



Osprey Approach: Adding Standard Text

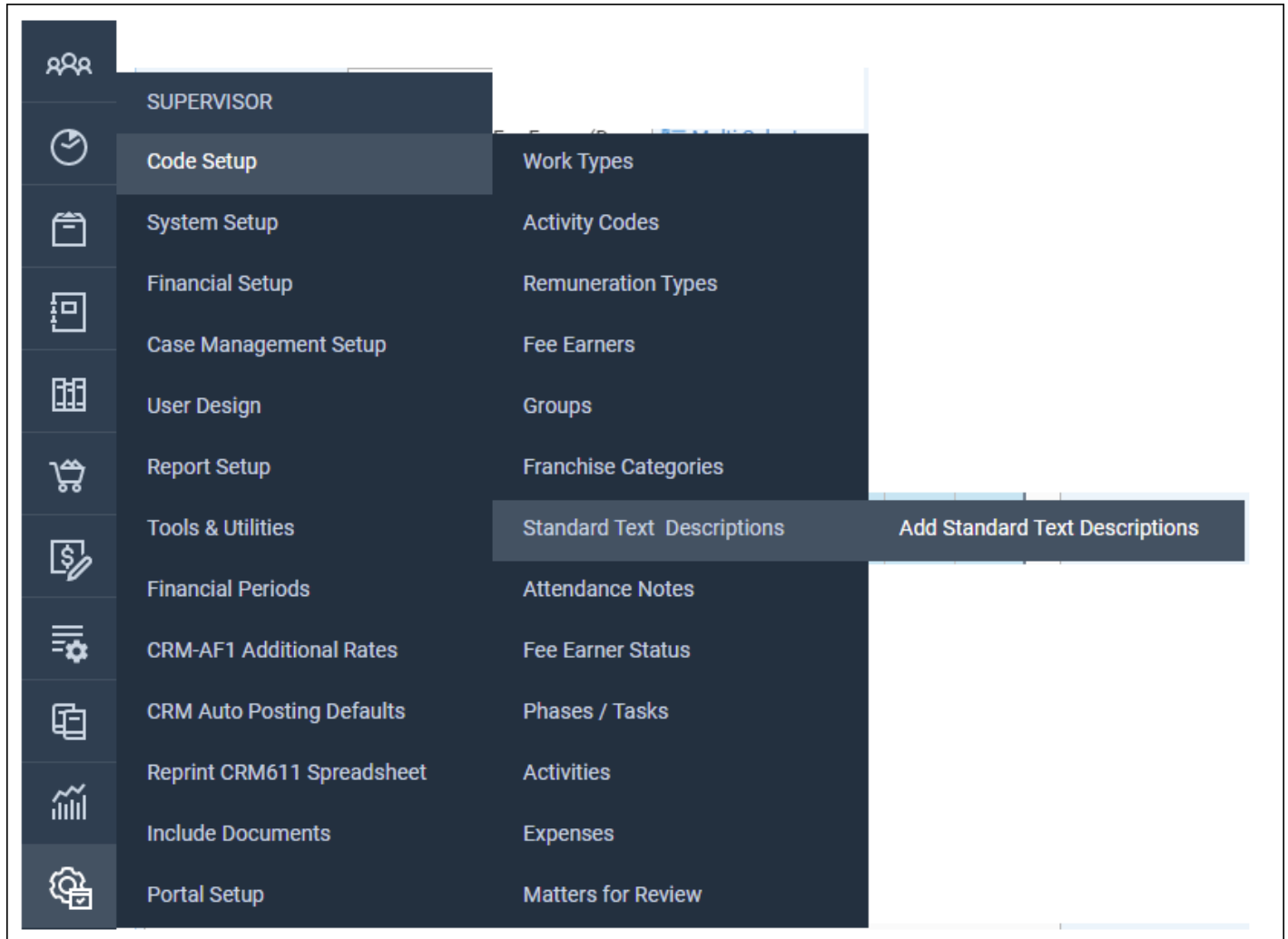
This help guide was last updated on
Apr 24th, 2024

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



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 with the following elements:

- At the top left, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with a close icon).
- Below the buttons, the label "Context Area:" is followed by a dropdown menu. The menu is currently open, showing a list of options: "Account Payee Text" (highlighted in blue), "Client Ledger Posting Text", "View Note", "Journal Posting Text", "Matter Description Text", "Nominal Ledger Posting Text", and "Purchase Ledger Posting Text".
- Below the dropdown menu, the label "Standard Text:" is followed by a large, empty text input area with a blue border.