View tab, and change the "Hidden files and folders" setting to "Show hidden files and folders."

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After selecting this file, click Next until you get to the Tables tab.



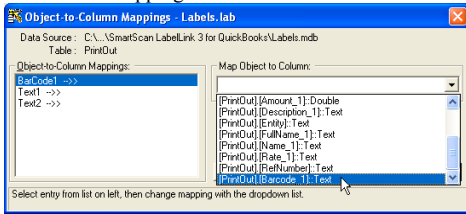
Check the box next to the PrintOut table, and then click Next until you get to the Selections tab.



Click the Select All button to add all the columns from the PrintOut table to the list of columns Wasp will draw data from, and then click the Exit Wizard button.

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If the label contains Objects that are mapped to database fields, then a dialog box will appear that you can dismiss by clicking OK, followed by the Object-to-Column Mappings window.



This window lists all the Text/Barcode Objects that are no longer mapped to a database field. Map each of the Objects to a database field by selecting the Object on the list, then selecting the database field to map from the dropdown menu on the right. When all the Objects are mapped to a database field, click OK to return to the main screen.