



# Osprey Approach: Linking fields to your Standard Documents

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

The latest version is always online at  
<https://support.ospreyapproach.com/?p=16941>



This guide explains how to link and unlink fields from your standard documents to include any information which you store within Osprey.

## Linking Fields to Documents Using the Browser

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### Locating your document template

Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

You can filter the list down using the options at the top left of the screen:

Document Type:	Standard	▼
Filter by Work Type:	Residential Conveya	▼
Filter by Expert Type:	(None)	▼

Or, you can search for a specific template name using the search box in the top right corner:

						
completion						

### Linking fields to your document template

Right click on the document you wish to add fields to and select the Fields link button:

Document Type: 

Standard

Filter by Work Type: 

Residential Conveya

Filter by Expert Type: 

(None)

WORK ID	DESCRIPTION	
TK_RCS	RCS Cli <b>Completion</b> Statement TK_RCS	
TK_RCS	RCS Cli Confirm <b>Completion</b> TK_RCS	
TK_RCS	RCS <b>Completion</b> Statement TK_RCS	
TK_RCS	RCS Sol Confirm <b>Completion</b> TK_RCS	

Edit

Fields

E-mails

Rate

Use the radio buttons to select from the following table types:

- Client - contains all available tables relating to the client and matter
- Dossier - contains all Matter specific dossier page tables linked to the work type of the letter template
- Formula - contains all formula fields created under Supervisor > Case Management Setup > Formulae
- Client Dossier - contains all Global or Client Level dossier tables
- Ask - contains all Ask fields created under Supervisor > Case Management Setup > Formulae > Asks
- Include Document - contains all header and footer include documents created under Supervisor > Include Documents
- CDS - contains all fields relating to Contract Work forms under Case Management

Supervisor

Case Management Setup

Standard Documents

Standard Document:R

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

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

Now choose from the available tables:

 Design Document


 Preview Document

STANDARD DOCUMENT FIELDS

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

Available Tables

MANAGE FIELDS

 Save

ACCUSER

↓

↓

CALCULATION

CLIENT

CONTACT

LASTMATTERDATES

LINKNAME

MATTER

ORGANISATION

↑

LINK/UNLINK	FIEL	LINKED?	↓
<input type="checkbox"/>	USER	<div></div>	
<input type="checkbox"/>	EMA	<div></div>	

Once you have selected the relevant table, the list of fields in this table will be displayed. Place a tick in the box alongside the fields you wish to link, and click Save.

## MANAGE FIELDS



LINK/UNLINK	FIELD	LINKED? ↓
<input type="checkbox"/>	MATTER_DESCRIPTION	●
<input type="checkbox"/>	FEE_EARNER_ID	●
<input checked="" type="checkbox"/>	WORK_ID	●
<input type="checkbox"/>	WIP_LIMIT	●
<input checked="" type="checkbox"/>	UNIQUE_FILE_NO	●

Select Design Document:

Supervisor

Case Management Setup

Standard Documents

Standard Document:RCS



Design Document



Preview Document

Word will open the document template:

Our Ref: «MATTER\_FEE\_EARNER\_ID»/«client\_no»/«matter\_no»

Your Ref:

1 June 2020

&

«CALCULATION\_ADDRESS»

Dear &

**RE: «MATTER MATTER DESCRIPTION»**

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

You may toggle field codes on or off by holding down the Alt key and pressing F9:

Our Ref: «MATTER\_FEE\_EARNER\_ID»/«client\_no»/«matter\_no»

Your Ref:

1 June 2020

&  
«CALCULATION\_ADDRESS»

Dear &

**RE: «MATTER\_MATTER\_DESCRIPTION»**

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID } { MERGEFIELD client\_no } { MERGEFIELD matter\_no }

Your Ref:

{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d MMMM yyyy" } { MERGEFORMAT }

