Creating a Participants Mailing and/or Contact List:

The Limited Query function allows a staff member to retrieve (query) certain information from the Mediated Services system. This information is from Mediated Services (not Talent Bank) and will only be information that has been *credited to the logged in staff member*.

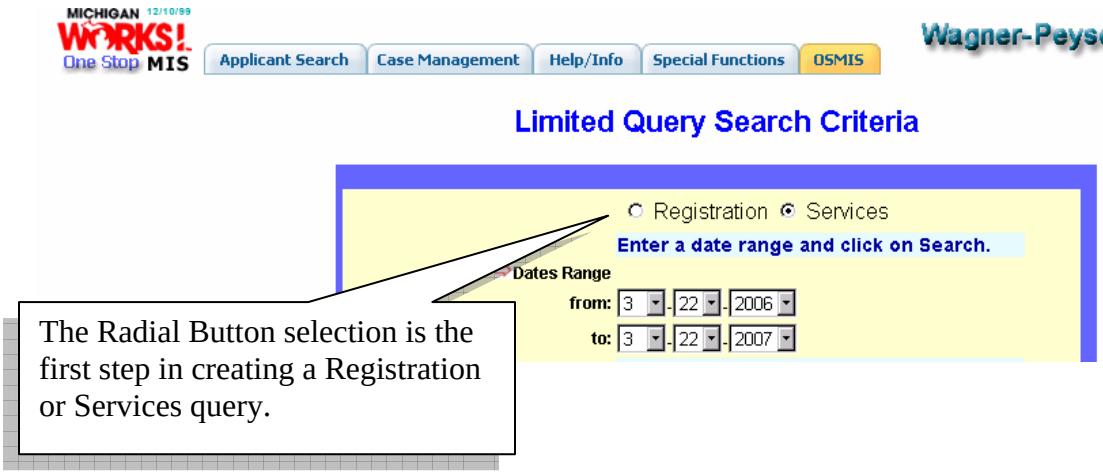
By placing the pointer on the "Special Functions" tab, a dropdown dialog box will open. Move down the list and rest your pointer on the "Online Reports." Another dropdown dialog box will open. Move your pointer over to "Limited Query" and Click. You have now gained access to the Limited Query criterion screen in Mediated Service.

Creating a Participants Mailing and/or Contact List:

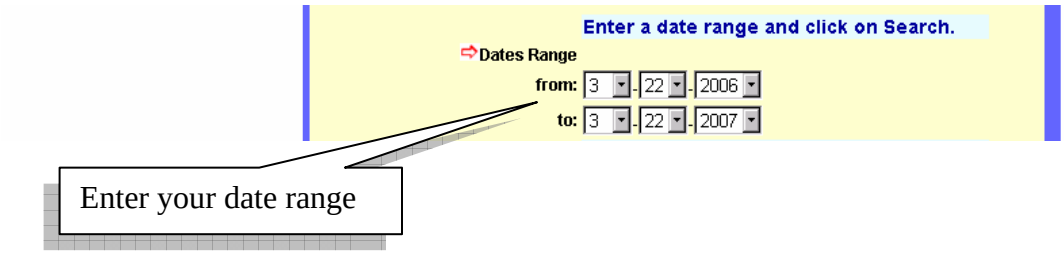
Please follow the step-by-step procedures below and you will be able to create an exportable data files for your Microsoft Word Mailing and/or Contact List.

Constructing a Registration and/or Service Query Display:

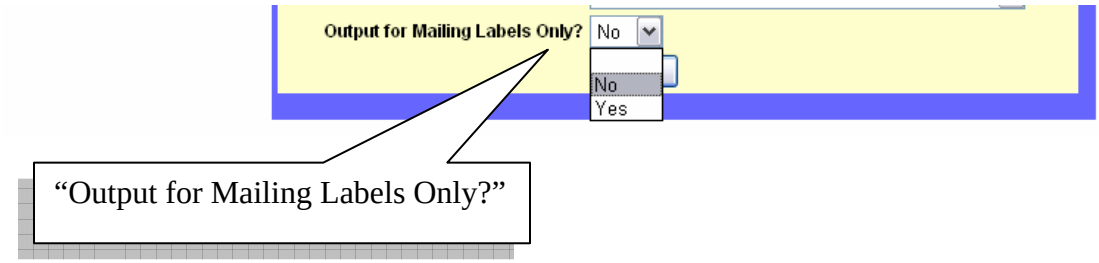
The first requirement for the construction of your mailing or contact display is the selection of the type of query. Select either Registration or Services. In order for you to get a complete list of participants for your mailing and/or contact list y*ou will have to run two (2) queries, one for registrations and one for services*.



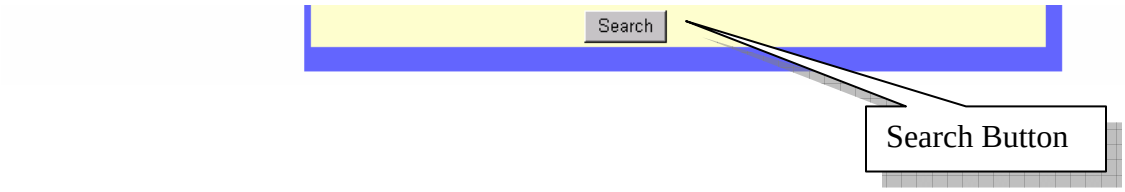
Next, enter your mailing and/or contact list date range.



After selecting the date range, scroll down to the bottom of the Limited Query Search Criteria screen. Locate the "Output for Mailing Labels Only?" Select "Yes" if you want to create a list of participants you intend to contact by mail or phone.

