



# Osprey Approach: Create a Letter to a Contact or Organisation

This help guide was last updated on  
May 28th, 2024

The latest version is always online at  
<https://support.ospreyapproach.com/?p=1974>

[Click here for a printer-friendly version](#)

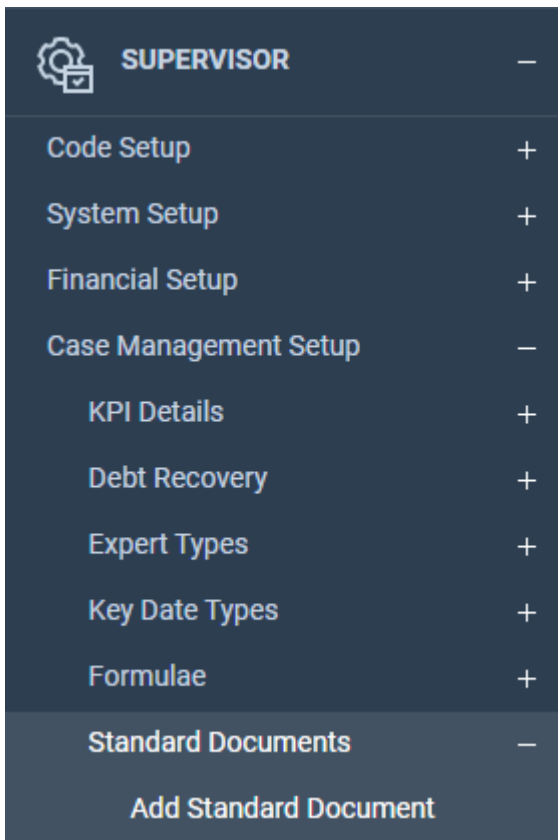


# You can select a contact or organisation to send an ad hoc letter to – This guide will detail the process required

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## Using the Browser

From Supervisor > Case Management Setup > Standard Documents, select Add Standard Document.



Choose the work type, if any, or leave set as Global to appear on all work types.

Give the document a description.

If this is to be a letter to a certain type of contact (e.g. Estate Agent) then select the relevant Expert Type.

Fill in any other details as relevant.

Click Save when done.

