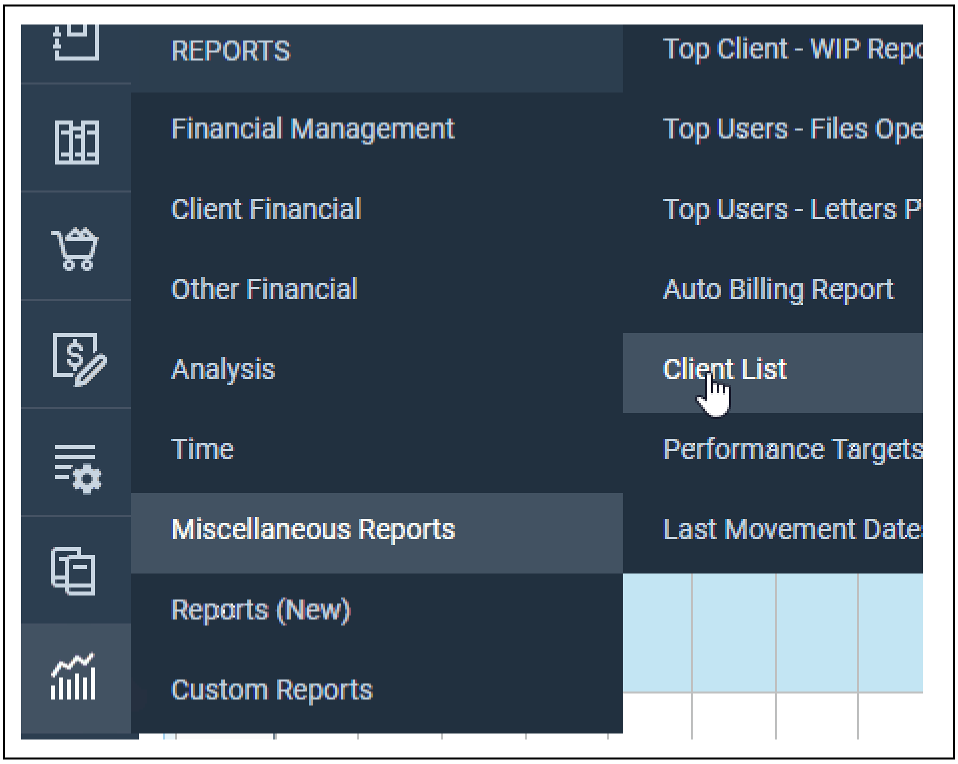
Osprey Approach: Produce a Mail Merge Using the Client List Report

This help guide was last updated on
Apr 26th, 2024

The latest version is always online at
https://support.ospreyapproach.com/?p=17418

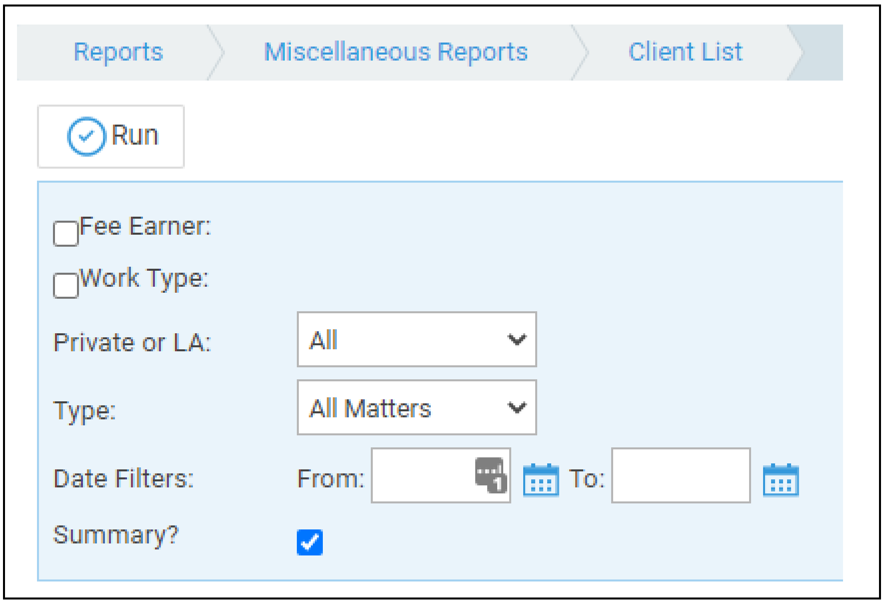
This guide will assist you in using the Client List Report to perform a mail merge

