



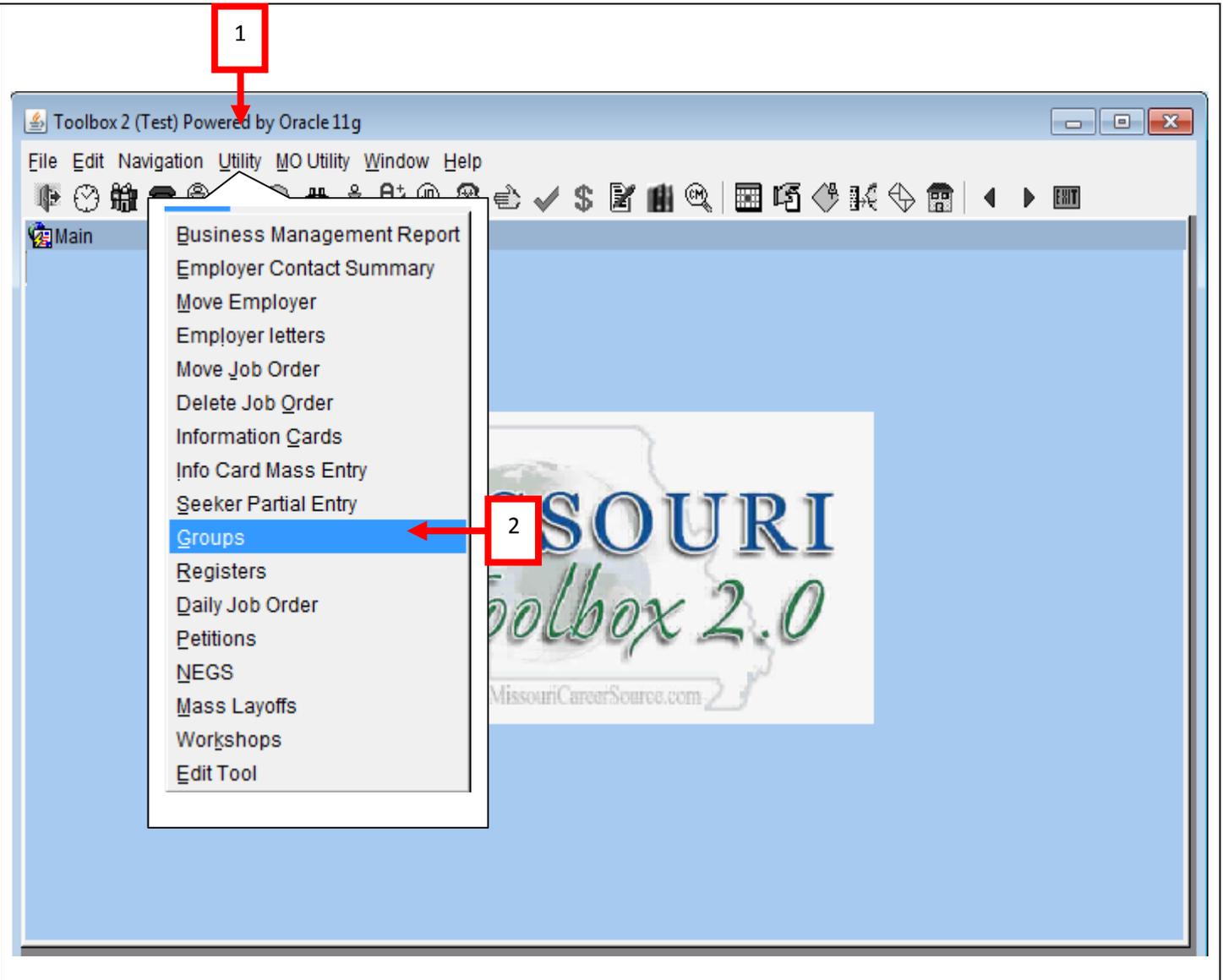
Creating a Correspondence Group

NOTE: Selecting a field then clicking the F1 Key on your computer keyboard will display field help.

A correspondence group will allow you to create a list of employers to easily communicate with, or to write a service note in mass.

