



Quick Guide to Form Letters

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This manual attempts to answer many of the questions asked about form letters. It explains editing and copying existing letters, creating new letters as well as many of the available format, function and feature commands.

First you will be introduced to the letter setup screen, and then a description of different types of commands used to format the words of the letter and gather data from the files to place in the letter.

First, an explanation of the keyboard commands used in the manual.

Commands using an identified key such as ENTER are shown as <Enter>

Commands shown as <Ctrl>W means hold down the CTRL key, touch the letter W, and then release them both

NEW: A major new feature in Form Letters is the ability to Archive Letters. While the program has always kept a list of letters generated on a case there is now the additional ability to archive an exact copy of the letter including the actual date the letter was generated. Users have found this is a way to eliminate printing additional file copies of each letter. Please call SEi for further explanation and for assistance setting up this feature for your court.

BARCODES

To help expedite retrieving cases, barcoding has been added to the program. A barcode can be printed on any letter, label or calendar. When the barcode is scanned a specific screen opens depending on the type of barcode used. For example, there's a barcode format which can be included on a fine notice. When that barcode is scanned the Fine Fee Payment screen automatically opens for the specific case. This helps eliminate opening the wrong case because of an error typing the case number or name when doing a case search.

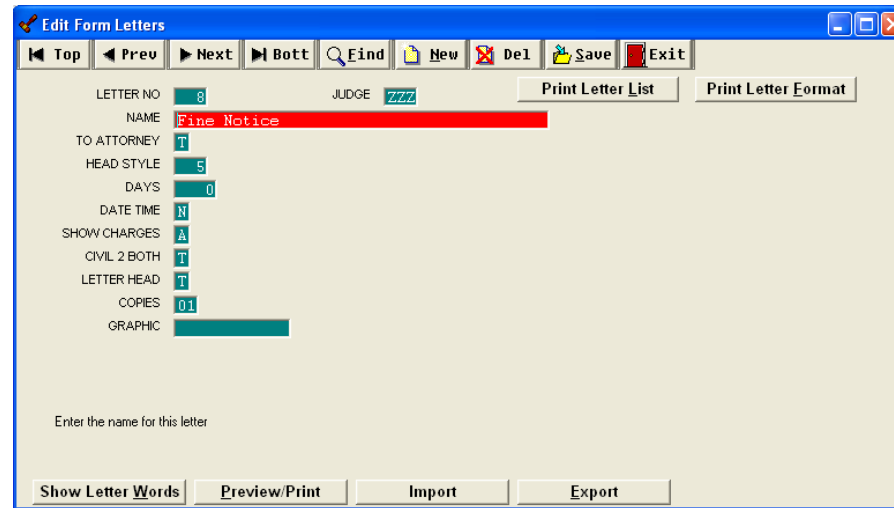
Barcode scanners can be ordered directly through the vendor by clicking **HELP->Web-Site Links-> Order Bar Code Reader from POS World** or by request on your grant application. When the court receives the scanner, they should call us for help programming the scanner and adding barcodes to the forms and letters.

SCANNED SIGNATURES

Judges and/or clerks can use a scanned version of their signature in a letter. The file can be scanned by us or them and must be in a JPG or BMP format. Coding is added to the letters where the scanned signature is to be used. Every time the letter is generated, the appropriate signature is included. **It is up to the Court to determine when a scanned signature is acceptable.**

FORM LETTER SETUP SCREEN

To access the form letters database, click on **UTILITY -> Edit databases ->Form Letters**. The setup screen for the first letter in your letters data base displays. When creating a new letter, these setup lines must be filled in.



LETTER NO Assigned by the computer

NAME The unique letter name assigned by the court

TO ATTORNEY T addresses letter to attorney, if there is one on the case. Otherwise, letter is addressed to defendant. F addresses letter to defendant, even if there is an attorney on the case.
NOTE: Other factors in the letter setup may give you the option to chose who the letter is addressed to.

HEADSTYLE Defines what information included in the heading of the letter. **The format styles are pre-programmed.** A basic outline of what head styles go with what letter follows:

CIVIL CASES = 3, 12	NON CIVIL CASES - ONE ADDRESS = 1, 10, 14, 15, 16, 20
TO/REGARDING = 2, 5, 6, 7, 8,	FINE NOTICE = 5
SUPPORTING DEP = 6	LONG FORM INFO = 7
CERTIF DISPO = 9	STATE VS ___ = 2, 4, 5, 8, 9, 11, 17, 18, 19

Note: The best way to see different styles is to go to the letters database and Preview/print a letter which has the letter head you're interested in. Previewing letters through this utility will not make a record that the letter was sent on the case.