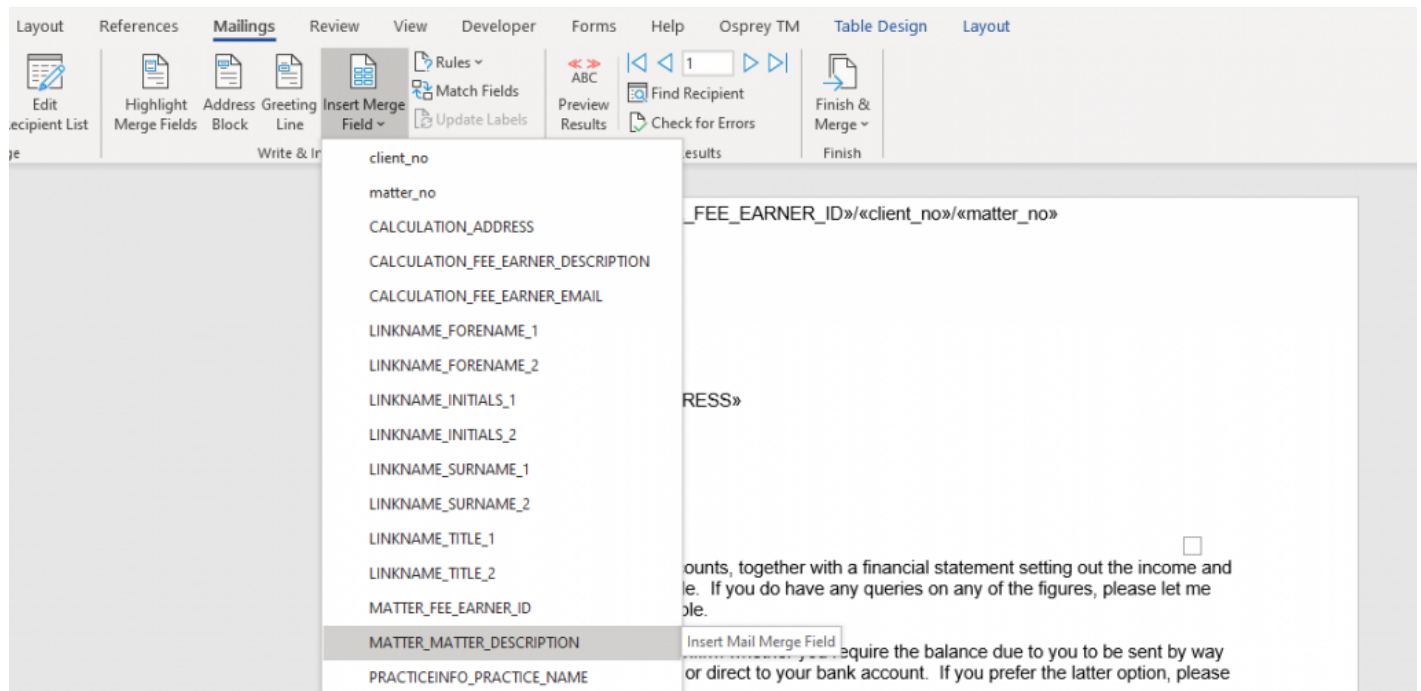
{ IF { MERGEFIELD LINKNAME\_SURNAME\_1 } = "" { MERGEFIELD LINKNAME\_SURNAME\_2 } { MERGEFIELD LINKNAME\_TITLE\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " " { MERGEFIELD LINKNAME\_SURNAME\_2 } = "" { MERGEFIELD LINKNAME\_SURNAME\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 } } { MERGEFIELD CALCULATION\_ADDRESS }

Dear { IF { MERGEFIELD "TK\_CLPERSONAL.tk\_SALUTATION" } = "" { IF { MERGEFIELD LINKNAME\_SURNAME\_1 } = "" { MERGEFIELD LINKNAME\_SURNAME\_2 } { MERGEFIELD LINKNAME\_TITLE\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " " { MERGEFIELD LINKNAME\_SURNAME\_2 } = "" { MERGEFIELD LINKNAME\_SURNAME\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 } } { MERGEFIELD "TK\_CLPERSONAL.tk\_SALUTATION" } }

