Creating Letters or Mailing Lists for
ProTracts Applications or Contracts

Introduction:
The Manage Letters function in ProTracts can be used to produce letters from ProTracts using existing ProTracts templates through Word or to export an Excel mailing list for either contracts or applications.

Overview:

Application Directions:

1. **Perform Application Query**
   Manage Letters is accessed through the Manage Applications screen (see Image 1). Use any of the searching mechanisms to query the applications for which the letter or mailing list is needed.

   Image 1- Manage Applications Screen

2. **Access Manage Letters**
   Adjacent to the view application button is the Manage Letters button (see Image 2), click to access manage letters. In the case of applications, the application needs a particular status for the Manage Letters to activate which includes ineligible, preapproved, deferred, or pending.

Image 2 - Manage Letters for Applications

Manage EQIP 2002 Applications for Fiscal Year 2007

| Applications | Search | View Application | Manage Letters | Promote Deferrals | Vendor Info | Sign Contract | Assign Tracking Codes | Undo Status | Print | Export | Sav |

|<<Start | <Previous | Record: 1 through 1 of: 1 | Next> | End>>|

County	Fund Code	Ranking Score	Priority	Tracking Code	Contract Number	Applicant	Current Status	New Status	CPA-1202 Signed	Contract Cost	Cumulative Calculated Cost
Champaign	Applications Not Related to Livestock	104.32	None		745A12071TJ	JEFFREY G STOTT	Deferred	-- Select a Status -- ▼	☐ Signed	$0.00	$0.00

3. Make Letter Selection

From the "Letters" drop down list select a letter template or mailing list for applications (see Image 3).

Image 3 - Select a Letter Option for Applications

Manage Application Letters - Microsoft Internet Explorer

Select All | Unselect All | OK | Cancel

Letters [Select a Letter ▼]

Select a Letter
Preapproved
Pending
Ineligible
Deferred
AGI Ineligible Members
Mailing List
Beginning Farmer/Rancher Review Letter
Limited Resource Farmer/Rancher Review Letter

4. Select Participant(s)

After a letter or mailing list selection is made, the participants and their application number will appear. For participants (decision maker) with multiple addresses, their name will show up in blue (see Image 4). Before letters are produced for participants, one address must be selected for Manage Letters to work for that participant. Click on the blue name and select the address to be used for the letter (see Image 5).

Next, select participant(s) for which a letter will be produced. The participants can be selected individually by clicking on each entry and highlighting the entry yellow or the "Select All" button can be used. Finally click the OK button (see Image 6).

Image 4 - Example of a Participant with Multiple Addresses

Manage Application Letters - Microsoft Internet Explorer

Select All | Unselect All | OK | Cancel

Letters [Ineligible ▼]

Participant with multiple addresses

Participant	Contract Number	Program
JIM ELLIS	745A1208Y52	EQIP 2002
KEITH BUDDY	745A1208LM3	EQIP 2002

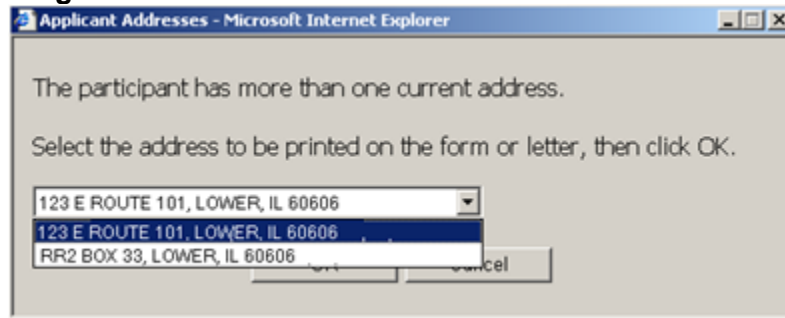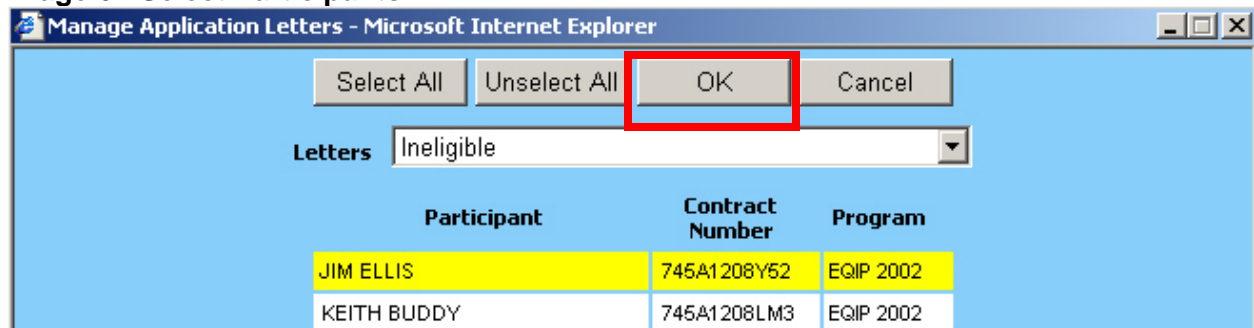**Image 5 - Select One Address**