Creating a Group

1. Click on the **Utility** Menu
2. Choose **Group**

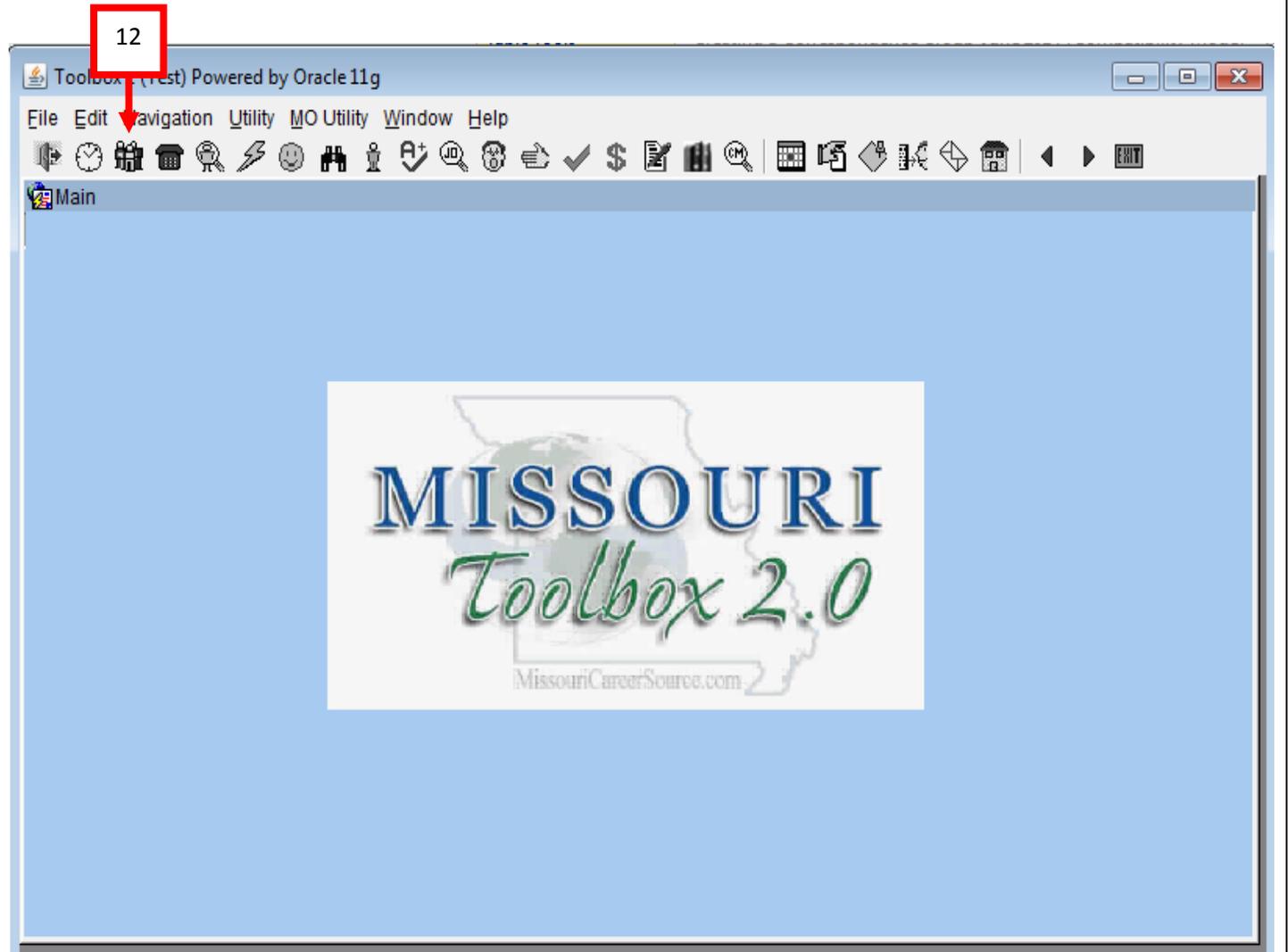


3. Enter **Title** you wish to name the group
4. Double-click in the **Office** field (This will bring up a list of values)
5. Choose the office you wish to tie the group to (this should be your office)
6. Click **Ok** button
7. Double click in the **Active Date** field (This will bring up a calendar)
8. Select the date you want the Group to become active, default is date the group is created.
9. Click **Ok** button

