



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

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The latest version is always online at
<https://support.ospreyapproach.com/?p=17636>



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.

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
☐	Dossier Field to input an address.

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

 Save

 Cancel

Document Type: Standard

Work Type: Global

Description: Residential Conveyancing Sale - Turnkey
TM_test
TM_LA
Transfer of equity
Wills & Probate
Wills
Oscar_Matter 1

Expert Type: No

Retention Period: ☐

Copy to Client?

Copy To Associate?

Auto Web Enabled

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

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

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