Image 6 - Select Participants

5. **Open or Save File**
   Next users will have the option to open or save the file created. A Word document will be created for letters and the participant and office information will be auto-filled. For mailing lists, an Excel document will be created that can be mail merged with any letter or used to create labels.

   If the multiple addresses shown by the name in blue were not dealt with, a warning message will be shown notifying the user to select one address otherwise that participant will be skipped and no letter created (see Image 7).

Image 7 - Warning Message for Multiple Addresses
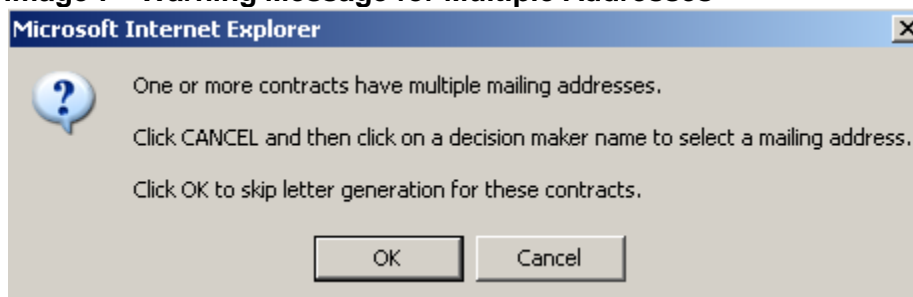
6. **Producing Letters/Mailing List for More than 50 Applications**
   The letters will be limited to the 50 applications on the screen. To produce letters or a mailing list for the additional applications (51-100 and 101-150, etc) that resulted from the query, click to the next page of results (see Image 8) and repeat steps 2 through 5.

Image 8 - Advance to Additional Applications Returned

Manage EQIP 2002 Applications for Fiscal Year 2008

County	Fund Code	Ranking Score	Priority	Tracking Code	Contract Number	Applicant	Current Status				
Coffee	General EQIP		None		745A1208GG3	GEORGE GLASS	Pending	-- Select a Status --	Signed	Pending	$400.00

Applications — Search | View Application | Manage Letters | Promote Deferrals | Vendor Info | Sign Contract | Assign Tracking Codes | Undo Status | Print

|<<Start <Previous Record: 1 through 50 of 61 Next> End>>|

Advance to application results 51-100

Contract Directions:

1. **Perform Contract Query**

   Manage Letters is accessed through the Manage Contacts screens (see Image 9). Use any of the searching mechanisms to query the contracts that the letter or mailing list will be needed. Some examples include:

   - Practices to be implemented in a contract; (annual practice reminder letter option)
   - Contracts that have expired or will expire shortly but are not complete; and
   - Start a practice in the first year of the contract.

   Image 9 - Manage Contracts Screen

2. **Access Manage Letters**

   Above the query results is the Manage Letters button, click to access manage letters (see Image 10).

   Image 10 - Manage Letters for Contracts

3. **Make Letter Selection**

   From the "Letters" drop down list select a letter template or mailing list for contracts (see Image 11).