The screenshot shows the 'Correspondence Groupings' application window. At the top, there is a menu bar with 'File', 'Edit', 'Navigation', 'Utility', 'MO Utility', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains a 'Correspondence Grouping Search' section with a 'Title:' text box (callout 3) and a 'Search' button (callout 4). Below this is a table with columns: 'Title', 'Office', 'Active Date', and 'Inactive Date'. A callout (5) points to the 'Office' column. A callout (6) points to the 'OK' button in the 'Offices' pop-up window. A callout (7) points to the 'Active Date' column. A callout (8) points to the 'Date List of Values' pop-up window. A callout (9) points to the 'OK' button in the 'Date List of Values' pop-up window. At the bottom right, there is an 'Add' button with a green plus sign. At the bottom of the window, there are 'Save', 'Cancel', and 'Close' buttons.

Adding Employer/Organization to the Group

12. Click **Employer** icon



- 13. Enter search criteria.
- 14. Click **Search** button

The screenshot shows a web application window titled "Toolbox 2 (Test) Powered by Oracle 11g - Employer". The interface includes a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar with various icons. Below the menu is a tabbed interface with tabs for "Emp Query", "Emp Summary", "Emp Update", "Letter", "Worksite Learning", and "Adv Query". The "Emp Query" tab is active, displaying a search form with fields for "Phone Number" (containing "573"), "Employer Name", "Key Words", "FEIN", "UI ID", "Status" (set to "Active"), and "Search Area" (with radio buttons for "Office", "Statewide", and "Region"). A "Search" button is highlighted with a red box and labeled "14". A red arrow labeled "13" points to the "Key Words" field. Below the form is a table with columns: "Sta", "Name", "Address", "City", "Last Job", "UI ID", and "FEIN". The table is currently empty. At the bottom of the window, there are buttons for "Select All", "Deselect All", and "Export to Excel", along with a "Total Selected: 0" indicator.

15. If more than one employer is returned double click on the employer record you wish to access.

The screenshot shows the 'Employer' application window with the following details:

- Phone Number: 573
- Employer Name: DIS
- Key Words: (empty)
- Search: Search button
- Add Employer: + Add Employer button
- FEIN: (empty)
- UI ID: (empty)
- Status: Active
- Search Area: Office (selected), Statewide, Region
- Return: Legal, Worksite (selected), Both

Status	Name	Address	City	Last Job	UI ID	FEIN
<input type="checkbox"/>	Active	DISABLED AMERICAN VETERANS C	TEST RECORD	JEFFERSON CITY	111111	12-3456789
<input type="checkbox"/>	Active	DISCOUNT FURNITURE	JEFFERSON CITY		EX_OTH	
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Buttons at the bottom: Select All, Deselect All, Export to Excel, Total Selected: 0

16. Click **Emp Update** tab

Toolbox 2 (Test) Powered by Oracle 11g - Employer

File Edit Navigation Options Utility **16** Window Help

Employer - DISABLED AMERICAN VETERANS CHAPTER 17

Emp Query Emp Summary **Emp Update** Letter Worksite Learning Adv Query

UI ID: 111111 Worksite ID: 005 FEIN: 12-3456789 UI Status: 1 BUS: County: Cole
DISABLED AMERICAN VETERANS, ERNESTINE SCHUMANN-HEI Created: 07/14/05 Updated: 06/10/14 FCJL: N Union: Size: 1
DISABLED AMERICAN VETERANS CHAPTER 17 NAICS: 813410 CIVIC AND SOCIAL ORGANIZATIONS
TEST RECORD Registers:
JEFFERSON CITY MO 65102

