

# **Customer Correspondence OSOS Guide**

## PURPOSE

As part of good customer case management, there will be times that you may need to contact one or more customers via email or written correspondence to notify customers about employment-related information, such as:

- Job matches and referrals
- Upcoming job fairs and recruitment events
- Scheduled appointments
- Workshops
- Relevant training programs
- Other employment-related information, such as appropriate labor market information (LMI), applicable articles or updates

This guide will go over the basic process of how to use correspondence features in OSOS to generate email and written correspondence.



*The steps to set up both email and written correspondence (letter form) will be nearly identical. Any steps which are different for one or the other will be outlined specifically.*

## OSOS DATA ENTRY

### GETTING STARTED

Before you can begin generating correspondence, you will first need to set up your computer and configure ActiveX controls so that you will be able to perform the processes in this guide. You will need to first go to the **OSOS Correspondence Guide & Resources** section of the OSOS site and complete the set up steps in both the [Set Up Guide](#) and the [ActiveX Configuration Guide](#).

Once you have followed all of the set up steps in both guides, you will be able to start using the correspondence features in OSOS.



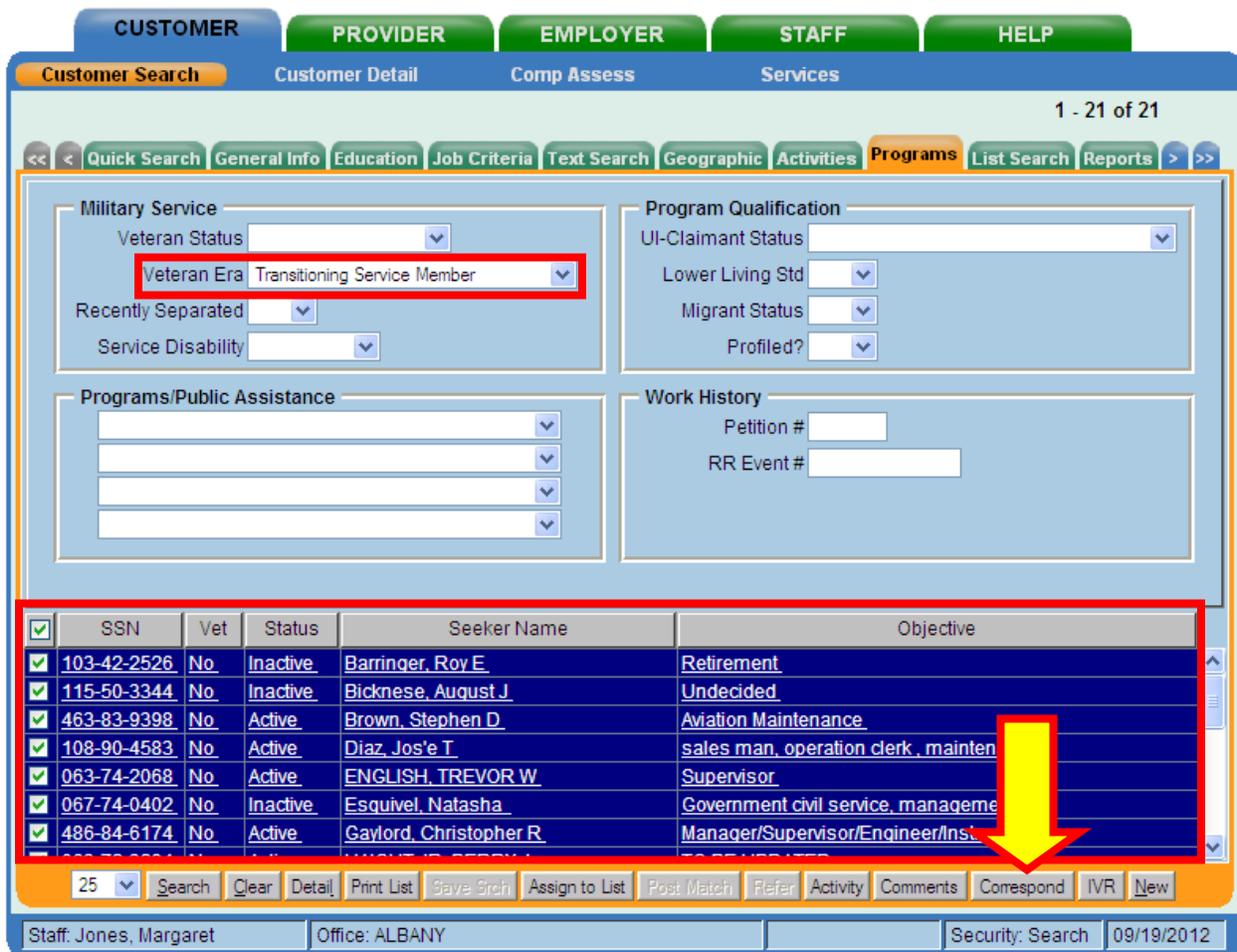
*The set-up steps will take about 20-30 minutes. This is a one-time process and **must** be done ahead of time in order for the correspondence features to function properly.*

