

Step-by-Step Procedure

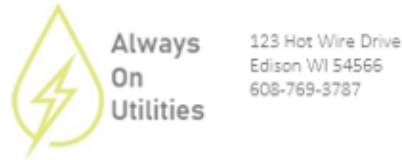
Create the Letter in MS WORD

Open MS Word and create a new document.

Create the body of the letter.

Enter the generic field name for each variable field of the letter.

Note: If using a Utility logo, insert the logo in the header of the document.



Customer Name
Customer Address 1
Customer Address 2
City State Zip

Today's Date

Dear Customer Name,

Welcome to Always On Utilities, your locally owned and operated electric and water utility. At Always On, we strive to provide low-cost, reliable service with a friendly, personal touch. Because we are your friends and neighbors, we share and understand your needs.

Enclosed is a copy of your Utility Service Agreement. Please review the information for your account as shown below. If there are any changes, please contact the business office before the first of the month.

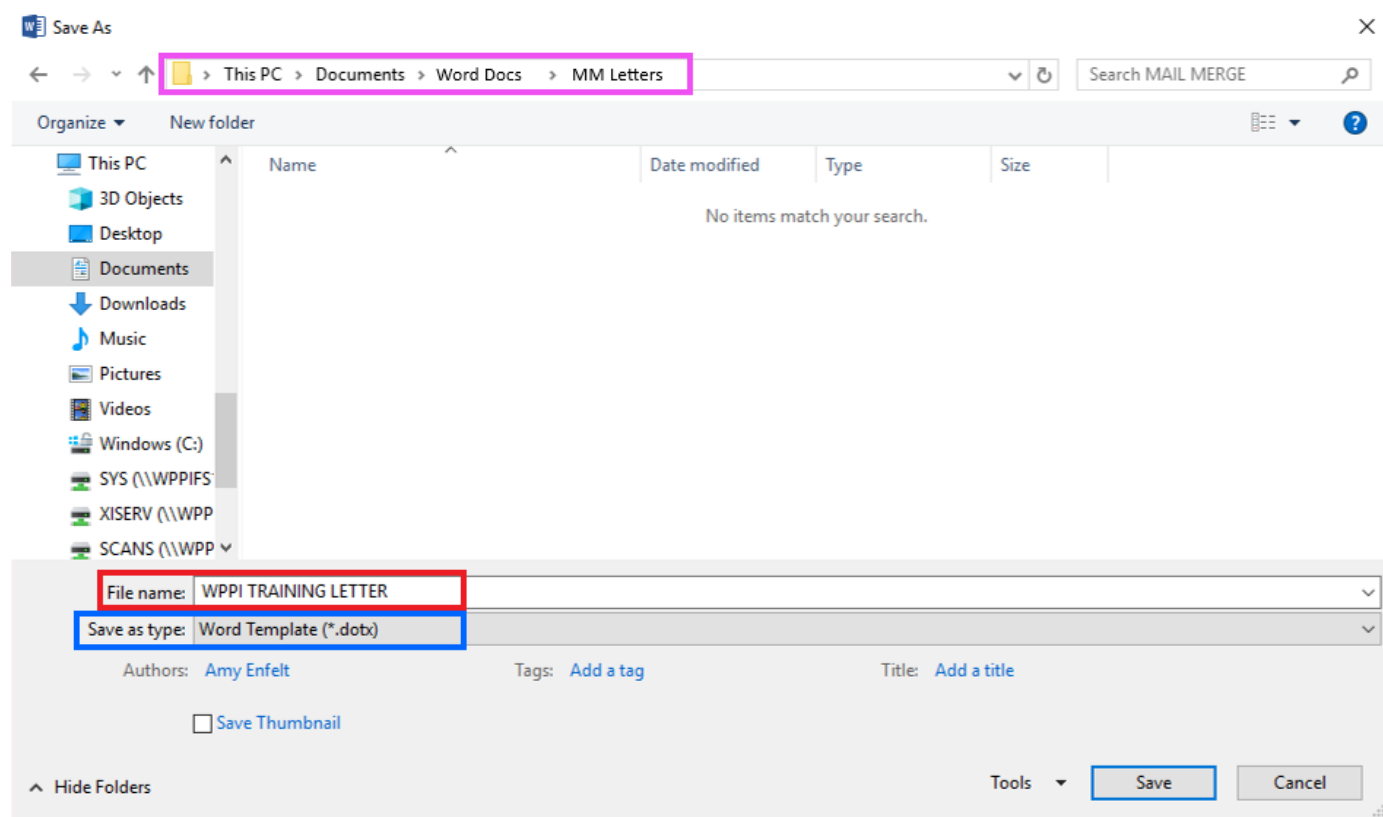
Account Number-Occupant Code
Account Name
Address
Customer email address
Customer phone number

Our service dates are from the first of the month to the last day of the month. Bills mail around the eighth of the next month with a due date of the twenty-eighth. Payment options are as follows:

Save the letter locally as a template file using the **.dotx** extension.

Recommended Best Practice:
When saving the letter, follow these steps for fewer clicks.

- a. At **File name:** enter the Name of the file
- b. Change the **Save as type:** to Word Template (*.dotx)
- c. Select the location to **save the file locally**
- d. Click **Save**.