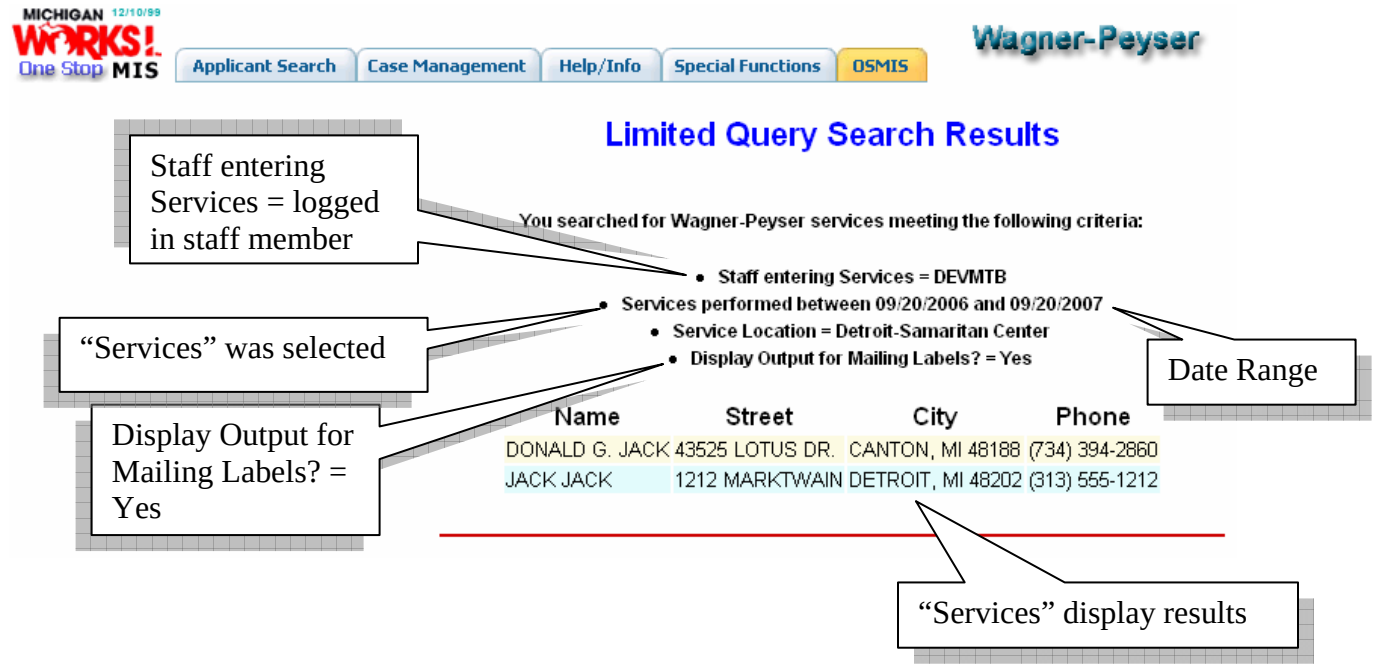


Lastly, after completing the query criterion entries and selecting "Yes" to create an "Output for Mailing Labels Only?" click the search button at the bottom of the screen.



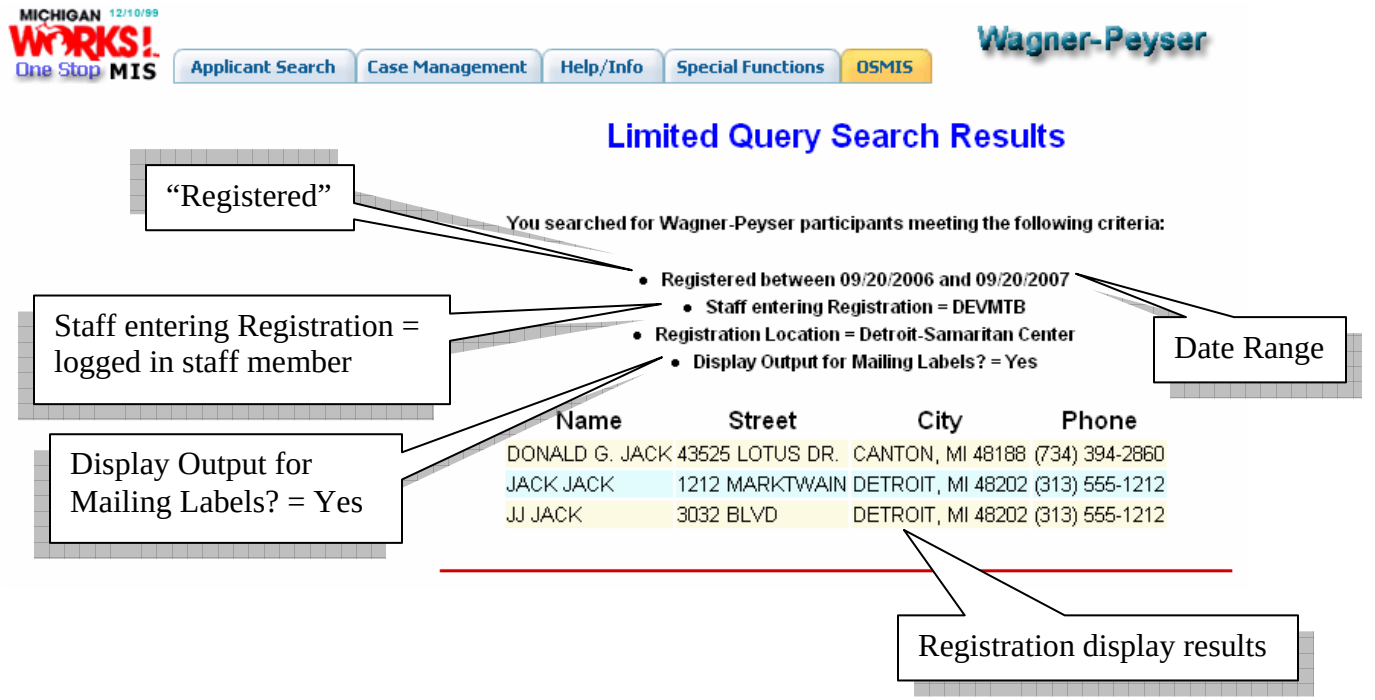
Services Query Results Returned:

As you can see by the below screen display, 'Services" was selected with a date rage of "09/18/2006-09/18/2007." This searched returned two participants. The First and Last Names are located in the "Name" column, Street Addresses are locate in the "Street" column, Cities, State and Zips are located in "City" column, and Phone numbers are located in the "Phone" column.