## SELECTING CUSTOMERS IN OSOS

To begin the correspondence process, you must first search for the customer(s) to whom you wish to send correspondence. You can select one or more customers for correspondence.

Keep in mind that correspondence can be used for many different purposes. In this example case, the staff person has set search criteria for *Transitioning Service Member* veterans in Albany County, and has selected all of the records for correspondence.

Once you have selected the customer(s), click on the **Correspond** button.



The screenshot shows the OSOS Customer Search interface. The 'Veteran Era' dropdown is set to 'Transitioning Service Member'. Below the search criteria, a table of search results is displayed. A red box highlights the table, and a yellow arrow points to the 'Correspond' button at the bottom of the interface.

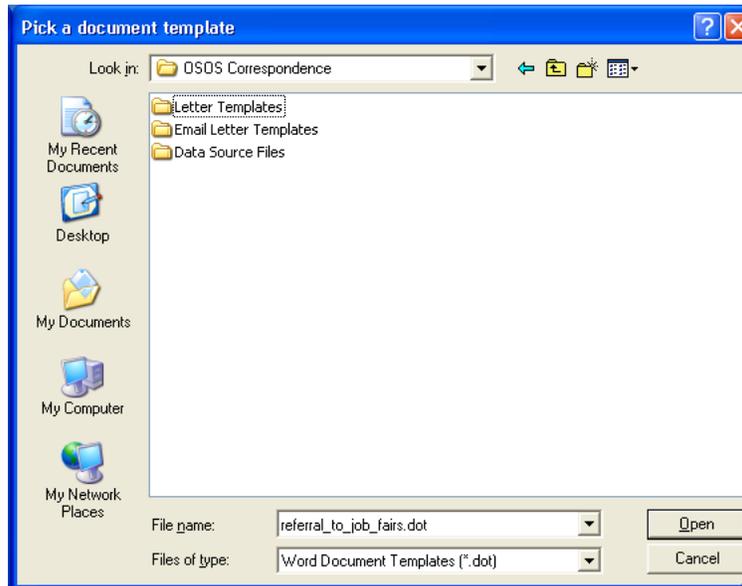
SSN	Vet	Status	Seeker Name	Objective
103-42-2526	No	Inactive	Barringer, Roy E	Retirement
115-50-3344	No	Inactive	Bicknese, August J	Undecided
463-83-9398	No	Active	Brown, Stephen D	Aviation Maintenance
108-90-4583	No	Active	Diaz, Jos'e T	sales man, operation clerk, mainten
063-74-2068	No	Active	ENGLISH, TREVOR W	Supervisor
067-74-0402	No	Inactive	Esquivel, Natasha	Government civil service, manageme
486-84-6174	No	Active	Gaylord, Christopher R	Manager/Supervisor/Engineer/Inst



*In order for customers to receive correspondence, the contact information for each customer (i.e., mailing addresses for written correspondence and email addresses for email correspondence) must be populated, correct and up-to-date in OSOS. As a best practice and for correspondence to be successful, be sure to check this on the **Gen. Info** tab for each customer before sending correspondence.*

## SELECTING A TEMPLATE

If you successfully completed the set up steps for correspondence, a pop-up window similar to this one will appear.



In this example case, the staff person would like to mail a job fair referral to the selected recipients, so she expands **Letter Templates** and then opens **Customer Correspondence Templates** and selects the appropriate template from the folder.

