



Osprey Approach: Create a Letter to a Contact or Organisation

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

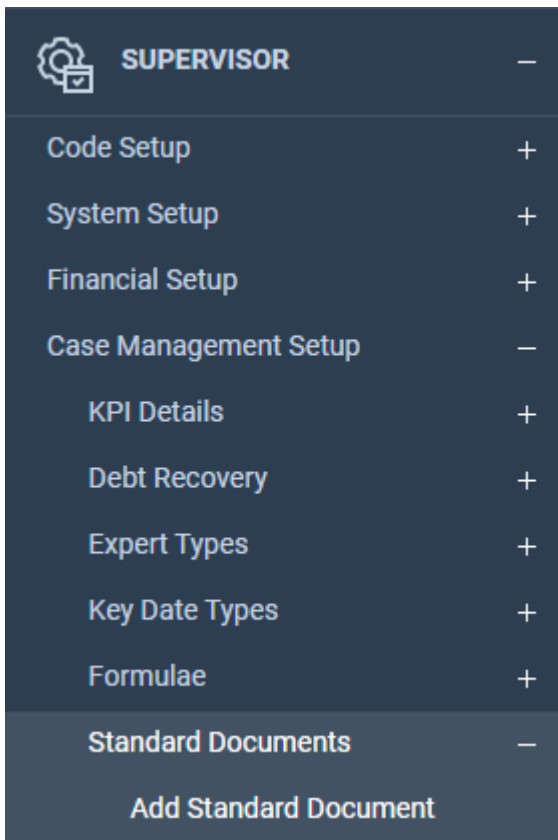
The latest version is always online at
<https://support.ospreyapproach.com/?p=1974>



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

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
Practice 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:

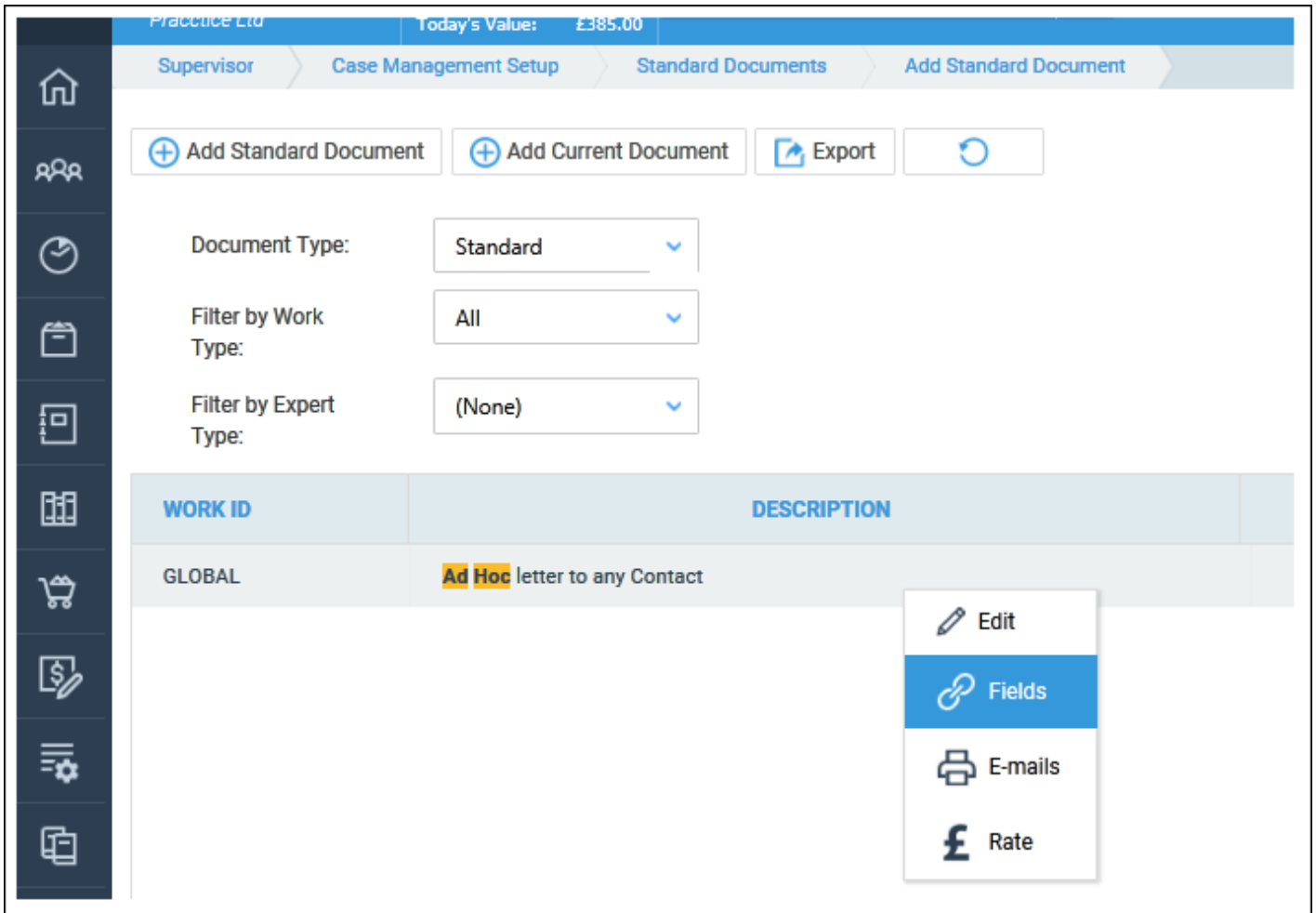
Auto Print:

Batch Print:

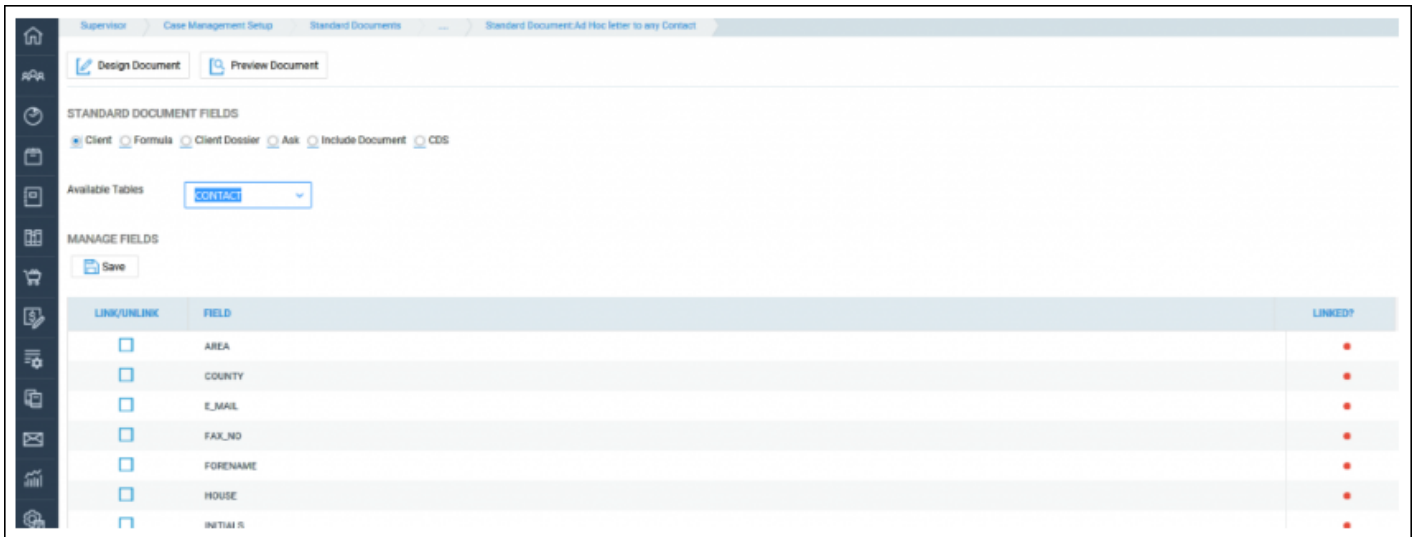
TIME RECORDING OPTIONS

Automatically Time Record on Matters:

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

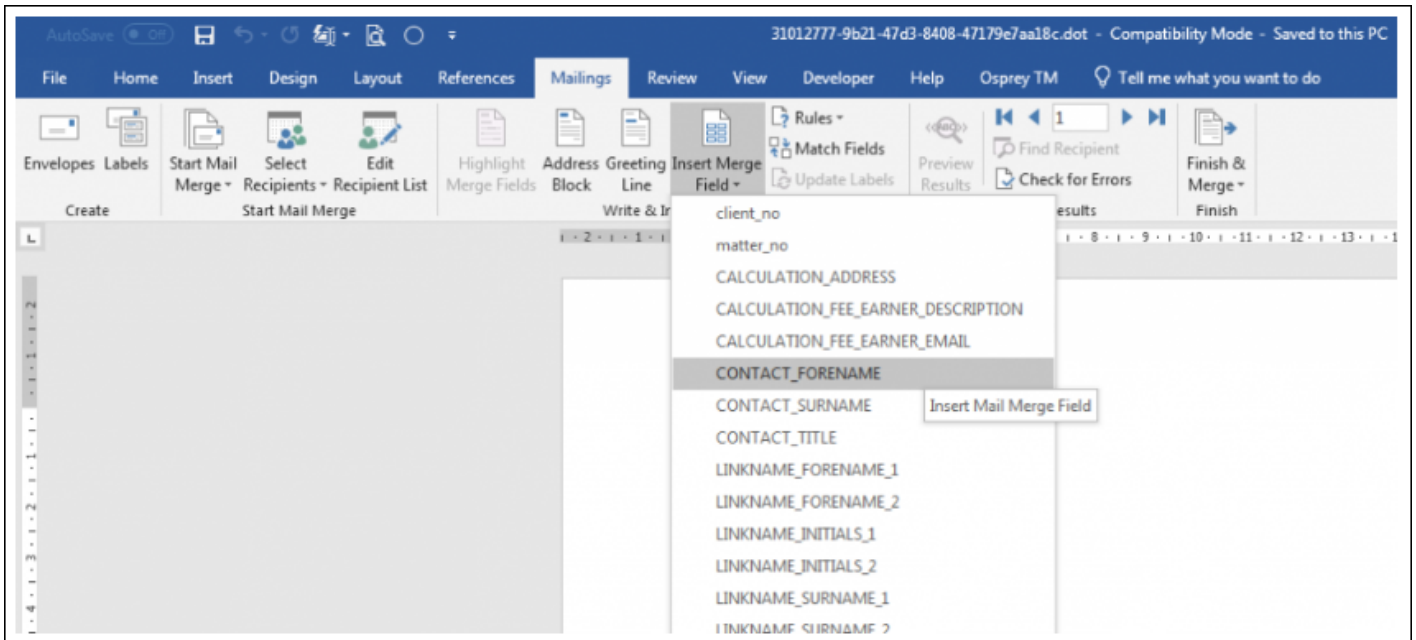


In the Available Tables box, select Contact if you wish to send the letter to Contacts, or Organisation if you want to send the letter to Organisations:



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

↻

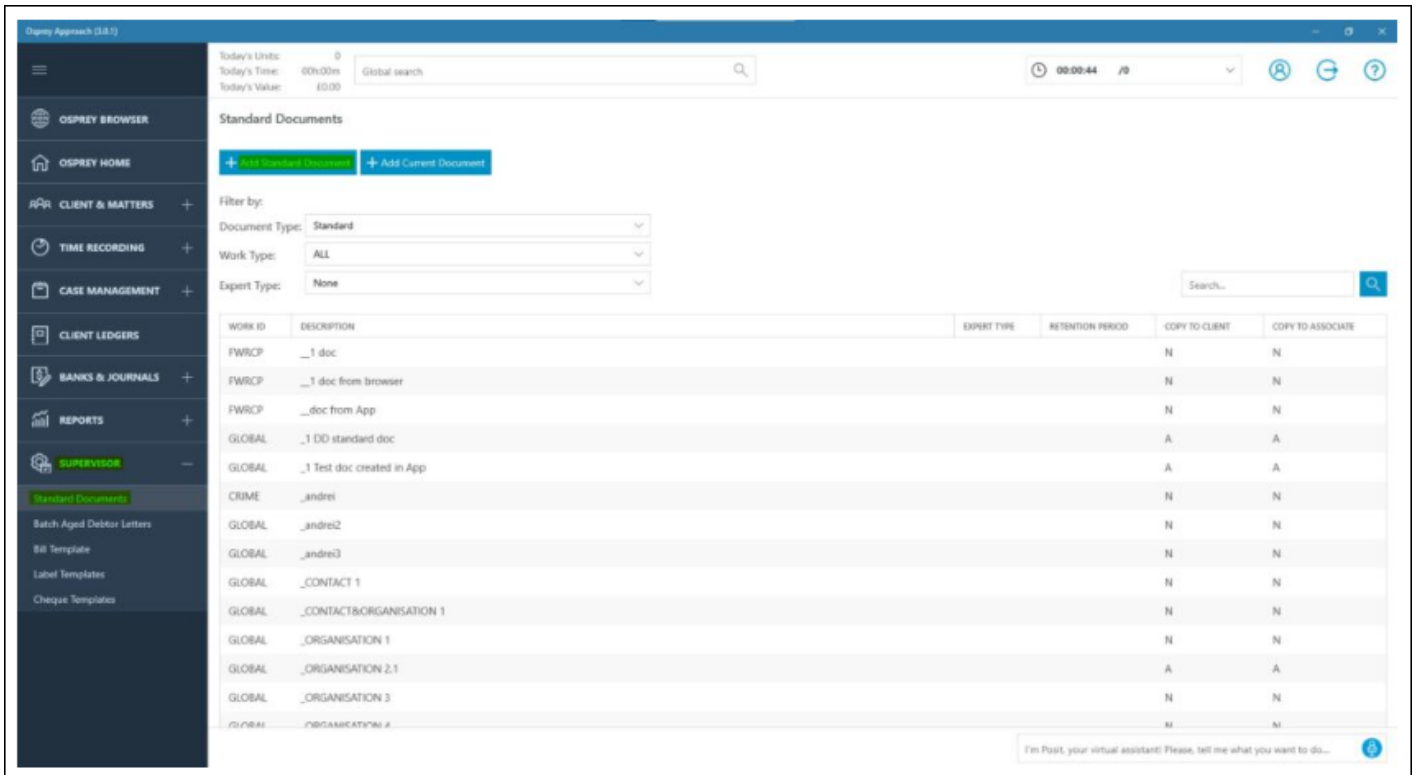
Surname	Forename	initials	title
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Yuriko			Mortgage
Young	Jacob	JY	Mr
Xenia			
Xena			
x	z		y
Wood	Richard	R	Mr
Wood	Matthew	M	Mr
Wilson	Linda	WL	Mrs
Williams	Dan	WD	Mr
Wilkinson	Maria	WM	Mrs
Wilkinson	Anthony	AW	Mr

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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.



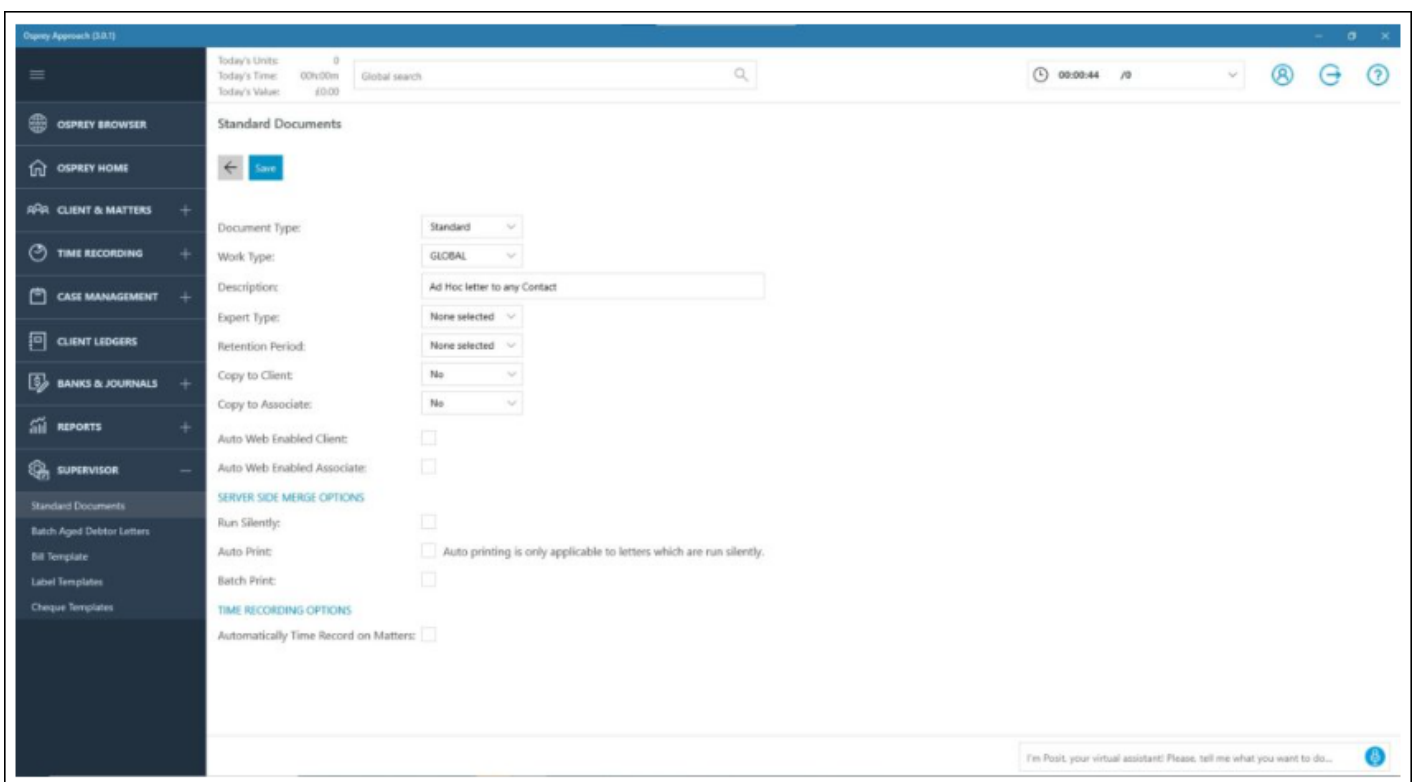
Choose the work type, if any, or leave set as Global to appear on all work types.

