

Osprey Approach: Use ASK and IF Statements

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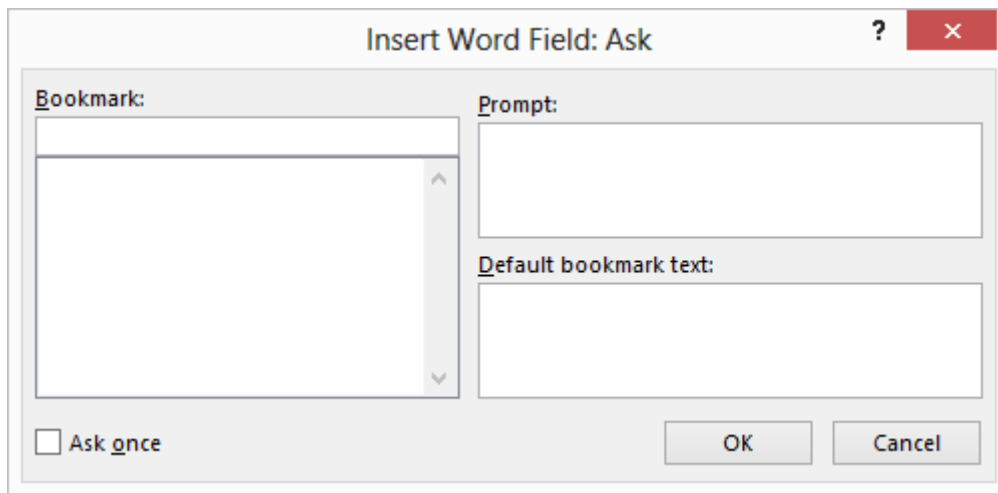
You can insert IF and ASK statements into your standard documents on Osprey.

Designing a Document

ASK and IF fields may be used in Osprey documents, we have other documentation on Creating a New Standard Document and Linking Fields to documents. With a designed document on screen select the 'Mailings' menu and then select 'Rules'

ASK Statements

Choose "ASK". This will open a box which will allow you to create an ask field. As an example we will use an ask to insert the secretary initials.



- In the Bookmark box, enter a name which the field will be known by. E.g. INITS
- In the Prompt box, enter the question which will appear to a user who opens the letter. E.g. Please enter the secretary initials.
- In the Default Bookmark Text box, enter a space if you do not wish anything to show up as default. If there is any default text you wish to show, enter it here. Once those have been completed, click on OK. This will bring up an example of what the ask field will look like to a user. Click OK on the example to return to the document.

Now a reference will need to be added to allow the results of the ask field to display. Place the mouse cursor where you wish the information to be displayed and then on the very top menu, select 'Insert' and the 'Quick Parts' and then select 'Field'. This will open up a new box which should display a list of field names on the left side. Scroll down here until you find 'Ref'. Left-click on 'Ref' once and then in the middle of the box, the reference for 'Inits' will appear. Click on 'Inits' and then on OK to place the reference field in the letter.

Close and save the letter and then run it in Preview mode to check that the field has worked and the reference is bringing through the information.

IF Statements

To add an IF Statement place the mouse cursor where you want the Statement to appear. Now Navigate to the rules area and choose the 'If...Then...Else' option. The following screen will come up.

Insert Word Field: IF

IF

Field name: LINKNAME_SURNAME_2 Comparison: is blank Compare to:

Insert this text: A

Otherwise insert this text: B

OK Cancel

This will place the field in your document. Select Alt + F9 to show the mergefields, and in place of the A, in between the speech marks put in the details you wish to show should the second surname not be filled in (so if the second surname is blank, it will only need to be the title, forename and surname of the 1st named client.)

In place of B, put in the details you wish to show should the second surname be filled in (so if the second surname is NOT blank, it will be the title of both clients, followed by just the surname of the 1st named client.)