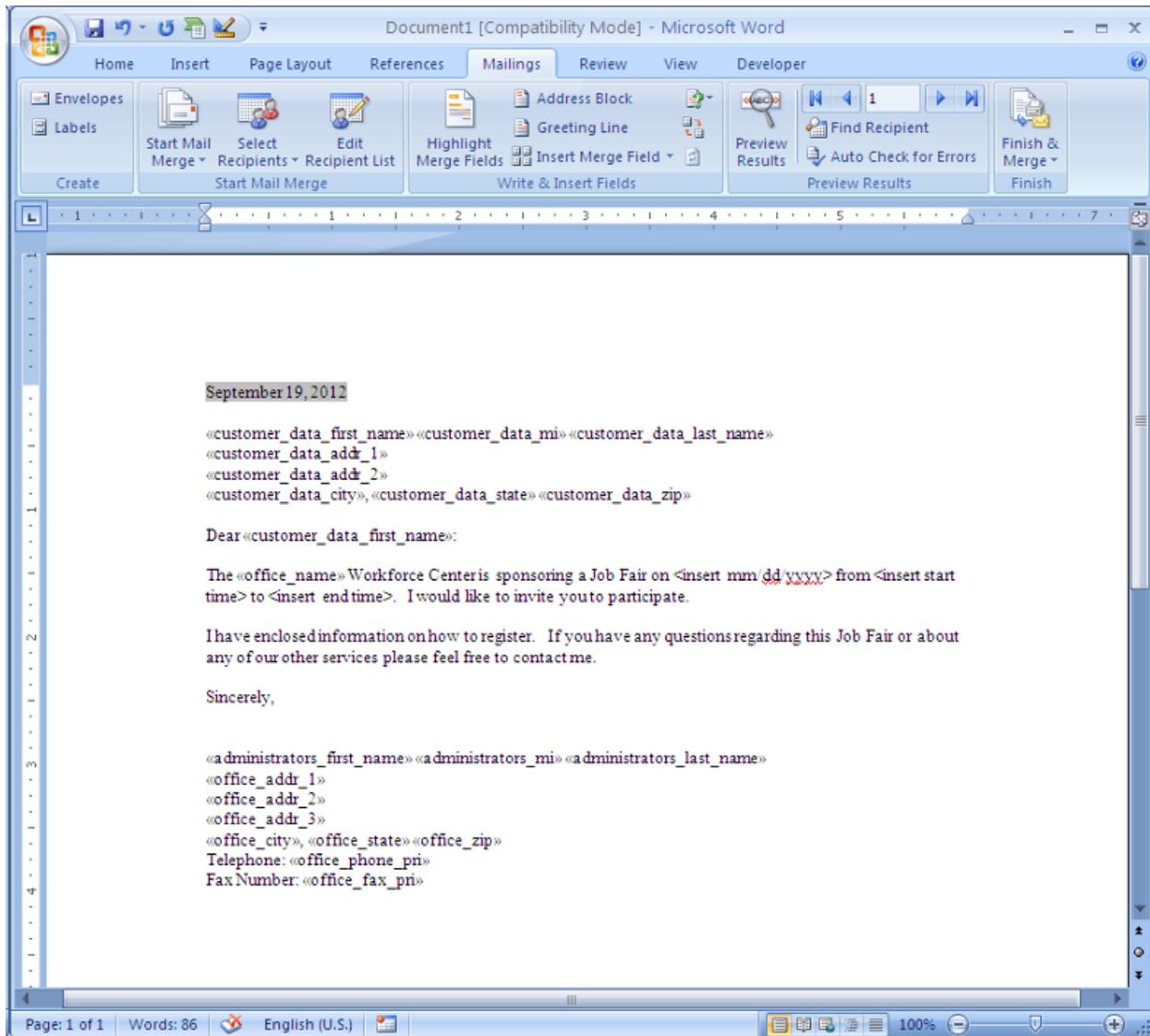
After you select the appropriate template, click **Open** to open the template.





Depending on how you set up your templates, you would either follow the same steps to send an email correspondence, or you would select the **Email Letter Templates** folder first instead of the **Letter Templates** folder, depending on whether or not you separated your letter and email letter correspondence templates.

The template will open in Microsoft Word as a mail merge document.