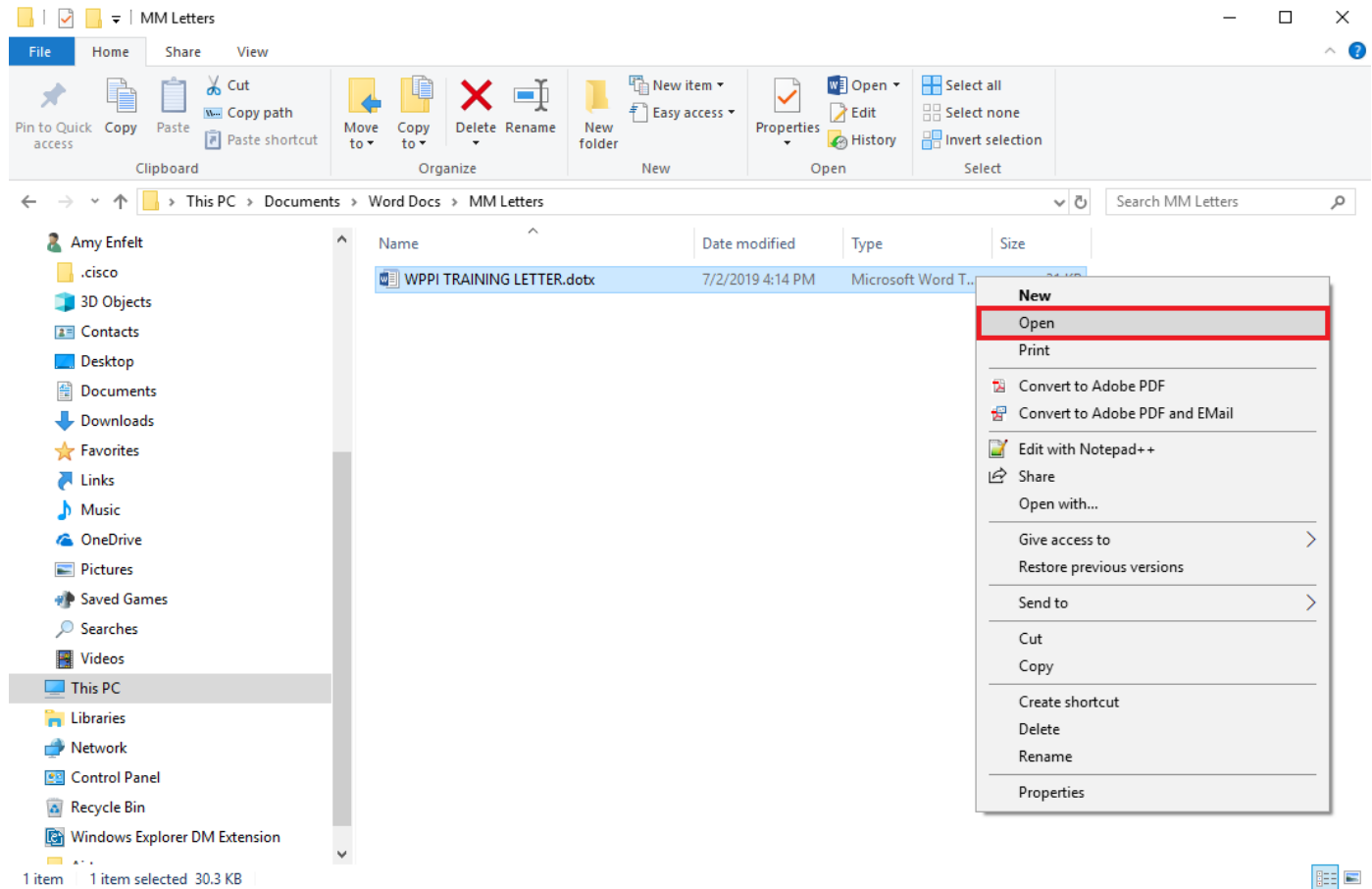


Open the newly saved .dotx letter from the local folder.

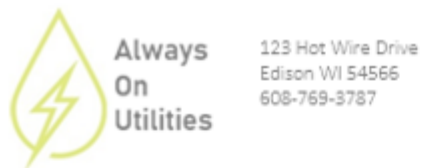
Recommended Best Practice:
Right click on the letter.

Select **Open**.

Note: This prevents the need to save the letter as a new template, delete the original letter, and rename the new template to the original letter name.



Highlight all the fields that will require a NorthStar token.



Today's Date

Tokens are NorthStar fields assigned a unique field number. In an MS Word letter, the token triggers NorthStar to populate the letter with that field information.

Customer Name
Customer Address 1
Customer Address 2
City State Zip

Dear Customer Name,

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Enclosed is a copy of your Utility Service Agreement. Please review the information for your account as shown below. If there are any changes, please contact the business office before the first of the month.

Account Number-Occupant Code
Account Name
Address
Customer email address
Customer phone number

Our service dates are from the first of the month to the last day of the month. Bills mail around the eighth of the next month with a due date of the twenty-eighth. Payment options are as follows:

Letter Setup in NorthStar

Navigate to the **Setups** module.

From the **Credit Control** folder, open **Letter Maintenance** table.

Click **OK** to load all letters into the table.

Click on the **Browse Box**.

Using the **Letter** field, review the current letter number ranges. Letters related to the same process are often consecutive numbers to help group them.

Choose a new range for the letter to keep it separated from other process letters (ie – past due/overdue notices, budget letters, etc.)

Note: In the example used, letters 95 – 104 are for past due, overdue, disconnect, and lien notices. Letters 400 – 410 are for budget letters.

Setups > Credit Control > Letter Maintenance

Letter Maintenance (BROWSE)

1 of 13

Letter	Description	Page Length	Page Width	Duplicate Suppress	Template
-9999	EbillNotice Letter	66	254	0	
-9998	UIWorkflow Rejection Notifica..	40	80	0	
-9997	ScheduledNotice Letter	66	254	0	
-9996	Scheduled Stop Service Notic...	66	254	0	
95	PAST DUE FINAL NOTICE	66	80	0	PAST DUE F...
99	PAST DUE NOTICE	66	80	0	PAST DUE N...
100	OVERDUE NOTICE	66	80	0	Overdue No...
101	DISCONNECTION NOTICE	66	80	0	Disconnect ...
102	OWNER LIEN MM	66	80	0	OWNER LIEN
103	TENANT LIEN MM	66	80	0	TENANT LIEN
104	LANDLORD LIEN MM	66	80	0	LANDLORD ...
400	BUDGET TRUE-UP MM	66	80	0	BUDGET TR...
410	UPDATE BUDGET LETTER	66	80	0	UPDATE BU...