Give the document a description.

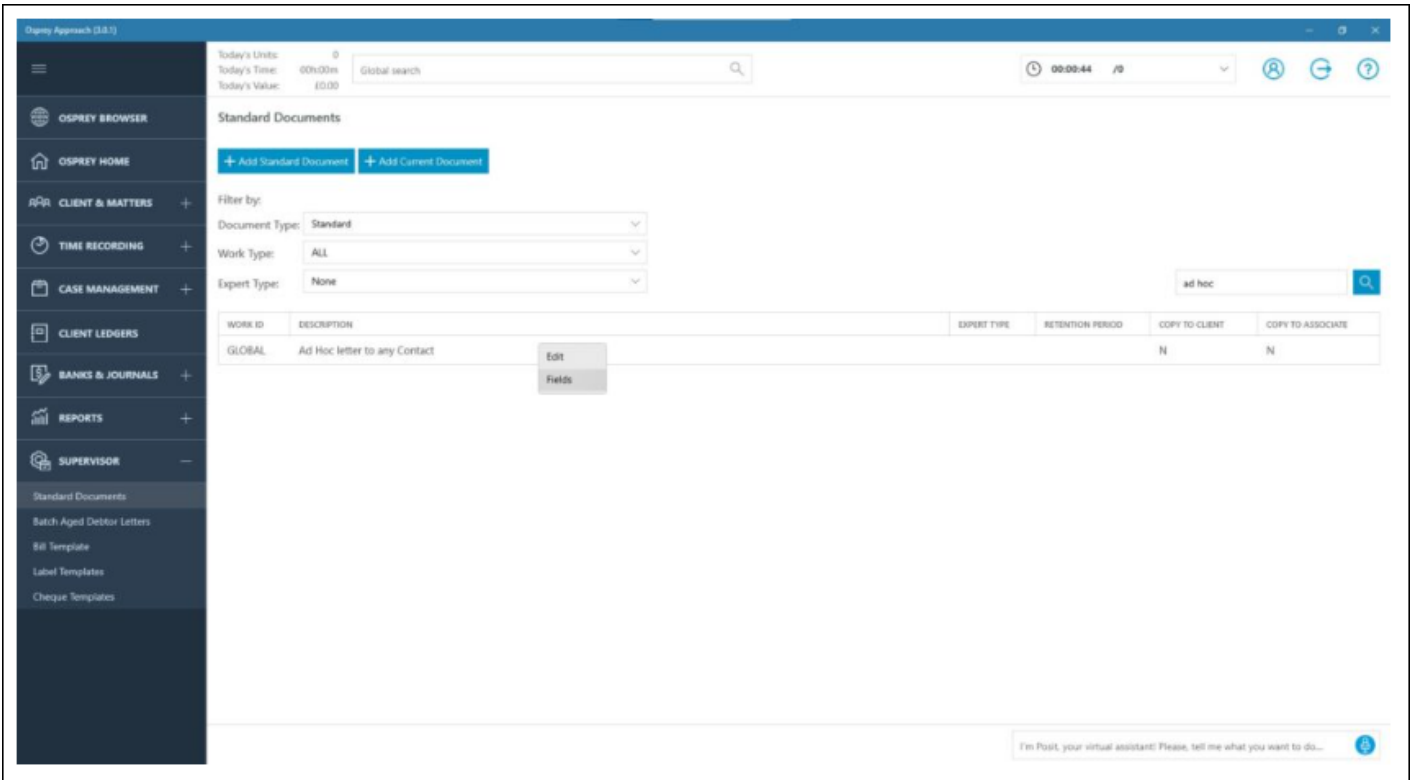
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Fill in any other details as relevant.

