



Osprey Approach: Create a Letter to a Contact or Organisation

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

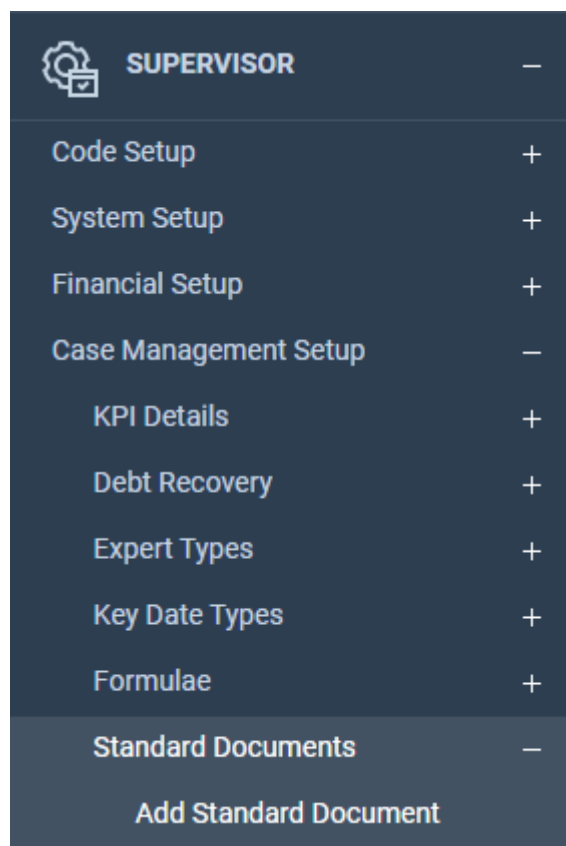
The latest version is always online at
<https://support.ospreyapproach.com/?p=1974>



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.

Osprey Pracctice Ltd	Today's Units: 55 Today's Time: 05h:30m Today's Value: £385.00	<input type="text" value="Global search"/>
Supervisor Case Management Setup Standard Documents Add Standard Document		

Save

Cancel

Document Type	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Standard ▼</div>
Work Type	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Global ▼</div>
Description	<div style="border: 1px solid #ccc; padding: 5px;">Ad Hoc letter to any Contact</div>
Expert Type	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">None selected ▼</div>
Retention Period	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">None selected ▼</div>
Copy to Client?	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">No ▼</div>
Copy To Associate?	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">No ▼</div>
Auto Web Enabled	<input type="checkbox"/>
SERVER SIDE MERGE OPTIONS	
Run Silently	<input type="checkbox"/>
Auto Print	<input type="checkbox"/>
Batch Print	<input type="checkbox"/>
TIME RECORDING OPTIONS	
Automatically Time Record on Matters:	<input checked="" type="checkbox"/>

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

Practice Ltd Today's Value: £385.00

Supervisor Case Management Setup Standard Documents Add Standard Document

+ Add Standard Document + Add Current Document Export

Document Type: Standard

Filter by Work Type: All

Filter by Expert Type: (None)

WORK ID	DESCRIPTION
GLOBAL	Ad Hoc letter to any Contact

Edit

Fields

E-mails

Rate

In the Available Tables box, select Contact if you wish to send the letter to Contacts, or Organisation if you want to send the letter to Organisations:

Supervisor Case Management Setup Standard Documents Standard Document: Ad Hoc letter to any Contact