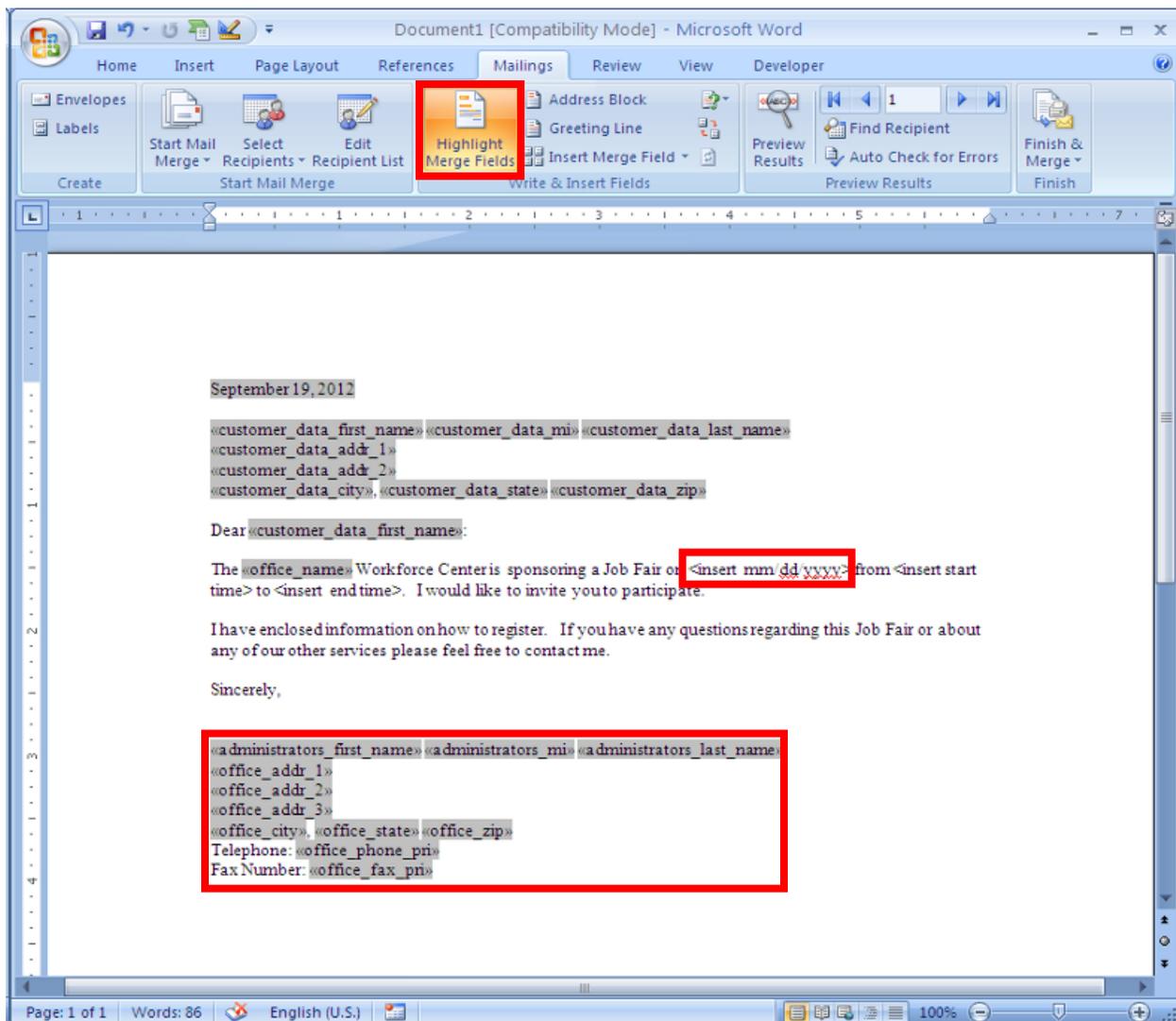


## PREVIEWING AND EDITING THE LETTER

To see which fields will be merged into the letter from OSOS, click on the **Highlight Merge Fields** button.

All of the highlighted fields, such as the customer's name and address fields, will be pulled in from OSOS. However, if you are using a generic template, you will probably need to edit additional information before completing the merge.

