

## **Adding COKAMO routing slips to your ILLiad templates**

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### **In the ILLiad Customization Manager:**

1. Go to System Billing – Setup – BillingShippingFees (you don't have to bill to use this table)
2. Click "New Record"
3. Create a new record as follows:
4. Process Type: Lending
5. Shipping Method: COKAMO
6. Amount: (blank)
7. Click "Save"

### **In ILLiad Client:**

1. Go through list of COKAMO libraries and for each be sure that each has the following:
  - a. Billing Category: Exempt
  - b. Default Shipping: COKAMO
  - c. Note: (enter Courier Code from list)
  - d. Optional: Create a COKAMO group to make it easier to run statistics and indicate membership when you update courier codes

### **In your LendingLoanLabels, LendingLoanSlips, or LendingLoanShippingLabels document:**

1. Find a place in your template where the information will fit – be sure to leave room to fold and staple the slip.
2. If you are reading this document in Word, you can try these steps:

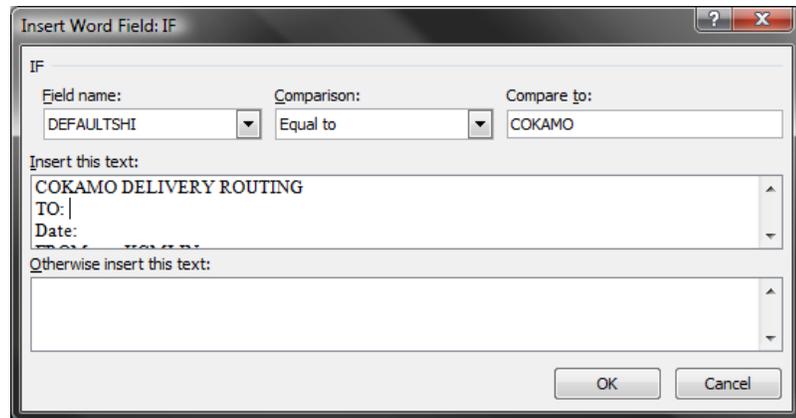
- a. Hit ALT+F9
  - b. Copy the entire code listed below (will only display if you hit Alt+F9)
  - c. Paste it into your template
  - d. Hit ALT+F9 again to toggle codes if necessary to make formatting changes
  - e. Note: this will NOT work if you simply type the code – it must be copied and pasted
3. To manually add the code:
  4. Click on the “Mailings” ribbon
  5. Click “Rules”
  6. Select “If...Then...Else...”
  7. Fill out the dialog box:
    - a. Field Name: DEFAULTSHI
    - b. Comparison: Equal To
    - c. Compare To: COKAMO
    - d. Insert this Text (don't worry about formatting, this happens next):

COKAMO DELIVERY ROUTING

TO:

Date:

FROM: KCMLIN



8. Click "OK" (NOTE – it might look like nothing has been inserted when you do this – this is okay!)
9. Hit ALT+F9 to display source codes (this will probably do some crazy things to your document – again, this is okay)
10. You should see something like this:
 

```
{ IF { MERGEFIELD DEFAULTSHI } = "COKAMO" "COKAMO DELIVERY ROUTE
TO:
Date:
From: KCMLIN" "" }
```
11. Place your cursor immediately after TO:
12. In the Mailings Ribbon select "Insert Merge Field" and select "Notes"
  - a. You should now see { MERGEFIELD NOTES } in that location
13. Place your cursor immediately after Date:
14. Go to the "Insert" ribbon tab and select "Date and Time" (just choose the format you prefer)
  - a. You should now see something like { DATE \@ "M/d/yy" } depending on the format you selected

15. Now do any formatting you want – I made mine bigger and centered it. Mine looks like this:

```
{ IF { MERGEFIELD DEFAULTSHI } = "COKAMO" "COKAMO DELIVERY
ROUTING
To: { MERGEFIELD NOTES }
Date: { DATE \@ "M/d/yy" }

From: KCMLIN" "" }
```

And prints like this:

**COKAMO DELIVERY ROUTING**  
**To: C444**  
**Date: 3/18/09**  
**From: KCMLIN**

16. \*If you do not have room on your template for the slip, or if you want to print sometimes else instead of this for non COKAMO libraries (particularly if you are using LendingLoanShippingLabels.doc), you can follow similar steps to put the content of the label in the last set of quotation marks (after KCMLIN" in my sample). For example, it might look like this:

```
{ IF { MERGEFIELD DEFAULTSHI } = "COKAMO"
"COKAMO DELIVERY ROUTING
To: { MERGEFIELD NOTES }
Date: { DATE \@ "M/d/yy" }
From: KCMLIN"
" Ship To:

{ MERGEFIELD LIBRARYNAM }
{ MERGEFIELD ADDRESS1 }
{ MERGEFIELD ADDRESS2 }
{ MERGEFIELD ADDRESS3 }
{ MERGEFIELD ADDRESS4 }" }
```

In this sample, the address will print for non COKAMO libraries, rather than the courier information. However, this is more complicated and you may need assistance in creating this if you are not very familiar with customizing these templates.