



Osprey Approach: Add Multi-Record Dossier Merge-fields to Standard Documents

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The latest version is always online at
<https://support.ospreyapproach.com/?p=17636>



If you have created Multi-line Dossier pages you can display the information within Standard Documents, this guide will show the process of creating a table to merge all the records.

At least one Multi-Record Dossier must be set and populated with records.

Multi-record Dossier Pages can only be populated using the Osprey Approach App for Windows.

The screenshot shows the 'Design Document' interface. At the top, there are two buttons: 'Design Document' (with a pencil icon) and 'Preview Document' (with a magnifying glass icon). Below these is a section titled 'STANDARD DOCUMENT FIELDS' with radio button options: Client, Dossier (selected), Formula, Client Dossier, Ask, Include Document, and CDS. Underneath is an 'Available Tables' section with a dropdown menu showing 'ACCUSER'. Below that is a 'MANAGE FIELDS' section with a 'Save' button. At the bottom is a table with two columns: 'LINK/UNLINK' and 'FIELD'. The table contains one row with an unchecked checkbox in the 'LINK/UNLINK' column and the text 'Dossier Field to input an address.' in the 'FIELD' column.

LINK/UNLINK	FIELD
<input type="checkbox"/>	Dossier Field to input an address.

Select Supervisor and then Case Management Setup, Standard Documents, Add Standard Document

Save Cancel

Document Type: Standard

Work Type: Global

Description: Residential Conveyancing Sale - Turnkey

Expert Type: TM_test

Retention Period: TM_LA

Copy to Client?: Transfer of equity

Copy To Associate?: Wills & Probate

Auto Web Enabled: Wills

Oscar_Matter 1

Select a Work Type, Fill in a suitable description and other options

Filter by Work Type: Wills

Filter by Expert Type: (None)

WORK ID	DESCRIPTION	EXPERT TYPE
WILLS	Address Test Document 2.0 Tom P	
WILLS	Letter to Executor	
WILLS	New Will Standard Document	
WILLS	template 1	
WILLS	template 2	
WILLS	template 3	
WILLS	template contacts (linked but not used)	

Locate the new template and right click to select Fields



Design Document



Preview Document

STANDARD DOCUMENT FIELDS

Client Dossier Formula Client Dossier Ask Include Document CDS

Available
Tables

ACCUSER

**MANAGE FIELDS**

Save

LINK/UNLINK	FIELD
<input type="checkbox"/>	USER_ID
<input type="checkbox"/>	EMAIL_ADDRESS

Select Dossier, choose a Dossier Page, then tick the fields to link, click save and finally Design Document to launch the template

Mailings Review View Help Osprey TM Search

Address Block Greeting Line Insert Merge Field

Rules Match Fields Update Labels

Preview Results Find Recipient Check for Errors

Finish & Merge

Write & Insert Fields Preview Results Finish

1

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 17 18

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Insert content

From the insert menu insert a table of the appropriate size. In the first row enter the column headings

Place the cursor in the first cell of the second row and from Mailings > Insert Merge Fields drop-down list from the top ribbon select any field

Note – The merge-field related to Multi-Record Dossiers are not displayed by the Insert Merge Fields drop-down list, therefore, any other can be selected

Right-click on the inserted merge-field > Edit field

Change the existing Name only by typing "TableStart:", then the Dossier Page ID

Click OK to save the merge-field changes

Repeat the previous step into the last cell of the second row, but by typing "TableEnd" instead of "TableStart"

Insert merge-fields (any) into each cell from the second row of the table, including in the first cell immediately after "TableStart" merge-field and also into the last cell before "TableEnd"

Edit each merge field and rename it with the ID of the desired multi-record Dossier Field using the format «FieldID»

If necessary, add Totals into the last row in the same way, but using the format «PageID_FieldID_TOTAL» when editing this merge-field