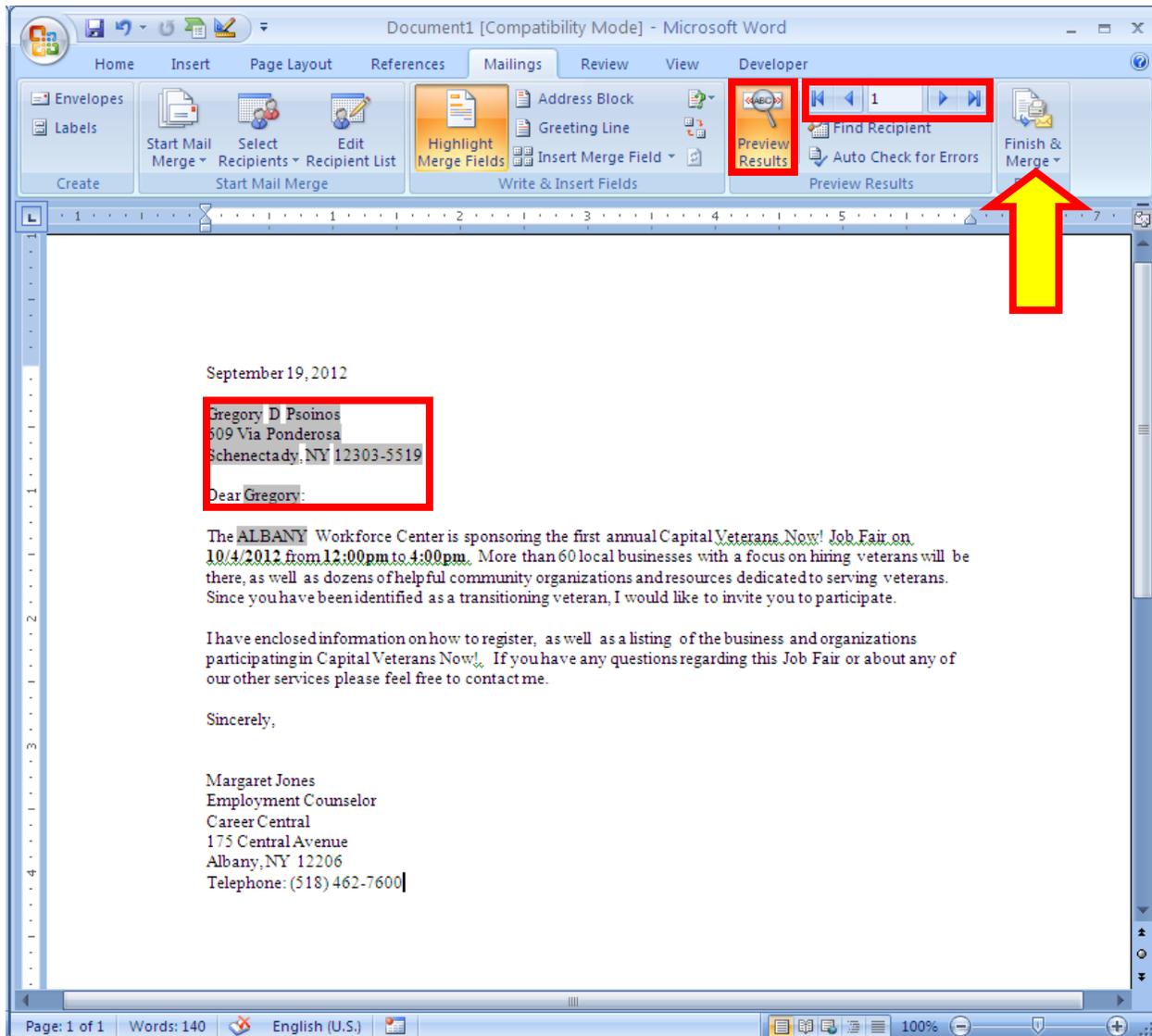
In this case, the staff person will need to enter the date and time of this job fair, and will probably want to include additional specifics about the job fair in this letter. Since she is the primary contact person in her office for the job fair, she will also want to change the closing information in the signature to reflect her information so that these fields will not auto-populate from OSOS.





Once the letter has been revised, you can preview what the letter will look like by clicking on the **Preview Results** button. This will populate the letter with a customer's information. If multiple OSOS records have been selected for correspondence, you can preview how the letter will look for each customer by using the arrow buttons next to the **Preview Results** button.