- DAYS** Use in combination with Date-Time = (F)uture. Days is set to the number of days from today the action to be complete. We recommend using a multiple of 7 so the due date calculates to a day the court is normally open (usually).
- DATE TIME** Identifies a control date or action due date to be printed on the letter.
Leave when no date is needed.
(F)uture date - *see DAYS explanation above*
(N)ext prints the next adjournment date from the case
(T)oday prints today's date
(Y)esterday prints yesterday's date
(P)rompt prompts user for a date
- SHOW CHARGES** On most letters, charges print at the top of the letter between the address lines and the letter body. Keep in mind, there are other ways to list charges on a letter, although, this is the standard format.
(A)ll - lists all charges on the case
(S)ome- you identify which charges should be listed when letter is generated
(N)one - no charges are listed.
- CIVIL 2 BOTH** For civil cases (T) rue prints a copy for the plaintiff and defendant. If (F)alse, only one letter gets printed to the selected individual. In some circumstances such as the Transcript of Judgment or Small Claims started, there are prompts within the letter, or even separate letters for the plaintiff and defendant.
- LETTERHEAD** Normally set to (T) rue, unless you use stationary with your court letterhead, or unless you are using head style 11. If you use preprinted letterhead, enter the number of linefeeds/2 to indicate where the letter should begin printing. Entering the number 9 would move the heading down 18 lines (3 inches) from the top of the page.
- COPIES** Set the number of copies to print each time the letter is generated. There are some letters where the number of copies may vary depending on the case, set Copies to P to be prompted each time the letter is generated.
- GRAPHIC** Letterheads can be customized with individual logos and graphics as well as customized for each judge in the court. Please call our office for help using this option.

AT THE BOTTOM OF THE EDIT FORM LETTER SCREEN ARE SEVERAL OPTIONS.

SHOW LETTER WORDS Opens the body of the letter for text modification. The next section describes editing letters in detail

PREVIEW/PRINT

Print a sample of the letter in one of two ways. Search on a case, and print it from there. Or click Preview/Print and search for a specific case or click on the F3 (same case) key or Previous Searches

IMPORT

In addition to the letters initially installed with the program, there are hundreds on the SEi website to be imported into your list. To access the list on the website click **Import-> Search SEi Website for Letters.**



NEW: Click Preview to see a sample of the letter before downloading it into the program.

Be careful when importing a letter into an existing list. You need to know whether you are adding a BRAND NEW letter into your list or replacing an existing letter with a different version of THE SAME LETTER.

Replace Existing Letter -To replace an existing letter with a newer version of the same letter, find the existing letter in your letter list by clicking **UTILITY->EditDatabases->Form Letters**. Click **Find** to seek on the specific letter you want to replace. **It's very important to go to the specific Letter, otherwise when you import from the website you'll overwrite the wrong letter.** Once you've selected the letter in your list, click **Import->Search SEi Website for Letters**. Respond YES to the prompt asking whether you want to Replace the Existing Letter. Once on the website, scroll through the list or begin typing the name of the letter in the Seek box. Highlight the letter and click Preview to see a sample of the letter. Click Select if it is the letter you want to copy into your letter list.

Add a New Letter - To add a new letter to your list, click **UTILITY->Edit Databases->Form Letters**. Click **NEW** and respond to the prompt to add a new letter. The program automatically assigns the letter number. Click **Import-> Search SEi Website for Letters**. Once on the website, find the letter you want to add to your list. Highlight the letter, click Preview if you want to see a sample of the letter. Click Select to copy the letter into your letter list.

EXPORT Transfer one of your letters to the SEi Website or a jump drive so it can be copied to another computer. Give our office a call for help with this option.

ARROW KEYS The Top, Prev, Next, and Bott keys are another way to go through the letter list.

FIND Look for a specific letter in your letter list. By default, the list is in numerical order. Scroll through the list to select a specific letter. Or, in the seek box type in the letter number ie, 024 highlights letter #24 in the list.
To search by letter name first alphabetize the list by placing the cursor on the column heading NAME. Click once with the right mouse button. Start typing the letter name in the Seek box, highlight the letter and press Select.

NEW Click to add a new letter

DEL To delete a letter, click the button. **Be careful not to delete vital letters that have been used on cases.**

SAVE & EXIT The save button saves any changes made. The exit button closes the screen.

PRINT LETTER LIST Prints the current list of letters

PRINT LETTER FORMAT Prints the setup, all the programming codes and text of the current letter

SECTION 2 LETTER WORDS

CREATE A NEW LETTER

Add a brand new letter into your letter list. In this case, you would be entering **all** the text and codes yourself.

Click on New or <Ctrl> N

Respond to the prompts, Yes indicates you want to create a letter or touch <Enter>

After creating the letter enter the new letter name and modify the setup codes.