Registration Query Results Returned:

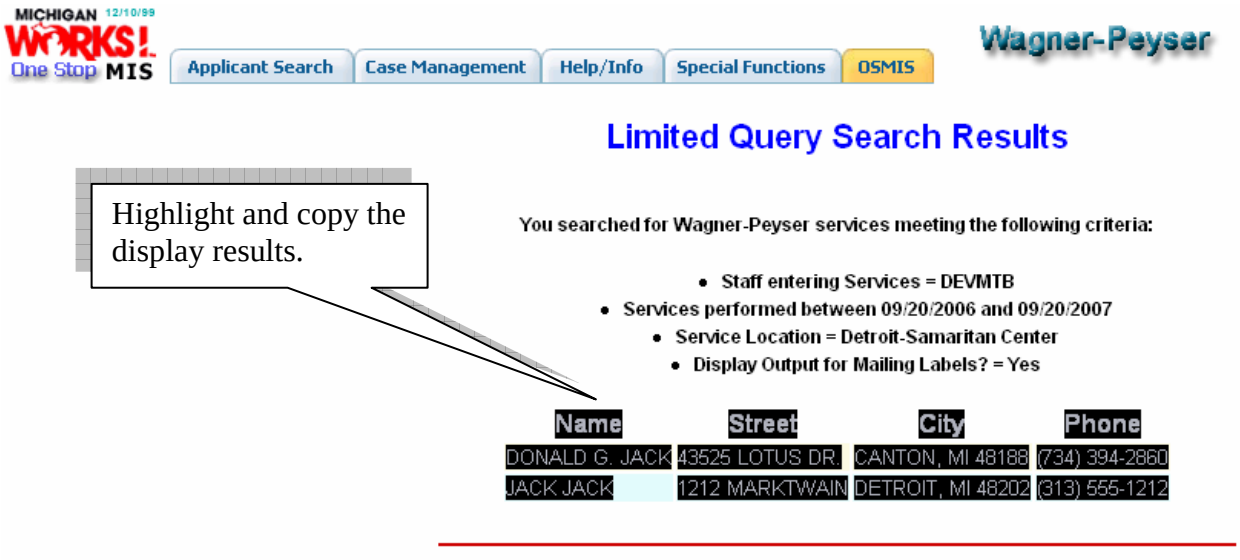
As you can see by the below screen display, "Registrations" was selected with a date rage of "09/18/2006-09/18/2007." This searched returned three participants.



In the above two examples, five participants were found using the following criteria: the logged in staff member's "username," querying both "registrations" and "services," setting the "date range," selecting "Yes" in the Output for Mailing Labels Only drop down menu and selecting the "Search" button.

Copying and Exporting the Services Display:

The next step in creating a mailing or contact list is to export your display output. On the search results screen for "Services," highlight and copy the display results.

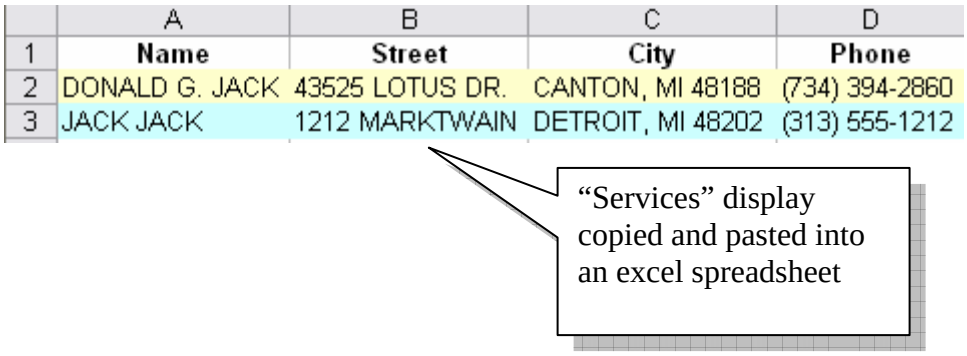


Printing:

The query results can be printed by using the print function on the browser toolbar or by selecting File--print.