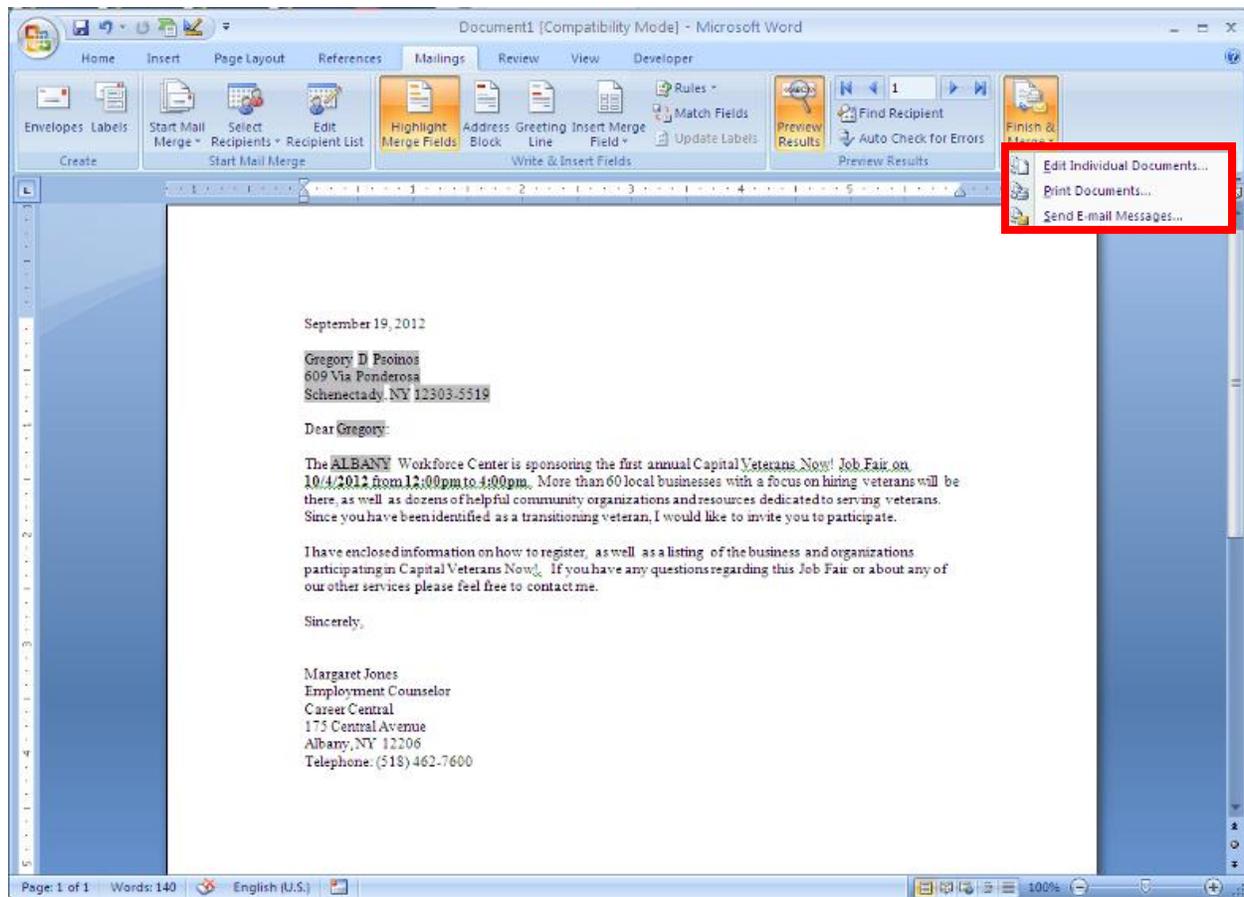
When you are satisfied with the results, click on the **Finish & Merge** button.



## COMPLETING THE MERGE

Once you click on the **Finish & Merge** button, you will be able to select from the following options:

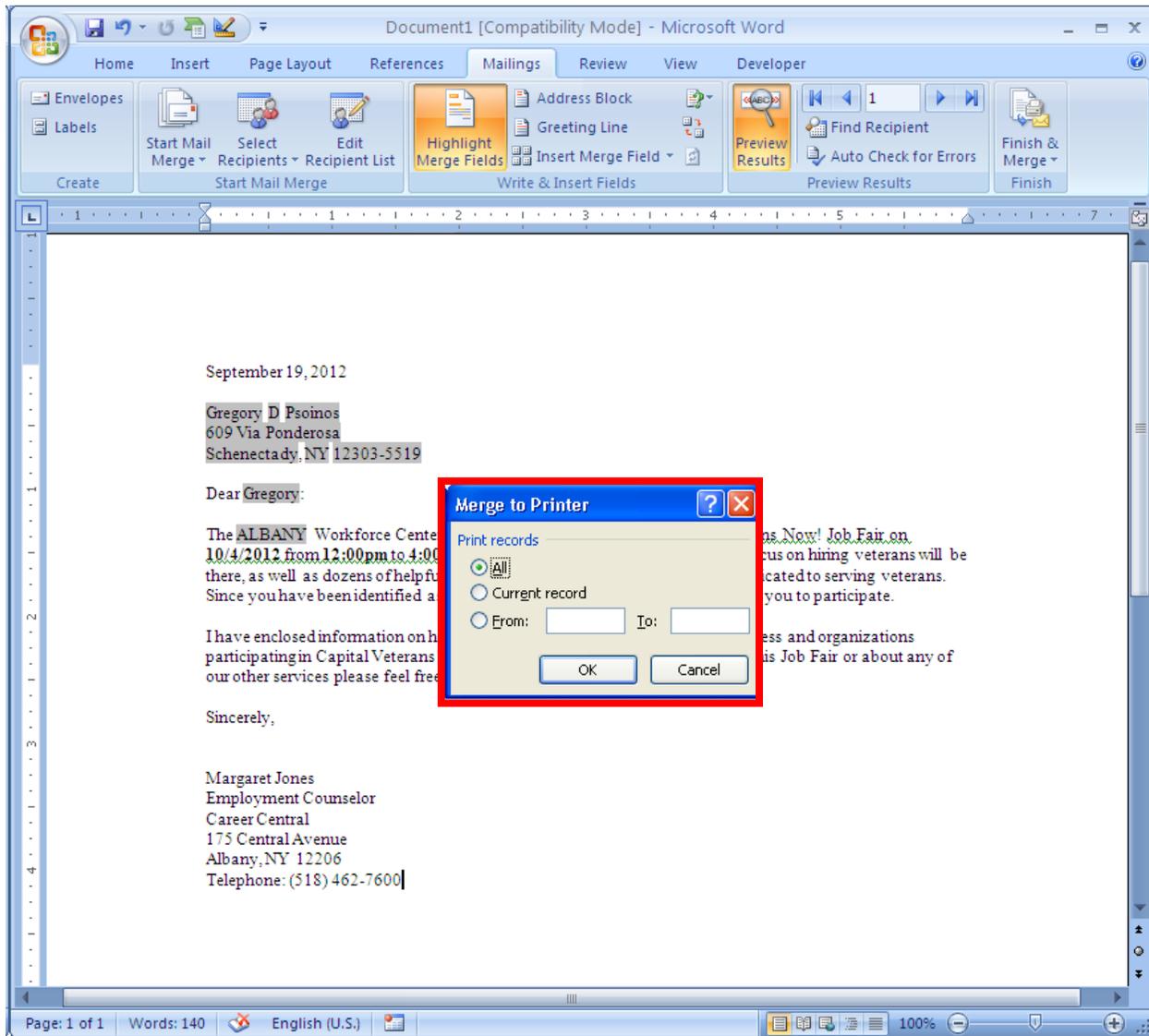
- **Edit Individual Documents:** This option allows you to customize individual letters for each customer
- **Print Documents:** This will prepare your correspondence merge for printing (use this option for written correspondence which will be mailed)
- **Send Email Messages:** This will prepare your correspondence merge to be sent as individual email messages to each customer (use for email correspondence)



## WRITTEN CORRESPONDENCE (TO BE MAILED)

For letters which will be mailed to customers, the **Print Documents** options should be selected from the **Finish & Merge** menu.

This will bring up the **Merge to Printer** pop-up window. The default option selected is to print all of the records, or you can select to print only the current record or a specific range of records. Click **OK** to print the letter(s).