Letter Contents (BROWSE)

Content | Tokens

Your Ebill is ready [noreply@northstarutilities.com
Dear [],

Thank you for choosing convenient online.

To access your account statement, please login by entering your username and password ⁢a href="http://dnndev.me">http://dnndev.me⁢a> .

Account Number: []-[]
Customer Number: []
Due Date: []
Amount Due: []
Previous Balance: []

Thank you for choosing Northstar Utilities, we appreciate your business.

Ready

To create the new letter, click the **Add** icon.

In the **Letter** field, enter the pre-determined number.

At **Description**, enter a description of the new letter.

It is helpful to add MM (Mail Merge) at the end to differentiate mail merge letters from NorthStar letters.

Use the default settings for

- Page Length
- Page Width
- Duplicate Suppress

In **Template**, enter the name of the letter template created in MS Word.

Note: The Template name MUST be identical to the name of the template letter (.dotx) for NorthStar to print it.

Click **OK** to save.

The screenshot shows a software window titled "Letter Maintenance (BROWSE)". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with icons for search, add, edit, delete, and navigation, along with a page indicator "14 of 14" and "OK Cancel" buttons. The main content area is divided into two sections. The top section, titled "Letter Maintenance", contains several input fields: "Letter:" with the value "150", "Description:" with the value "WPPI TRAINING LETTER MM", "Page Length:" with the value "66", "Page Width:" with the value "80", "Duplicate Suppress:" with the value "0", and "Template:" with the value "WPPI TRAINING LETTER". The bottom section, titled "Letter Contents (BROWSE)", has tabs for "Content" and "Tokens" and a toolbar with edit, delete, and "OK Cancel" buttons. The status bar at the bottom left shows a green dot and the text "Ready".

The following steps are the creation of tokens in the letter and NorthStar. These steps merge the NorthStar data fields to the letter.

In the MS Word Letter template: *WPPI TRAINING LETTER.dotx*

Locate the first highlighted field.



Today's Date

Customer Name
Customer Address 1

Clear the field by highlighting it

Click the **Backspace button**, so the cursor remains at the beginning of the field.



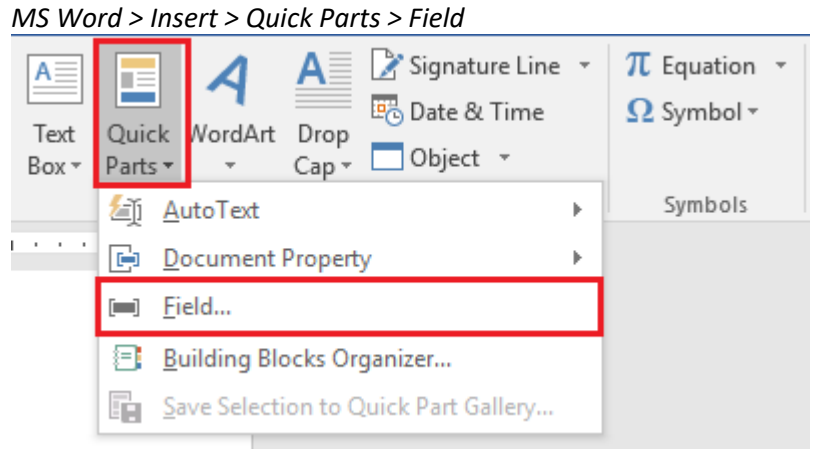
|

Customer Name
Customer Address 1

Move to the **Insert** tab.

Click on **Quick Parts**.

Click **Field**.



A pop-up window opens.

Please choose a field section:

- Select **MergeField**.

Field Properties section:

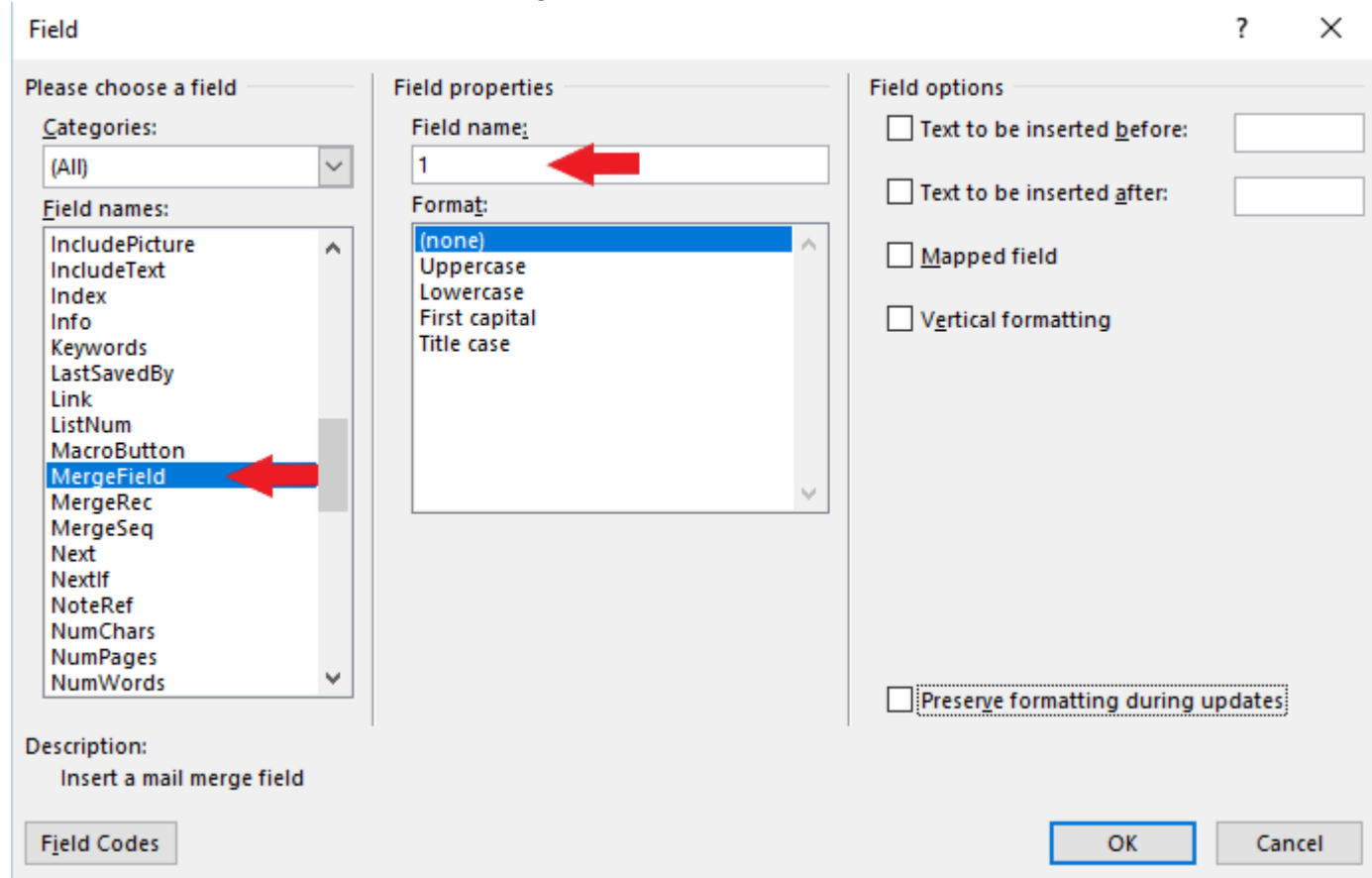
- Enter the **Field Name**.

