

Osprey Approach: Adding Standard Text

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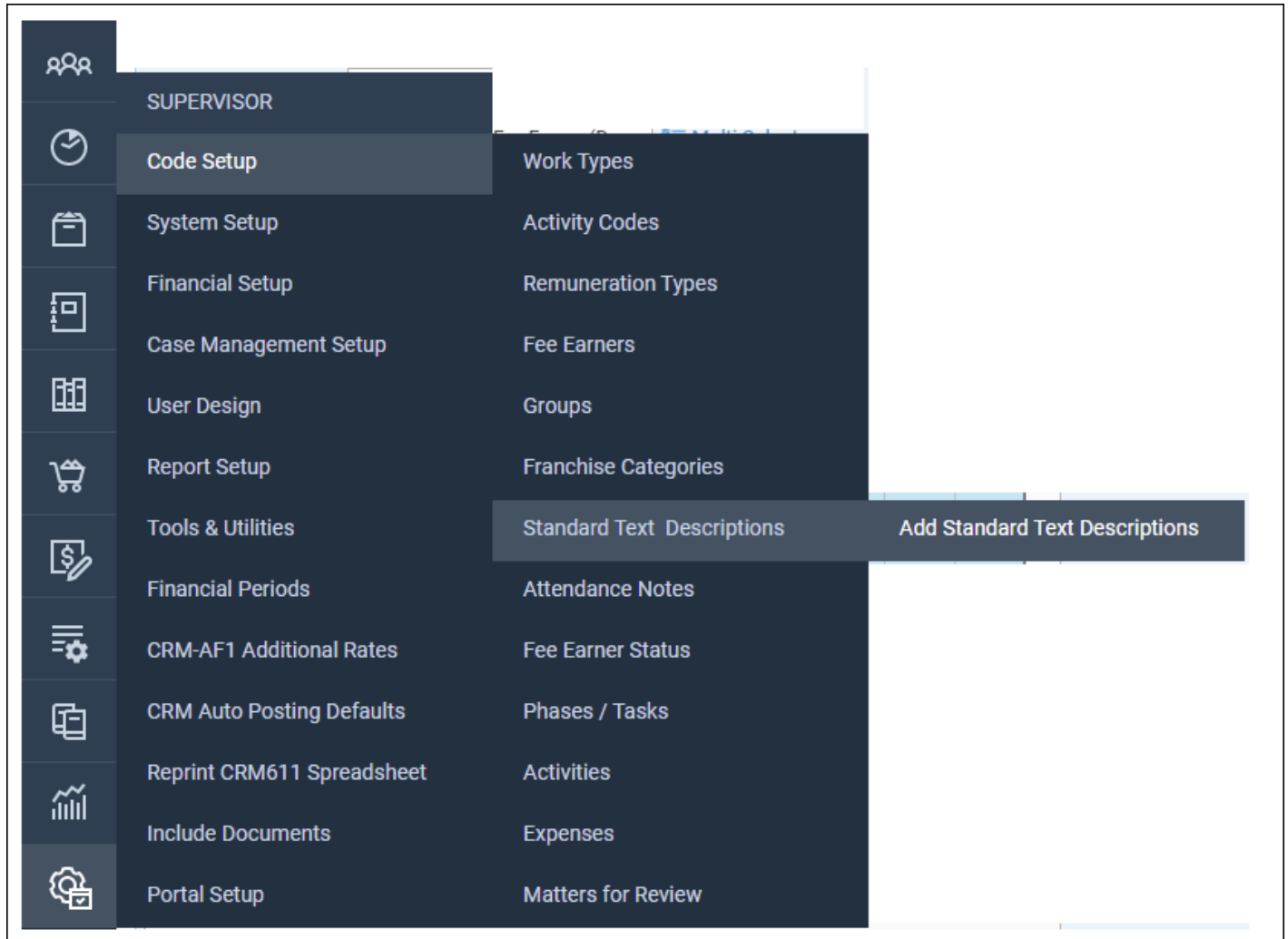
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<https://support.ospreyapproach.com/?p=44906>

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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



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

Standard Text Message - Shows as a template to choose when sending SMS

The screenshot shows a software interface for defining standard text. At the top, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with a close icon). Below these buttons, the interface is divided into two main sections. The first section is labeled "Context Area:" and contains a dropdown menu. The dropdown menu is currently open, showing a list of options: "Account Payee Text" (highlighted in blue), "Account Payee Text", "Client Ledger Posting Text", "View Note", "Journal Posting Text", "Matter Description Text", "Nominal Ledger Posting Text", and "Purchase Ledger Posting Text". The second section is labeled "Standard Text:" and contains a large, empty text box with a blue border, intended for entering the text content.