Osprey  
Approach  
Pracctice Ltd

Today's Units: 55  
Today's Time: 05h:30m  
Today's Value: £385.00

Global search

Supervisor Case Management Setup Standard Documents Add Standard Document

Save Cancel

Document Type Standard

Work Type Global

Description Ad Hoc letter to any Contact

Expert Type None selected

Retention Period None selected

Copy to Client? No

Copy To Associate? No

Auto Web Enabled

**SERVER SIDE MERGE OPTIONS**

Run Silently

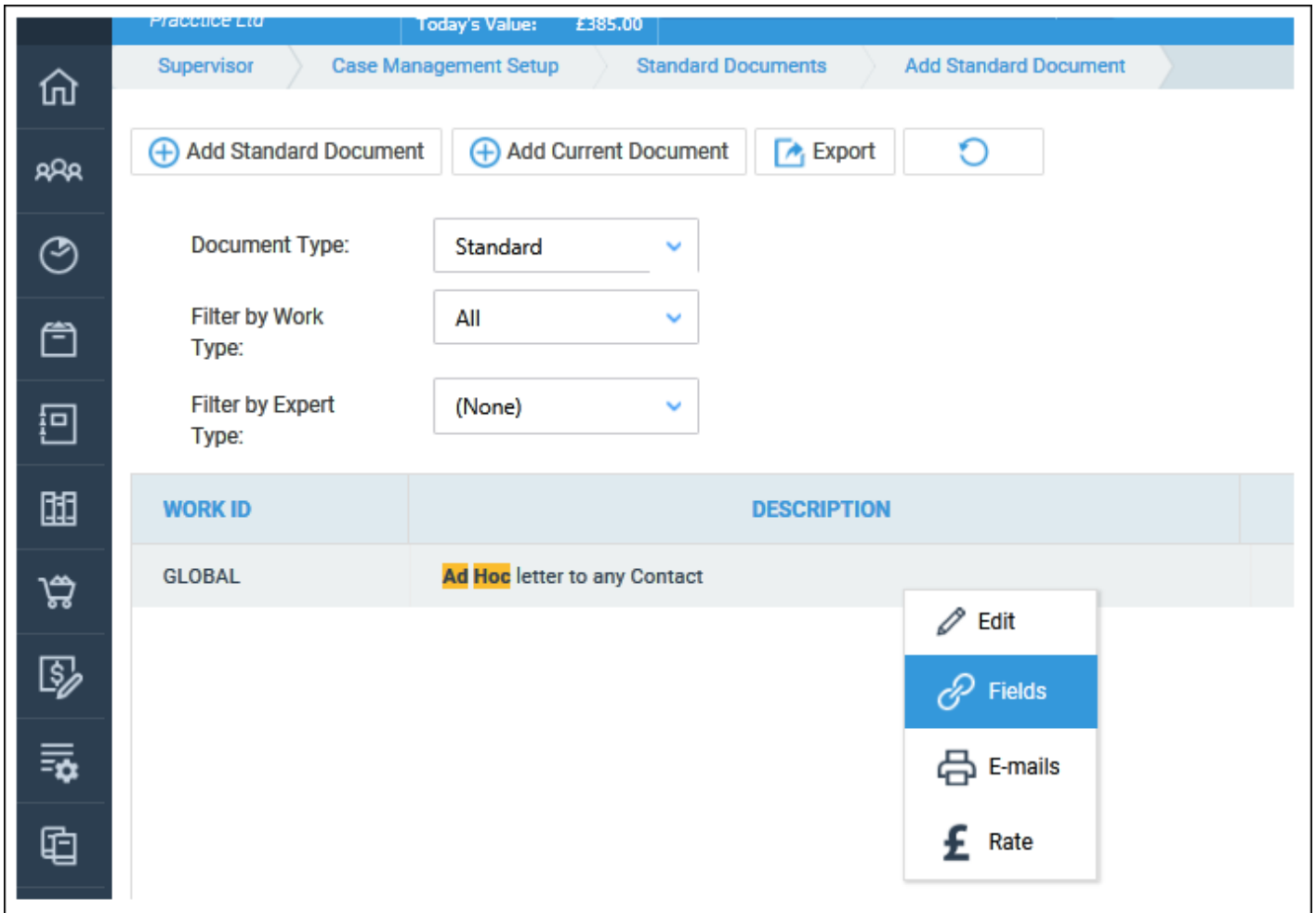
Auto Print

Batch Print

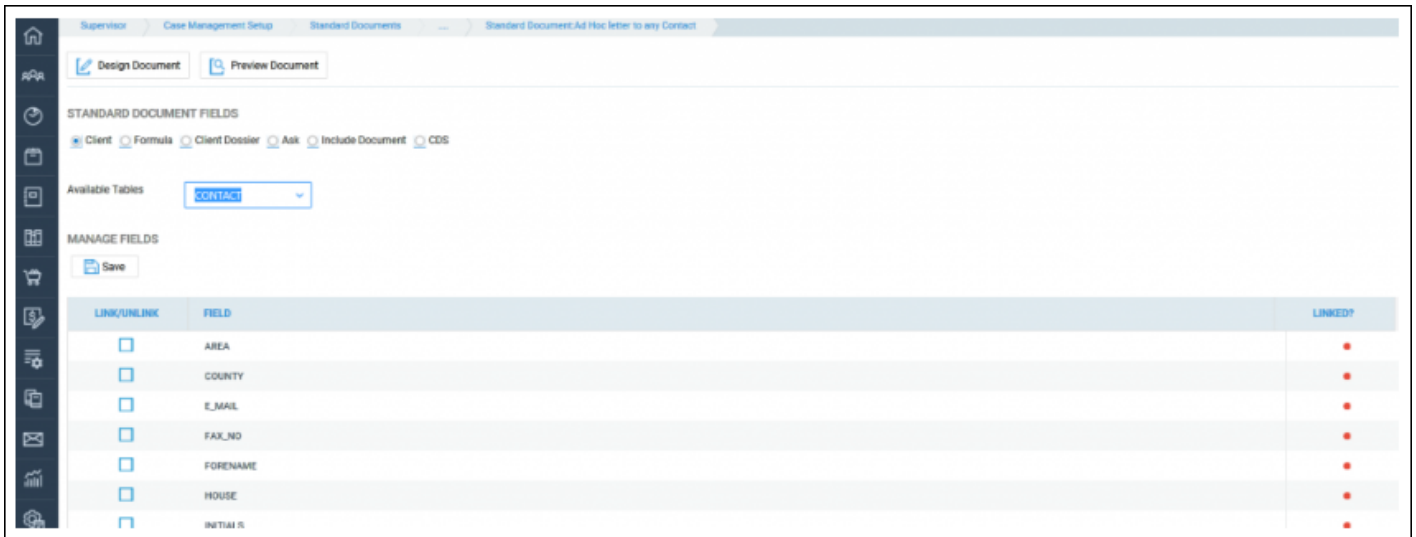
**TIME RECORDING OPTIONS**

Automatically Time Record on Matters:

Now, locate the letter within your list, right click it, and select the Fields option:

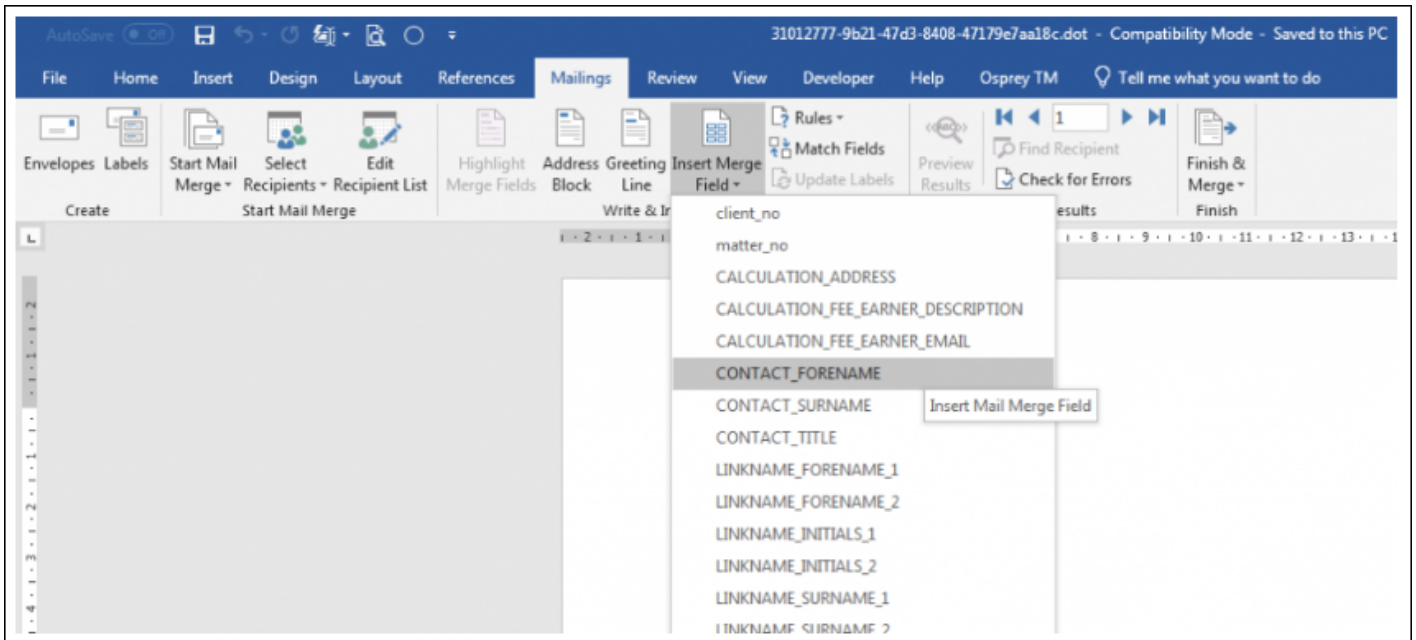


In the Available Tables box, select Contact if you wish to send the letter to Contacts, or Organisation if you want to send the letter to Organisations:



Link any fields you wish to use by ticking the Link/Unlink box and selecting Save when done.

Design your document as required, inserting fields as usual:



Close and save the document when done.

When this document is run from Document Production, you will be prompted to choose the contact / organisation to whom you would like to send the document:

test.ospreyapproach.com/main/DocumentProductionContOrgNew.aspx?area=30... — □ ×

https://test.ospreyapproach.com/main/DocumentProductionContOrgNew.aspx?... A

**Contacts**

↻

Surname	Forename	initials	title
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Yuriko			Mortgage
Young	Jacob	JY	Mr
Xenia			
Xena			
x	z		y
Wood	Richard	R	Mr
Wood	Matthew	M	Mr
Wilson	Linda	WL	Mrs
Williams	Dan	WD	Mr
Wilkinson	Maria	WM	Mrs
Wilkinson	Anthony	AW	Mr

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Select the contact / organisation you require and the letter will be merged with the relevant details.

