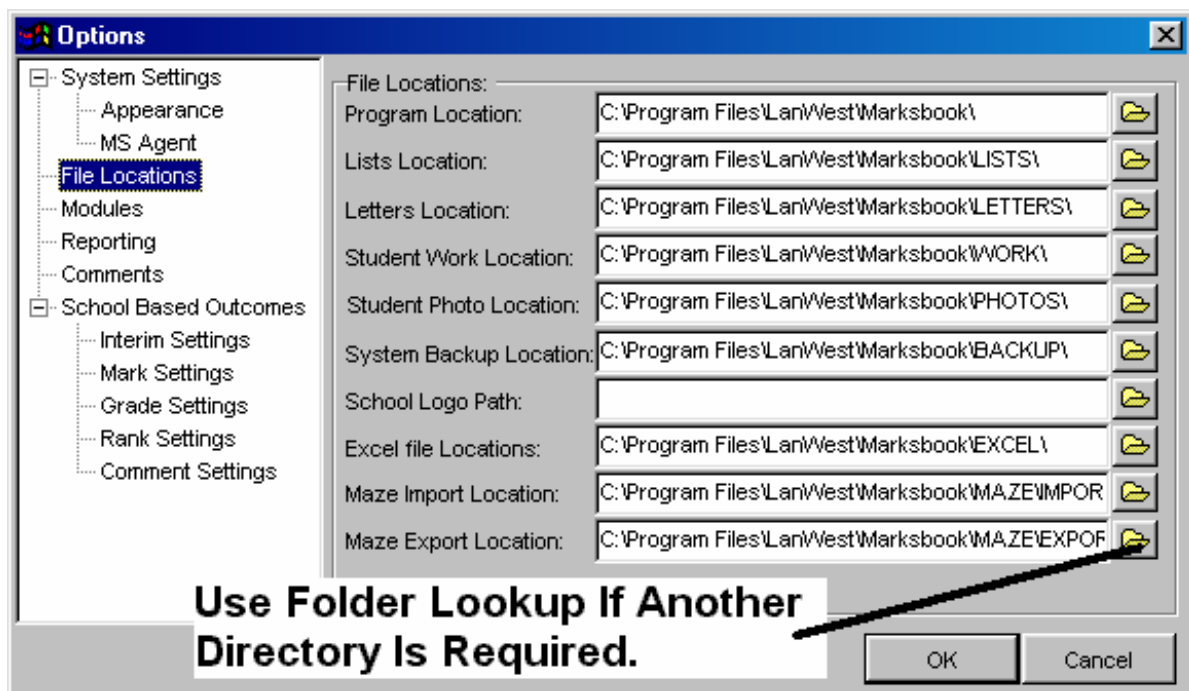


# Letters Management

*The ability to Mail Merge Documents with the Student, and Guardian databases is a huge convenience to the classroom teacher who can very quickly send letters for a selected number of students in the class.*

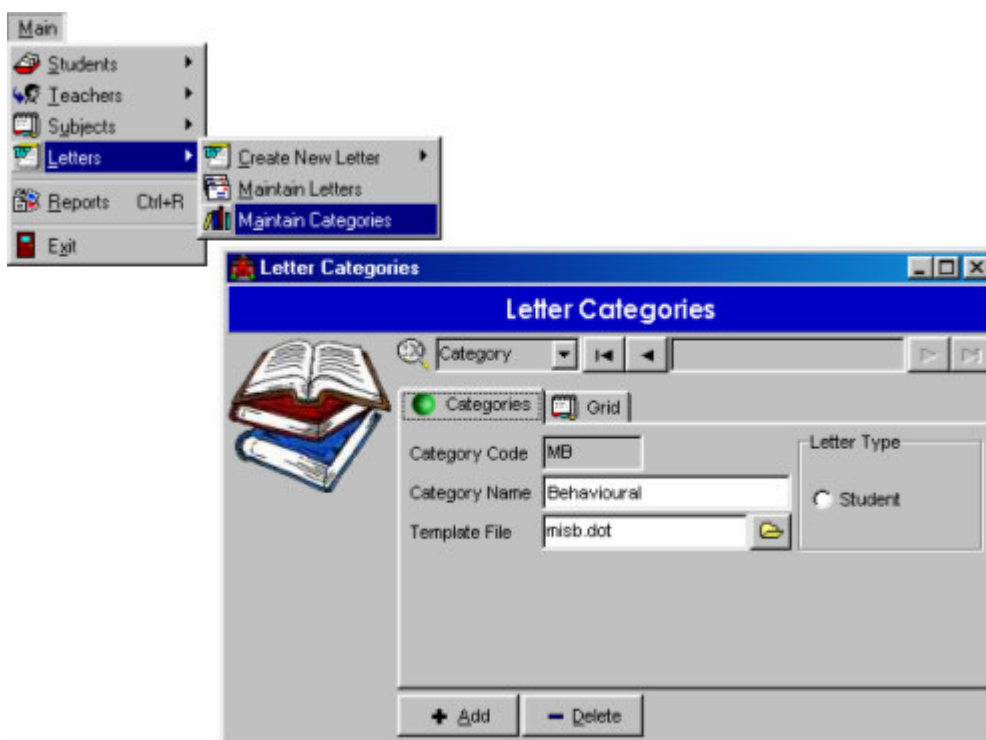
**M**arksbook allows users to design their own letters/documents that are used in every day application of the software. The sample set provided should be used as a guide and note that other applications like Certificates, Subject Selection Forms and Class Tests