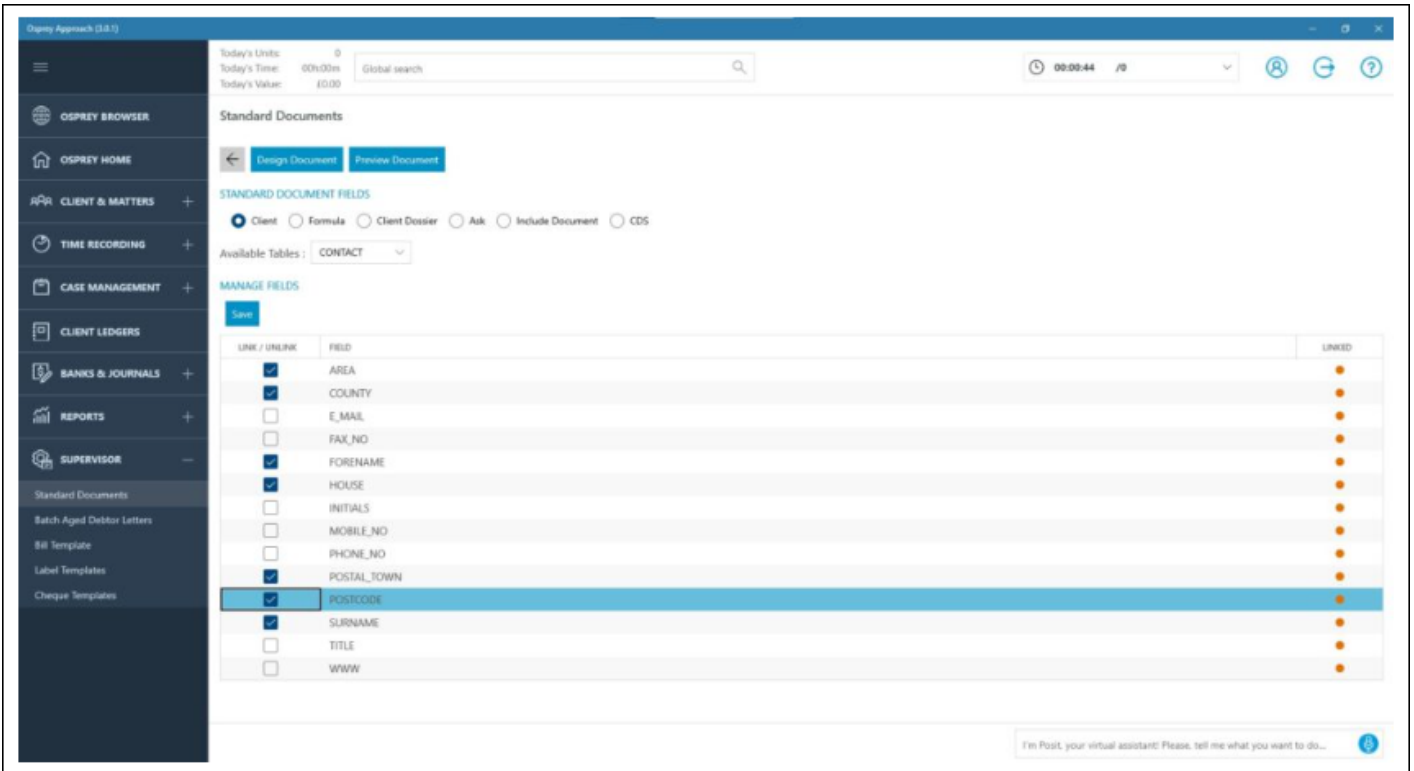
Click Save when done.