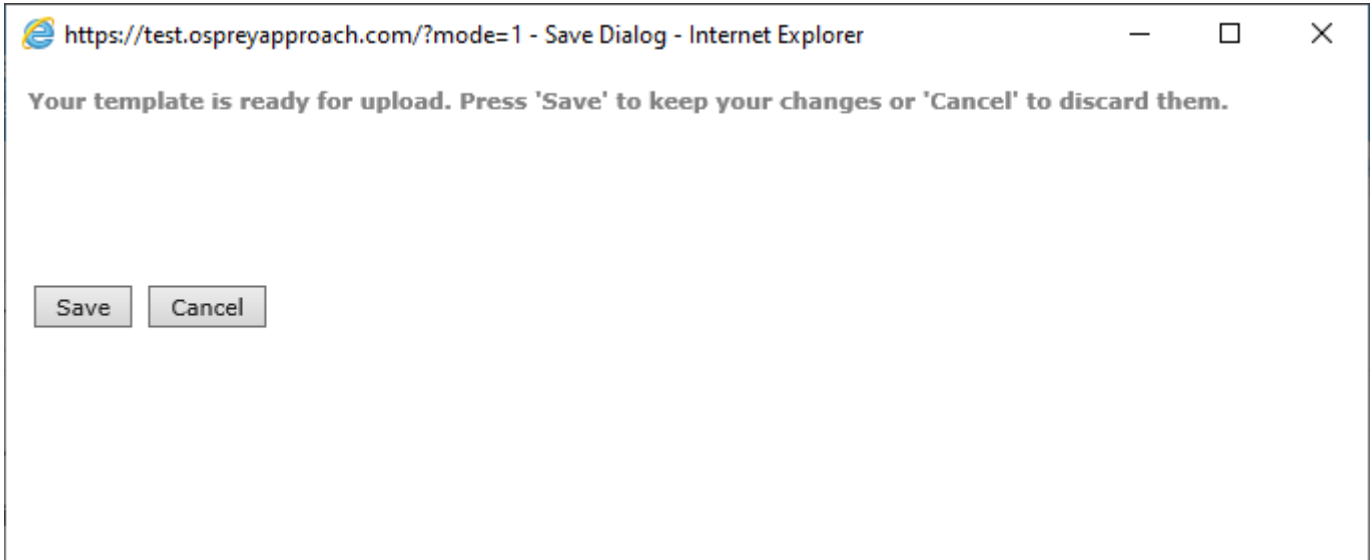
**RE: { MERGEFIELD MATTER\_MATTER\_DESCRIPTION }**



To link a new field to the document, position your mouse cursor in the place you would like the new field to appear, and from the Mailings menu tab select Insert Merge Field:




Once you have inserted all the required fields into the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:





## Removing linked fields from a document

To remove a field from a document, you must first ensure that the field has been removed from the template.

Right click on the document you wish to remove fields from and select the Fields link button:

Document Type: Standard 

Filter by Work Type: Residential Conveya 

Filter by Expert Type: (None) 

WORK ID	DESCRIPTION	
TK_RCS	RCS Cli <b>Completion</b> Statement TK_RCS	
TK_RCS	RCS Cli Confirm <b>Completion</b> TK_RCS	
TK_RCS	RCS <b>Completion</b> Statement TK_RCS	
TK_RCS	RCS Sol Confirm <b>Completion</b> TK_RCS	

 Edit  
 Fields  
 E-mails  
 Rate

Select Design Document:



Design Document



Preview Document

Word will open the document template:

Our Ref: «MATTER\_FEE\_EARNER\_ID»/«client\_no»/«matter\_no»

Your Ref:

1 June 2020

&  
«CALCULATION\_ADDRESS»

Dear &

**RE: «MATTER MATTER DESCRIPTION»**

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Select the field you want to remove and delete it from the template. If you are unable to see the field, you may toggle field codes on or off by holding down the Alt key and pressing F9:

Our Ref: «MATTER\_FEE\_EARNER\_ID»/«client\_no»/«matter\_no»

Your Ref:

1 June 2020

&  
«CALCULATION\_ADDRESS»

Dear &

**RE: «MATTER MATTER DESCRIPTION»**

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID } { MERGEFIELD client\_no } { MERGEFIELD matter\_no }

Your Ref:

{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d MMMM yyyy" } { MERGEFORMAT }

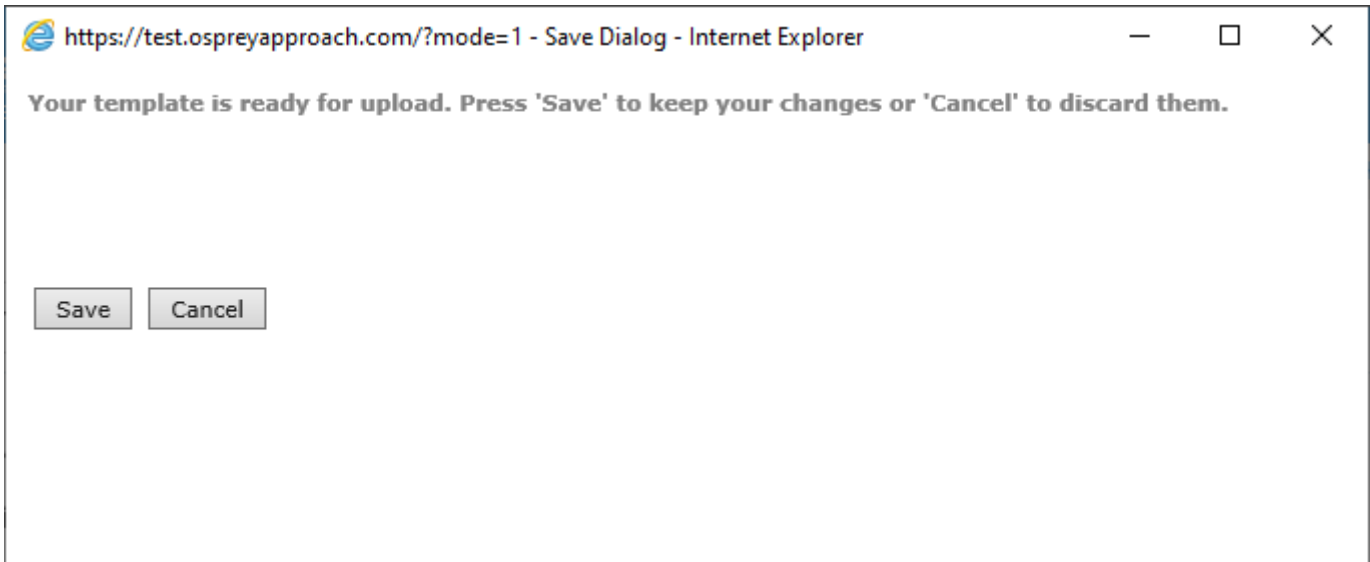
{ IF { MERGEFIELD LINKNAME\_SURNAME\_1 } = "{ MERGEFIELD LINKNAME\_SURNAME\_2 }" { MERGEFIELD LINKNAME\_TITLE\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " { IF { MERGEFIELD LINKNAME\_SURNAME\_2 } = "" { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_1 } { MERGEFIELD LINKNAME\_SURNAME\_2 } " } { MERGEFIELD CALCULATION\_ADDRESS }

Dear { IF { MERGEFIELD "TK\_CLPERSONAL tk SALUTATION" } = "" { IF { MERGEFIELD LINKNAME\_SURNAME\_1 } = "{ MERGEFIELD LINKNAME\_SURNAME\_2 }" { MERGEFIELD LINKNAME\_TITLE\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " { IF { MERGEFIELD LINKNAME\_SURNAME\_2 } = "" { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } and { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 } " } { MERGEFIELD "TK\_CLPERSONAL tk SALUTATION" } }