Creating the Excel File for Mail Merge:

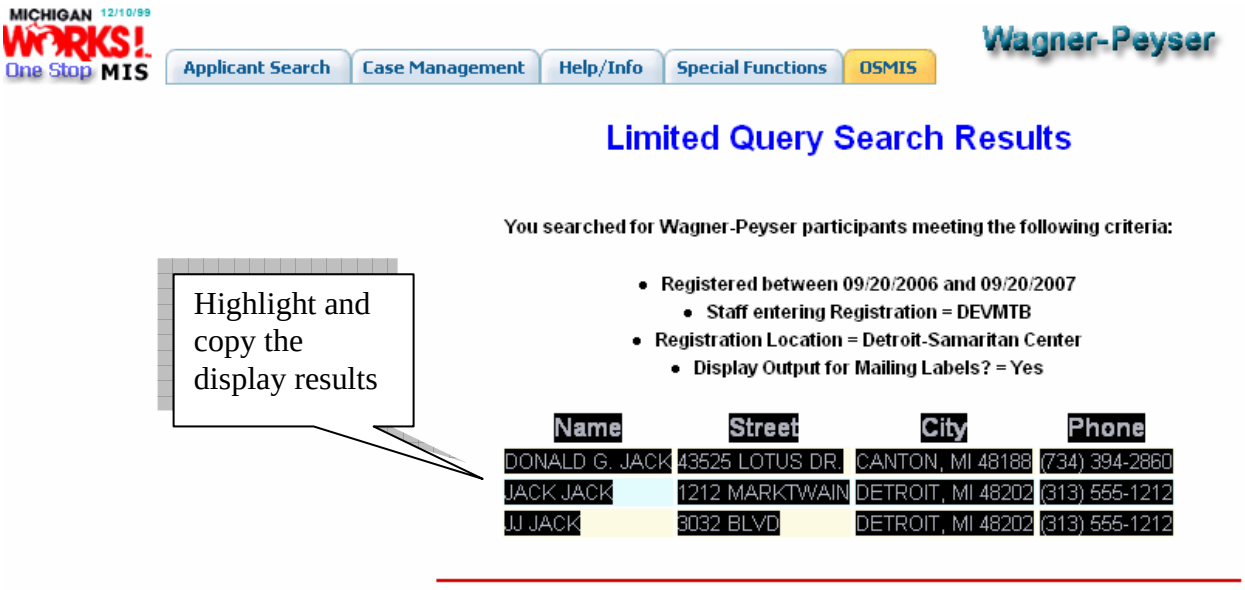
Open an excel spreadsheet and paste your "Services" display results. SAVE YOUR EXCEL DATA FILE.



Your Excel file for "Services" should look similar to the above example. Note: Your participant names and the length of the list will be different.

Copying and Exporting the Registration Display:

The next step in creating a mailing or contact list is to export your display output. On the search results screen for "Registration," highlight and copy the display results.

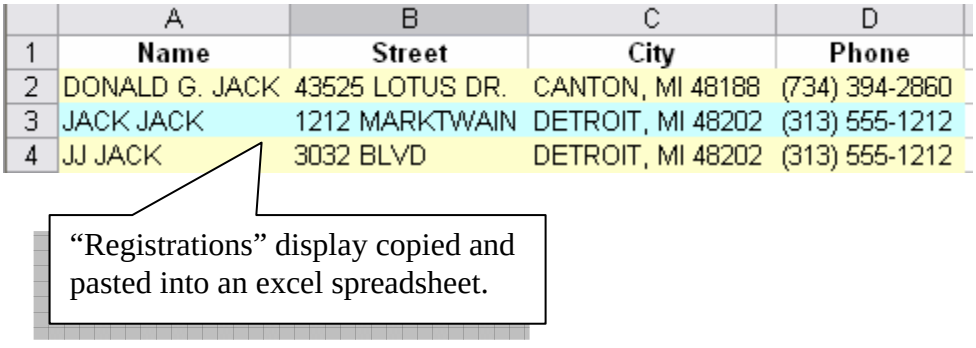


Printing:

The query results can be printed by using the print function on the browser toolbar or by selecting File--print.