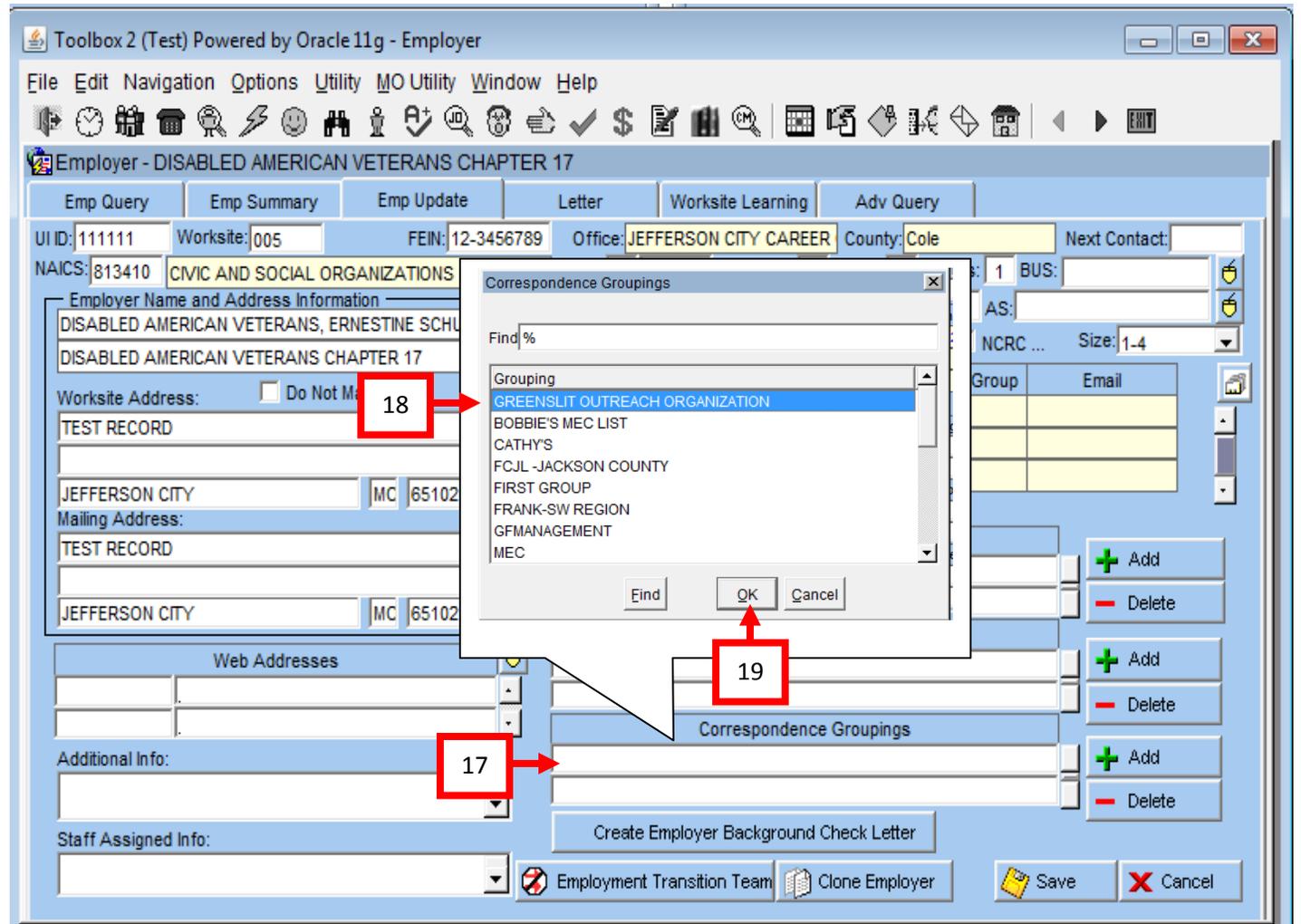
Contact Name	Phone/Ext	Contact Group	Email
TEST TESTER	(573)522-3017	Other	

Job Order	Status	St Date	Job Title	Opened	Source	Open	Ref	Hire	Salary	Staff Assigned
							0	0		

Job Orders: Open: 0 Entry: 0 Hold: 0 Mailbox: 0 Closed: 0 Archive: 0 Total: 0

New Order Save Cancel

17. Double-click in **Correspondence** field (This will bring up a list of values)
18. Choose the **Group** you wish to use.
19. Click **Ok** button



20. Click **Save** button

Follow steps 12-20 to add additional employers to the group.