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

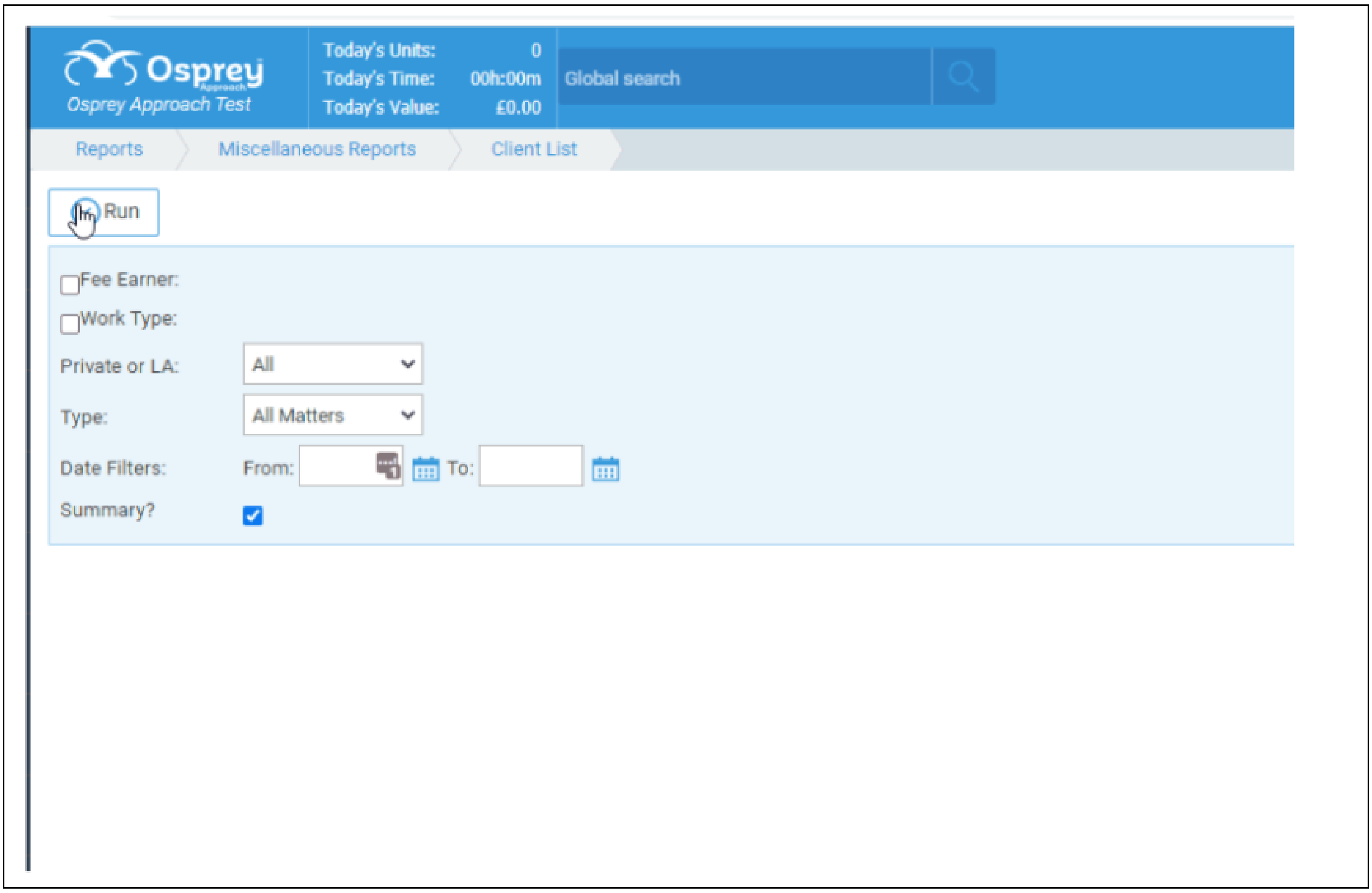
Work Type: Tick this box to select only certain work types, or leave unticked for all work types

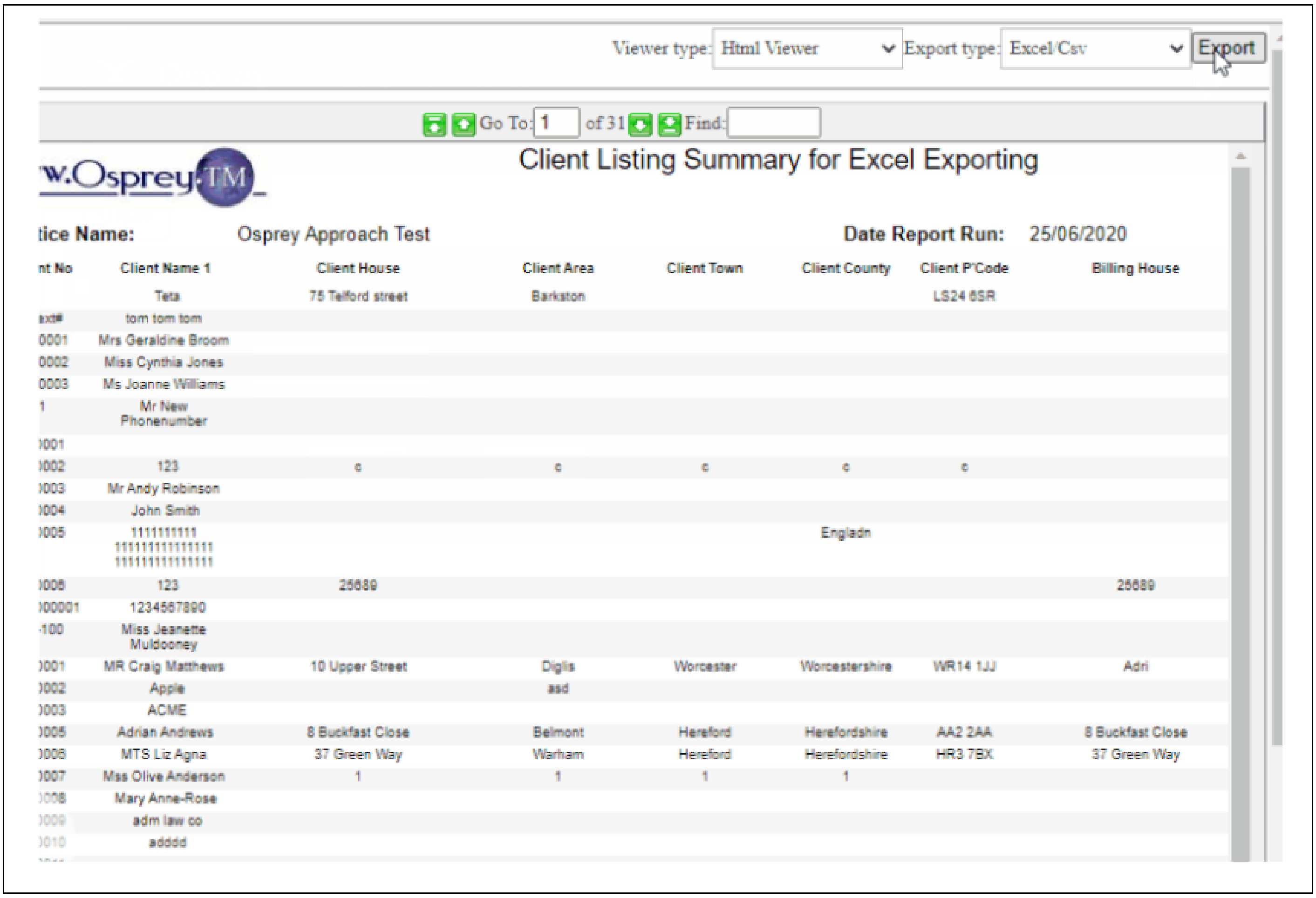
Private or LA: Leave on All for all clients or select Private or Legal Aid.

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

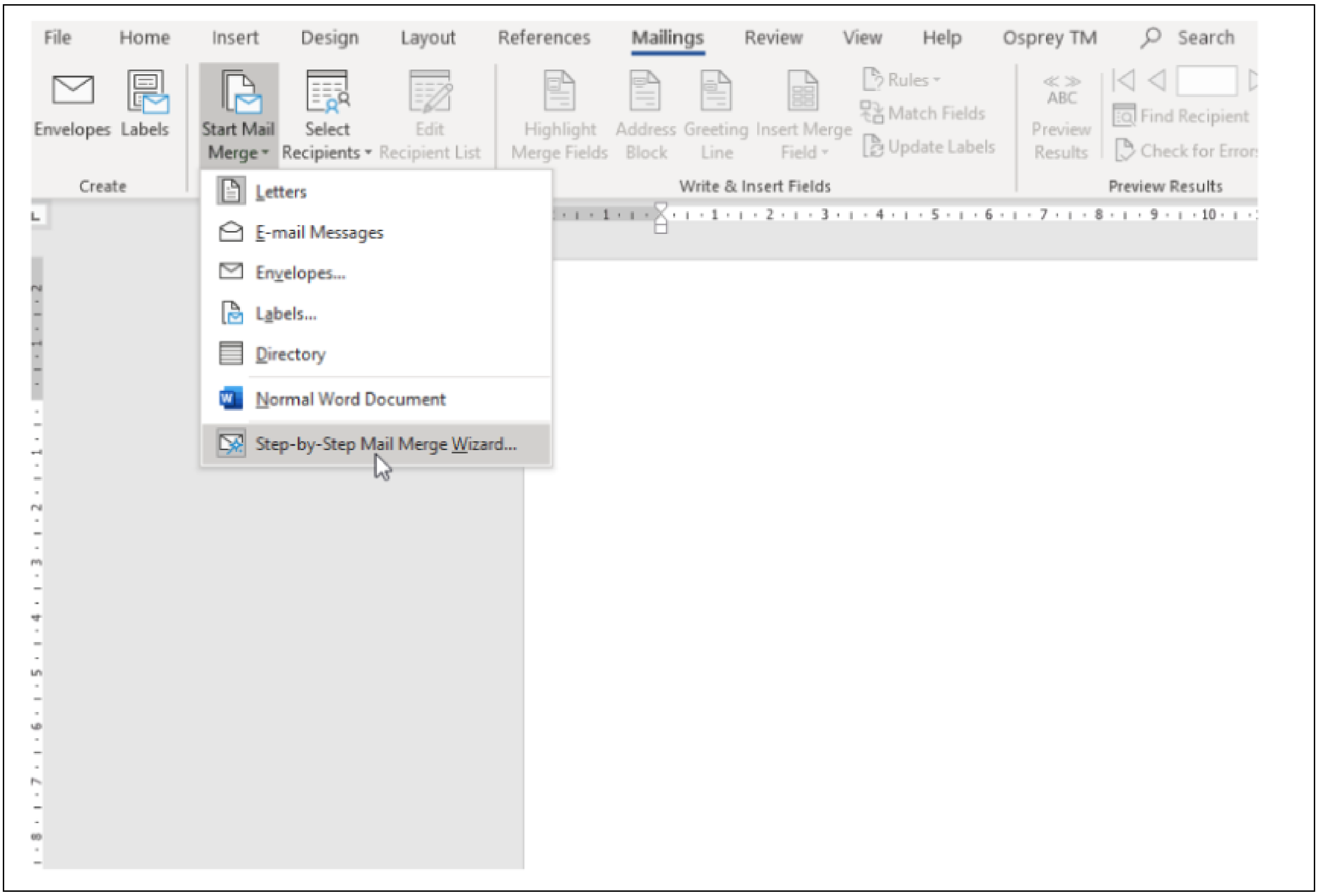
Date Filters: Enter the date range for the matters you wish to see

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

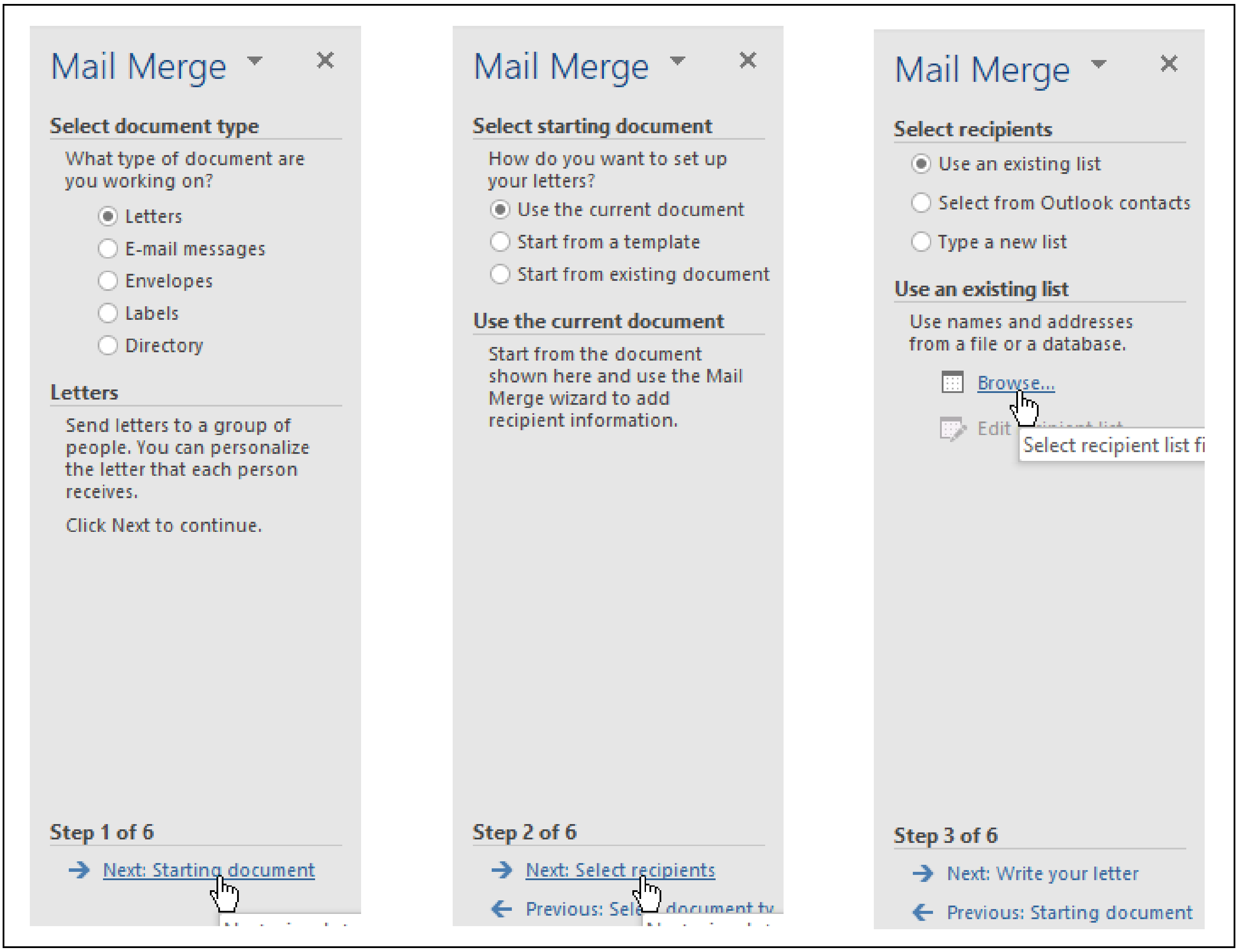




Open a blank word document.

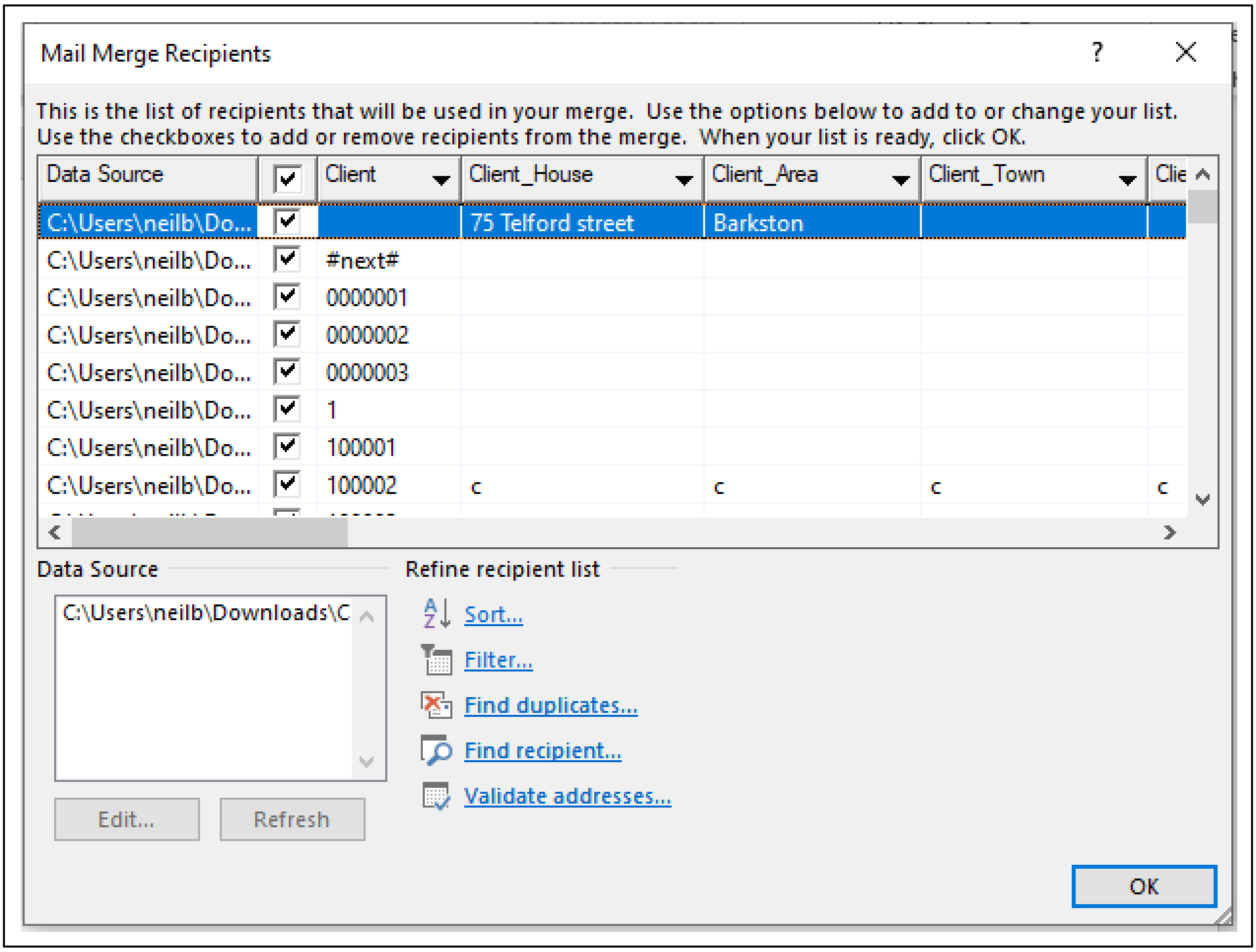


The right hand side of the screen shows the mail merge wizard, as shown below, and will assist you through the process.



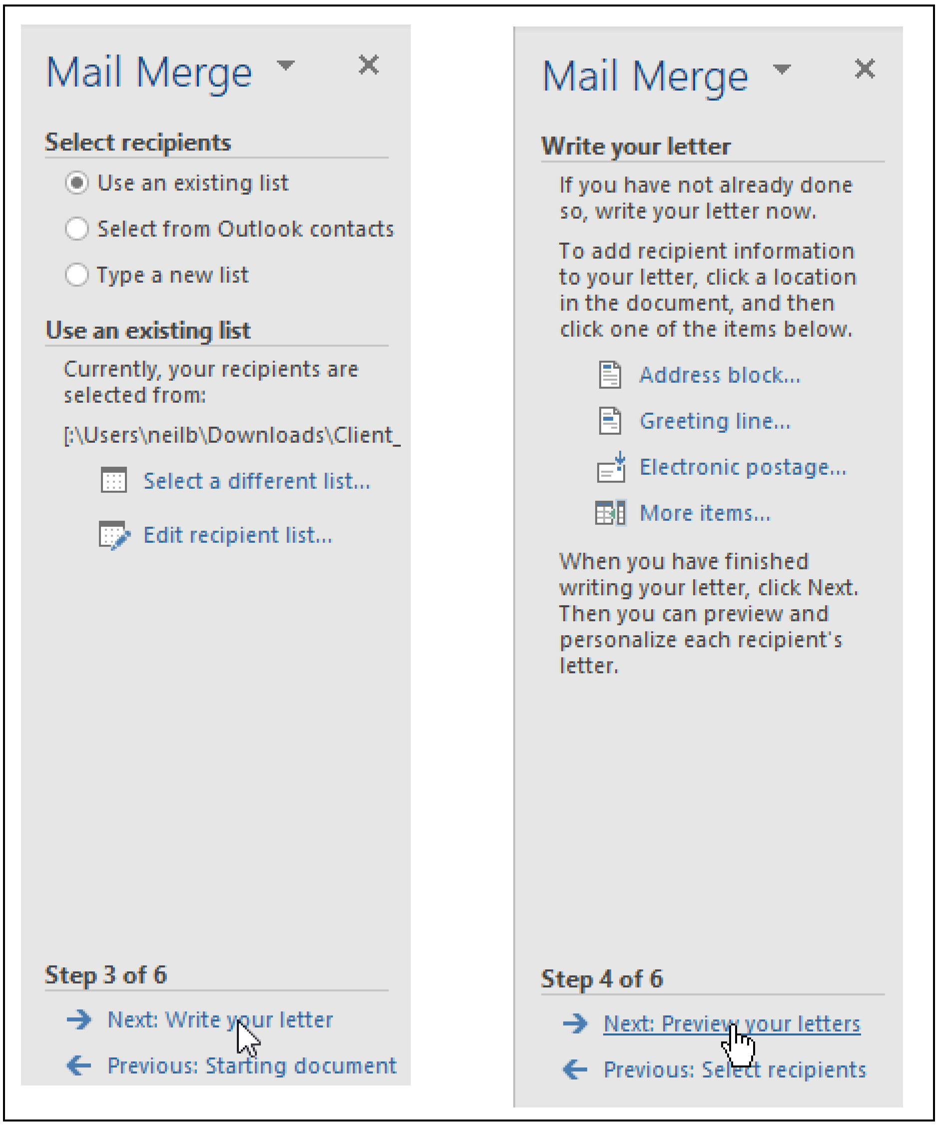
Click Next: Starting Document, Next: Select Recipients and Browse to select and open the saved Client List Report

The Client list is then displayed and all items are 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.



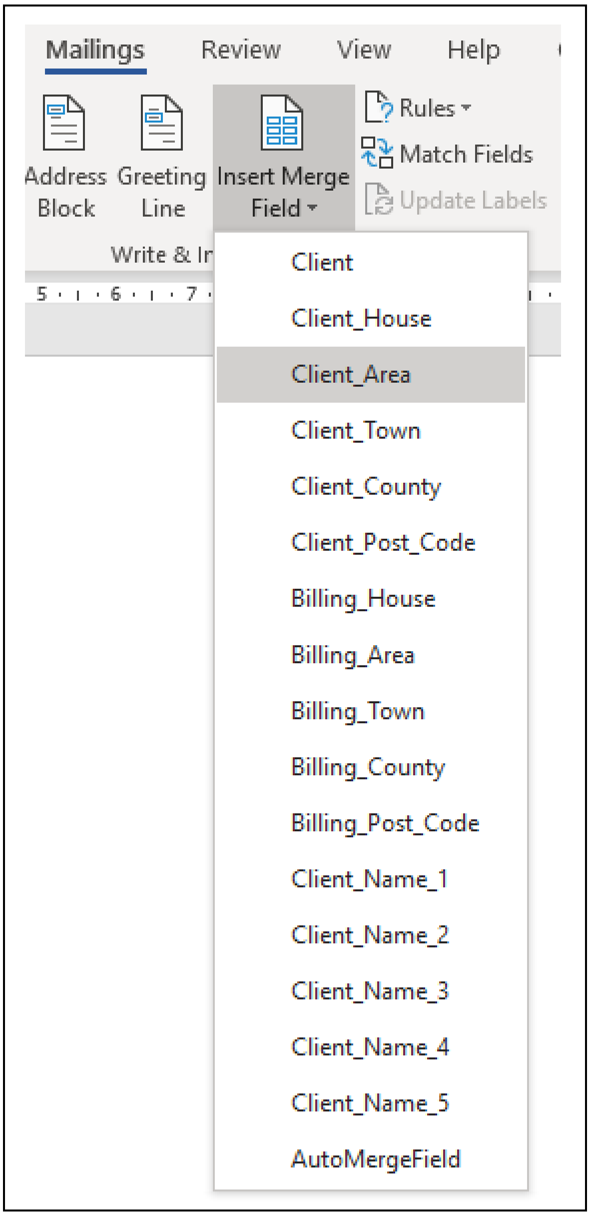
Select the **OK** button to proceed.

This will return you to the word screen. At the bottom right select Next: Write your letter and then Next: Preview your letters

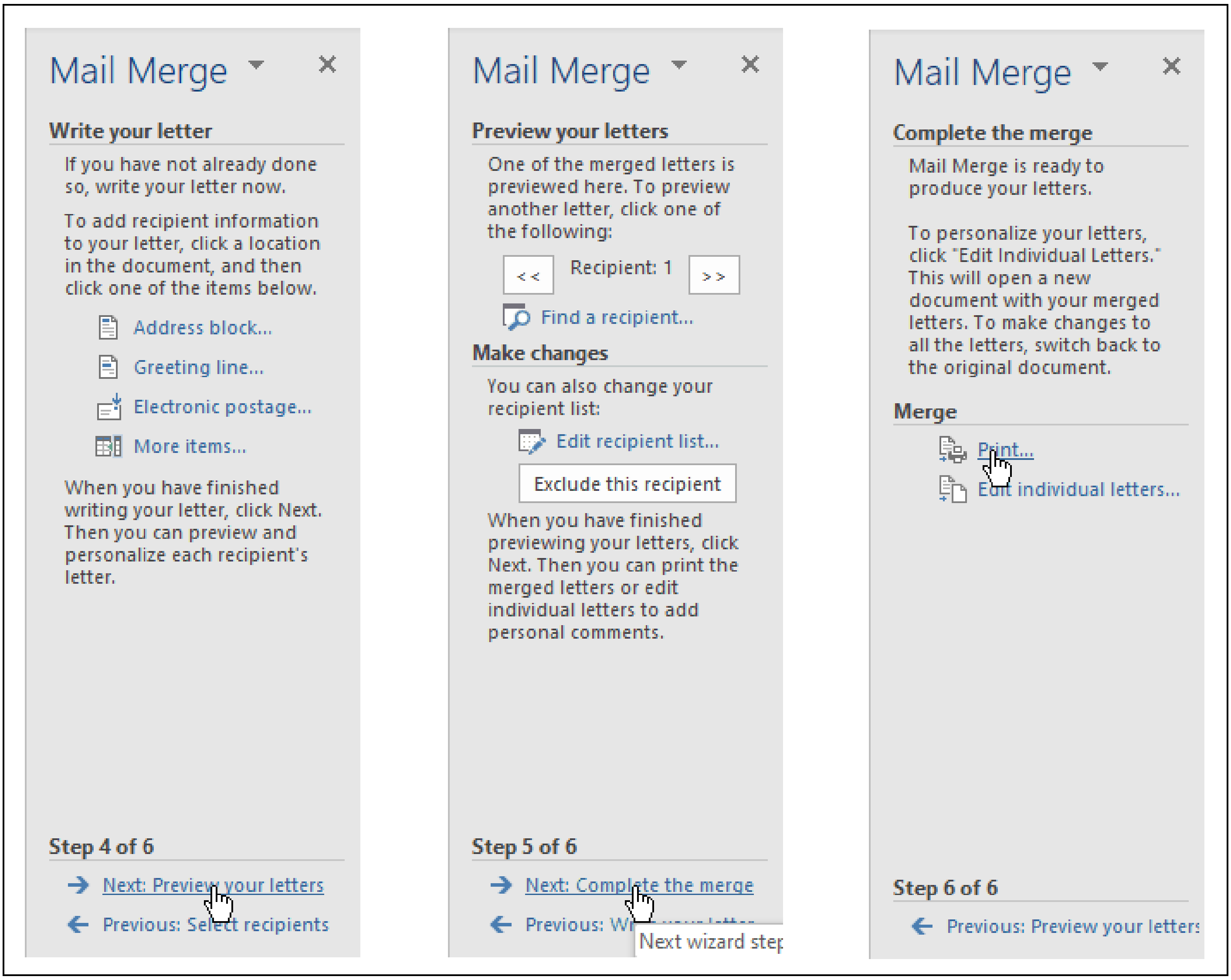


All the merge fields available for your letter are now available from the more items box on the right.

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



Once the letter is completed select Next. Preview your letters and amend as necessary. Then click Next: Complete the merge. Finally, you can print your letters.


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
Mail Merge
Preview your letters
One of the merged letters is previewed here. To preview another letter, click one of the following:
Recipient: 1
Find a recipient...
Make changes
You can also change your recipient list:
Edit recipient list...
Exclude this recipient
When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.
Step 5 of 6
Next: Complete the merge
Next wizard step
Mail Merge
Complete the merge
Mail Merge is ready to produce your letters.
To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all the letters, switch back to the original document.
Merge
Print...
individual letters...
Step 6 of 6
Previous: Preview your letters