

Osprey Approach: Adding Standard Text

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The latest version is always online at https://support.ospreyapproach.com/?p=44906

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This guide will show you how to add standard text descriptions for use throughout Osprey

You may add predefined text to various text entries throughout Osprey. Navigate to Supervisor > Code Setup > Standard Text Descriptions > Add Standard Text Descriptions

888			
	SUPERVISOR		
G	Code Setup	Work Types	
Ē	System Setup	Activity Codes	
50 E	Financial Setup	Remuneration Types	
	Case Management Setup	Fee Earners	
	User Design	Groups	
\$ \$	Report Setup	Franchise Categories	
নি	Tools & Utilities	Standard Text Descriptions	Add Standard Text Descriptions
	Financial Periods	Attendance Notes	
	CRM-AF1 Additional Rates	Fee Earner Status	
Ē	CRM Auto Posting Defaults	Phases / Tasks	
~	Reprint CRM611 Spreadsheet	Activities	
	Include Documents	Expenses	
(ĝ.	Portal Setup	Matters for Review	

You will be able to choose the area you wish to add text for

Account Payee Text - shows the text when typing the Payee for Cheques Required.

Client Ledger Posting Text - shows the text when typing the posting description on Client Ledger

View Note - Can be linked to Views to add more information to views for Questionnaires and Extensions.

Journal Posting Text - shows the text when typing the posting description in Journals

Matter Description Text - shows the text when typing the Matter Description

Nominal Ledger Posting Text - shows the text when typing the posting description on Nominal Ledger

Purchase Ledger Posting Text - shows the text when typing the posting description on Purchase Ledger

Standard Text - shows on the Time Posting Screen to append/replace Attendance Notes

 $\label{eq:standard} \textbf{Text} \ \textbf{Message} \ \text{-} \ \textbf{Shows} \ \textbf{as} \ \textbf{a} \ \textbf{template} \ \textbf{to} \ \textbf{choose} \ \textbf{when} \ \textbf{sending} \ \textbf{SMS}$

Save 🛛	3 Cancel	
Context Area:	Account Payee Text	
	Account Payee Text	
	Client Ledger Posting Text	
	View Note	
	Journal Posting Text	
	Matter Description Text	
	Nominal Ledger Posting Text	
	Purchase Ledger Posting Text	
Standard Text:		