Toolbox 2 (Test) Powered by Oracle 11g - Employer

File Edit Navigation Options Utility MO Utility Window Help

Employer - DISABLED AMERICAN VETERANS CHAPTER 17

Emp Query Emp Summary Emp Update Letter Worksite Learning Adv Query

UI ID: 111111 Worksite: 005 FEIN: 12-3456789 Office: JEFFERSON CITY CAREER County: Cole Next Contact:

NAICS: 813410 CIVIC AND SOCIAL ORGANIZATIONS FCJL N Show Me Union: Status: 1 BUS:

Employer Name and Address Information
DISABLED AMERICAN VETERANS, ERNESTINE SCHUMANN
DISABLED AMERICAN VETERANS CHAPTER 17

Worksite Address: Do Not Mail
TEST RECORD

JEFFERSON CITY MC 65102

Mailing Address:
TEST RECORD

JEFFERSON CITY MC 65102

Web Addresses

Additional Info:

Staff Assigned Info:

Preferred Contact Method: NCRC ... Size: 1-4

Contact Name	Phone/Ext	Contact Group	Email
TEST TESTER	(573)522-3017	Other	

Registers + Add - Delete

Directory Names + Add - Delete

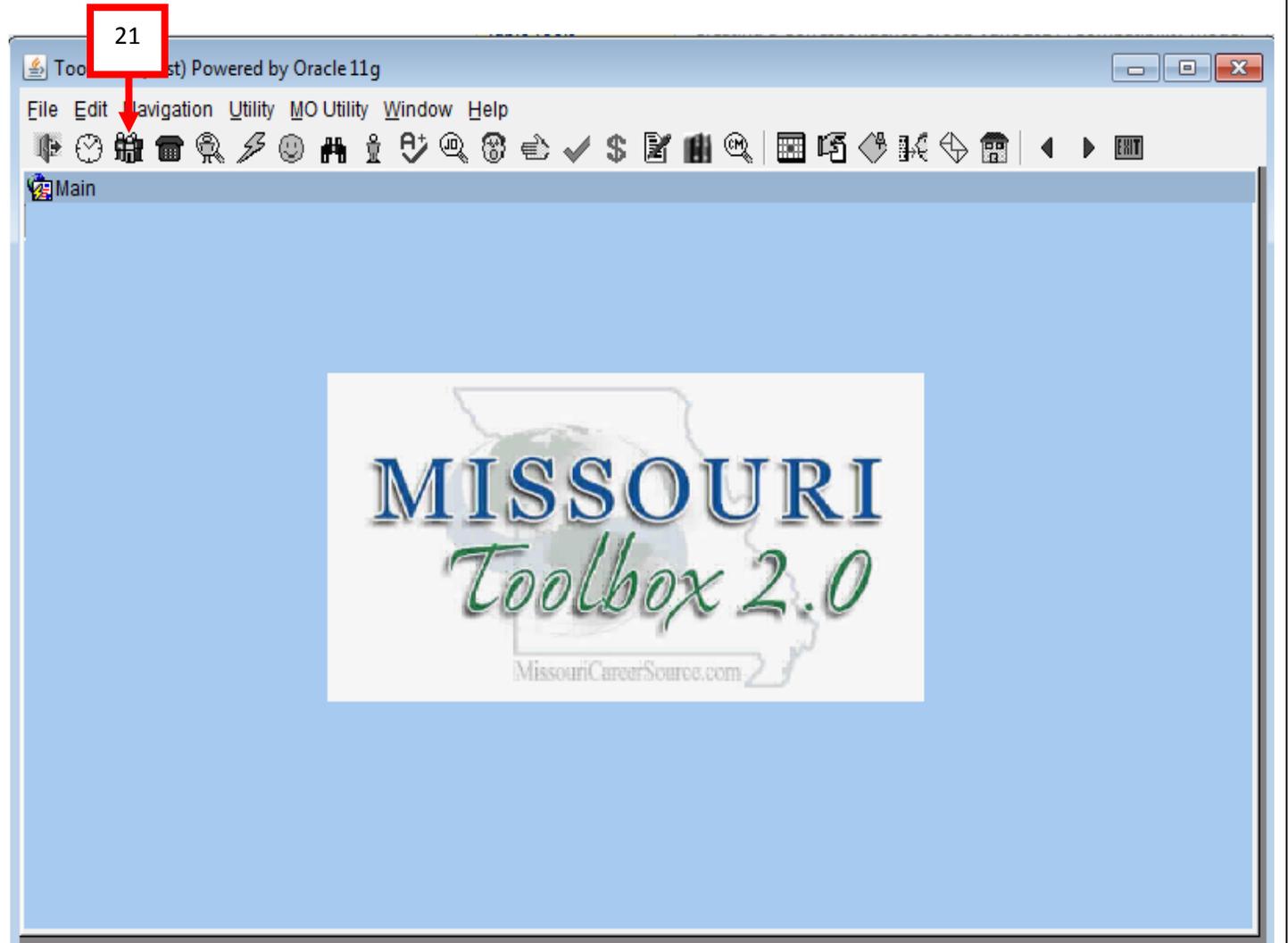
Correspondence Groupings
GREENSLIT OUTREACH ORGANIZATION + Add - Delete

Create Employer Background Check Letter

Employment Transition Team Clone Employer Save Cancel

Query Correspondence Group

21. Click **Employer** icon



22. Click **Adv Query** tab

The screenshot shows the 'Employer' application window titled 'Toolbox 2 (Test) Powered by Oracle 11g - Employer'. The interface includes a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar with various icons. The 'Adv Query' tab is selected, and a red box with the number '22' and an arrow points to it. The main area contains search filters for Phone Number (573), Employer Name, Key Words, FEIN, UI ID, Status (Active), Web Account, and Show Me Hero Flag (No). There are also radio buttons for 'Return' (Legal, Worksite, Both) and 'Search Area' (Office, Statewide, Region). Below the filters is a table with columns: Status, Name, Address, City, Last Job, UI ID, and FEIN. The table is currently empty. At the bottom, there are buttons for 'Select All', 'Deselect All', and 'Export to Excel', along with a 'Total Selected' counter showing 0.

23. Click **Groups** tab

NOTE: If necessary you can select search criteria on the **Demographics** tab. If you're responsible for more than one office, you will need to select statewide for the search area to pull your entire correspondence group. You can also pull a query based off a specific county or zip code if necessary.

The screenshot shows the 'Employer' application window titled 'Toolbox 2 (Test) Powered by Oracle 11g - Employer'. The 'Groups' tab is selected, and a red box with the number '23' and an arrow points to it. The interface includes various search filters and a table of results.

Search Filters:

- Staff: [Text Field] Assigned [Dropdown]
- NAICS: [Text Field]
- Ownership: [Dropdown] FCJL: [Dropdown]
- Search Area: Office JEFFERSON... [Dropdown], Region [Dropdown], Statewide
- Counties: [List Box]
- Zip Codes: [List Box]
- Created From: [Text Field] To: [Text Field] Status: Active [Dropdown]
- Job Orders Within: [Text Field] Mths
- Email: Both [Dropdown] Open JO's Only: Show Me Hero:

Table:

	Name	Address	City	FEIN	UI ID	Size	BC
<input checked="" type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>

Buttons: Clear, Search, Select All, Deselect All, MEC Mailing, Print Report, Send Letter, Export to Excel, Add to Group, Add Note

Summary: Total Employers: 0, Total Selected: 0

24. Double-click in **Corr Grp** field (This will bring up a list of values)
25. Choose the **Correspondence Group** you wish to use.
26. Click **Ok** button

The screenshot shows the 'Employer' application window with the 'Correspondence Groupings' dialog box open. The dialog box contains a list of groups, with 'GREENSLIT OUTREACH ORGANIZATION' selected. The 'OK' button is highlighted. Red boxes and arrows indicate the steps: 24 points to the 'Corr Grp' field, 25 points to the selected group, and 26 points to the 'OK' button.

Name	FEIN	UID	Size	BC
BOBBIE'S MEC LIST				
CATHY'S				
FCJL -JACKSON COUNTY				
FIRST GROUP				
FRANK-SW REGION				
GFMANAGEMENT				
GREENSLIT OUTREACH ORGANIZATION				
MEC				

27. Click **Search** button

The screenshot shows a web application window titled "Toolbox 2 (Test) Powered by Oracle 11g - Employer". The interface includes a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar with various icons. The main content area is divided into two tabs: "Demographics" and "Groups".

Under the "Demographics" tab, there are several input fields and a search button:

- Registers: [Empty text box]
- NEG: [Empty text box]
- RR Register: [Empty text box]
- Corr Grp: GREENSLIT OUTREACH ORGANIZATION
- Contains All [Dropdown menu]
- Contact Type: [Empty text box]
- Mass Layoff: [Empty text box]
- All RR Registers

A red box with the number "27" is positioned to the right of the "Mass Layoff" field, with a red arrow pointing down to the "Search" button. The "Search" button is located to the right of a "Clear" button.

Below the search area is a table with the following columns: Name, Address, City, FEIN, UI ID, Size, and BC. The table is currently empty, with only the header row visible. To the right of the table is a vertical scrollbar.

At the bottom of the window, there are several action buttons: "Select All", "Deselect All", "MEC Mailing", "Print Report", "Send Letter", "Export to Excel", "Add to Group", and "Add Note". On the far right, there are two status indicators: "Total Employers: 0" and "Total Selected: 0".

28. All employers tied to your correspondence group are returned.

Write a Single Service Note for Multiple Employers.

29. Place a check mark in the checkbox next to the employers you wish to write the note for, or choose the **Select All** button

The screenshot shows the 'Employer' application window with the following details:

- Staff:** Assigned
- Search Area:** Office (JEFFERSON ...), Region, Statewide
- Counties:** (Empty list)
- Zip Codes:** (Empty list)
- Job Orders Within:** Mths
- Mail/Worksite/Both:** Both
- Status:** Active
- Email:** Both

	Name	Address	City	FEIN	UID	Size	BC
<input type="checkbox"/>	AMERICAN LEGION AUXILIARY - DE	TEST DRIVE	JEFFERSON CITY	12-3456789	111111	20	<input type="checkbox"/>
<input type="checkbox"/>	DISABLED AMERICAN VETERANS CH	TEST RECORD	JEFFERSON CITY	12-3456789	111111	1	<input type="checkbox"/>
<input type="checkbox"/>	MARINE CORPS LEAGUE	TEST	JEFFERSON CITY		EX_OTH	10	<input type="checkbox"/>
<input type="checkbox"/>	VFW	123 TESTER	JEFFERSON CITY	44-0474290	009439	1	<input type="checkbox"/>
<input type="checkbox"/>	VFW DEPT. OF MO	TESTING THIS	JEFFERSON CITY	11-1111111	11111	50	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>

Buttons at the bottom: Select All, Deselect All, MEC Mailing, Print Report, Send Letter, Export to Excel, Add to Group, Add Note. Summary: Total Employers: 5, Total Selected: 0.

30. Click **Add Note** button

The screenshot shows the 'Employer' application window with the following details:

- Search Area:** Office (JEFFERSON ...), Region, Statewide
- Counties:** (Empty list)
- Zip Codes:** (Empty list)
- Job Orders Within:** Mths
- Email:** Both, Open JO's Only: , Show Me Hero:

	Name	Address	City	FEIN	UI ID	Size	BC
<input checked="" type="checkbox"/>	AMERICAN LEGION AUXILIARY - DE	TEST DRIVE	JEFFERSON CITY	12-3456789	111111	20	<input type="checkbox"/>
<input checked="" type="checkbox"/>	DISABLED AMERICAN VETERANS CH	TEST RECORD	JEFFERSON CITY	12-3456789	111111	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	MARINE CORPS LEAGUE	TEST	JEFFERSON CITY		EX_OTH	10	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW	123 TESTER	JEFFERSON CITY	44-0474290	009439	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW DEPT. OF MO	TESTING THIS	JEFFERSON CITY	11-1111111	11111	50	<input type="checkbox"/>
<input type="checkbox"/>						30	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>

Toolbar buttons: Select All, Deselect All, MEC Mailing, Print Report, Send Letter, Export to Excel, Add to Group, Add Note

Total Employers: 5
Total Selected: 5

31. Click **Drop Down Arrow**

32. Choose the **Contact Type**

Toolbox 2 (Test) Powered by Oracle 11g - Employer

File Edit Navigation Options Utility MO Utility Window Help

Multiple Note Create

Contact Type: [v]

Subject:

Notes:

Follow-up Date:

Save Cancel

City	FEIN	UI ID	Size	BC
JEFFERSON CITY	12-3456789	111111	20	<input type="checkbox"/>
JEFFERSON CITY	12-3456789	111111	1	<input type="checkbox"/>
JEFFERSON CITY		EX_OTH	10	<input type="checkbox"/>
JEFFERSON CITY	44-0474290	009439	1	<input type="checkbox"/>
JEFFERSON CITY	11-1111111	11111	50	<input checked="" type="checkbox"/>

