

Osprey Approach: Create Compulsory Fields in Client & Matter Extensions

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Osprey will allow you to set up compulsory fields on client and matter extensions which are designed to ensure that a particular dossier field has been filled in before allowing the user to progress to the next screen. This can be useful for ensuring that all critical data relating to a client or matter has been captured.

	User Design	Questionnaire Administrator
	Report Setup	View
	Tools & Utilities	
	Financial Periods	
	CRM-AF1 Additional Rates	
	CRM Auto Posting Defaults	
	Reprint CRM611 Spreadsheet	
	Include Documents	
ĝ.	Portal Setup	

First we will set up a compulsory field. Navigate to the Supervisor area, select the User Design option and then click on View.

Change the view type drop down to either Client Extension (Individual or company) or Matter extension, whichever is appropriate.

Hew Export View Type	All		Search Q		
SCRIPTION	All	^	^	WORKTYPE	VIEW TYPE
	Client Extension - Company			HORRITE	
1st Client Instruction Meeting Details TK_CRM	Client Extension - Individual			TK_CRM	Custom Questionnnaire
1st Defendant - Liability	Custom Company Client View			PI	Custom Questionnnaire
1st Defendant - Liability TK_PI	iability TK_PI Custom Individual Client View			TK_PI	Custom Questionnnaire
1st Defendant Details (non RTA)	Custom Matter View			PI	Custom Questionnnaire
1st Defendant Details (non RTA) TK_PI	Custom Questionnnaire	~	TK_PI	Custom Questionnnaire	

Right click on the extension you wish to create compulsory fields on and select the option to Link.

Tick the compulsory tick box next to the field(s) you wish to be compulsory.

PAGE	FIELD	DESCRIPTION	LINK/UNLINK	COMPULSORY
ANCCLIDETS	BIRTHPLACE	Place of Birth		☑ 🔶
ANCCLIDETS	BIRTHSURNA	Surname at Birth		
ANCCLIDETS	CLINAME	Client Full Name	Z	
ANCCLIDETS	CONFLICTCK	Conflict Check?		

Click Save Link Status to keep your changes.

If you now try to add a client or matter which has an extension with compulsory fields, and you do not fill these fields in, you will be unable to save and will be prompted to complete these fields, as shown in the screenshot below.

MATTER EXTENSION (AL) ~

 Please check the following: 'Annual Leave Start Date' field is required 'Annual Leave End Date' field is required 	
Annual Leave Start Date:	
Annual Leave End Date:	

Once all compulsory fields have been completed you will be able to save the new client or matter.

Please note that dossier List fields cannot be made compulsory due to the way they function. A list field will always default to the first entry on the list unless a default value is set, therefore it is seen as being filled.