



Osprey Approach: Reports: Client List

This help guide was last updated on
Jul 29th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=33165>



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 CU | 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:

Type:

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

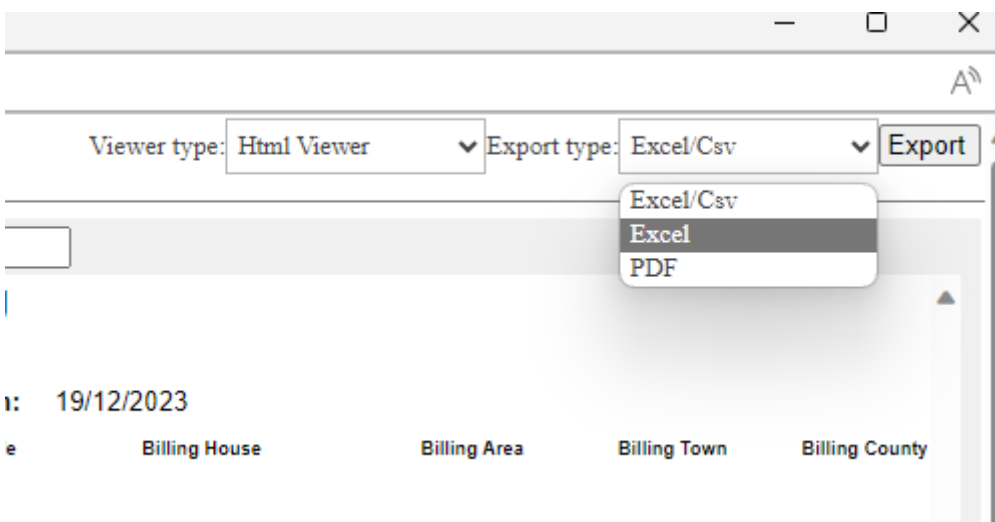
- If Summary is ticked
 - Client Number

- 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

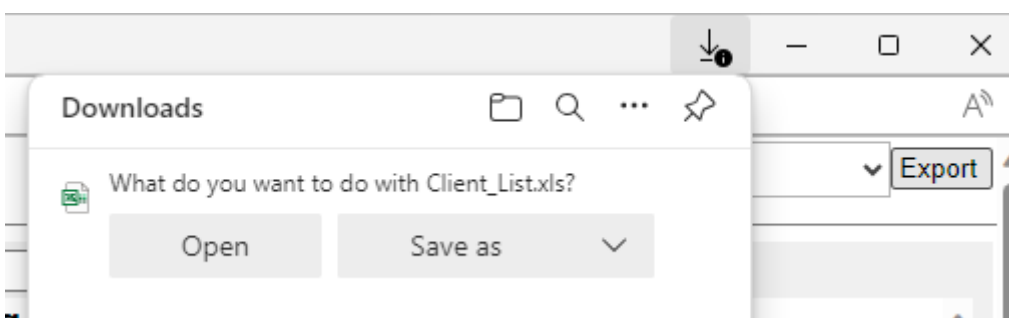
How to use the excel sheet in a Word Mail

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)

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.