Osprey Approach: Produce a mail merge using the Client List report
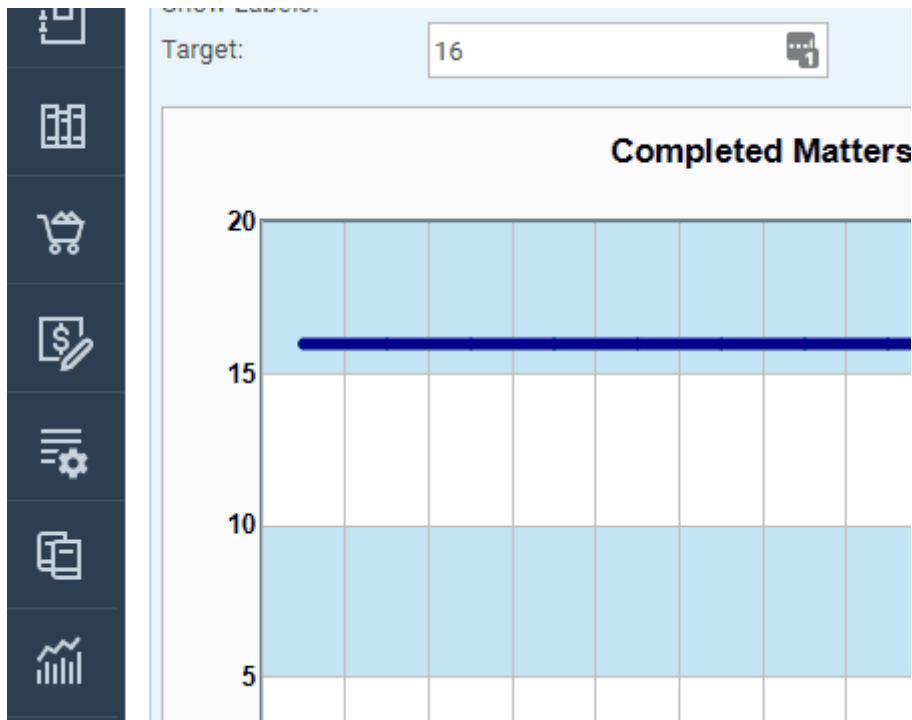
Click here for a printer-friendly version

The Client List report lists all of your clients names and addresses according to the filter options that you choose. This list can then be used for purposes outside of Osprey by exporting to Excel.

Select Reports, Miscellaneous Reports and then Client List

Filter Options

Fee Earner –Tick this box to select only certain fee earners, or leave unticked for all fee earners

Work Type –Tick this box to select only certain work types, or leave unticked for all work types

Private or LA –Leave on All for all clients or select Private or Legal Aid.

Type –Choose from All Matters, Live Matters or Archived Matters.

Date Filters –Enter the date range for the matters you wish to see

Summary – if ticked doesn't include the fee earner or work type and only matter 1.