**RE: { MERGEFIELD MATTER MATTER DESCRIPTION }**

Once you have deleted the field from the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:





To unlink the field you have removed from the template, select the relevant Standard Document Fields radio button and Available Table, place a tick in the Link/Unlink box, and click Save:

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS Cli

Design Document

Preview Document

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### STANDARD DOCUMENT FIELDS

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

Available Tables 

LINKNAME

### MANAGE FIELDS

Save

LINK/UNLINK	FIELD	LINKED?
<input checked="" type="checkbox"/>	TITLE_2	
<input type="checkbox"/>	TITLE_1	
<input type="checkbox"/>	SURNAME_2	

## Linking Fields to Documents Using the Case Management App

# Locating your document template

Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

You can filter the list down using the options at the top left of the screen

## Standard Documents

+ Add Standard Document

+ Add Current Document

Filter by:

Document Type:

Standard

▼

Work Type:

ALL

▼

Expert Type:

None

▼

Or, you can search for a specific template name using the search box in the top right corner:

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

# Linking fields to your document template

Right click on the document you wish to add fields to and select the Fields link button

Osprey Approach (1.0.1)

Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

00:00:44 / 0

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

Standard Documents

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
DANCLN	Aa Client - Send Court Order	Client		N	N
GLOBAL	AAATest			N	N
COMP	Acknowledgement of Complaint			N	N
GLOBAL	Ad Hoc letter to any Contact			N	N
ADMLAW	Adam Buckley BHB test			N	N
GLOBAL	Address			N	N
AEH	Address 5 test			N	N
MH_WT1	Address field			N	N
WILLS	Address Test Document 2.0 Tom P			N	N
GLOBAL	Address_J			N	N
GLOBAL	00004 test			N	N
CIVW1	0001 Civil Current Document	Accountant		N	N
A_G	001 - Legal OA		1 year	A	A
GLOBAL	001 - Standard letter WEB			N	N
CONSAL	001 - Test Address 3			N	N

Use the radio buttons to select from the following table types:

- Client - contains all available tables relating to the client and matter
- Dossier - contains all Matter specific dossier page tables linked to the work type of the letter template
- Formula - contains all formula fields created under Supervisor > Case Management Setup > Formulae
- Client Dossier - contains all Global or Client Level dossier tables
- Ask - contains all Ask fields created under Supervisor > Case Management Setup > Formulae > Asks
- Include Document - contains all header and footer include documents created under Supervisor > Include Documents
- CDS - contains all fields relating to Contract Work forms under Case Management

## STANDARD DOCUMENT FIELDS

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

Now select the relevant table

Osprey Approach (3.0.1)

Today's Units: 0  
 Today's Time: 00h:00m  
 Today's Value: £0.00

Global search

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

Standard Document

Design Document

STANDARD DOCUMENT

Client

Available Tables :

MANAGE FIELDS

Save

LINK / UNLINK

ACCUSER

BRANCH

BRANCHINFO

CALCULATION

CLIENT

CONTACT

LASTMATTERDATES

LINKNAME

MATTER

ORGANISATION

PRACTICEINFO

PUBASSOC

PUBDATA

VATNO

Once you have selected the relevant table, the list of fields in this table will be displayed. Place a tick in the box alongside the fields you wish to link, and click Save.