Each Field Name is unique and represented by a number up to the total number of tokens used in the letter setup in NorthStar.

In this example, the letter field *Today's Date* is the field name and represented by token 1 because it is the first token in the letter.

Click **OK** to save the MergeField.

MS Word > Insert > Quick Parts > Field > MergeField



Field name «1» now populates the Today's Date field in the letter.

When the letter prints out of NorthStar, the field will populate with the current date.



**Always
On
Utilities**

123 Hot Wire Drive
Edison WI 54566
608-769-3787

«1»

Customer Name

Customer Address 1

In the NorthStar Letter Maintenance table, create the first token for the letter.

Click on the **Tokens** tab.

Click the **Add** icon.

Note: If the Add icon is not visible, click on the Record Details tab to activate the Add icon.

The **Sequence Number** will auto-populate. The field corresponds to the MergeField number in the MS Word letter template. T

Prompt for Data select 'N', 'Y', or 'F'.

- N = No Prompt – Data for the token is retrievable from the database. NorthStar will automatically retrieve the data based on the account information available.
- Y = Prompt for Data – Data for the token is *not* accessible from NorthStar. (ie –dates)
- F = Fixed Data – The token data is standardized for all letters regardless of the recipient.

Setups > Credit Control > Letter Maintenance > Tokens

Letter Maintenance (BROWSE)

Letter Maintenance

Letter: 150
Description: WPPI TRAINING LETTER MM
Page Length: 66
Page Width: 80
Duplicate Suppress: 0
Template: WPPI TRAINING LETTER

Letter Contents (BROWSE)

Content Tokens

Token Definition (ADD)

None Selected OK Cancel Insert

Token Definition

Sequence Number:
Prompt for Data: N
Field Number:
Field Description:
Field Format / Prompt:

Choose a field number
Ready

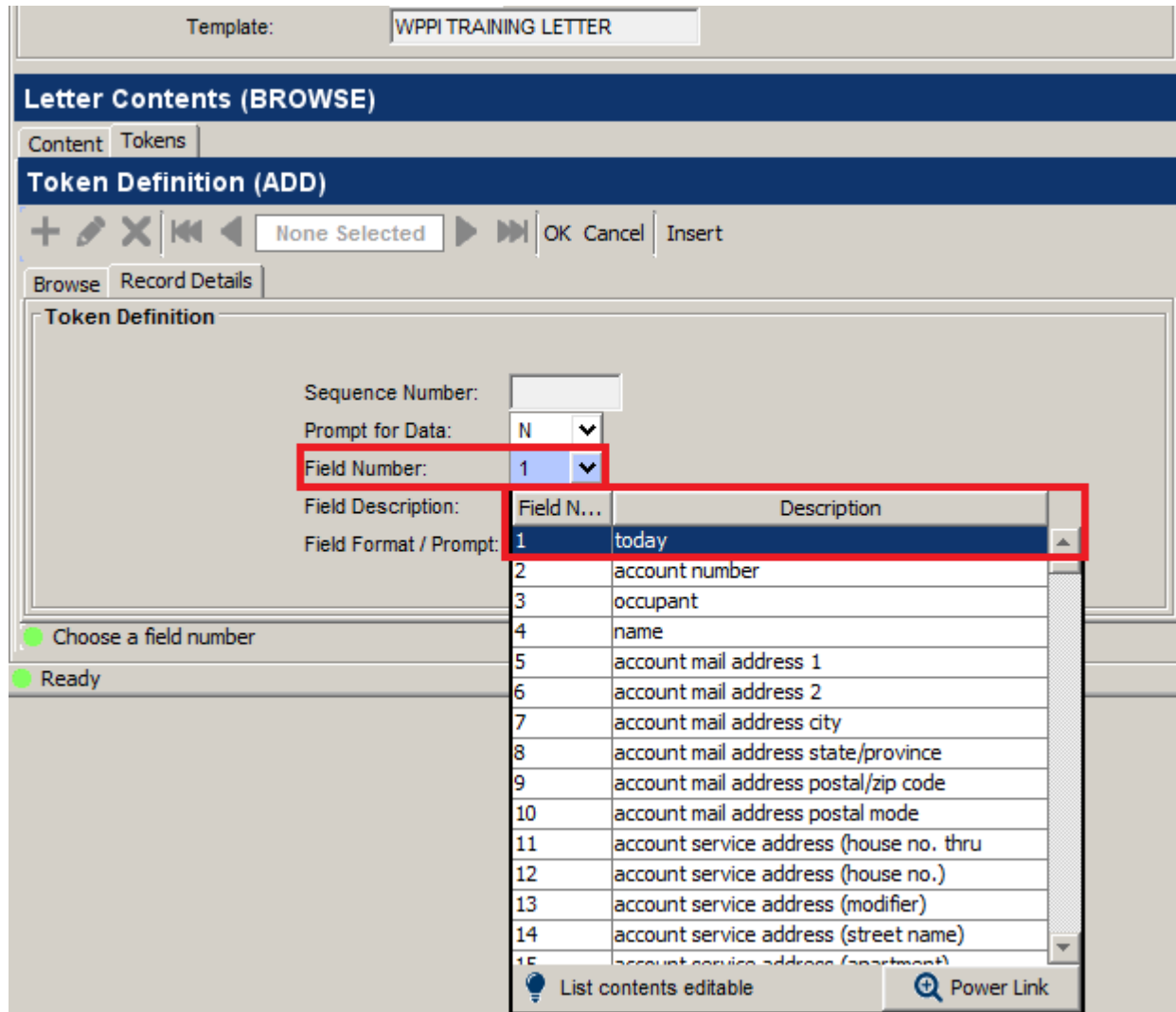
If **Prompt for Data** = 'N' (No Prompt)