Design Document Preview Document

STANDARD DOCUMENT FIELDS

Client Formula Client Dossier Ask Include Document CDS

Available Tables CONTACT

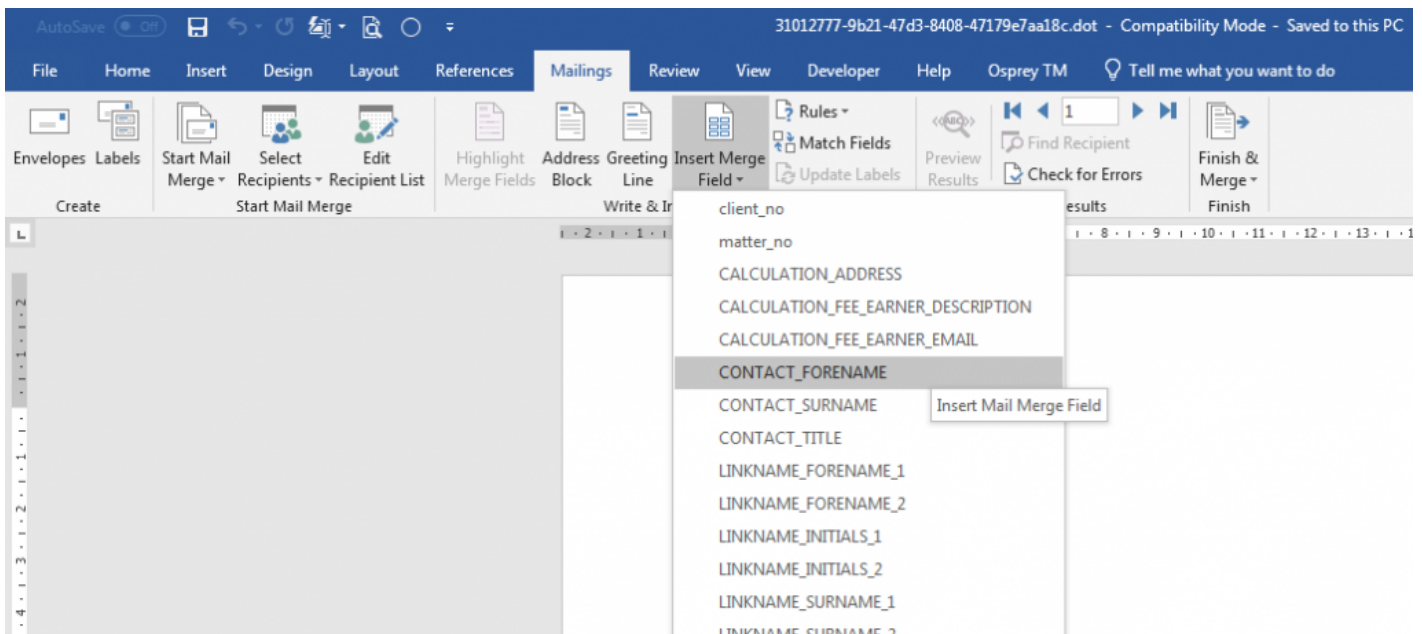
MANAGE FIELDS

Save

LINK/UNLINK	FIELD	LINKED?
<input type="checkbox"/>	AREA	•
<input type="checkbox"/>	COUNTY	•
<input type="checkbox"/>	E_MAIL	•
<input type="checkbox"/>	FAX_NO	•
<input type="checkbox"/>	FORENAME	•
<input type="checkbox"/>	HOUSE	•
<input type="checkbox"/>	INITIALS	•