Select All Deselect All

MEC Mailing Print Report Send Letter Export to Excel Add to Group Add Note

Total Employers: 5
Total Selected: 5

33. Enter **Subject**

34. Enter **Notes**

35. Click **Show Purpose List**

Multiple Note Create

Contact Type: In Person

Subject:

Notes:

Follow-up Date:

Save Cancel

+ Show Purpose List

Select All DeSelect All

<input checked="" type="checkbox"/>	MARINE CORPS LEAGUE	TEST	JEFFERSON CITY		EX_OTH 10	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW	123 TESTER	JEFFERSON CITY	44-0474290	009439 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW DEPT. OF MO	TESTING THIS	JEFFERSON CITY	11-1111111	11111 50	<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>

Select All Deselect All

MEC Mailing Print Report Send Letter Export to Excel Add to Group Add Note

Total Employers: 5
Total Selected: 5

36. Choose the Purpose(s) of the visit with these employers.

37. Enter a **Follow-up Date** if necessary. This will create a task on your scheduler for the date entered.

Multiple Note Create

Contact Type: In Person

Subject: Outreach

Notes: Met with service organization leadership to set up a time that I can come out and work with veterans on site.

Follow-up Date:

100 Missouri Miles

Assist with Recruitment

Assisted with jobs.mo.gov

Company Specific Hiring

Customer Service Follow

DVOP Service

Develop Business

Develop OJT Contract

Follow-up on Complaint or

Make Business

Show Purpose List

Select All DeSelect All

<input checked="" type="checkbox"/>	MARINE CORPS LEAGUE	TEST	JEFFERSON CITY		EX_OTH 10	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW	123 TESTER	JEFFERSON CITY	44-0474290	009439 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW DEPT. OF MO	TESTING THIS	JEFFERSON CITY	11-1111111	11111 50	<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>

Select All DeSelect All

MEC Mailing Print Report Send Letter Export to Excel Add to Group Add Note

Total Employers: 5
Total Selected: 5

38. Click **Save** button

Toolbox 2 (Test) Powered by Oracle 11g - Employer

File Edit Navigation Options Utility MO Utility Window Help

Multiple Note Create

Contact Type: In Person

Subject: Outreach

Notes: Met with service organization leadership to set up a time that I can come out and work with veterans on site.

Follow-up Date: 06/30/14

Save Cancel

<input checked="" type="checkbox"/>	MA	PS LEAGUE	TEST	JEFFERSON CITY		EX_OTH	10
<input checked="" type="checkbox"/>	VF		123 TESTER	JEFFERSON CITY	44-0474290	009439	1
<input checked="" type="checkbox"/>	VPW	DEPT. OF MO	TESTING THIS	JEFFERSON CITY	11-1111111	11111	50
<input type="checkbox"/>							
<input type="checkbox"/>							

Select All Deselect All

MEC Mailing Print Report Send Letter Export to Excel Add to Group Add Note

Total Employers: 5
Total Selected: 5

This completes adding multiple notes to employer sites. To view the notes enter the employers record and select the notes icon

Toolbox 2 (Test) Powered by Oracle 11g - Employer

File Edit Navigation Options Utility MO Utility Window Help

Employer

Demographics Groups

Staff: Assigned

NAICS:

Ownership: FCJL:

Created From: To: Status: Active

Email: Both Open JO's Only: Show Me Hero:

Search Area: Office JEFFERSON ... Region Statewide

Counties:

Zip Codes:

Mail Worksite Both

Clear Search

	Name	Address	City	FEIN	UI ID	Size	BC
<input checked="" type="checkbox"/>	AMERICAN LEGION AUXILLIARY - DE	TEST DRIVE	JEFFERSON CITY	12-3456789	111111	20	<input type="checkbox"/>
<input checked="" type="checkbox"/>	DISABLED AMERICAN VETERANS CH	TEST RECORD	JEFFERSON CITY	12-3456789	111111	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	MARINE CORPS LEAGUE	TEST	JEFFERSON CITY		EX_OTH	10	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW	123 TESTER	JEFFERSON CITY	44-0474290	009439	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VFW DEPT. OF MO	TESTING THIS	JEFFERSON CITY	11-1111111	11111	50	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>

Select All Deselect All

MEC Mailing Print Report Send Letter Export to Excel Add to Group Add Note

Total Employers: 5
Total Selected: 5