

Osprey Approach: Create a Letter to a Contact or Organisation

This help guide was last updated on Apr 11th, 2024

The latest version is always online at https://support.ospreyapproach.com/?p=1974

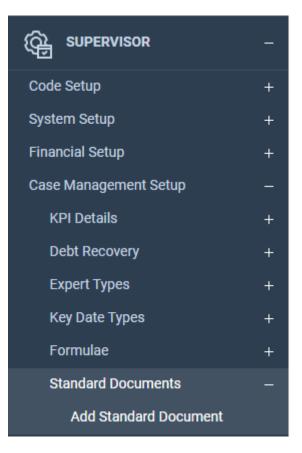
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You can select a contact or organisation to send an ad hoc letter to.

## Using the Browser

From Supervisor > Case Management Setup > Standard Documents, select Add Standard Document.



Choose the work type, if any, or leave set as Global to appear on all work types.

Give the document a description.

If this is to be a letter to a certain type of contact (e.g. Estate Agent) then select the relevant Expert Type.

Fill in any other details as relevant.

Click Save when done.

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Now, locate the letter within your list, right click it, and select the Fields option:

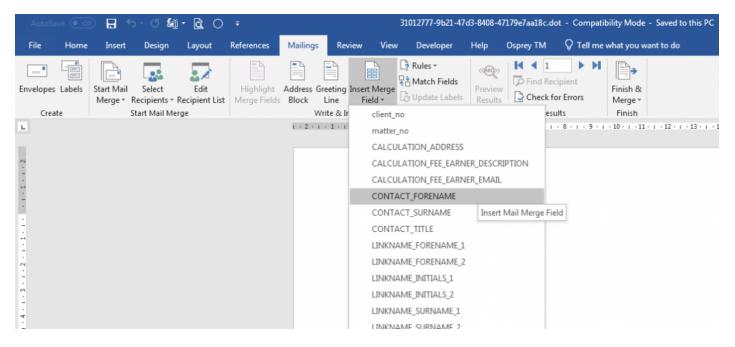
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Link any fields you wish to use by ticking the Link/Unlink box and selecting Save when done.

Design your document as required, inserting fields as usual:



Close and save the document when done.

When this document is run from Document Production, you will be prompted to choose the contact / organisation to whom you would like to send the document:

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Select the contact / organisation you require and the letter will be merged with the relevant details.

## Using the Case Management App

## From Supervisor > Case Management Setup > Standard Documents, select Add Standard Document.

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Choose the work type, if any, or leave set as Global to appear on all work types.

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Fill in any other details as relevant.

Click Save when done.

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Now, locate the letter within your list, right click it, and select the Fields option

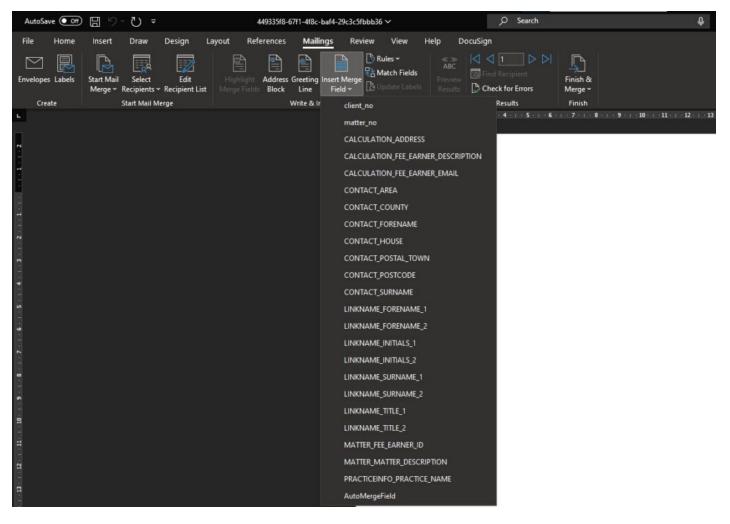
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