

The key to using either the 'mail to whom' addresses, or the caregiver's address in Caregivers details is care in setting up the label in Special Lists > Caregiver and Electoral Lists > Student Caregiver Mailing Labels as follows:

Line 1 {Title} {First Names} {Family Name}
Line 2 {Postal Address 1} {Physical Address 1}
Line 3 {Postal Address 2} {Physical Address 2}
Line 4 {Postal Address 3} {Physical Address 3}
Line 5 (optional – user choice) {First Name(Student)} {Family Name(Student)}
(NOTE: right align student name in Line 5 above – set at font size 8)

Don't use BOTH the 'Mail to whom' Yes/No instruction and the Caregiver1 flag for Reports/Invoices – you must use one **or** the other. (You can use the Caregiver2-8 flag for second reports.)

We recommend that you use the 'Mail to whom' **Yes** instruction, if you want one label addressed to Mr and Mrs ?.

To achieve this you need to use grid mode on the 'Mailing details' page, filter for eldest and globally fill the column with Yes. Then filter for non-eldests and fill with 'No'. This will allow 1 label per family for reports. Select either the postal **or** physical as the preferred address (you must select one **or** the other).

Now for second reports, you can use the flags on the 'Caregiver details' page. Tick reports on any caregiver to get a second report, as indicated above. To select the preferred address here you need to remember that if you select 'Postal' as preferred, the label will have the physical address on it and vice versa, ie, there is currently a mix up in the code which causes the opposite address to be printed from the one selected as 'Preferred'.

If you want your reports to go to the first caregiver and not to 'Mail to whom', then use the 'Reports' flag in 'Caregiver details' and do NOT use the Yes/No instruction on the 'Mailing details' page (set relevant columns in Grid mode to 'No').

NOTE: Using Student Caregiver mailing labels, the correct flag set will be used only if there is data on all caregivers.

To achieve this, set up a new document to merge the relevant fields on to for grid mode editing as follows:

- 1 Click 'Add document'
- 2 Click 'Data assistant'
- 3 Click 'Student Manager' then 'Personal'
- 4 select students 'First Names' and 'Family Name' columns. Click 'Student Manager' again then 'Caregivers'
- 5 Select CGAddress1, CGAddress2 etc through to CGAddress8
- 6 Click 'Next' until data fields appear on the document
- 7 Save the document and add it to your Viewing List
- 8 Open the document in 'Grid mode'

To get the postal addresses as the Preferred address, globally fill the column(s) with 1. Right-click the column heading and select 'Data column functions, fill this column with', your own number and enter a 1. If you want the physical address as the preferred address, enter a 0 (zero).

If you have board elections in mind you will want labels for both caregiver 1 and caregiver 2 for each eldest student. The BOT Elections Utility will take care of who has the flag set to achieve this, however you will need to specify the preferred address(es).

In summary, for reports and invoices you can use a combination of the 'Mail to whom' Yes/No instructions and the Caregiver details report flag to get the labels both first and second reports in a single print run. Just remember to use the 'Mail to whom' **Yes** instruction for the first report/invoice and the 'Reports' flag in 'Caregiver details' to get the second reports (typically on the 2nd or 3rd caregiver who lives at a different address from the 'Mail to whom' /'student').

If you remember that the 'Preferred' address in the 'Mail to whom' is accurate - but that it is opposite in 'Caregiver details', you should be fine.

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