Set the **Field Number** as the value for the token from the dropdown menu.

This is the unique number assigned to a field by NorthStar.

In the example, the Field Number is 1 and represents Today's Date.

The **Field Description** auto-populates with the description of the field chosen.



If the Field Number is a date, it is possible to format it to appear as a long date (ie – July 10, 2019).

At **Field Format / Prompt** enter 'LONGDATE' to change the formatting.

Click **OK** to save the token.

Notice the Sequence Number populated upon saving the token setup.

Repeat each step starting from page 12 through page 18 for each of the highlighted variable fields in the letter template.

The image shows two overlapping windows from a software application. The top window is titled "Letter Maintenance (BROWSE)" and contains the following fields:

- Letter: 150
- Description: WPPI TRAINING LETTER MM
- Page Length: 66
- Page Width: 80
- Duplicate Suppress: 0
- Template: WPPI TRAINING LETTER

The bottom window is titled "Token Definition (BROWSE)" and contains the following fields:

- Sequence Number: 1
- Prompt for Data: N
- Field Number: 1
- Field Description: today
- Field Format / Prompt: LONGDATE (highlighted with a red box)

Both windows have a status bar at the bottom that says "Ready".

Adding a Space Before /After a Token

Some tokens will require a space before or after the text. This should be done while creating the token.

Example: City State Zip tokens

A space is required between City and State, as well as between State and Zip.

Create the spaces using **Field Options**.

Check **Text to be inserted before** the token.

Use the **Enter** button on the keyboard to insert the desired number of spaces before the token in the box.

Check **Text to be inserted after** the token.

Use the **Enter** button on the keyboard to insert the desired number of spaces after the token in the box.

Field

Please choose a field

Categories: (All)

Field names:

- Fill-in
- GoToButton
- GreetingLine
- Hyperlink
- If
- IncludePicture
- IncludeText
- Index
- Info
- Keywords
- LastSavedBy
- Link
- ListNum
- MacroButton
- MergeField**
- MergeRec
- MergeSeq
- Next

Field properties

Field name: 6

Format:

- (none)**
- Uppercase
- Lowercase
- First capital
- Title case

Field options

- Text to be inserted **before**:
- Text to be inserted **after**:
- Mapped field
- Vertical formatting
- Preserve formatting during updates

Description: Insert a mail merge field

Field Codes OK Cancel

In the above example, a space will appear before and after the State token. The light gray line in the example represents the space entered in the box.

Adding Text Before / After a Token

Some tokens will require punctuation before or after the text. This should be done while creating the token.

Example: Dear Customer Name,

A comma is required after the Customer's Name.

Create the spaces using **Field Options**.

Check **Text to be inserted after** the token.

Type the text/punctuation to be inserted after the token in the box.

In this example, a comma will appear after the Customer Name token.

The same process is used if adding text/punctuation before a token.

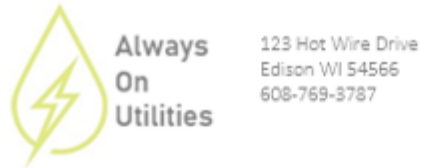
Check **Text to be inserted before** box and then type the text/punctuation in the box.

The screenshot shows the 'Field' dialog box with the following details:

- Field name:** 8
- Format:** (none)
- Field options:**
 - Text to be inserted before: []
 - Text to be inserted after: [,]
 - Mapped field
 - Vertical formatting
 - Preserve formatting during updates

Buttons: Field Codes, OK, Cancel

With all tokens created, the MS Word letter template will display with the numbered tokens in place of the field names.



«1»

«2»
«3»
«4»
«5» «6» «7»

Dear «8»,

Welcome to Always On Utilities, your locally owned and operated electric and water utility. At Always On, we strive to provide low-cost, reliable service with a friendly, personal touch. Because we are your friends and neighbors, we share and understand your needs.

Enclosed is a copy of your Utility Service Agreement. Please review the information for your account as shown below. If there are any changes, please contact the business office before the first of the month.

«9»-«10»
«11»
«12» «13» «14»
«15»
«16»

Save the MS Word template by clicking the **disk** icon or using the **File > Save** menu.

Close the saved MS Word letter template.