that require Selective Data from the Lists should also be considered. The system uses 3 types of files for the Mail Merge operation. Types are determined by the file extension at the end of the file name. DOT files are the Template files used when a new letter is created and would contain the generic information such as school logo, date and address information if that was standard in the category selected. DOC files are the letter documents used as the link to the database description and contain the specific information relating to that letter. DAT files are the database field types stored in the DOC file. Before starting, ensure that your system has a proper location for the Document Files to be assigned into. Default is the LETTERS folder in the program location. Every letter created will have a DOC and a DAT extension to the file. The DOT extension files are also stored in this location. To set the location, go to: **Setup → File Locations**



## Letter Categories

Creating a letter will require you to select a Letter Category. A letter Category is a grouping under which you will assign letters such as “Academic” or “Behavioral”, etc. Letter Categories are user defined and are edited in the Letter Category Module found on the menu path **Main**→**Letters**→**Maintain Categories**.



Note that the Letter Type will determine which letters are displayed in various sections of the system depending upon which area you are in.

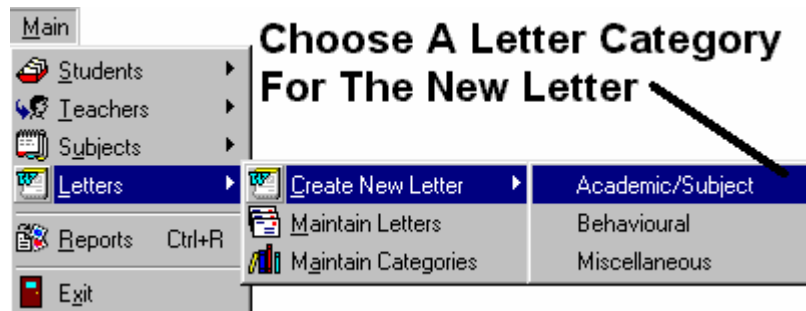
The Template File should contain the most common layout for that Category. The DOT files can be edited and saved under MS WORD.

To add a new category, Click on the “+ Add” button. A blank entry will appear on the screen requiring you to fill in the fields including the Code for the Category.

Be careful not to delete a Category especially if there are letters already linked to it. Removal of a Category will block the access to any letters linked to it. Re-entering the category will restore the link providing the same code is used in creating the category.

## Creating and Maintaining Letters

To create a new letter, you will need to select a category for the letter to be grouped by. Selecting the Menu Path: **Main** → **Letters** → **Create New Letter** → **Category**.



Selection of a Category will then activate a request for the Description of the Letter. Once the description has been entered, the system will

1. Create the letter from the template stored with the Category.
2. The File Name will be the next numbered letter. Eg. LETT0145.DOC
3. Load MS WORD and require you to edit the Letter.
4. Close MS WORD and return back to the Marksbook System
5. Check via Letter Maintenance (Main -> Letters -> Maintain Letters) that the entry has been added.

The screenshot shows the 'Letter Maintenance' window. It has a title bar 'Letter Maintenance' and a green header 'Letter Maintenance'. There are two tabs: 'Letters' (selected) and 'Grid'. The form contains the following fields:

- Letter Code: SChang02
- Description: Change Of Class
- Filename: LETT0143.DOC
- Creation Date: 22/10/01
- Author: Vaughans
- Letter Type:  Student
- Category: Academic/Subject (dropdown menu)

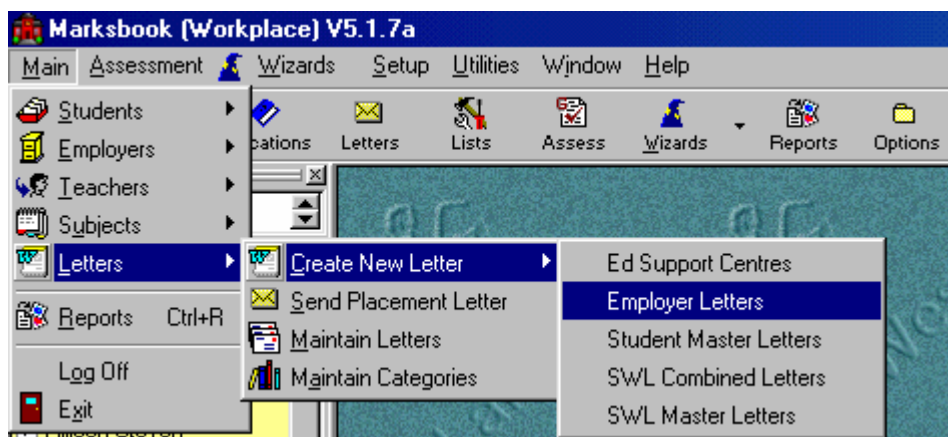
At the bottom, there is a toolbar with navigation buttons (back, forward, etc.), an 'Edit' button, and a 'Categories' button.

6. Note the New Letter Code and the New Numbered Document.
7. Click on Edit to check if the Letter is what you designed.

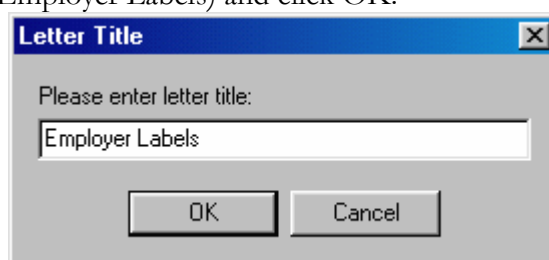
## Creating a Mailing Label Document

This section will outline how to create labels using the Marksbook programs. For this example creating an Employer Label will be demonstrated.

Firstly create a new letter in the Marksbook program by going to 'Main' -> 'Letters' -> 'Create New Letter', then select the category you wish to store your letters under (in this case it will be 'Employer Letters'). This is demonstrated below.



Next give your letter a name (eg. Employer Labels) and click OK.



This should now open up Microsoft word so you can now start creating the letter.

Now that Your Letter has opened you need to insert the Mail merge fields in the order and layout that you want. Below is an example of a format you might use when creating employer labels:

«CONTACT»  
 «COMPANYNAME»  
 «STREETADDRESS1»  
 «STREETADDRESS2»  
 «STREETSUBURB» «STREETSTATE»  
 «STREETPCODE»

Once you have entered in all of your information you now need to find a button called 'Insert Word Field' and then click on it. This will bring up a list of options and you need to insert the function called 'Next Record'. The 'Insert Word Field' button is normally found next to the 'Insert Merge Field Button' and is shown below:



Your total label should now look like the example below:

«CONTACT»  
 «COMPANYNAME»  
 «STREETADDRESS1»  
 «STREETADDRESS2»  
 «STREETSUBURB» «STREETSTATE»  
 «STREETPCODE» «Next Record»

To complete the label letter you now need to copy the above data and paste it into the some documents as many times as labels you want. A completed sheet might look something like this:

«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»	«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»
«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»	«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»
«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»	«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»
«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»	«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»
«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»	«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»
«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»	«CONTACT» «COMPANYNAME» «STREETADDRESS1» «STREETADDRESS2» «STREETSUBURB» «STREETSTATE» «STREETPCODE» «Next Record»

It is easier if you insert a table and then put each label in a separate cell because it prints out more uniformly this way. Now you can save this document.