Click on Show Letter Words or <Ctrl> W to modify the letter text. A white screen resembling the notes box displays. This is where the text of the letter goes. We have provided a basic word processor to use for letter editing.

At any time click on HELP <F1> for explanations of codes and procedures.

SPECIAL CHARACTERS

Special characters insert codes or text into your form letter. Usually, letters are used by more than one judge. You would not want to have separate letters for each judge or clerk, so we have provided codes to insert the applicable information. In the printed letter, the special characters or variables are replaced with the appropriate information. IE. ^J is replaced by the Judge's name.

RESERVED CHARACTERS

The ~ (Tilde) or ^ (Carat) characters should not be used in the body of a letter except when used in a function command.

Format commands are special printing codes such as bold or underline print. The text to be formatted is identified by turning the format command on at the beginning of the text and turning it off at the end of the text. Several of the format commands are used in pairs (i.e. ^Btext^b or \b1text\b0).

COMMANDS	DEFINITION	FORMAT	PRINTS AS
Bold	Selected text prints in bold print	Text ^Bprints in bold^b letters OR Text \b1prints in bold \b0 letters	Text prints in bold letters
Underline	Selected text is underlined	Some ^Utext is^u underlined OR Some \ul1 text is \ul0 underlined	Some <u>text is</u> underlined
Bold and Underline	Bold & underlined text	^B^Ubolded and underlined^u^b words OR \b1 \ul1 bolded and underlined\b0 \ul0 words	<u>bolded and underlined</u> words
Wide	Print in wide characters	Prints ^Win wide^w text	Prints in wide text
Bold and Wide	Bold & Wide Text	This ^B^Wis bold, wide^w^b Text OR This \b1^W is bold wide ^w\b0text	This is bold, wide text
Font Size	Set font size, dependant on type of font in letter	Sets \fs20 font \plain size <i>\plain restores font to default size</i>	Sets Font size
Title	Form/Letter title defined by you. <i>Prints below letter date and before heading and charge information. Look at 160.55 Seal Order for a sample.</i>	..T[Special Heading Defined by You ..]t <i>..]t inserts a blank line between heading and next line of letter/form. Can use bold, wide or underline</i>	Special Heading Defined by You
Substring	Prints a portion of the field. <i>Often used with index number to prevent charge number from being printed.</i>	^&dispindxno(aChg[ccIndexNo])& <i>Without substring command</i> ^&substr(cmIndex9,2)& <i>With substring command</i>	04070001.01 04070001
Trim	Removes trailing blanks <i>Trim is often used with name and address lines</i>	^&aName[cnFirst]& ^&aName[cnLast]& ^&alltrim(aName[cnFirst])& ^&aName[cnLast]&	James Baker James Baker
Upper & Lower	Print in upper or lower case	^&upper(tonn)& ^&lower(tonn)&	SOMEBURG someburg

Functions read information from the current case. When creating or editing the letter, type the command in the format shown below in the exact spot you want that information to print. These functions begin with the combination ^& (carat, ampersand) and end with the &.

FUNCTIONS	DEFINITION	FORMAT	PRINTS AS
Municipality	Name of municipality	^&town&	Someburg
Name of Court	Full Court Name	^&upper(alltrim(client))& <i>upper sets print to upper case</i>	SOMEBURG VILLAGE COURT
Court Street	Court's street location	^&alltrim(ciCtStreet)&	125 Elm Street
Court Town	Town, state and zip of court	^&alltrim(ciCtCSZ)&	Someburg, NY 13000
County	Court's County	^&court_cnty& County	Monroe County
Judge Judge's Title Judge & operator Operator's name Operator's Initials		^J ^&j_title() ^I ^&mOperator& ^&cuTypistCode&	John J. Justice Someburg Village Justice JJJ:CCC Connie C. Clerk CCC
Arresting Agency	Agency of arresting officer	^&aChg[ccForce]&	SP
NCIC	NCIC number of arresting agency	^& NCIC(aChg[ccforce])&	05140
Arresting Officer	Name of arresting officer	^&aChg[ccCOP]&	Brooks, Ken
Officer Title	Title of arresting officer	^&o_title()& ^&o_title('L')& ^&o_title('S')&	Officer Officer Ofc.