## Using the Case Management App

From Supervisor > Case Management Setup > Standard Documents, select Add Standard Document.

Today's Units: 0  
 Today's Time: 00h00m  
 Today's Value: £0.00

Global search

00:00:44 / 0

Standard Documents

+ Add Standard Document + Add Current Document

Filter by:

Document Type: Standard

Work Type: ALL

Expert Type: None

Search...

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
FWRCP	_1 doc			N	N
FWRCP	_1 doc from browser			N	N
FWRCP	_doc from App			N	N
GLOBAL	_1 DD standard doc			A	A
GLOBAL	_1 Test doc created in App			A	A
CRIME	_andrei			N	N
GLOBAL	_andrei2			N	N
GLOBAL	_andrei3			N	N
GLOBAL	_CONTACT 1			N	N
GLOBAL	_CONTACT&ORGANISATION 1			N	N
GLOBAL	_ORGANISATION 1			N	N
GLOBAL	_ORGANISATION 2.1			A	A
GLOBAL	_ORGANISATION 3			N	N
GLOBAL	_ORGANISATION 4			N	N

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Choose the work type, if any, or leave set as Global to appear on all work types.

Give the document a description.

If this is to be a letter to a certain type of contact (e.g. Estate Agent) then select the relevant Expert Type.

Fill in any other details as relevant.

Click Save when done.

Today's Units: 0  
 Today's Time: 00h00m  
 Today's Value: £0.00

Global search

00:00:44 / 0

Standard Documents

← Save

Document Type: Standard

Work Type: GLOBAL

Description: Ad Hoc letter to any Contact

Expert Type: None selected

Retention Period: None selected

Copy to Client: No

Copy to Associate: No

Auto Web Enabled Client:

Auto Web Enabled Associate:

SERVER SIDE MERGE OPTIONS

Run Silently:

Auto Print:  Auto printing is only applicable to letters which are run silently.

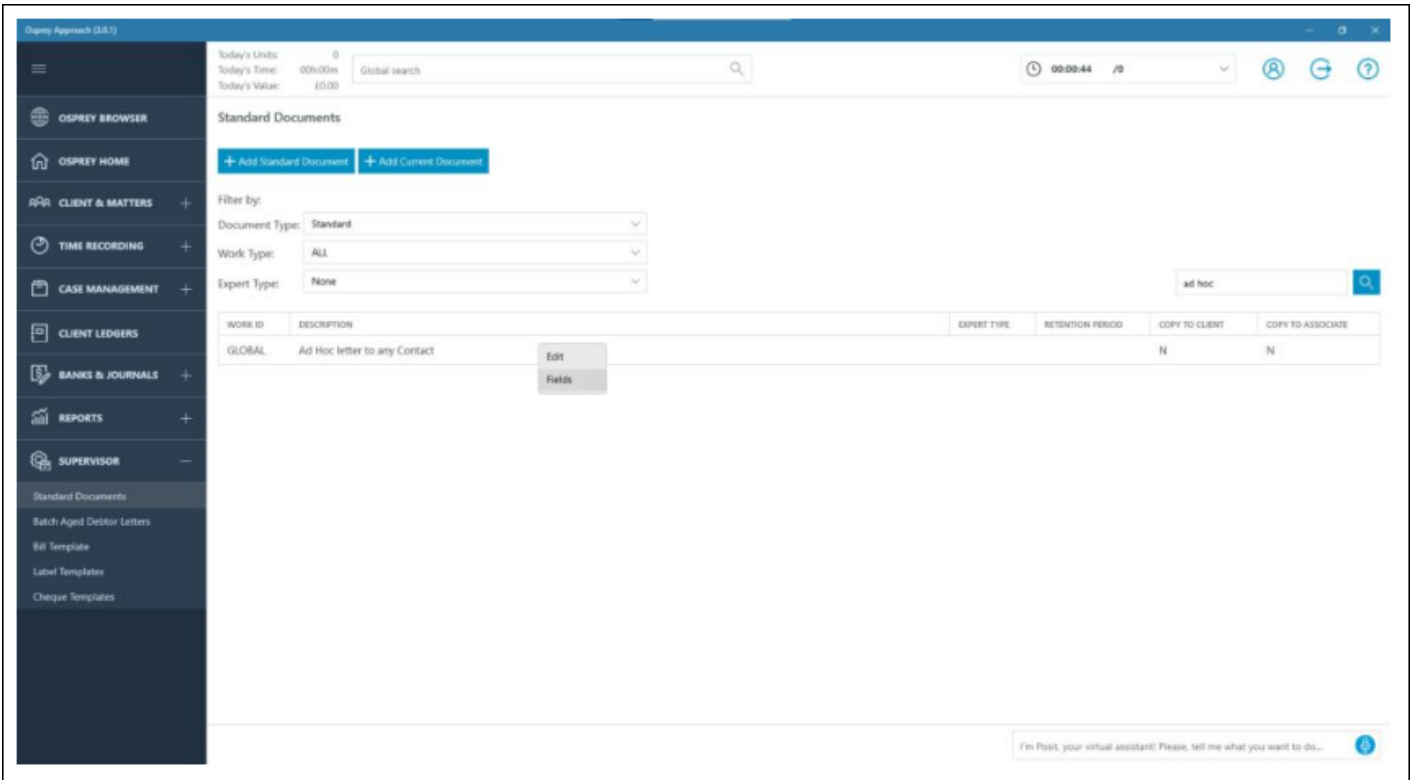
Batch Print:

TIME RECORDING OPTIONS

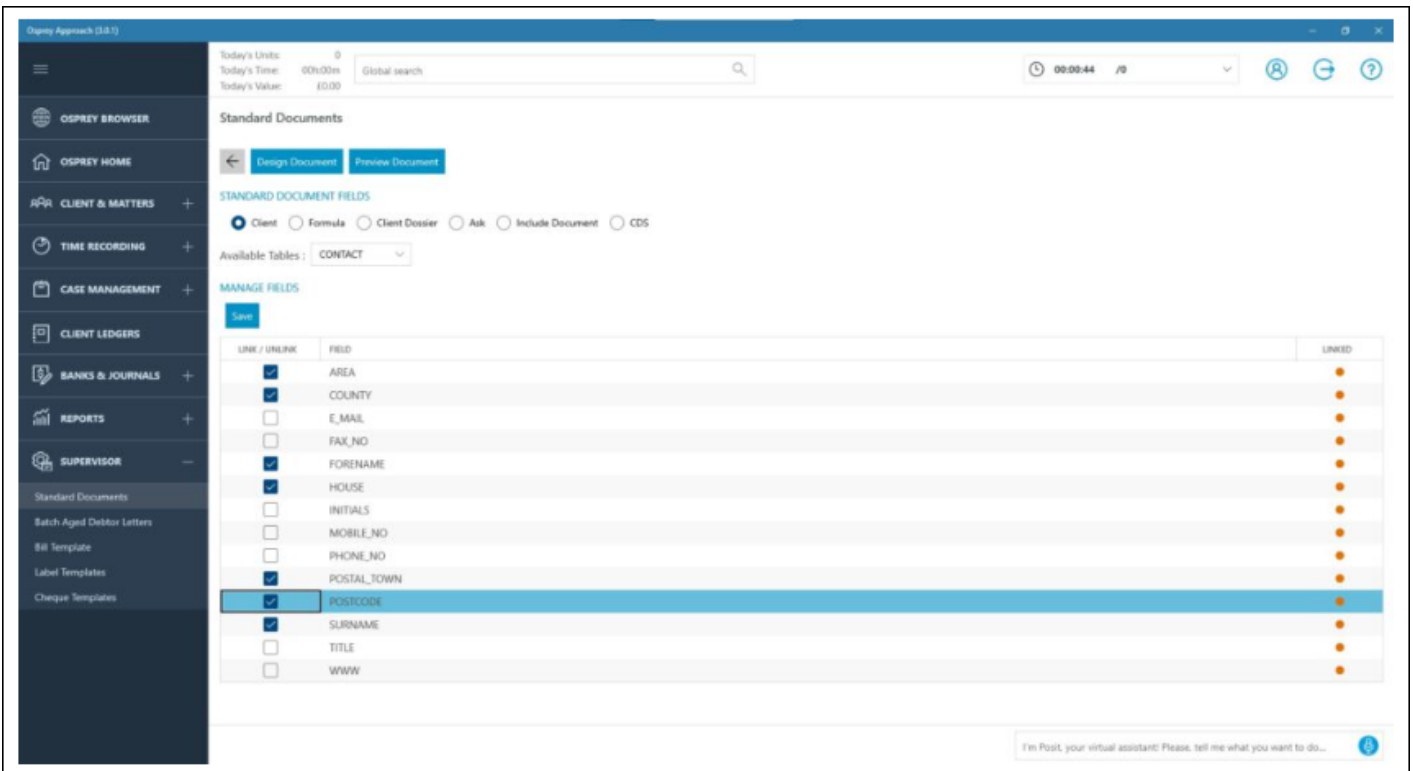
Automatically Time Record on Matters:

I'm Posit, your virtual assistant! Please, tell me what you want to do...