   Image 11 - Select a Letter/Mailing List Option for Contracts

4. Select Participant(s)
   After a letter selection is made, the participants and their contract number will appear. For participants (decision maker) with multiple addresses, their name will show up in blue (see Image 12). Before letters are produced for participants, one address must be selected for Manage Letter to work for that participant. Click on the blue name and select the address to be used for the letter or mailing list (see Image 13).

   Next, select participant(s) for which a letter will be produced. The participants can be selected individually by clicking on each entry and highlighting the entry yellow or the "Select All" button can be used. Finally click the OK button (see Image 14).

Image 12 - Example of a Participant with Multiple Addresses
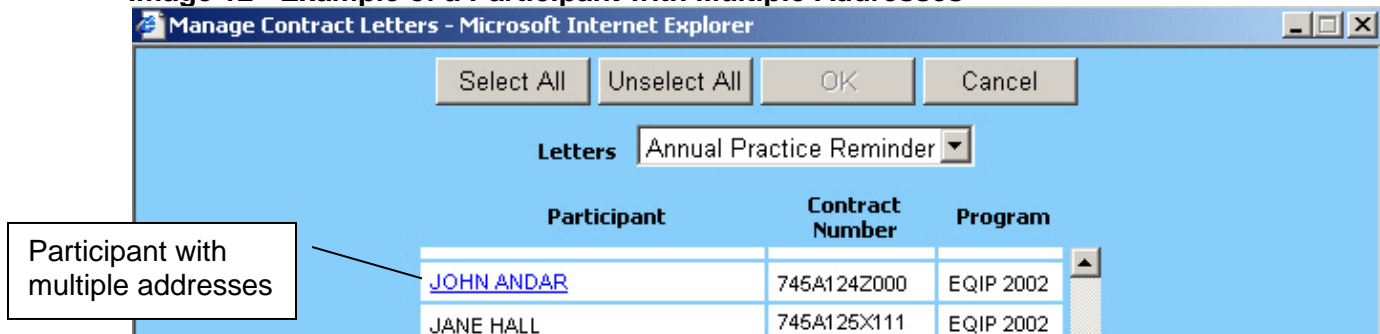
Image 13 - Select One Address
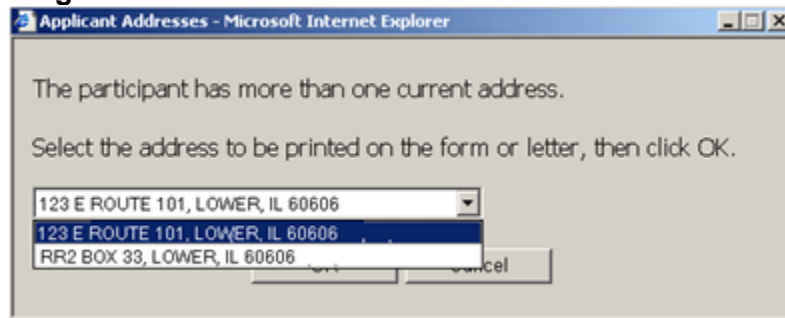

Image 14 - Select Participants
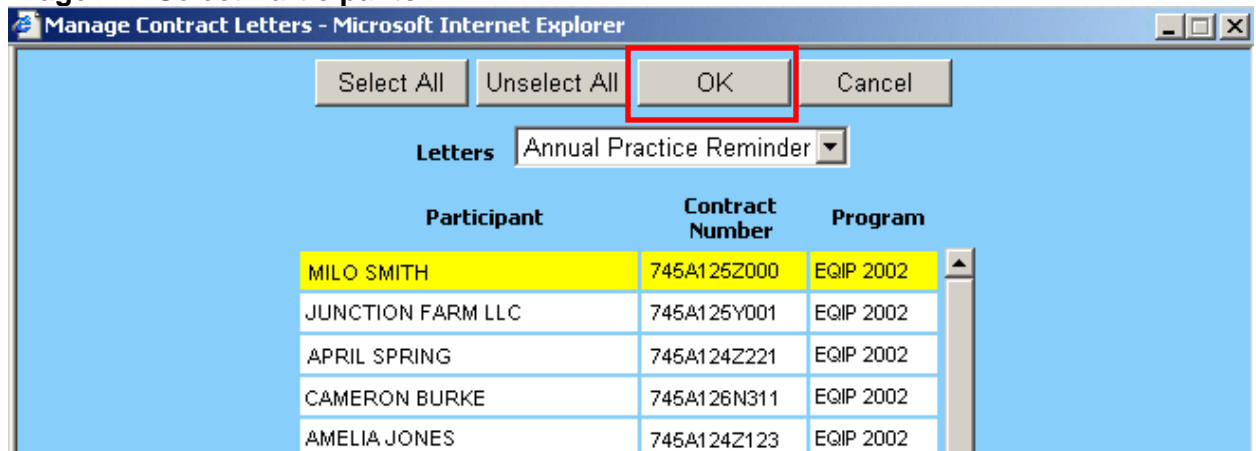
5. Open or Save File