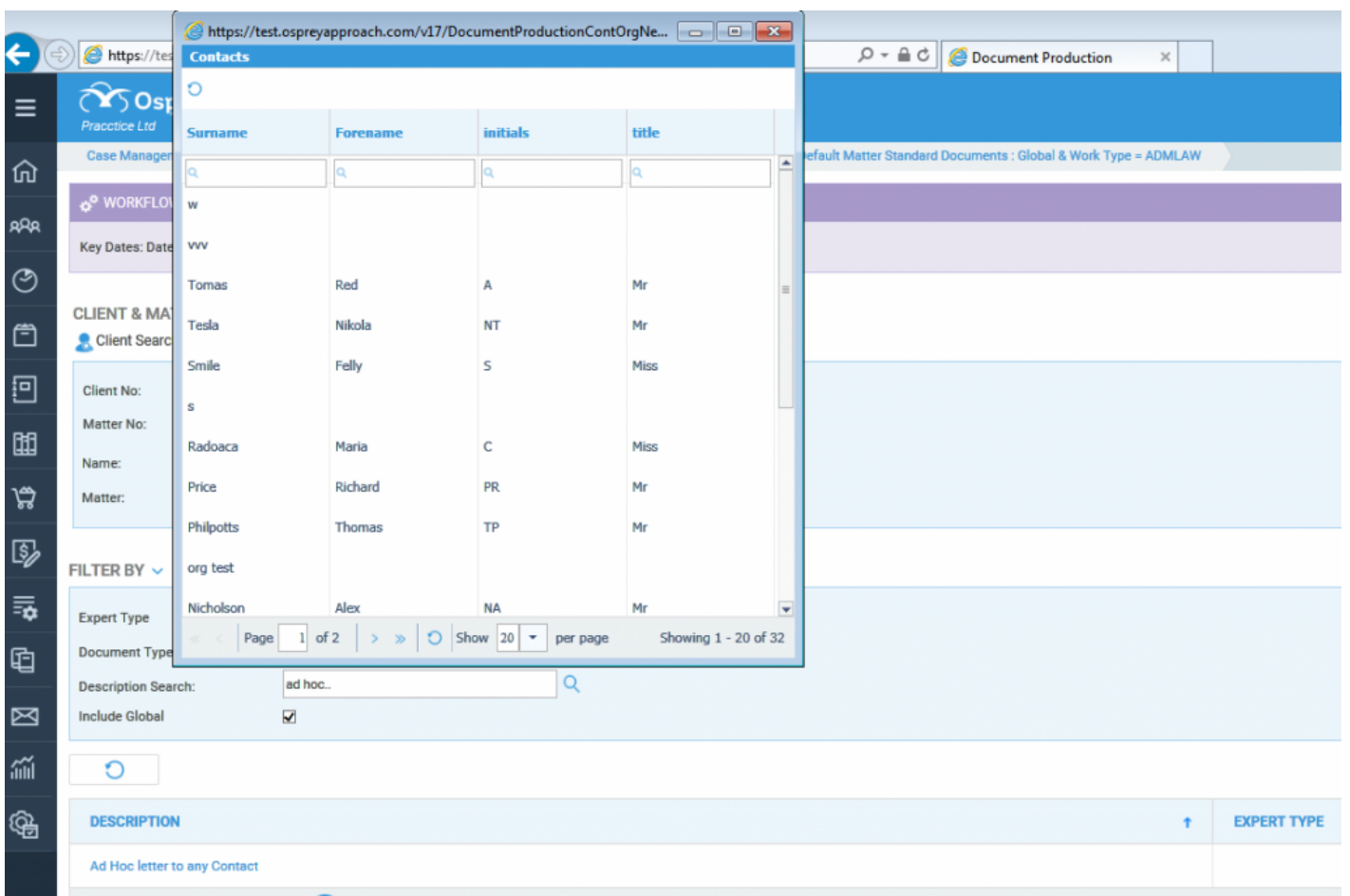
Link any fields you wish to use by ticking the Link/Unlink box and selecting Save when done.

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:



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.

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

Standard Documents

Batch Aged Debtor Letters

Bill Template

Label Templates

Cheque Templates

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:44 / 0

Standard Documents

+ Add Standard Document

+ Add Current Document

Filter by:

Document Type: Standard

Work Type: ALL

Expert Type: None

Search...

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
FWRCP	_1 doc			N	N
FWRCP	_1 doc from browser			N	N
FWRCP	_doc from App			N	N
GLOBAL	_1 DD standard doc			A	A
GLOBAL	_1 Test doc created in App			A	A
CRIME	_andrei			N	N
GLOBAL	_andrei2			N	N
GLOBAL	_andrei3			N	N
GLOBAL	_CONTACT 1			N	N
GLOBAL	_CONTACT&ORGANISATION 1			N	N
GLOBAL	_ORGANISATION 1			N	N
GLOBAL	_ORGANISATION 2.1			A	A
GLOBAL	_ORGANISATION 3			N	N
GLOBAL	_ORGANISATION 4			N	N

I'm Post, your virtual assistant! Please, tell me what you want to do...

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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Label Templates

Cheque Templates

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:44 / 0

Standard Documents

← Save

Document Type: Standard

Work Type: GLOBAL

Description: Ad Hoc letter to any Contact

Expert Type: None selected

Retention Period: None selected

Copy to Client: No

Copy to Associate: No

Auto Web Enabled Client: ☐

Auto Web Enabled Associate: ☐

SERVER SIDE MERGE OPTIONS

Run Silently: ☐

Auto Print: ☐ Auto printing is only applicable to letters which are run silently.

Batch Print: ☐

TIME RECORDING OPTIONS

Automatically Time Record on Matters: ☐

I'm Post, your virtual assistant! Please, tell me what you want to do...

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

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Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:44 / 0

Standard Documents

+ Add Standard Document

+ Add Current Document

Filter by:

Document Type: Standard

Work Type: ALL

Expert Type: None

ad hoc

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
GLOBAL	Ad Hoc letter to any Contact			N	N

Edit

Fields

I'm Postit, your virtual assistant! Please, tell me what you want to do...

In the Available Tables box, select Contact if you wish to send the letter to Contacts, or Organisation if you want to send the letter to Organisations

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00:00:44 / 0

Standard Documents

← Design Document

Preview Document

STANDARD DOCUMENT FIELDS

☒ Client ☐ Formula ☐ Client Dossier ☐ Ask ☐ Include Document ☐ CDS

Available Tables: CONTACT

MANAGE FIELDS

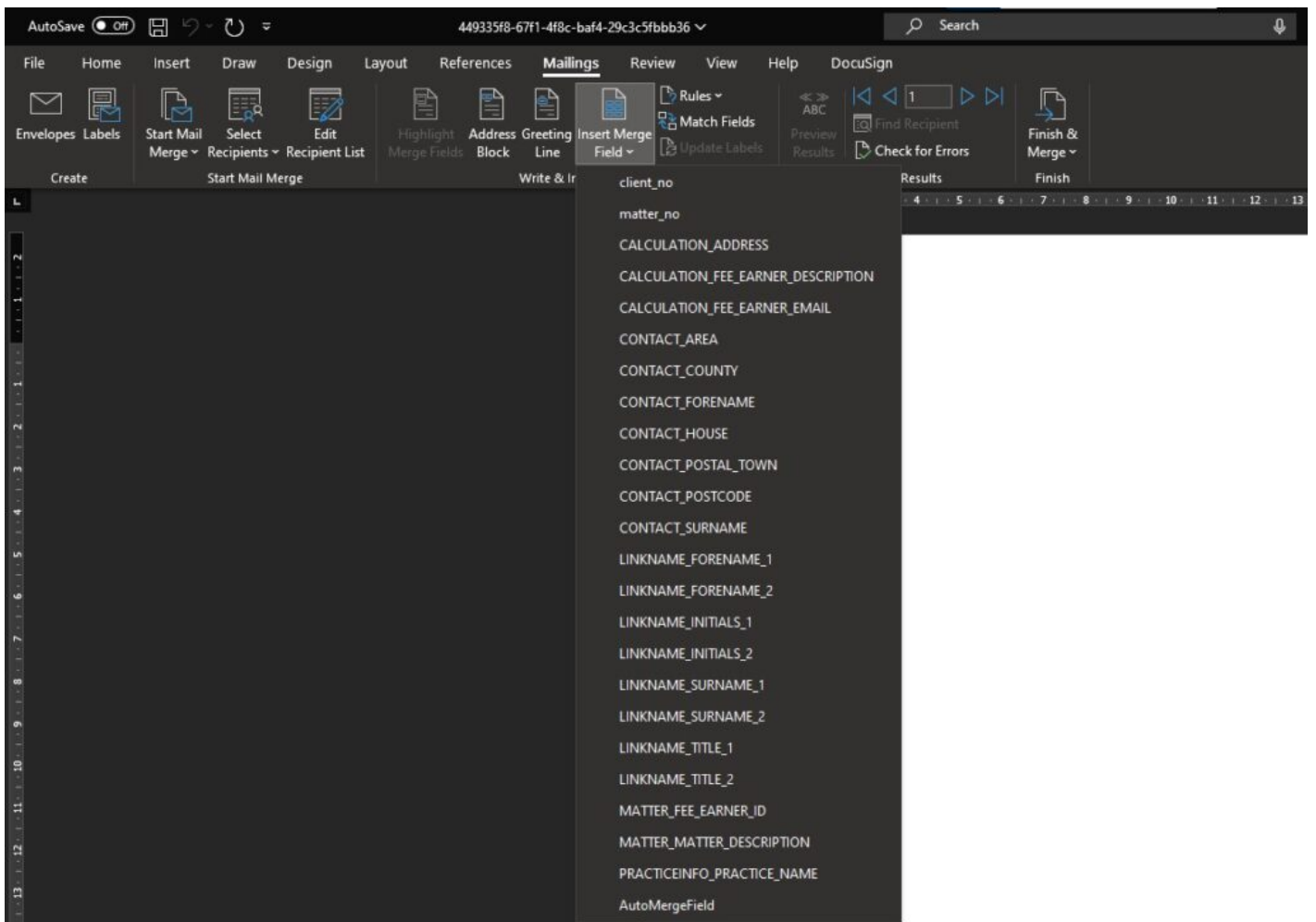
Save

LINK / UNLINK	FIELD	LINKED
<input checked="" type="checkbox"/>	AREA	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	COUNTY	<input checked="" type="checkbox"/>
<input type="checkbox"/>	E_MAIL	<input checked="" type="checkbox"/>
<input type="checkbox"/>	FAX_NO	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	FORENAME	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HOUSE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	INITIALS	<input checked="" type="checkbox"/>
<input type="checkbox"/>	MOBILE_NO	<input checked="" type="checkbox"/>
<input type="checkbox"/>	PHONE_NO	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	POSTAL_TOWN	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	POSTCODE	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	SURNAME	<input checked="" type="checkbox"/>
<input type="checkbox"/>	TITLE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	WWW	<input checked="" type="checkbox"/>

I'm Postit, your virtual assistant! Please, tell me what you want to do...

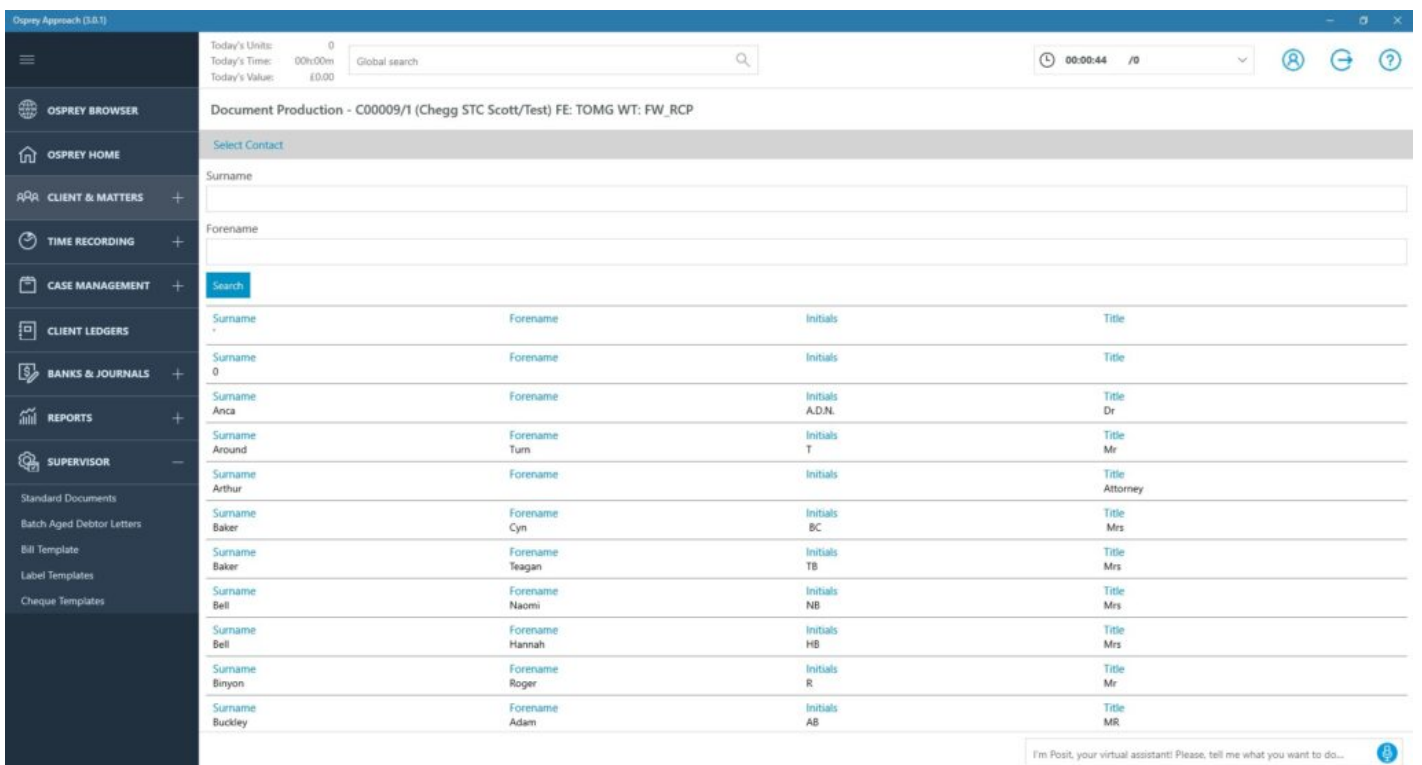
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