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

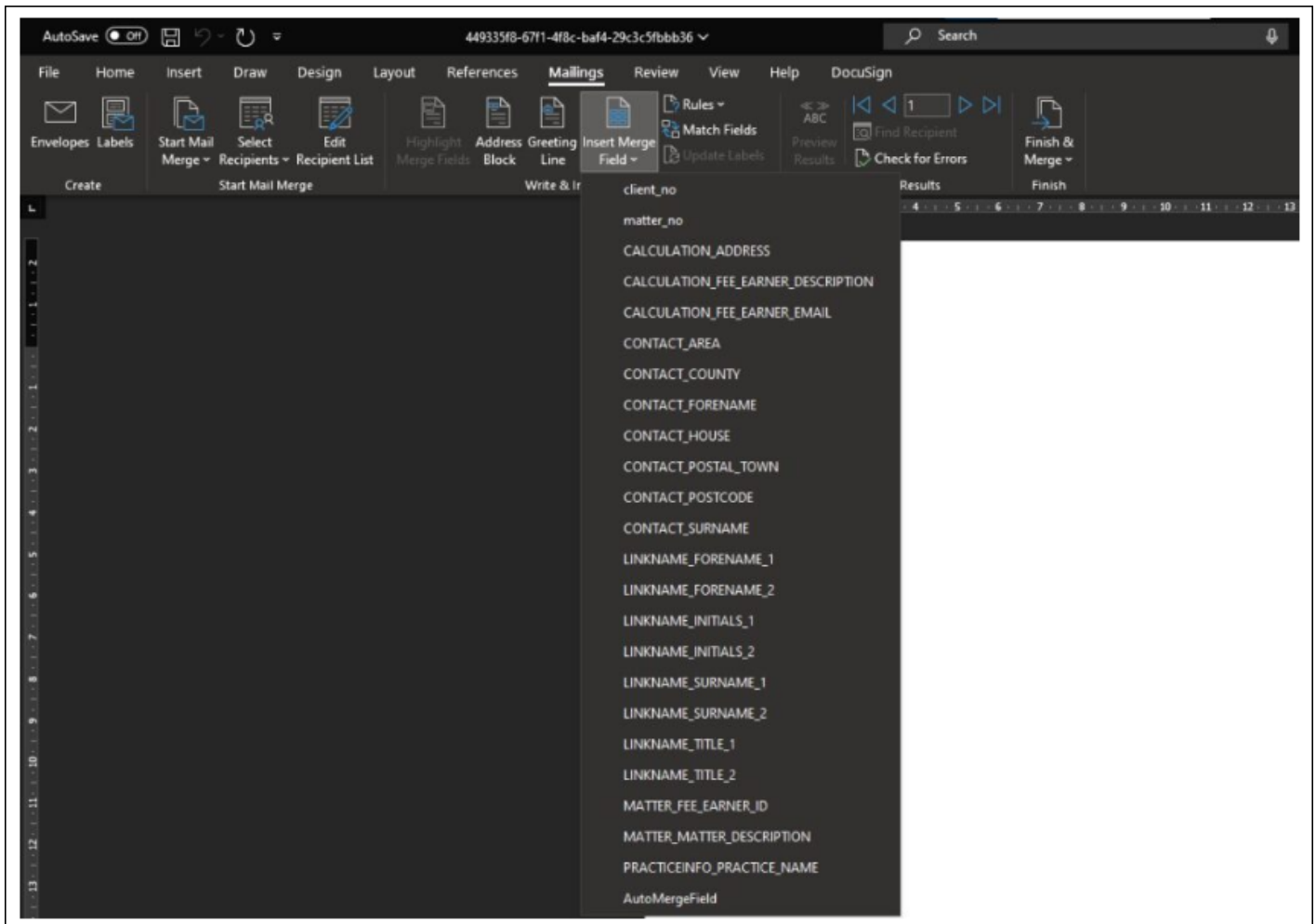


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