

# Osprey Approach: Reports: Client List

This help guide was last updated on  
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The latest version is always online at  
<https://support.ospreyapproach.com/?p=33165>

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# This guide will take you through running the Client List Report

This report lists all of your clients names and addresses according to the filter options that you choose. This list can then be used for purposes outside of Osprey by exporting to Excel.

Client Listing for Excel Exporting												
Practice Name: Broom & Broom Ltd				Date Report Run: 19/12/2023								
Client No	Matt	F/E	W/T	Client House	Client Area	Client Town	Client County	Client P'Code	Billing House	Billing Area	Billing Town	Billing County
BO0001	3	MAB	FW_L PA	Falstaff House, Enigma Business Park	Sandy's Road	Malvern	Worcestershire	HR2 6JU				
BO0001	4	MAB	FW_P RO	Falstaff House, Enigma Business Park	Sandy's Road	Malvern	Worcestershire	HR2 6JU				
BO0001	5	MAB	CONV CV	Falstaff House, Enigma Business Park	Sandy's Road	Malvern	Worcestershire	HR2 6JU				

## Filter options

Reports

Miscellaneous Reports

Client List

Run

☐ Fee Earner:

☐ Work Type:

Private or LA: 

All

Type: 

All Matters

Date Filters: From:  To:

Summary? ☐

- **Fee Earner** - Tick this box to select only certain fee earners, or leave unticked for all fee earners.
- **Work Type** - Tick this box to select only certain work types, or leave unticked for all work types.
- **Private Or LA** - Leave on All for all clients or select Private or Legal Aid.
- **Type** - Choose from All Matters, Live Matters or Archived Matters.
- **Date Filters** - Enter the date range for the matters you wish to see.
- **Summary** - if ticked doesn't include the matter details - matter number, fee earner or work type, i.e. client details only.

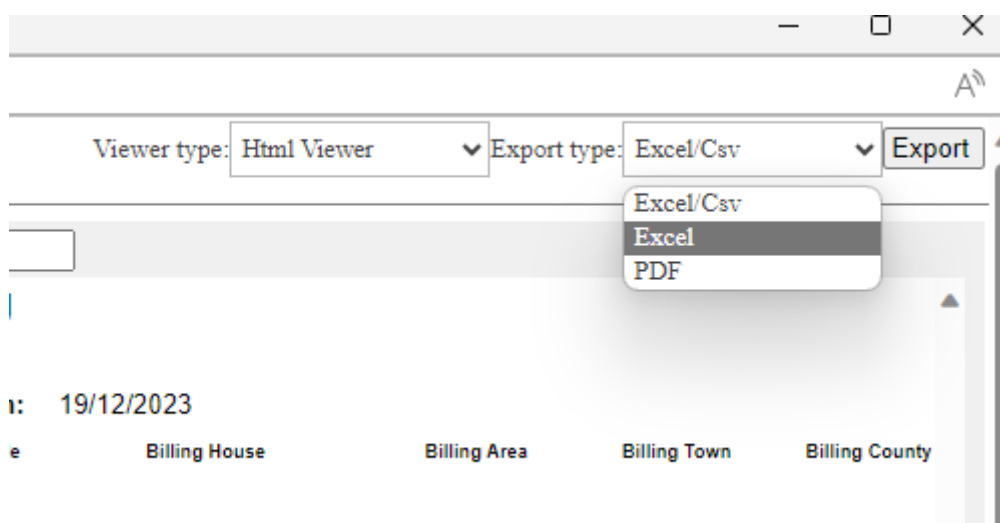
## List of columns produced

- If Summary is ticked
  - Client Number

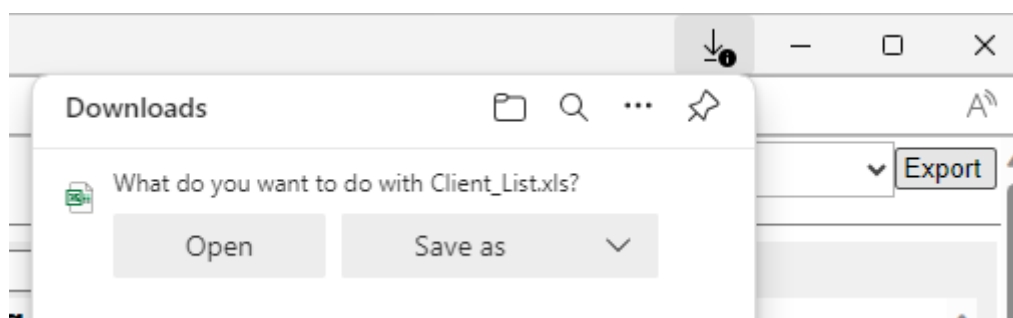
- Client Address (all fields)
- Client Billing Address (all fields)
- Client names 1-5
- If Summary is not ticked
  - Client Number
  - Matter Number
  - Fee Earner Code
  - Work Type Code
  - Client Address (all fields)
  - Client Billing Address (all fields)
  - Client names 1-5
  - Fee Earner Description
  - Work Type Description

## How to use the excel sheet in a Word Mail Merge

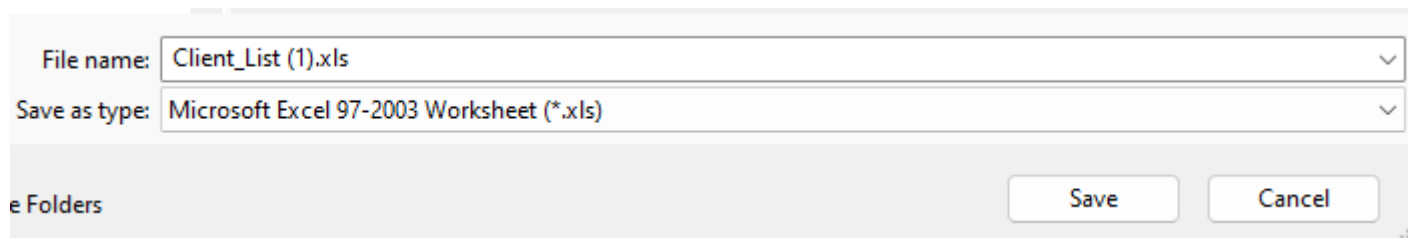
When the report has been generated to screen, select Export type Excel in the top right of the report.



Click Export.



Click Save As, select a location, name your file and ensure that the file type is XLS



File name: Client\_List (1).xls

Save as type: Microsoft Excel 97-2003 Worksheet (\*.xls)

e Folders

Save Cancel

You can now use this excel sheet as a data set for a Word Mail merge.

Follow Microsoft's guidance [here](#) to create your letters using this excel sheet.