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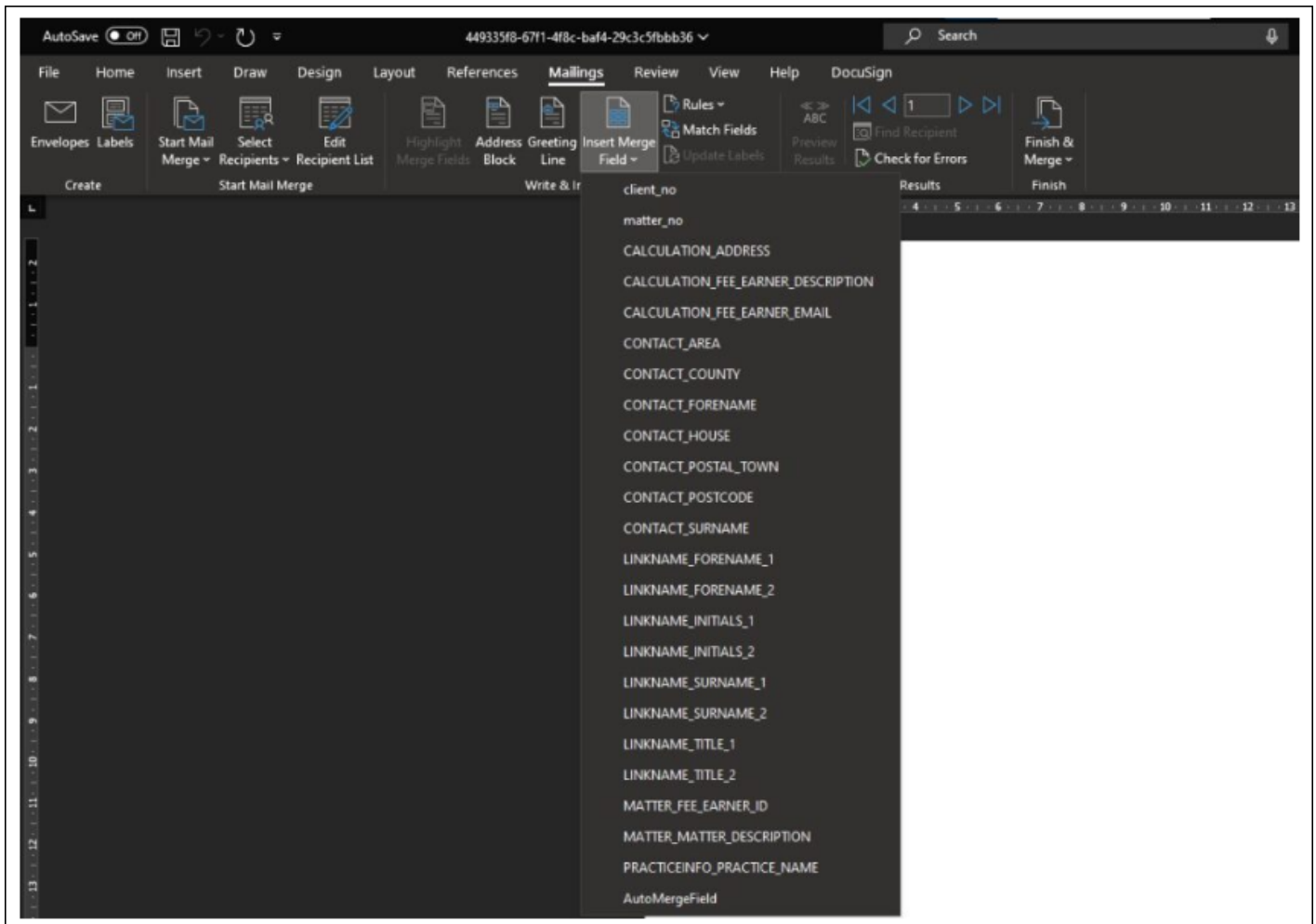
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