Click Run and in the preview Export to save the data in Excel format

Open a blank word document.
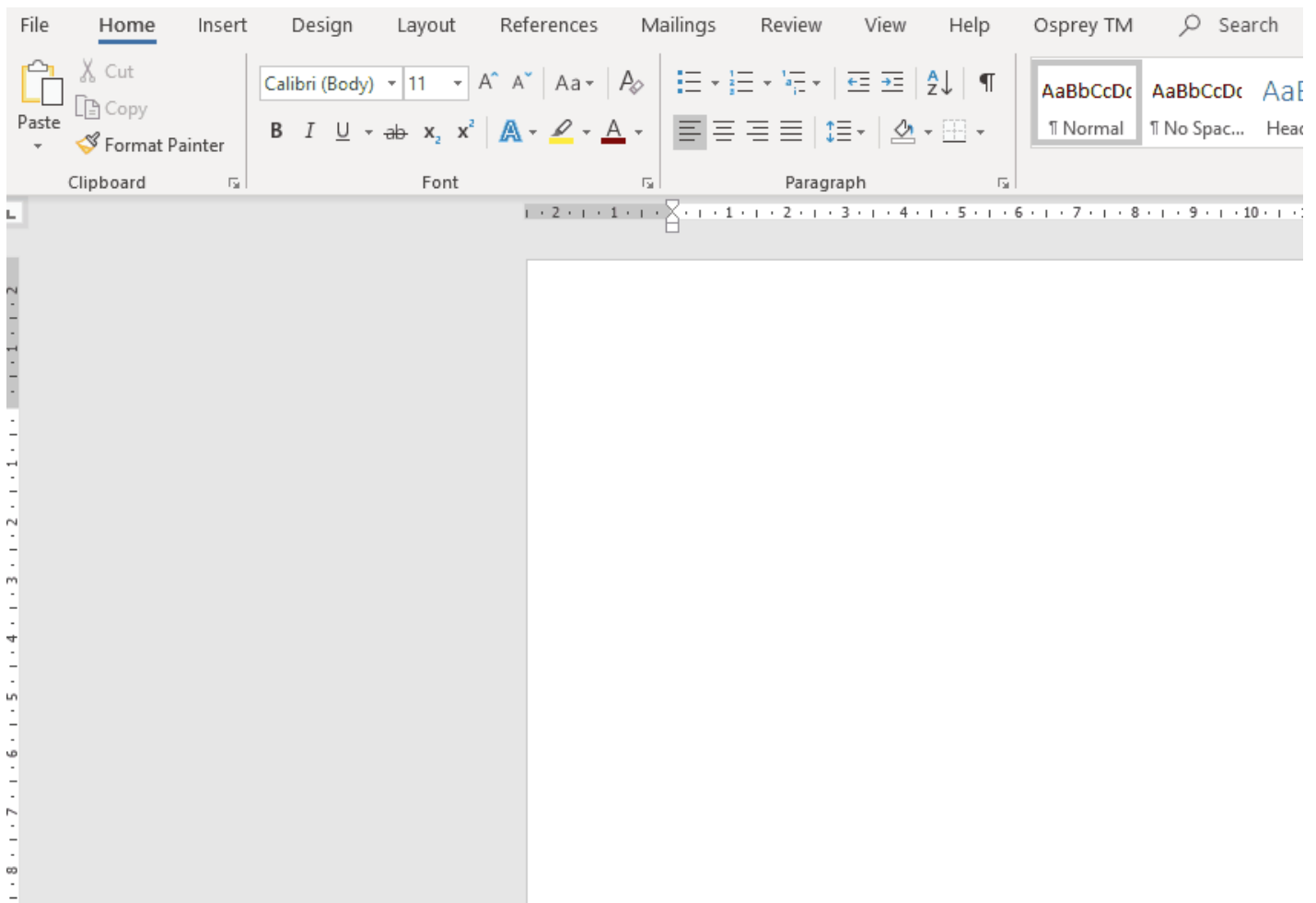
The right hand side of the screen shows the mail merge wizard, as shown above, and will assist you through the process.

Click Next: Starting Document, Next: Select Recipients and Browse to select and open the saved Client List Report

The Client list is then displayed with all items ticked. It is now possible to remove the ticks from any that need to be excluded from the mail merge. It is possible to scroll the list across to the right to see more columns.

Select the **OK** button to proceed.

This will return you to the word screen. At the bottom right select
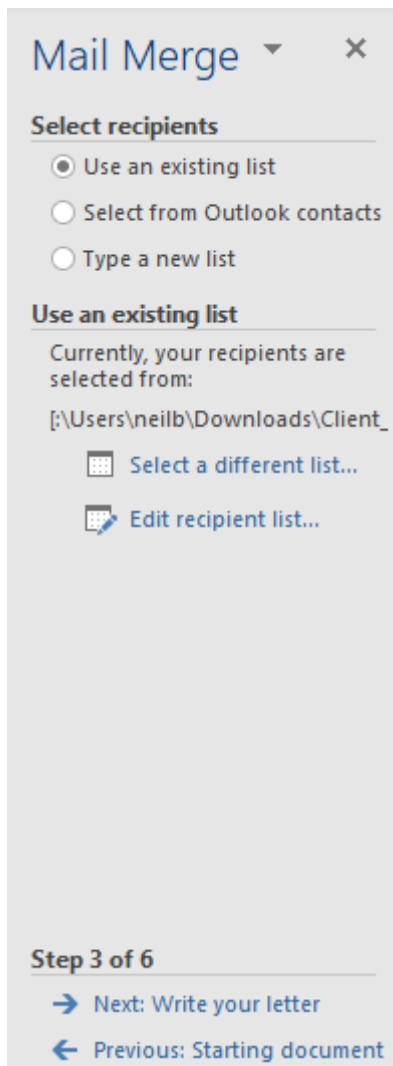
All the merge fields available for your letter are now available from the more items box on the right.

Start writing the letter to be merged inserting the merge fields in the appropriate places from the Mailings Menu, Insert Merge Field

Address Block   Greeting Line   Insert Merge Field ▾   ⍰ Rules ▾   Match Fields   Update Labels

Write & In

5 · ı · 6 · ı · 7 ·

Client

Client_House

Client_Area

Client_Town

Client_County

Client_Post_Code

Billing_House

Billing_Area

Billing_Town

Billing_County

Billing_Post_Code

Client_Name_1

Client_Name_2

Client_Name_3

Client_Name_4

Client_Name_5

AutoMergeField

Mail Merge ▾ ✕

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- 📄 Address block...
- 📄 Greeting line...
- 📑 Electronic postage...
- 🗂 More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

→ Next: Preview your letters

← Previous: Select recipients

Once the letter is completed select Next: Preview your letters, amend as necessary and then Next: Complete the merge, and lastly print.