Osprey Approach (3.0.1)

Today's Units: 0  
 Today's Time: 00h:00m  
 Today's Value: £0.00

Global search

00:00:44 / 0

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

Standard Documents

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

Client

Available Tables : LINKNAME

MANAGE FIELDS

Save

LINK / UNLINK	FIELD	LINKED
<input type="checkbox"/>	EMAIL_ADDRESS_4	
<input type="checkbox"/>	EMAIL_ADDRESS_5	
<input checked="" type="checkbox"/>	FORENAME_1	
<input checked="" type="checkbox"/>	FORENAME_2	
<input type="checkbox"/>	FORENAME_3	
<input type="checkbox"/>	FORENAME_4	
<input type="checkbox"/>	FORENAME_5	
<input type="checkbox"/>	HOUSE_2	
<input type="checkbox"/>	HOUSE_3	
<input type="checkbox"/>	HOUSE_4	
<input type="checkbox"/>	HOUSE_5	
<input checked="" type="checkbox"/>	INITIALS_1	
<input checked="" type="checkbox"/>	INITIALS_2	
<input type="checkbox"/>	INITIALS_3	
<input type="checkbox"/>	INITIALS_4	
<input type="checkbox"/>	INITIALS_5	

Select Design Document:

Osprey Approach (3.0.1)

☰

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS +

TIME RECORDING +

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

Standard Documents

←

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

☒ Client

☐ Formula

☐ Client Dossier

☐ Ask

☐ Include Document

☐ CDS

Available Tables :

LINKNAME

▼

Word will open the document template:

Our Ref: «MATTER\_FEE\_EARNER\_ID»/«client\_no»/«matter\_no»

Your Ref:

1 June 2020

&  
«CALCULATION\_ADDRESS»

Dear &

**RE: «MATTER MATTER DESCRIPTION»**

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

You may toggle field codes on or off by holding down the Alt key and pressing F9:

Our Ref: «MATTER\_FEE\_EARNER\_ID»/«client\_no»/«matter\_no»

Your Ref:

1 June 2020

&  
«CALCULATION\_ADDRESS»

Dear &

**RE: «MATTER\_MATTER\_DESCRIPTION»**

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID } { MERGEFIELD client\_no } { MERGEFIELD matter\_no }

Your Ref:

{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d MMMM yyyy" } { MERGEFORMAT }

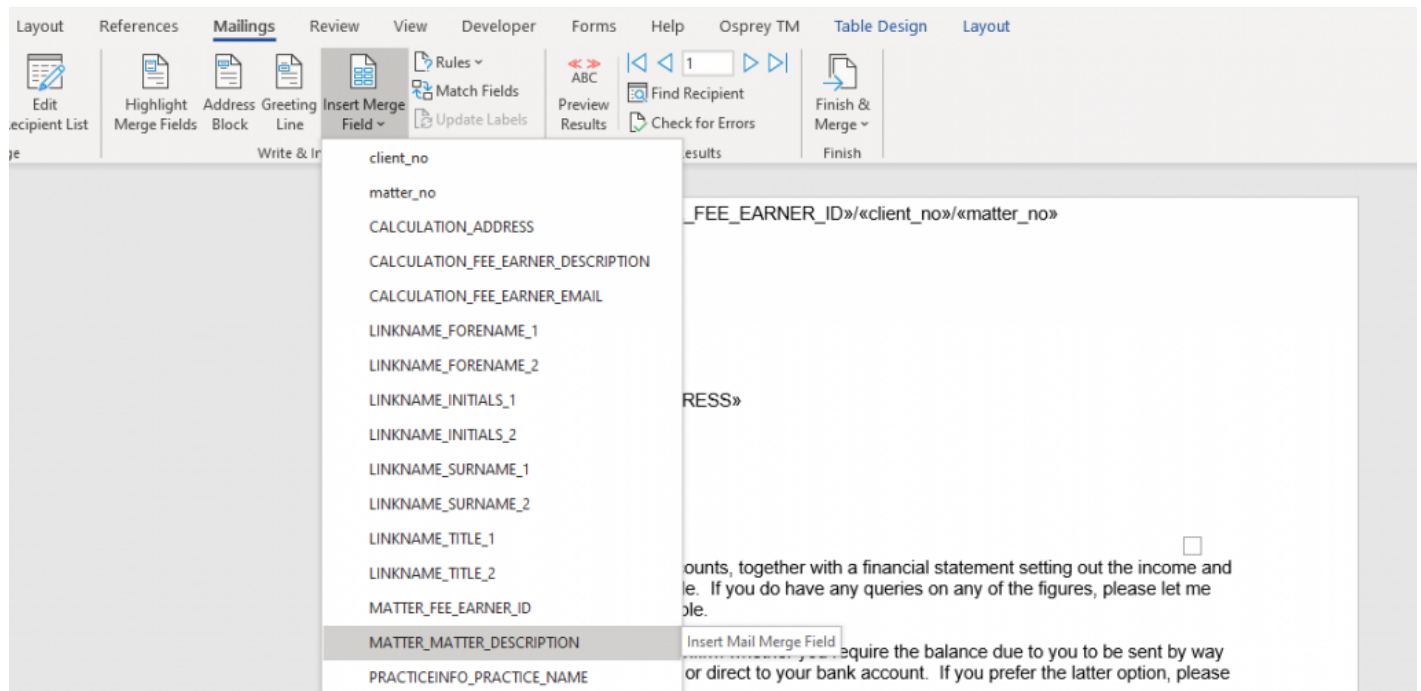
{ IF { MERGEFIELD LINKNAME\_SURNAME\_1 } = "" { MERGEFIELD LINKNAME\_SURNAME\_2 } { MERGEFIELD LINKNAME\_TITLE\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " " { MERGEFIELD LINKNAME\_SURNAME\_2 } = "" { MERGEFIELD LINKNAME\_SURNAME\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 } } { MERGEFIELD CALCULATION\_ADDRESS }