FUNCTIONS, continued

Function	Description	Format	Prints As
Case/Docket/Index #	Docket #	^&substr(cmIndex9,2)&	09070051
Defendant 1 st name Defendant's middle initial Defendant's last name		^&aName[cnFName]& ^&aName[cnMI]& ^&aName[cnLName]&	John A. Defendant
Defendant's name	Last name first First Name First	^&aName[cnLFName]& ^&aName[cnFLName]&	Defendant, John A. John A. Defendant
Defendant address	1 st street line 2 nd street line City State Zipcode	^&aName[cnLine2]& ^&aName[cnLine3]& ^&aName[cnCity]& ^&aName[cnState]& ^&aName[cnZip]&	123 Elm Street PO Box 2233 Someburg NY 14444-0999
Defendant Address	Combined	^&aName[cnAddr]&	123 Elm Street PO Box 2233 Someburg, NY 14444-0999
Defendant's Phone		^&aName[cnPhone]&	555-555-2193
Defendant's DOB		^&aName[dnDOB]&	01/23/1978
Defendant's Age	age at time of arrest	^&age()&	42
Motorist ID#	motorist id#	^&aName[cnMotorID]&	999-999-999

Date	Usually today's date, unless used in combination with another date. <i>The c_date() command can be used in combination with most date commands</i>	^&c_date()& ^&c_date(nextdate(),1)& ^&c_date(nextdate(),2)& ^&c_date(nextdate(),3)& ^&c_date(nextdate(),4)& ^&c_date(nextdate(),5)&	August 5, 2009 August 19, 2009 Wednesday, August 19, 2009 19th day of August, 2009 Wednesday, the 19th day of August, 2009 Wednesday
Arrest Date	Date of arrest	^&aChg[dcArrestDt]&	04/15/2011
Crime Date	Date of Crime <i>often, the same as Arrest date</i>	^&aChg[dcCrimeDate]&	04/15/2011
Adjourn Date	Next adjournment	^&mnexday&	06/27/2011
Previous Date	Previous adjournment date <i>There must be more than 1 adj. date on case</i>	^&prevdate()&	05/06/2011
Disposition Date	Date case closed	^&aChg[dispDate]&	06/27/2011
Defendant's Attorney	Name	^&getname(substr(aChg[ccAttorney],2),4,0,.F.)&	Defendant M. Attorney
	Name & Address	^&getname(substr(aChg[ccAttorney],2),4,0,.T.)&	Defendant M. Attorney 199 Main Street Someburg, NY 14444
Plaintiff's name <i>(person initiating a Civil case)</i>	Name	^&getname(aChg[ccNameNo],14,nil,.F.)&	Peter Plaintiff
	Name & Address	^&getname(aChg[ccNameNo],14,nil,.T.)&	Peter Plaintiff 189 Elm Street Someburg, NY 14444

FEATURES	DEFINITION	FORMAT	PRINTS AS
Merge text	Merges text from case notes into letter	^M <i>When the letter is generated you are prompted to enter text which gets saved in case notes</i>	Text notes
Font size	Set the font size.	\fs20	In a letter the font will print font size 20.
No record of letter	Leaves no record on case that letter was generated. Use on non case related letters, i.e. letter to Audit and Control or DMV. Or, when no record should be left on the case.	NR[]nr	On case, leaves no record of letter having been generated.
Edit	Causes edit window to open each time the letter is generated. Does not save text on case. The ^M command may be a better choice.	.E[]e	Prints text you enter at time of generating letter

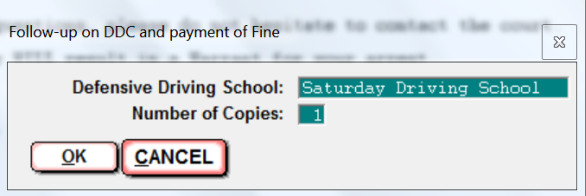
Variables can be used throughout letters and forms to insert information from a prompt or from the case. The most common is through the use of PROMPTS

When the letter is generated, the user is 'Prompted' for additional information to insert into the letter. A letter can have up to 20 variables (V1 – V20).

..PROMPTS

V1[Enter information:]v

..ENDPROMPTS

VARIABLES	DEFINITION	FORMAT	PRINTS AS
<p>Prompt Variable</p>	<p>Prompts user for information before letter is generated. Inserts information within the form in a spot designated by you.</p>	<p>..PROMPTS V1[Driving School:]v ..ENDPROMPTS User is prompted for and enters name of Driving School</p>  <p>V1[Payment: =\$=]v (input dollar amount) V2[Appear Date: =D=]v (input date mm/dd/yyyy) V3[Condition: =C=]v (character input) V4[Minor?:=L=T]v (Logical - T/F default True) V5[Days in jail:=N=]v Numeric input V5[Time :=L= ↑ {##:##AM}]v <i>Need 7 spaces</i></p>	<p>Letter reads: Please report to the ^V1 for fulfillment of your condition.</p> <p>Text prints as: Please report to the Saturday Driving School for fulfillment of your condition.</p>
<p>Copies</p>	<p>Enter the number of copies to print.</p>	<p>..C[^V1]v ..PROMPTS V1[copies:=L=]v Preview[Y] ..ENDPROMPTS</p>	<p>Print the number of copies indicated</p> <p>Turns Preview of letter On [Y] or Off [N]</p>