Transfer the MS Word Letter Template to the ftp

Our service dates are from the first of the month to the last day of the month. Bills mail around the eighth of the next month with a due date of the twenty-eighth. Payment options are as follows:

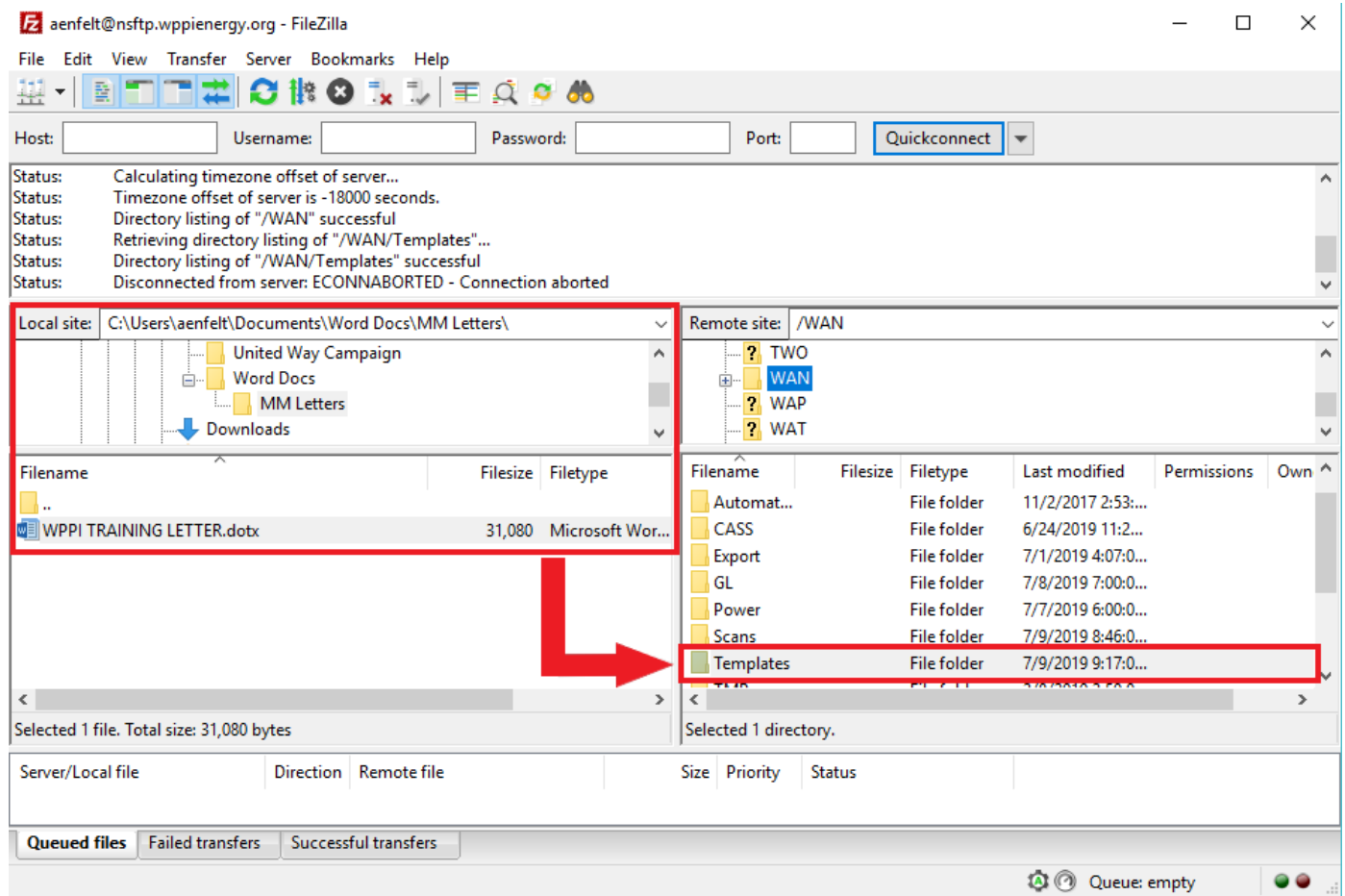
Using **Filezilla** (or similar program), transfer the MS Word letter template to the ftp Templates folder.

Locate the **Templates** folder on the Remote Site (right side of screen).

Locate the folder where the MS Word letter template saved locally (left side of screen).

Highlight the file name.

Click, drag, and drop the MS Word letter template in the Templates folder on the ftp.



Test the Letter in NorthStar

After the MS Word letter template has transferred to the ftp, test the letter in NorthStar.

In **Account Gateway**, select an account.

In **History Details**, open **Letter History**.

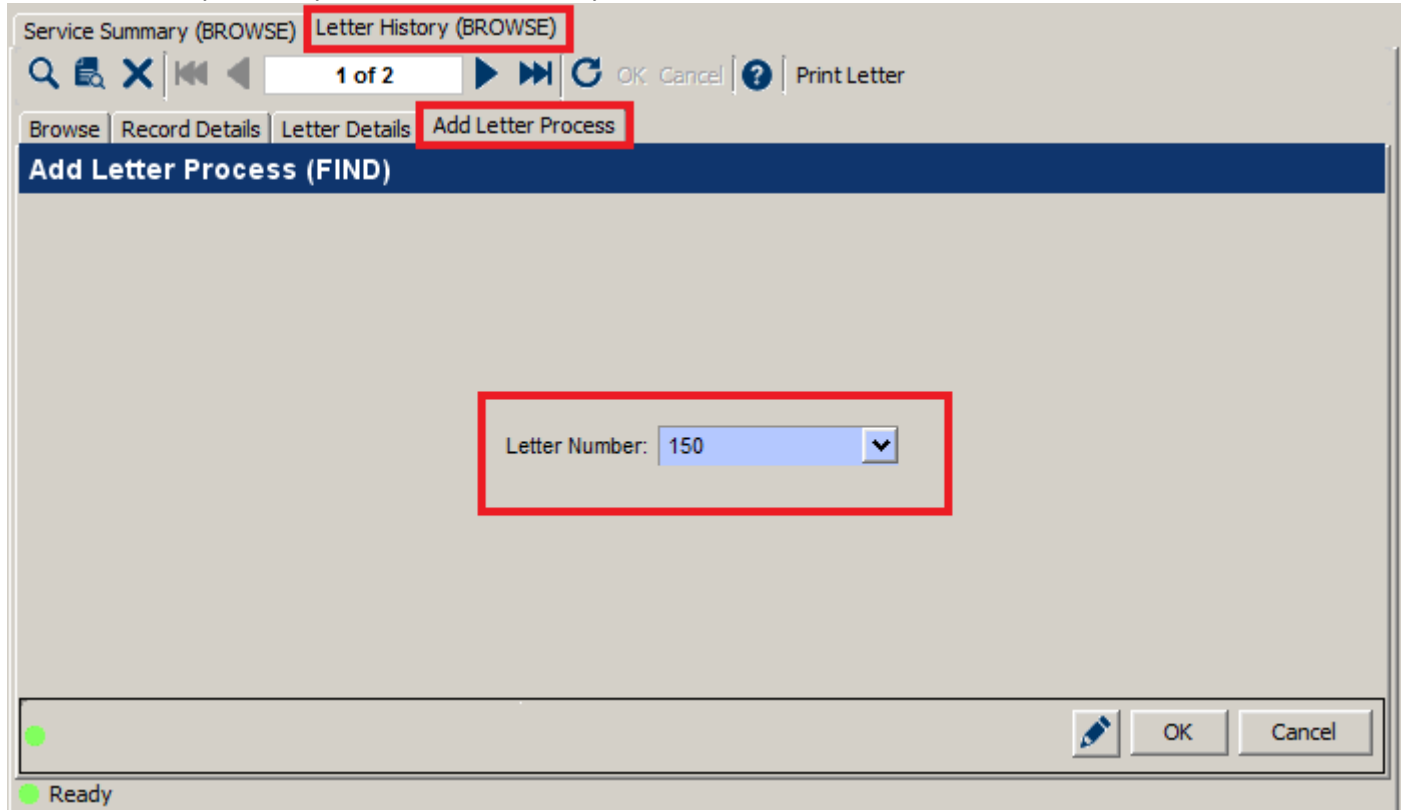
Navigate to the **Add Letter Process** tab.

Click the **Edit** icon.

Select the **Letter Number** from the dropdown menu.

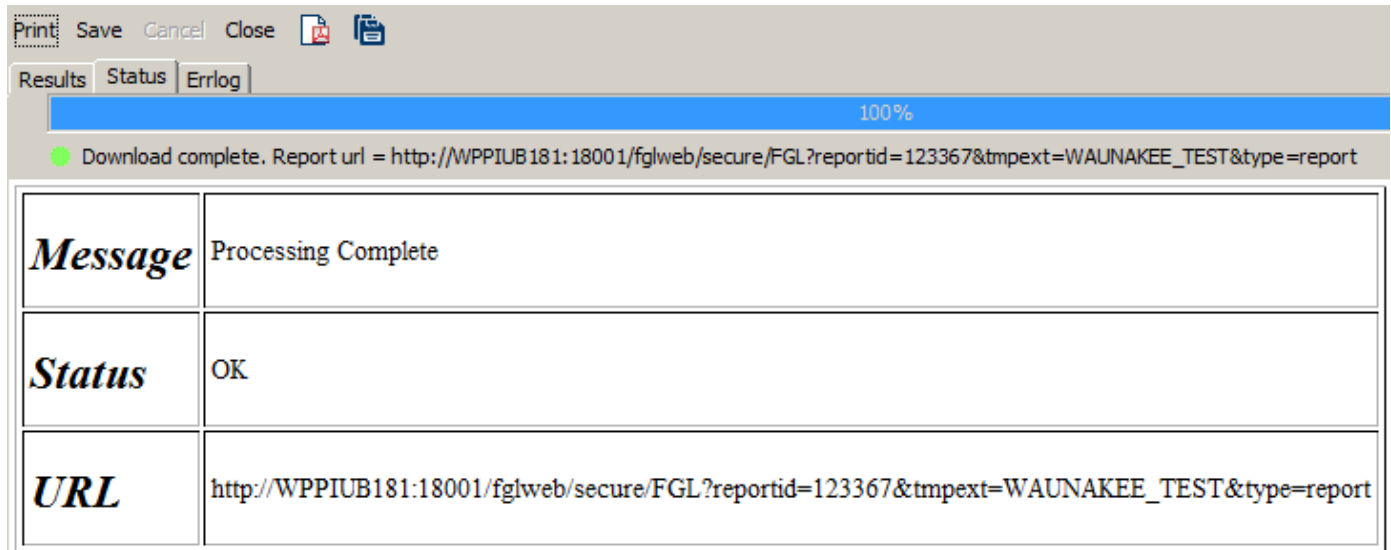
Click **OK**.

Account Gateway > History Details > Letter History



The processing screen appears.

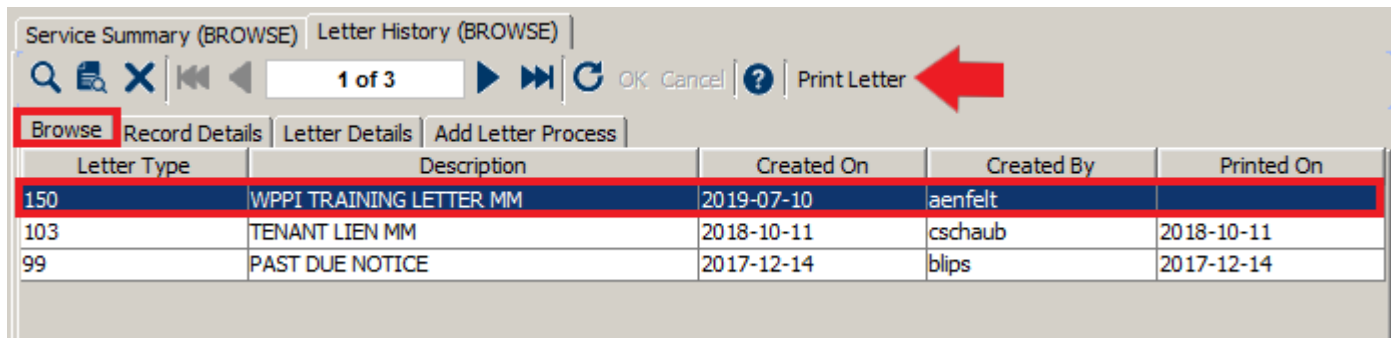
Click **Close** when the processing completes.



Move to the **Browse** tab.

Select the **Letter Type** (letter number) to print.

Click the **Print Letter** button.

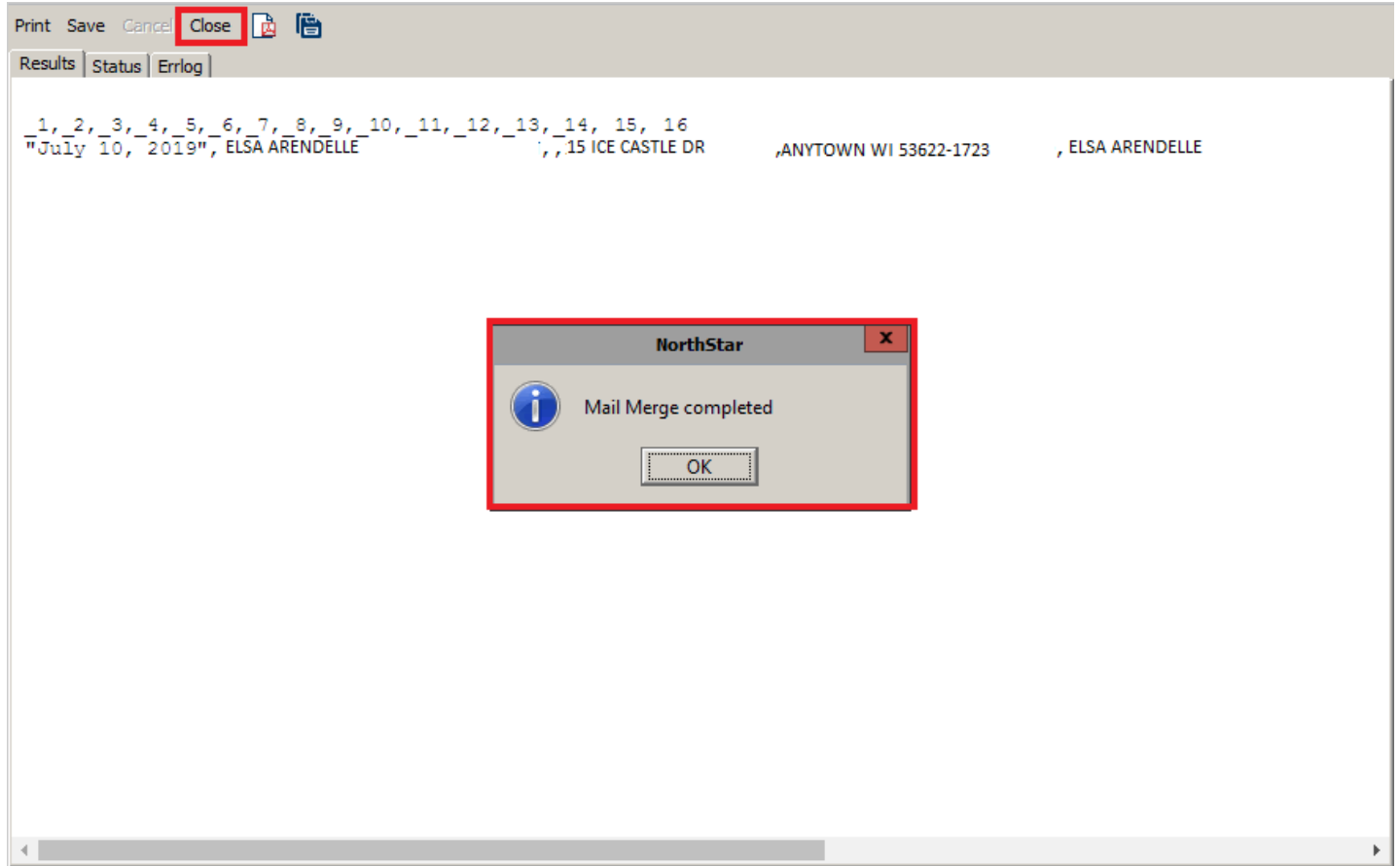


The processing screen will appear with a **Mail Merge completed** message.

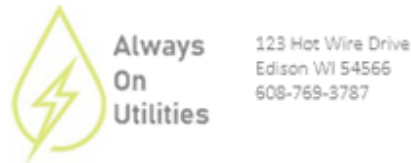
Click **OK**.

The processing screen will display the account data brought into the letter.

Click **Close**.



Review the MS Word letter to ensure the tokens are correct and the expected data has pulled into the letter.



July 10, 2019

ELSA ARENDELLE
15 ICE CASTLE DR
ANYTOWN WI 53622-1723

If all data is correct, follow normal utility procedure for printing letters.

Dear ELSA ARENDELLE,

If changes are required, return to the .dotx template in the local folder, and make the necessary adjustments to the letter and to the NorthStar Letter Maintenance template.

Welcome to Always On Utilities, your locally owned and operated electric and water utility. At Always On, we strive to provide low-cost, reliable service with a friendly, personal touch. Because we are your friends and neighbors, we share and understand your needs.

Enclosed is a copy of your Utility Service Agreement. Please review the information for your account as shown below. If there are any changes, please contact the business office before the first of the month.

240016-10
ELSA ARENDELLE
15 ICE CASTLE DR
a@b.com
414-656-7171

Then, re-transfer the MS Word letter template to the ftp via FileZilla (or similar program).

Our service dates are from the first of the month to the last day of the month. Bills mail around the eighth of the next month with a due date of the twenty-eighth. Payment options are as follows: