



# Osprey Approach: Cheque Printing Setup

This help guide was last updated on  
Apr 24th, 2024

The latest version is always online at  
<https://support.ospreyapproach.com/?p=30699>



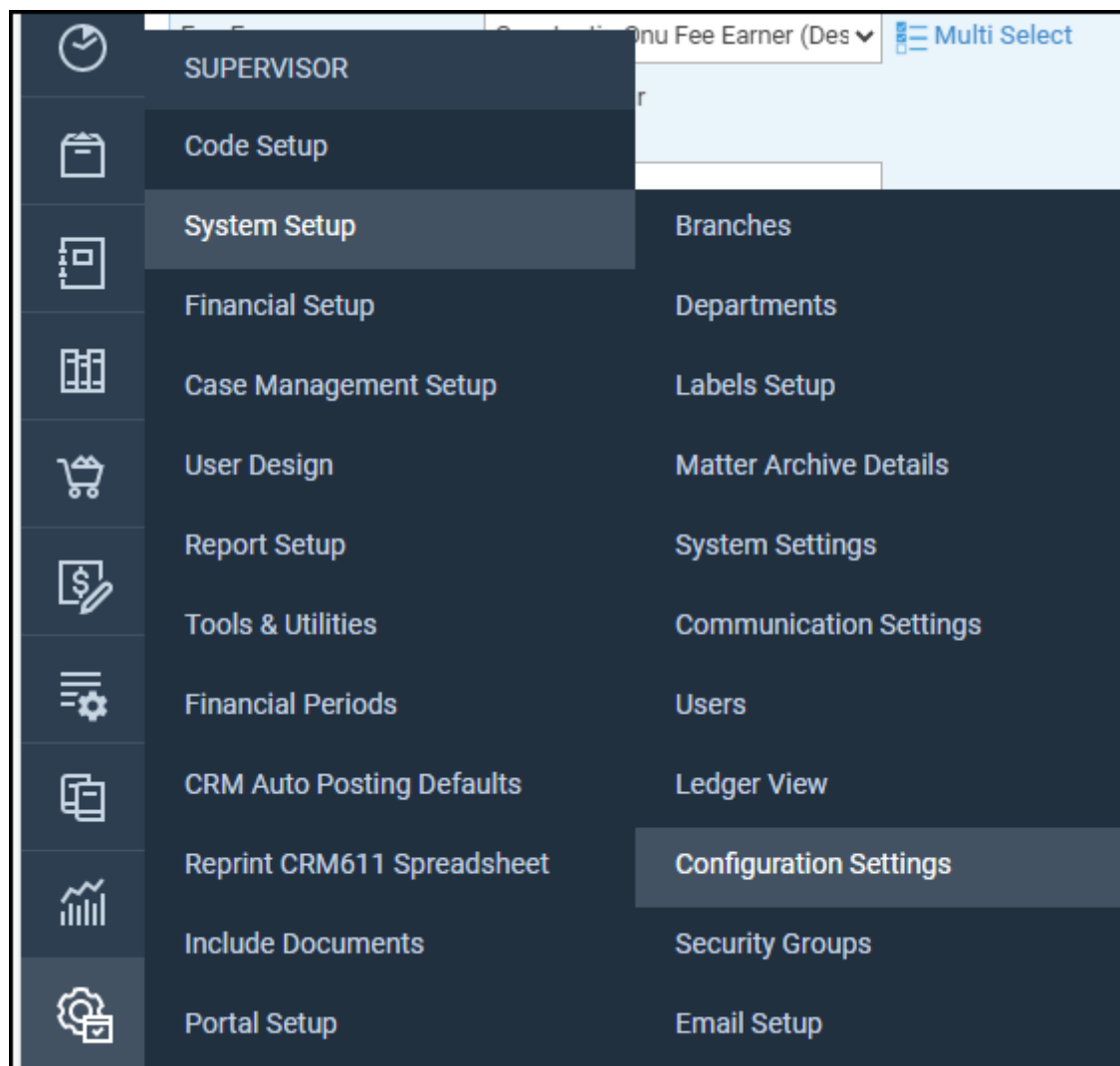
# This guide will go through the cheque printing setup, enabling you to run any cheques on pre-printed stationery

Osprey can print your cheques onto pre-printed stationery, saving time writing cheques which have already been posted on the system.

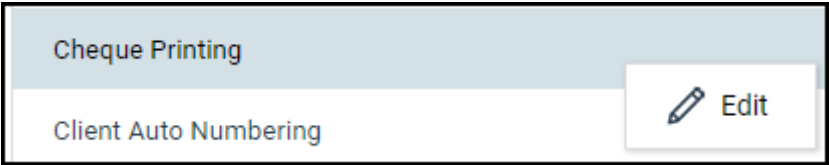
You should contact your bank to arrange for pre-printed stationery to be provided. Once you have pre-printed stationery or a template copy from your bank, you can set up the system ready to start printing your cheques.

## Enable cheque printing

Before you can print cheques, you will need to enable the option on the system. Select Supervisor > System Setup > Configuration Settings.



Locate the switch called Cheque Printing, right click it and select Edit



Change False to True, then Save your changes.

SWITCH NAME	SWITCH VALUE
Automatic Timer Start	True
Bill Auto Numbering	True
Bill Filtering	False
Cheque Printing	True

# Design your cheque template

You will now need to design the Word document template to fit your stationery.

Select Supervisor > Financial Setup > Cheques > Cheque Templates

SUPERVISOR

Code Setup

System Setup

Financial Setup

Banks

Case Management Setup

Cheques

Cheque Templates

User Design

Interest Rates/Bands

Report Setup

Deposit Accounts

Tools & Utilities

Periods

Financial Periods

Currency

CRM Auto Posting Defaults

Countries

Reprint CRM611 Spreadsheet

Include Documents

Portal Setup

Select New

Supervisor

Financial Setup

Cheques

Cheque Templates

New

Export

Enter a description, and select whether you would like your cheque to display as unitary or as a sentence.  
e.g. Unitary cheques have the units split so an amount of £2320.25 would look like this:

Thousands	Hundreds	Tens	Units	Pence
2	3	2	0	25
Unitary cheque				

Non-unitary cheques have the amount shown in words e.g.

Amount:
Two thousand three hundred and twenty pounds twenty five pence
<i>Non-unitary cheque</i>

Finally, choose the currency and click Save.

Supervisor		Financial Setup		Cheque Template		Add	
Save		Cancel					
Cheque Description:		Client Bank Cheque					
Unitary:		<input checked="" type="checkbox"/>					
Cheque Currency:		Pound Sterling					

To open the template for editing, right click your template, click Edit

Supervisor		Financial Setup		Cheques		Cheque Templates	
New		Export					
CHEQUE DESCRIPTION							
Office Bank Cheque							
Client Bank Cheque							
Edit							

Now select Design


Supervisor


Financial Setup


Cheques


....

Edit

 Save

 Cancel

 Design

 Preview

Cheque Description:

Client Bank Cheque

Unitary:

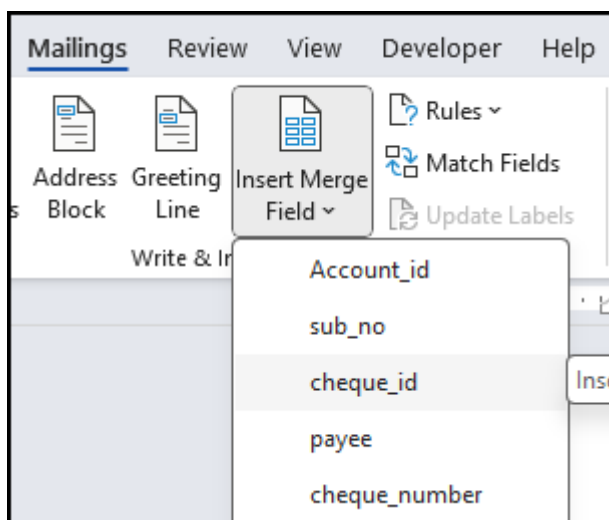
☐

Cheque Currency:

Pound Sterling

Word will open, and you can now create your template to match your stationery. We would recommend using tables for this.

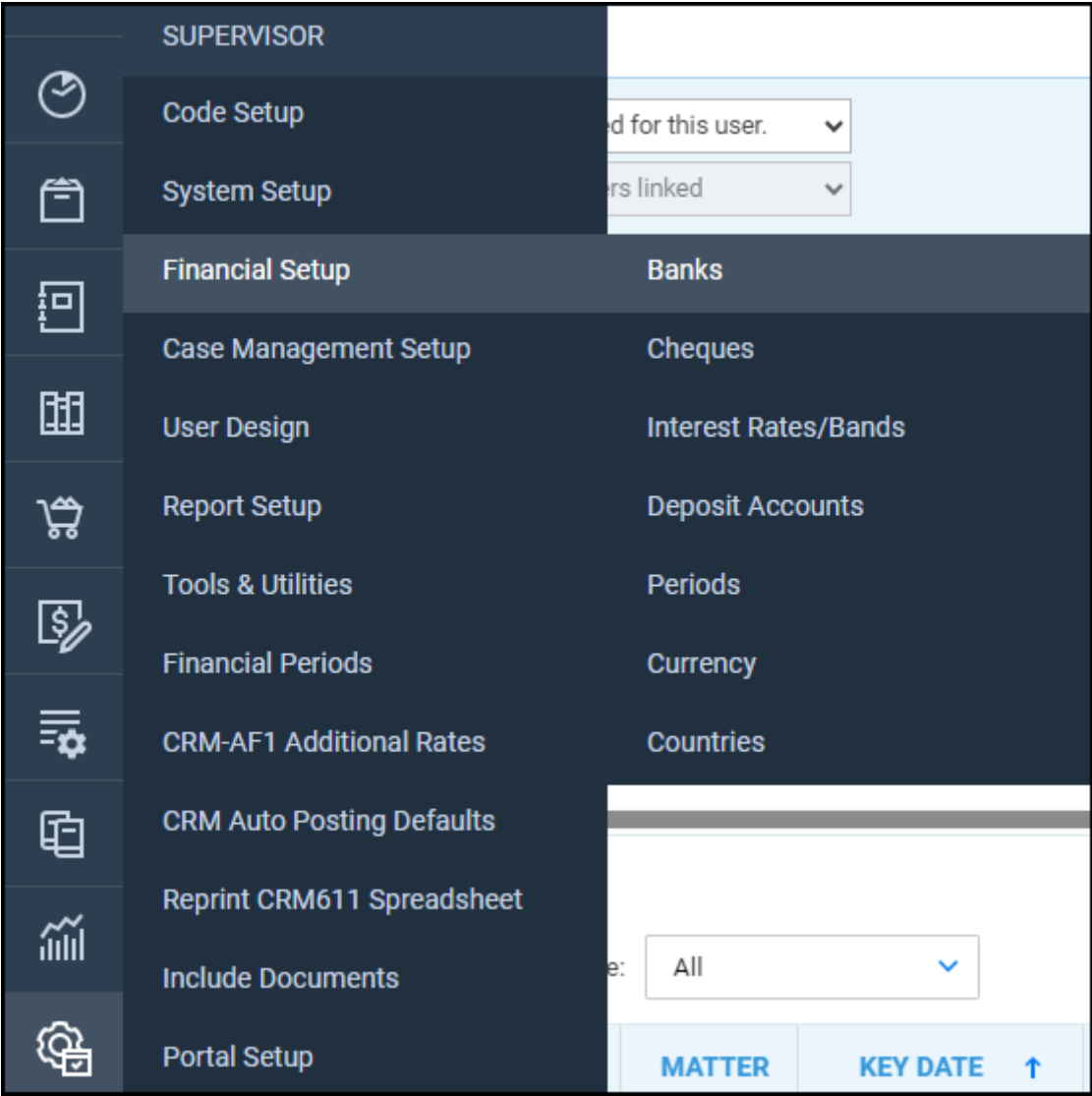
You may insert the relevant merge fields by selecting the Mailings menu and choosing Insert Merge Field to select the field to insert.



When you are finished close and Save the template

# Linking your cheque template to the relevant bank(s)


Now that you have designed your Cheque Template you will need to link it to the Bank or Banks that you want to use it for. Navigate to the Supervisor menu, Financial Setup and Banks.



Click Edit, set the last cheque number (Osprey will add one to this when you post your next cheque), select the Cheque Template and click Save.

## BANK ACCOUNT

Bank Type:

Client 

☐ Set as default for branch

ALL



Last Cheque  
Number:

000500

Cheque Template:

Cheque Template



Bank Account  
Number:

123456

Bank Sort Code:

11-22-00