Creating the Excel File for Mail Merge:

Open an excel spreadsheet and paste your "Registrations" display results. SAVE YOUR EXCEL DATA FILE.



	A	B	C	D
1	Name	Street	City	Phone
2	DONALD G. JACK	43525 LOTUS DR.	CANTON, MI 48188	(734) 394-2860
3	JACK JACK	1212 MARKTWAIN	DETROIT, MI 48202	(313) 555-1212
4	JJ JACK	3032 BLVD	DETROIT, MI 48202	(313) 555-1212

"Registrations" display copied and pasted into an excel spreadsheet.

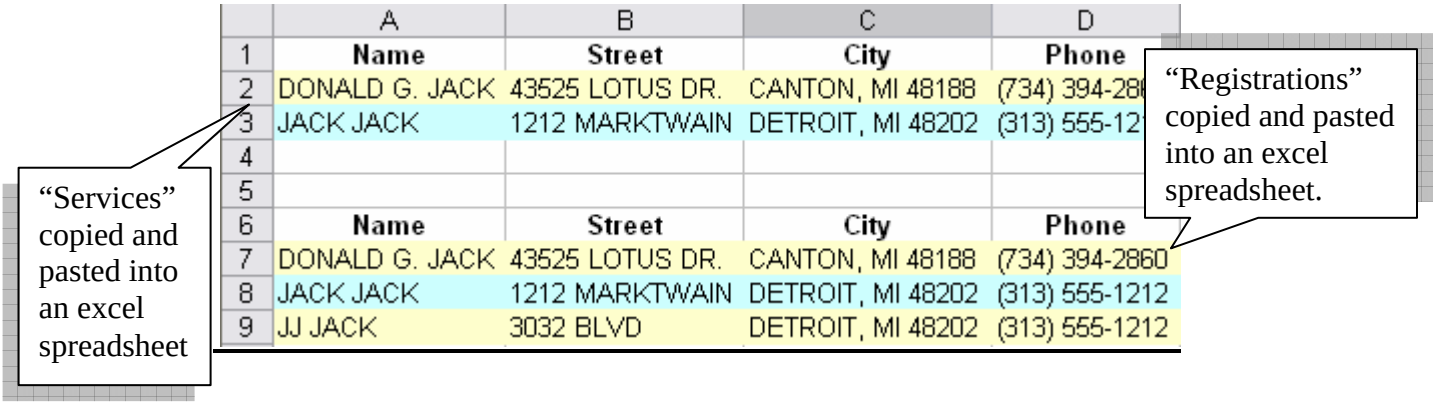
Your Excel file for "Registrations" should look similar to the above example. Note: Your participant names and the length of the list will be different.

Edit Your Excel File:

Working in the excel file you just created, delete any additional rows that have "Name", "Street" and "City" titles listed. The columns headings (Name, Street, City and Phone) are required only in row one. At this time you can also delete all the duplicate participant entries. In addition, if you are creating a mailing list, delete the "Phone" column. Click on save when completed.

Combining both the Registration and Services Display:

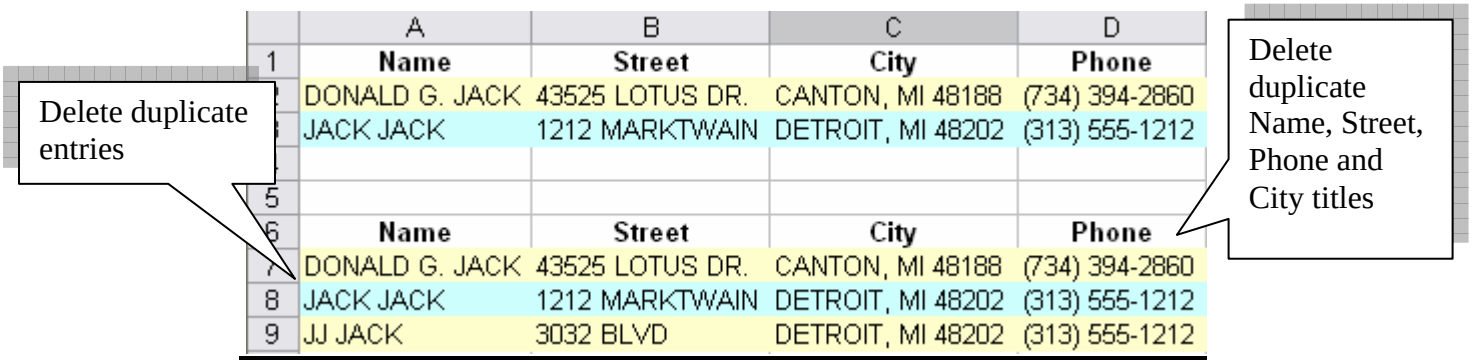
If you have decided to combine both the Services display and Registrations display to create one mailing or contact list, paste your Registration results on the same excel spreadsheet where you pasted the Services display results. Click on save when finished pasting the display.



	A	B	C	D
1	**Name**	**Street**	**City**	**Phone**
2	DONALD G. JACK	43525 LOTUS DR.	CANTON, MI 48188	(734) 394-28
3	JACK JACK	1212 MARKTWAIN	DETROIT, MI 48202	(313) 555-12
4				
5				
6	**Name**	**Street**	**City**	**Phone**
7	DONALD G. JACK	43525 LOTUS DR.	CANTON, MI 48188	(734) 394-2860
8	JACK JACK	1212 MARKTWAIN	DETROIT, MI 48202	(313) 555-1212
9	JJ JACK	3032 BLVD	DETROIT, MI 48202	(313) 555-1212

Edit Data File:

Delete any additional rows that have Name, Street and City titles listed. Also, delete all duplicate participant entries and the phone number column if you are creating a mailing list.



	A	B	C	D
1	**Name**	**Street**	**City**	**Phone**
2	DONALD G. JACK	43525 LOTUS DR.	CANTON, MI 48188	(734) 394-2860
3	JACK JACK	1212 MARKTWAIN	DETROIT, MI 48202	(313) 555-1212
4				
5				
6	**Name**	**Street**	**City**	**Phone**
7	DONALD G. JACK	43525 LOTUS DR.	CANTON, MI 48188	(734) 394-2860
8	JACK JACK	1212 MARKTWAIN	DETROIT, MI 48202	(313) 555-1212
9	JJ JACK	3032 BLVD	DETROIT, MI 48202	(313) 555-1212

Excel "Mailing" list file

Below is an example of a correctly formatted Excel "Mailing" list file. Your excel data file will be used to create your "Mailing" list in Microsoft Word. Save your data file in a place where you can easily locate it for uploading.

	A	B	C
1	**Name**	**Street**	**City**
2	DONALD G. JACK	43525 LOTUS DR.	CANTON, MI 48188
3	JACK JACK	1212 MARKTWAIN	DETROIT, MI 48202
4	JJ JACK	3032 BLVD	DETROIT, MI 48202

Excel "Contact" list file

Below is an example of a correctly formatted Excel "Contact" list file. Your excel data file could be used to create a "Contact" list in Microsoft Word. Save your data file in a place where you can easily locate it for uploading.

	A	B	C	D
1	**Name**	**Street**	**City**	**Phone**
2	DONALD G. JACK	43525 LOTUS DR.	CANTON, MI 48188	(734) 394-2860
3	JACK JACK	1212 MARKTWAIN	DETROIT, MI 48202	(313) 555-1212
4	JJ JACK	3032 BLVD	DETROIT, MI 48202	(313) 555-1212

Creating a Mailing List in Microsoft Word:

Open a word document and go to "Help" on the menu bar. Open Help, and search for Mail Merge. Follow the instructions for creating and printing Envelops and Labels.