Osprey Approach: Add Multi-Record Dossier Merge-fields to Standard Documents

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If you have created Multi-line Dossier pages you can display the information within Standard Documents, this guide will show the process of creating a table to merge all the records.

> At least one Multi-Record Dossier must be set and populated with records.

> Multi-record Dossier Pages can only be populated using the Osprey Approach App for Windows.

Select Supervisor and then Case Management Setup, Standard Documents, Add Standard Document

Save   Cancel

| Document Type | Standard ⌄ |
| Work Type | Global ⌄ |

Residential Conveyancing Sale - Turnkey

TM_test

TM_LA

Transfer of equity

Wills & Probate

Wills

Oscar_Matter 1

Description	
Expert Type	
Retention Period	
Copy to Client?	
Copy To Associate?	No ⌄
Auto Web Enabled	☐

Select a Work Type, Fill in a suitable description and other options

Type.

| Filter by Work Type: | Wills ⌄ |
| Filter by Expert Type: | (None) ⌄ |

WORK ID	DESCRIPTION	EXPERT TYPE	
WILLS	Address Test Document 2.0 Tom P		
WILLS	Letter to Executor		
WILLS	New Will Standard Document		
WILLS	template 1		
WILLS	template 2		
WILLS	template 3		
WILLS	template contacts (linked but not used)		

Locate the new template and right click to select Fields

Design Document   Preview Document

STANDARD DOCUMENT FIELDS

◉ Client ○ Dossier ○ Formula ○ Client Dossier ○ Ask ○ Include Document ○ CDS

Available Tables   ACCUSER ⌄

MANAGE FIELDS

Save

LINK/UNLINK	FIELD
☐	USER_ID
☐	EMAIL_ADDRESS

Select Dossier, choose a Dossier Page, then tick the fields to link, click save and finally Design Document to launch the template

Mailings   Review   View   Help   Osprey TM   🔍 Search

Address Block   Greeting Line   Insert Merge Field ▾   Rules ▾   Match Fields   Update Labels

Write & Insert Fields

≪ ≫ ABC   Preview Results |◁ ◁ 1 ▷ ▷| Find Recipient   Check for Errors

Preview Results

Finish & Merge ▾

Finish

Insert content

From the insert menu insert a table of the appropriate size. In the first row enter the column headings

Place the cursor in the first cell of the second row and from Mailings > Insert Merge Fields drop-down list from the top ribbon select any field

> **Note** – The merge-field related to Multi-Record Dossiers are not displayed by the Insert Merge Fields drop-down list, therefore, any other can be selected

Right-click on the inserted merge-field > Edit field

Change the existing Name only by typing "TableStart:", then the Dossier Page ID

Click OK to save the merge-field changes

Repeat the previous step into the last cell of the second row, but by typing "TableEnd" instead of "TableStart"

Insert merge-fields (any) into each cell from the second row of the table, including in the first cell immediately after "TableStart" merge-field and also into the last cell before "TableEnd"

Edit each merge field and rename it with the ID of the desired multi-record Dossier Field using the format «FieldID»

If necessary, add Totals into the last row in the same way, but using the format «PageID_FieldID_TOTAL» when editing this merge-field