Next users will have the option to open or save the file created. For letters, a Word document will be created and the participant and office information will be auto-filled. For mailing lists, an Excel document will be created that can be mail merged with any letter or used to create labels.

If the multiple addresses shown by the name in blue were not addressed, a warning message will be shown notifying the user to select one address otherwise that participant will be skipped (see Image 15).

Image 15 - Warning Message for Multiple Addresses
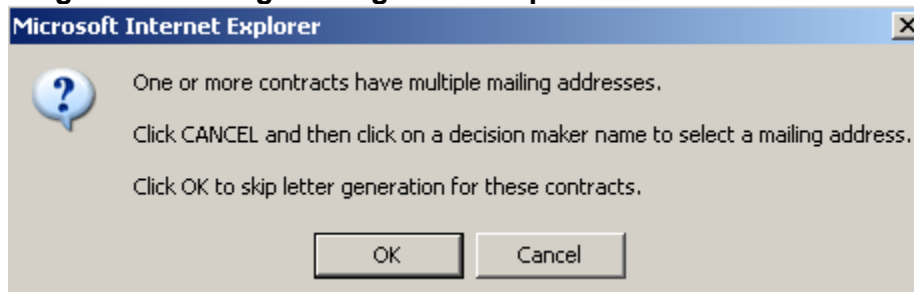
6. Producing Letters/Mailing List for More than 50 Contracts

The letters or mailing list will be limited to 50 contracts. To produce letters or a mailing list for the additional contracts (51-100 and 101-150, etc) that resulted from the query, click to the next page of results (see Image 16) and repeat steps 2 through 5.

Image 16 - Advance to Additional Contracts Returned
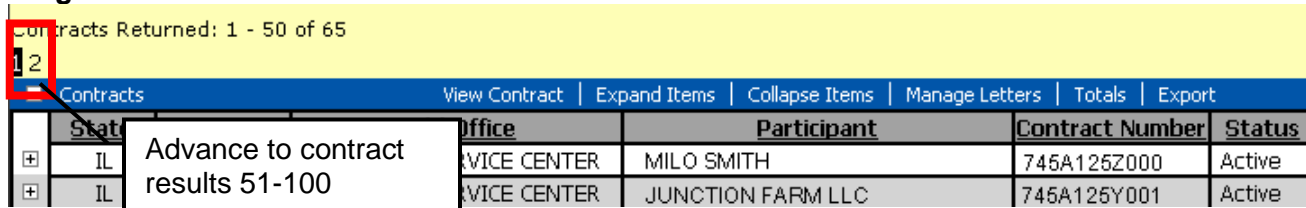
Microsoft Mail Merge Guidance

For step-by-step directions of doing mail merges and labels use the Microsoft support website for directions on:

- Merge mailing list with letter
- Creating address labels from mailing list

http://office.microsoft.com/en-us/support/

Annual Practice Reminder Letter

The annual practice reminder letter will contain practices that are planned for the current calendar year and any other practices from prior years that have not been applied. Also, both planned and partial certified practices will be listed in the letter.

<u>At the beginning of each calendar year</u>, field office must produce the annual practice reminder letter and send it to the participant as a reminder of the practices scheduled for the year. (per: CPM 440 Part 512.61B)

Image 17 – Annual Practice Reminder Letter Example