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Overview

There are several utilities built into NACCRRARware. Utilities (Basic) are functions of the program that are not done on a regular basis, but are provided for the times when necessary. Some relate to moving the data from and into another installation of NACCRRARware, others are templates for completing other processes. Because these processes can have major implications if completed incorrectly, many of these functions are only accessible to those users with Create, Modify, Reports and Delete or Total Administrator security levels. Here are the utilities that the Parent Counselors/Provider Services are able to use.

Labels and Letters

NACCRRARware data can be used to create mailing labels and custom documents, such as reminders or invoices, based on the data in the provider, client or community records.

Creating Label and Mail Merge Folder

The Mail Merge and Mailing Labels functions expect particular file names to be in a specific folder (directory) named NaccrraFiles on the workstation's C: drive. It is possible for users to utilize unique file names and folders on the hard drive, but will need to locate the datasource on the templates. The label and mail merge directions assume the user has created the correct folder and is using the designated file names. The following directions create a folder called NaccrraFiles on the c drive.

1. Go to my computer (click on the C-drive if you have to)
2. Moving the cursor to the right hand side of Explorer, which presents the contents of a drive or directory, but do not place the cursor over a file or otherwise highlight a file.
3. Right click the mouse.
4. Select New.
5. On the next menu, select Folder.
6. A folder will appear on the right hand side of Explorer and will be called New Folder
7. Erase that name and call the folder NaccrraFiles.
8. In the directions below, users will be directed to save files to this folder.



NOTE: Users not creating the NaccrraFiles folder or naming the files the names in the directions below may need to complete extra steps to locate the data source for the template.

Mailing Labels/Mail Merge Templates

Download the desired templates by going to <Utilities> Labels/Letters. The files need to be downloaded to the local machine once, unless the file is accidentally deleted, or a new version of NACCRRARware requires a change. Version 3.0 requires downloading new templates. The first time, download all of the desired formats to the local computer for future use. Download them to a file named c:\naccrra\mailmerge. To download files to the computer:

1. Right Click on the desired file name, for example: ClientAvery5160
2. Choose Save Target As.....
3. In the Download dialog box, change the directory in the Save in box to **c:\NaccrraFiles**
4. Click on Save.
5. Once the download is complete, click Close.
6. This file has now been saved to the local computer and can be used for the following steps.
7. The next step is to create a current dataset. This is done through Standard Reports for Providers and Clients and through Custom Search and Reports for Community Labels.

Labels

1. Open Reports>Standard
2. Go to Active or Inactive Listing for Client, Provider or Community (inactive not available for community)
3. If a specific sort of the labels is desired, for instance by zip code for bulk mail, choose the appropriate sort order under Report Parameters.
4. Also under Report Parameters, place a check in the box <Create text file.>
5. To create labels on all active or inactive records, click <Run> and continue to step number 7.

Or

6. To create labels for a selection of providers or clients,
 - o Choose <Run with Query>.
 - o On the Reports Field Selection page, place check marks in the fields that identify the selection desired. For instance, mark Type of Care to create labels for active family child care.
 - o After all fields have been checked, click <Next> at the bottom of the screen.
 - o In the Query builder, choose the criteria used to select the specific records.
 - o When the query is built, choose <Run Query> (Note: To save this query for later use, type a name in the Search Name box and click <Save Query.>)
7. The listing will appear.
8. In the upper right corner of the box, right click on Download Data File
9. Choose Save Target as..
10. A dialog box will open. Go to the C-drive and open up the **NaccrraFiles** folder.
11. In the name, type:
 - o client_address_data.doc for client files
 - o provider_address_data.doc for provider files.
 - o community.doc for community files.
12. Make sure the "Save as type" is listed as "All Files".
13. Press save (see note below.)
14. The last step is to open the template and merge the data into labels. Use the following directions to create a mailing label file for printing



NOTE: If you are unable to change the extension of the text file to a word document, you will need to right click on the text file and choose Open with Microsoft Word and resave it as a word document to your folder c:\NaccrraFiles.

Word 97/2000 Directions

1. Go to My Computer.
2. Locate **c:\NaccrraFiles**.
3. Double click on the correct label file (for example ProviderAvery5160.doc).
4. Microsoft Word will open and the label file will appear.
5. Go to Tools
6. Choose Mail merge
7. Click on Merge twice.
8. A box will pop up saying, "record *n* was an empty record." Press OK.
9. The template will reappear. Navigate windows to find the new document. Print or save document and close the template and select no.

Word XP Directions

1. Go to My Computer
2. Locate **c:\NaccrraFiles**.
3. Double click on the correct label file (for example ProviderAvery5160.doc).
4. File Conversion-addressdata box will appear. Use the Windows Default. Click on OK
5. Microsoft Word will open and the label file will appear.
6. Go to Tools
7. Choose Letters and Mailings
8. Click on Mail Merge Wizard.
9. A menu box will appear on the right.
10. Under Select Recipients, use an existing list will be check marked. Under the use an existing list, be certain that the correct mailing list is selected (client_address_data.doc, provider_address_data.doc or community.doc). If not, click on Select a different list and choose locate the correct file.
11. At the bottom, click on the arrow to the left of Next: Arrange your labels & go to the next step.
12. At the bottom, click Next: Preview your labels and move to the next step.
13. At the bottom, click Next: Complete the merge.
14. In the middle of the box, under the title Merge, click Print...
15. After printing, close out of the document. Do not save or Save As and save as another name so the template is not modified.

Creating Client Letters from Form Letters

Two sample form letters are included with NACCRRAware . One is a sample parent invoice, the other a sample letter to a client. It is possible to create custom form letters, the section on Creating Labels and Letter templates below.

To begin using the form letter, download a form letter document from <Utilities> Labels/Letters. The form letters are named: SampleParentInvoice.doc and SampleParentLetter.doc.

Next, select records and export the necessary data:

1. Click on Custom Search.
2. Choose Client.
3. Check fields which will create the query of records to be used. If all records in the database are desired, click Next at the bottom of the screen.
4. After all fields are checked, click Next at the bottom of the screen.
5. In the Query builder, choose the criteria used to select the specific records.
6. When the query is built, choose Run Query.
7. On the bottom of the Search Results screen, click Custom Report.
8. Mark the fields needed for the corresponding data document for labels (see list below). **If the report was saved earlier, choose the saved report name from the drop down list and click retrieve report.
 - Client First Name
 - Client Last Name
 - Street Address
 - Unit#
 - City
 - State
 - Zip
 - Zip +4
 - Agency name
 - Agency Area code
 - Agency Phone
 - Agency extension
 - Agency email
 - Client ID
 - Fee amount
 - Status date

9. Scroll to the bottom of the page and click Next.
10. Change Zip sort order to 1 to produce a list in zip code order.
11. Check the box “if mailing information is blank, replace with street information”
12. Click Run Custom Report
13. The results will open in a new window. Minimize or close the window and click Create File on the Client-Custom Search Reports page.

CREATE FILE

14. Right click on <Click Here> to download.
15. Choose Save Target as...
16. A dialog box will open.
17. Change directory until you are in the c:/NaccrraFiles directory
18. In the name, type: invoicedata.doc or letterdata.doc.
19. Press save

Last, run the letter or invoice. Use the following directions to create a file for printing.

Printing Letters

Word 97/2000 Directions

1. Go to My Computer.
2. Locate c:\NaccrraFiles.
3. Double click on the correct label file (for example SampleParentLetter.doc).
4. Microsoft Word will open and the label file will appear.
5. Go to Tools
6. Choose Mail merge
7. Click on Merge
8. Choose the output for the merge printer, new document or other. Choosing printer will send the labels directly to the printer.
9. If New Document is chosen, a second document will be created, although the template will reappear. Navigate windows to find the new document. Save the new document and close the template unmodified.

Word XP Directions

1. Go to My Computer
2. Locate c:\NaccrraFiles.
3. Double click on the correct label file (for example SampleParentLetter.doc).
4. File Conversion-invoicedata or parentletter.doc box will appear. Use the Windows Default. Click on OK
5. Microsoft Word will open and the label file will appear.
6. Go to Tools
7. Choose Letters and Mailings
8. Click on Mail Merge Wizard.
9. A menu box will appear on the right.
10. Under Select Recipients, use an existing list will be check marked. Under the use an existing list, be certain that the correct merge list is selected (invoicedata.doc or letterdata.doc). If not, click on Select a different list and choose locate the correct file.
11. At the bottom, click on the arrow to the left of Next: Arrange your labels and move to the next step.
12. At the bottom, click Next: Preview your labels and move to the next step.
13. At the bottom, click Next: Complete the merge.
14. In the middle of the box, under the title Merge, click Print...
15. After printing, close out of the document. Do not save or Save As and save as another name so the template is not modified.

If any fields are missing from the data file, mail merge is still possible, but the user will have to manually indicate that the missing fields should not be included for each record. If a large number of records are to be merged, this may be a long process. It may be easier to press CTRL+ALT+DEL to end the mail merge process and re-export the data with all the correct fields. If any fields do not have data, the mail merge will proceed normally.

Creating Labels and Letter Templates

NACCRRAware can be used to create mail merge documents for letters, invoices or other custom documents. The following steps are designed to give users a general idea of the steps to create a mail merge document for Microsoft Word 2000. It is also possible to use NACCRRAware with other word processing applications. To design a specific report using another program, see the manuals or help components for that program.

The first step is to decide what data is needed to incorporate into the final letter and which fields carry that data in NACCRRAware. Once that is complete, follow the steps below:

1. Export the data for the correct fields using the Custom Search and Report Section.
2. When saving data, give the document a name that will easily identify what data it contains. For instance, for creating a mail merge of an update letter to send to providers, name it something like updateletter.doc.



NOTE: Mail merge formats built into NACCRRAware require the data to be saved with a specific name, such as client_address_data.doc for mailing labels. See the section on mailing labels for details.

3. It is recommended to utilize the c:\NaccrraFiles directory. Save the files to this directory.
4. Open Microsoft Word
5. Go to Tools and choose Mail Merge
6. Click on Main Document-Create
7. From the options available, select the type of document you wish to create, such as Form Letters
8. Choose from the Active Window or a New Main Document
9. Click Get Data
10. Choose Open Data Source
11. A dialog box will open. Browse until you find the directory with the file created above.
12. Double click on the appropriate file
13. A dialog box will open saying Word found no merge fields in your main document. Click Edit Main Document
14. Begin typing the document you want to create.
15. When you want to include a field from the document, click on Insert Merge Field and choose from the list of fields. For more detailed documents, choose from the Insert Word Field list. A list of definitions for these fields are available in the Microsoft Word manual.
16. After the document has been created, go to Tools and choose Mail Merge
17. Now click on Merge
18. Choose where to merge the data, for example New Document
19. Choose the records to be merged, all or a set of records
20. When merging, choose how to print when data fields are empty. Which to choose depends on what type of data set up is chosen.
21. When complete, click Merge
22. The document is then created.
23. Save the mail merge document with field designations to be used at a later date.