Dear { IF { MERGEFIELD "TK\_CLPERSONAL.tk\_SALUTATION" } = "" { IF { MERGEFIELD LINKNAME\_SURNAME\_1 } = "" { MERGEFIELD LINKNAME\_SURNAME\_2 } { MERGEFIELD LINKNAME\_TITLE\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } " " { MERGEFIELD LINKNAME\_SURNAME\_2 } = "" { MERGEFIELD LINKNAME\_SURNAME\_1 } { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 } } } { MERGEFIELD "TK\_CLPERSONAL.tk\_SALUTATION" } }

**RE: { MERGEFIELD MATTER\_MATTER\_DESCRIPTION }**



To link a new field to the document, position your mouse cursor in the place you would like the new field to appear, and from the Mailings menu tab select Insert Merge Field:



Once you have inserted all the required fields into the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes

Osprey Approach (3.0.1)

Today's Units: 0  
Today's Time: 00:00:00  
Today's Value: £0.00

Global search

00:00:44 / 0

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

Standard Documents

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

Client Formula Client Dossier Ask Include Document CDS

Available Tables: LINKNAME

MANAGE FIELDS

Save

LINK / LINKNAME	FIELD	LINKED
<input type="checkbox"/>	EMAIL_ADDRESS_4	
<input type="checkbox"/>	EMAIL_ADDRESS_5	
<input checked="" type="checkbox"/>	FORENAME_1	
<input checked="" type="checkbox"/>	FORENAME_2	
<input type="checkbox"/>	FORENAME_3	
<input type="checkbox"/>	FORENAME_4	
<input type="checkbox"/>	FORENAME_5	
<input type="checkbox"/>	HOUSE_2	
<input type="checkbox"/>	HOUSE_3	
<input type="checkbox"/>	HOUSE_4	
<input type="checkbox"/>	HOUSE_5	
<input checked="" type="checkbox"/>	INITIALS_1	
<input checked="" type="checkbox"/>	INITIALS_2	
<input type="checkbox"/>	INITIALS_3	
<input type="checkbox"/>	INITIALS_4	
<input type="checkbox"/>	INITIALS_5	

Save Dialog

Your template is ready for upload. Press 'Save' to keep your changes or 'Cancel' to discard them.

SaveCancel

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

## Removing Linked Fields from a Document

To remove linked fields from a document, you will need to click "Design" on the document so that it is open in Word and then delete the field. Once this has been done you will be able to untick the field from the field linking screen and clicking Save.