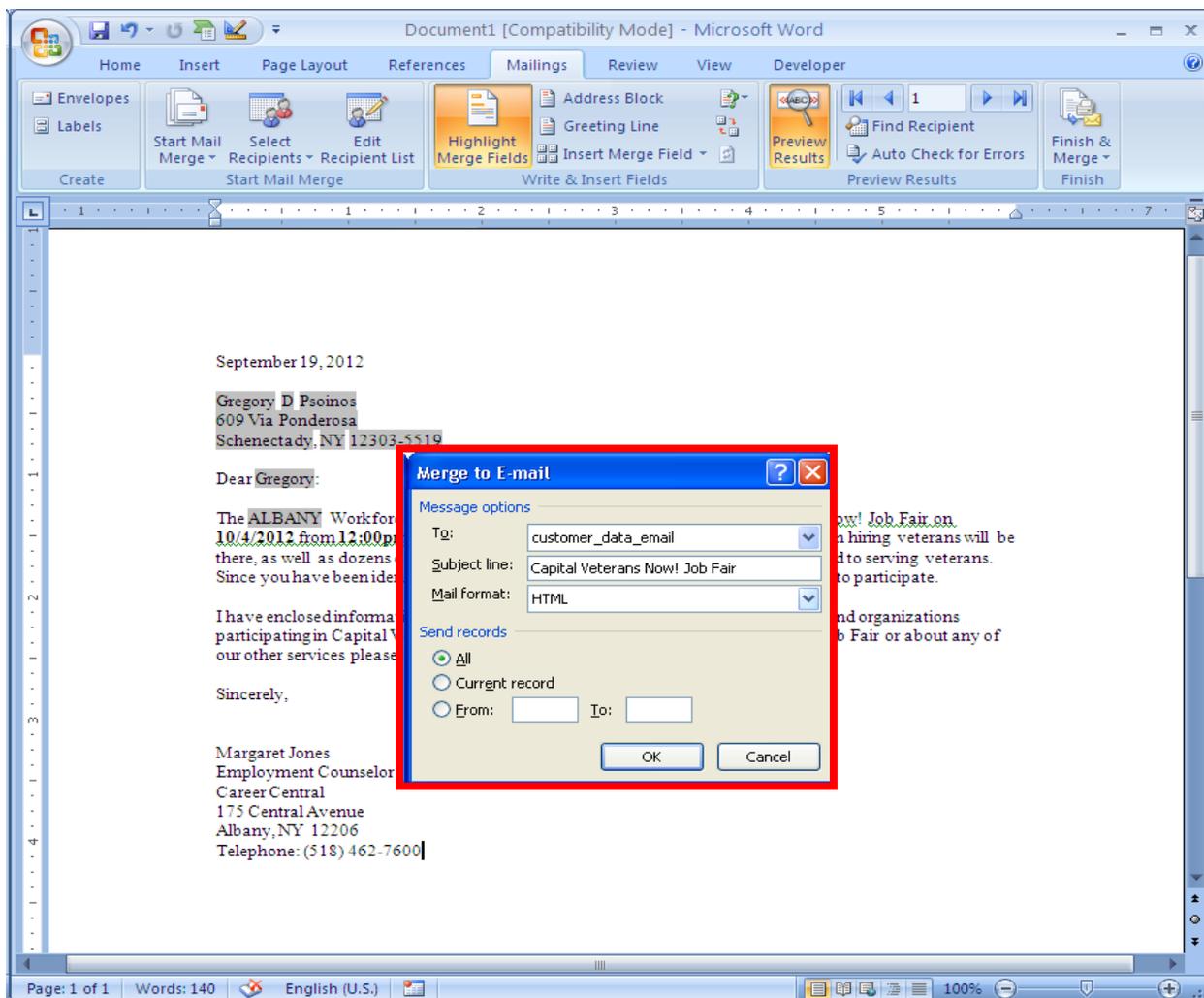
## EMAIL CORRESPONDENCE

To send the correspondence as an email, select the **Send E-mail Messages** option from the **Finish & Merge** menu.

This will bring up the **Merge to E-mail** pop-up window. Under **Message Options**, you will need to populate the following information:

- **To:** Select *customer\_data\_email* from the drop-down field
- **Subject line:** Type a relevant subject line
- **Mail format:** The format defaults to HTML – you can also choose to send as a Plain Text document or an attachment

As with written correspondence, you can then choose to send email correspondence to all recipients, the current record only, or a range of records. Click **OK** when you are ready to send.





## **RESOURCES AND ASSISTANCE**

OSOS Correspondence Guide & Resources

<http://labor.ny.gov/workforcenypartners/osos/correspondence.shtm>

Additional program information, OSOS guides and other resources can be found at:

<http://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov)