



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

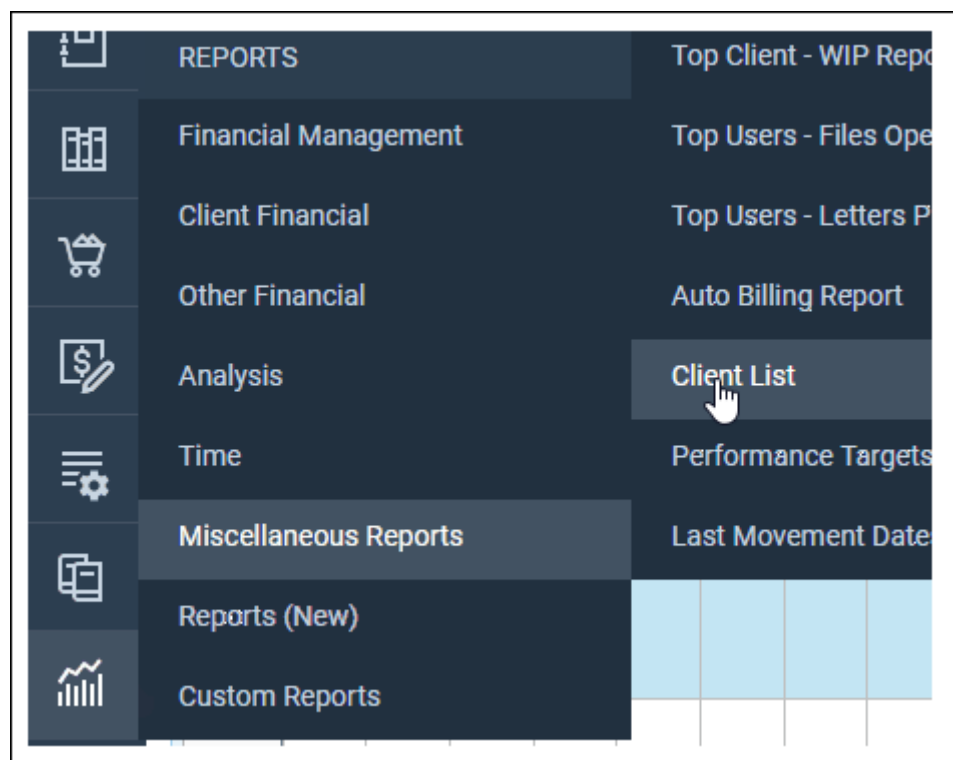
This help guide was last updated on
Apr 26th, 2024

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

A screenshot of the 'Client List' report filter options. At the top, there are three tabs: 'Reports', 'Miscellaneous Reports', and 'Client List'. Below the tabs is a 'Run' button with a checkmark icon. The filter options are grouped into a light blue box. It includes checkboxes for 'Fee Earner:' and 'Work Type:'. Below these are dropdown menus for 'Private or LA:' (set to 'All') and 'Type:' (set to 'All Matters'). There are also date filters with 'From:' and 'To:' fields, each with a calendar icon. At the bottom, there is a 'Summary?' checkbox which is checked.

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.

The screenshot displays the Osprey Reports interface. At the top, the Osprey logo and 'Osprey Approach Test' are on the left. To the right, a status bar shows 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. A 'Global search' bar with a magnifying glass icon is also present. Below the status bar, a navigation menu includes 'Reports', 'Miscellaneous Reports', and 'Client List'. The main content area features a 'Run' button with a play icon. Below this, there are several filter options: 'Fee Earner:' with an unchecked checkbox, 'Work Type:' with an unchecked checkbox, 'Private or LA:' with a dropdown menu set to 'All', 'Type:' with a dropdown menu set to 'All Matters', 'Date Filters:' with 'From:' and 'To:' date pickers, and 'Summary?' with a checked checkbox.

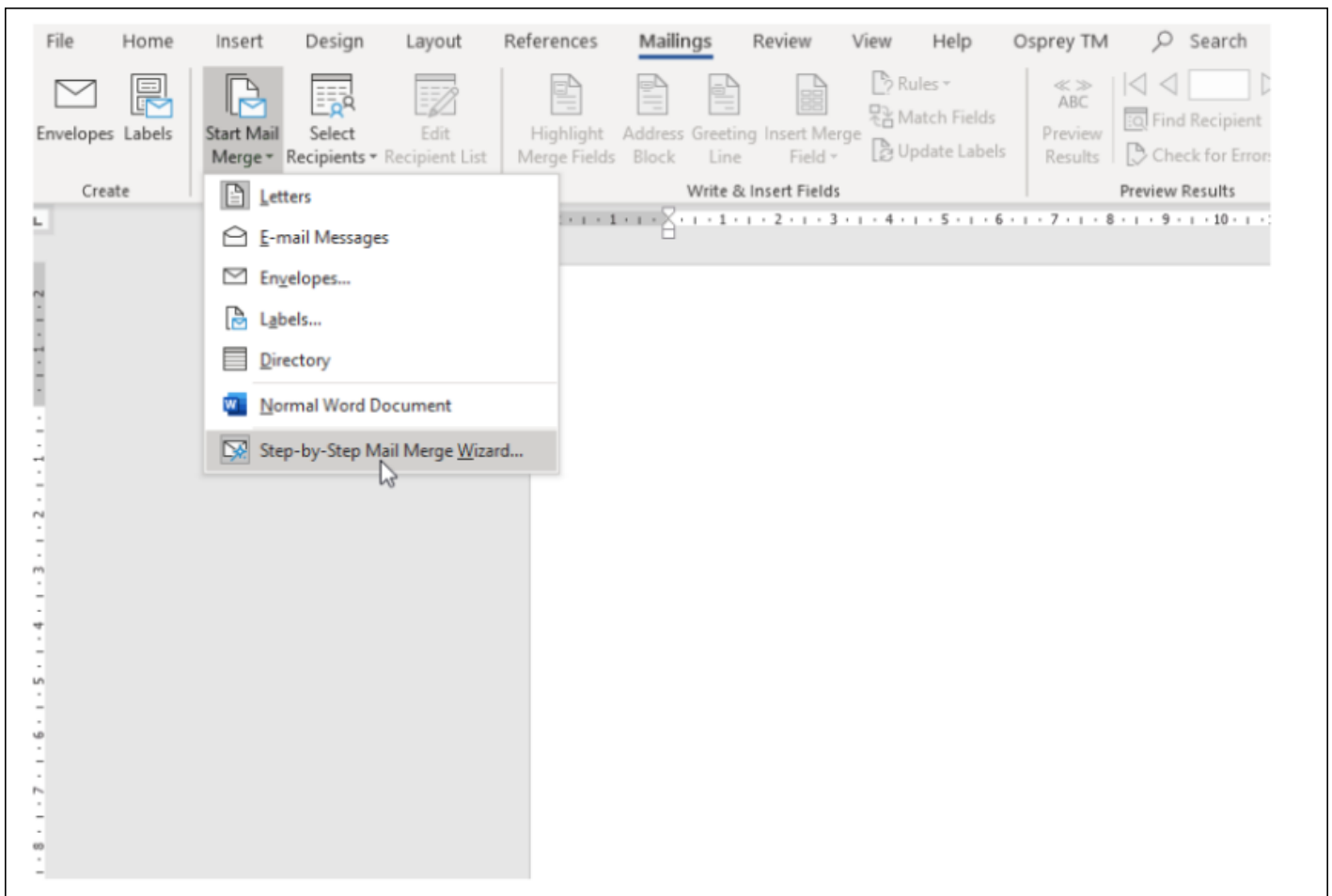


Client Listing Summary for Excel Exporting

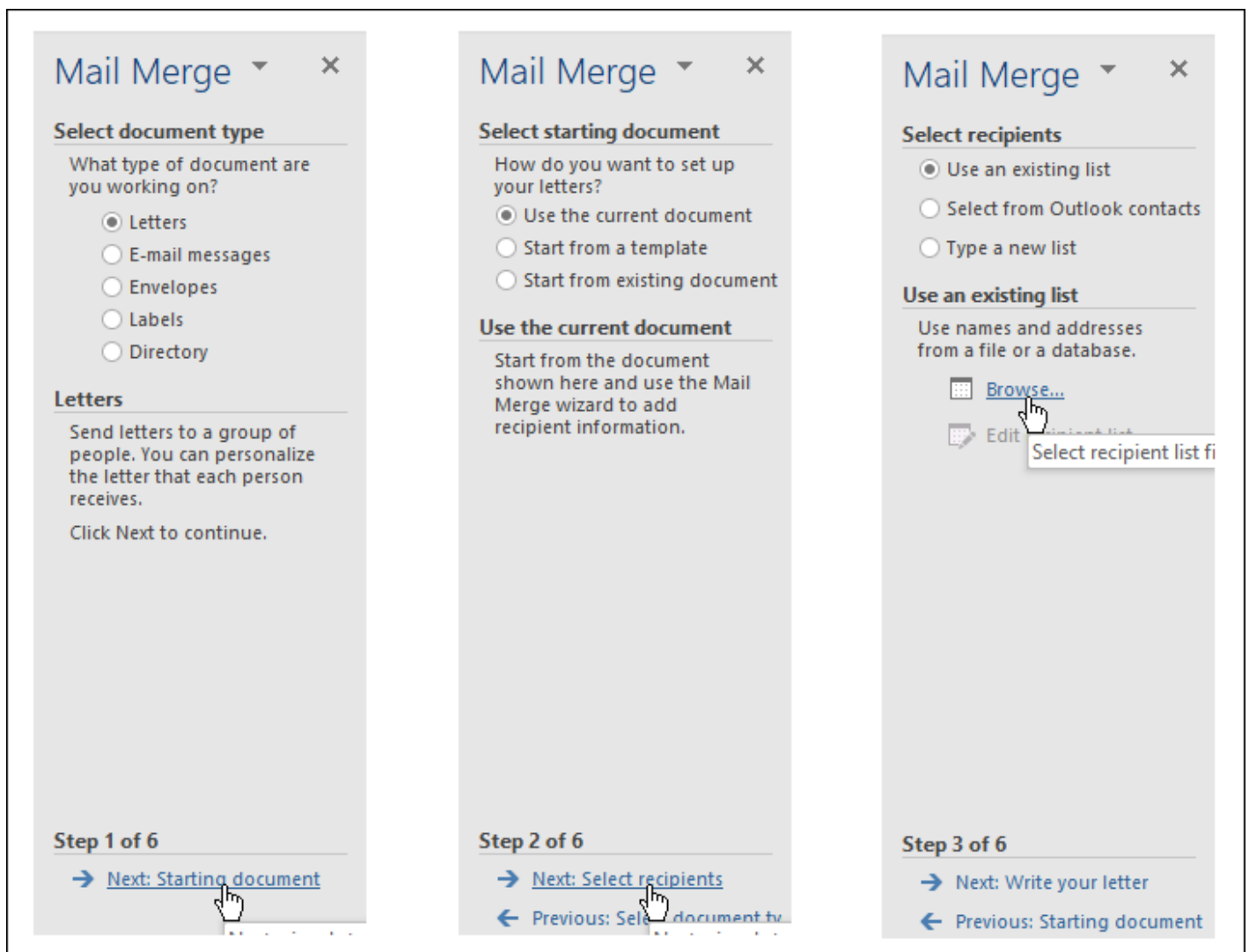
Exercise Name: Osprey Approach Test

Date Report Run: 25/06/2020

nt No	Client Name 1	Client House	Client Area	Client Town	Client County	Client P'Code	Billing House
	Teta	75 Telford street	Barkston			LS24 6SR	
add#	tom tom tom						
0001	Mrs Geraldine Broom						
0002	Miss Cynthia Jones						
0003	Ms Joanne Williams						
1	Mr New Phonenumber						
1001							
1002	123	c	c	c	c	c	
1003	Mr Andy Robinson						
1004	John Smith						
1005	11111111111 111111111111111111111 111111111111111111111				Engladn		
1006	123	25689					25689
100001	1234567890						
-100	Miss Jeanette Muldooney						
1001	MR Craig Matthews	10 Upper Street	Diglis	Worcester	Worcestershire	WR14 1JJ	Adri
1002	Apple		add				
1003	ACME						
1005	Adrian Andrews	8 Buckfast Close	Belmont	Hereford	Herefordshire	AA2 2AA	8 Buckfast Close
1006	MTS Liz Agna	37 Green Way	Warham	Hereford	Herefordshire	HR3 7BX	37 Green Way
1007	Ms Olive Anderson	1	1	1	1		
1008	Mary Anne-Rose						
1009	adm law co						
1010	adddd						

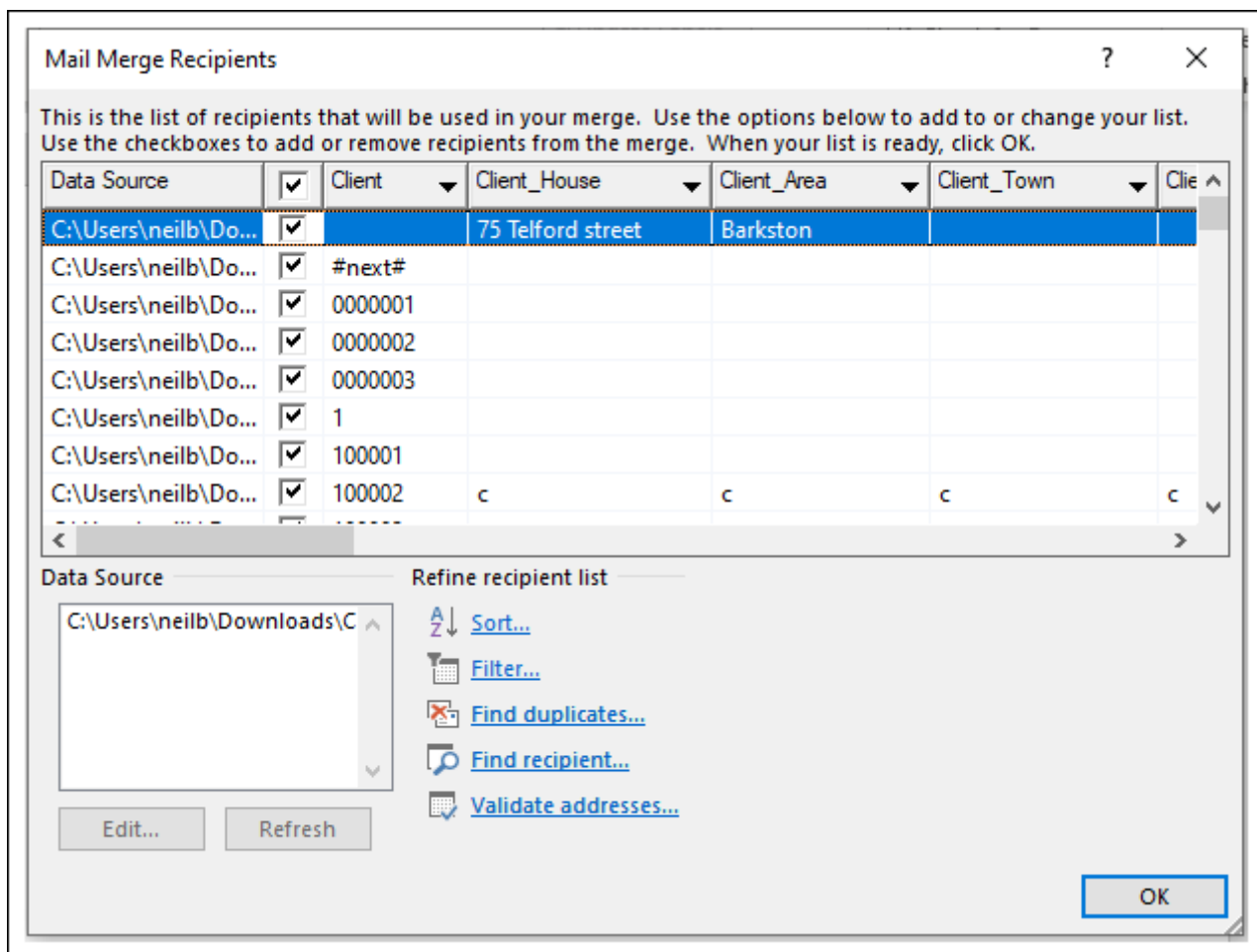


The right hand side of the screen shows the mail merge wizard, as shown below, and will assist you through the process.



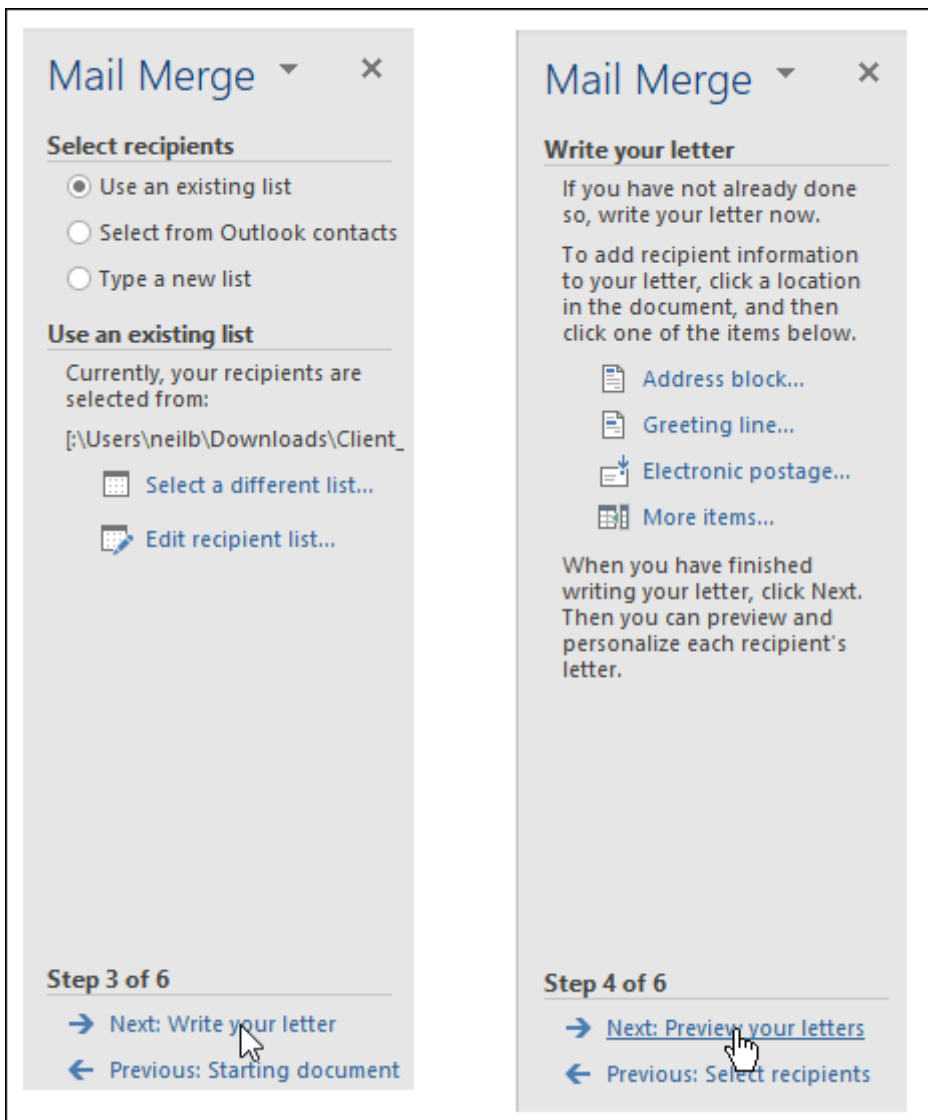
Click Next: Starting Document, Next: Select Recipients and Browse to select and open the saved Client List Report

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.



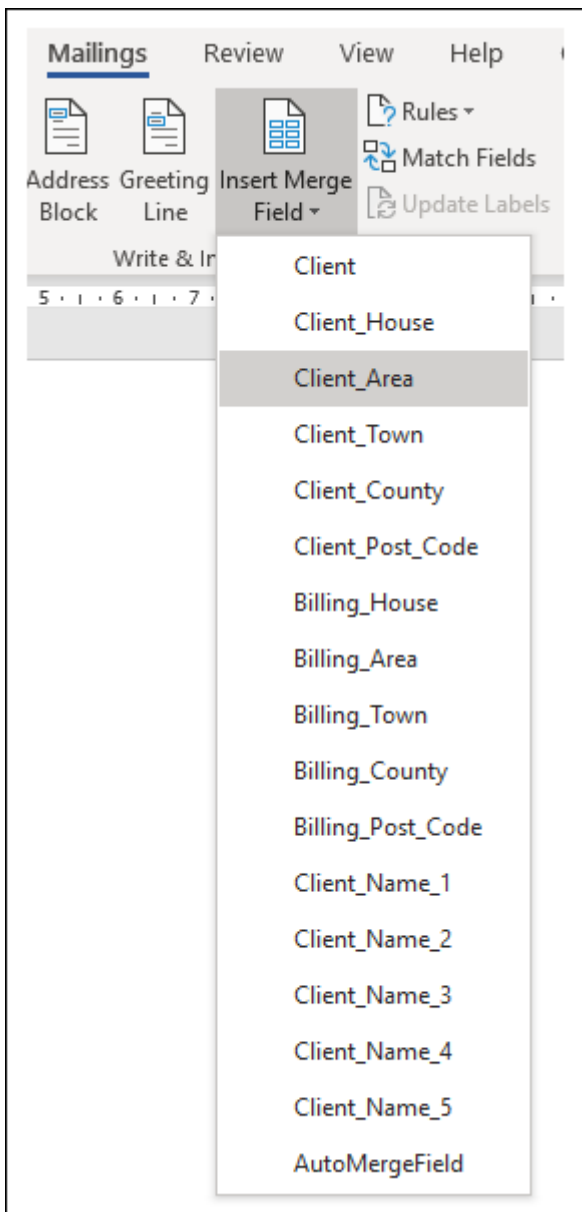
Select the OK button to proceed.

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](#)

← Previous: Write your letter

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...](#)

 [Edit individual letters...](#)

Step 6 of 6

← Previous: Preview your letters