

Osprey Approach: Create a New Standard Document

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May 22nd, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=23864>

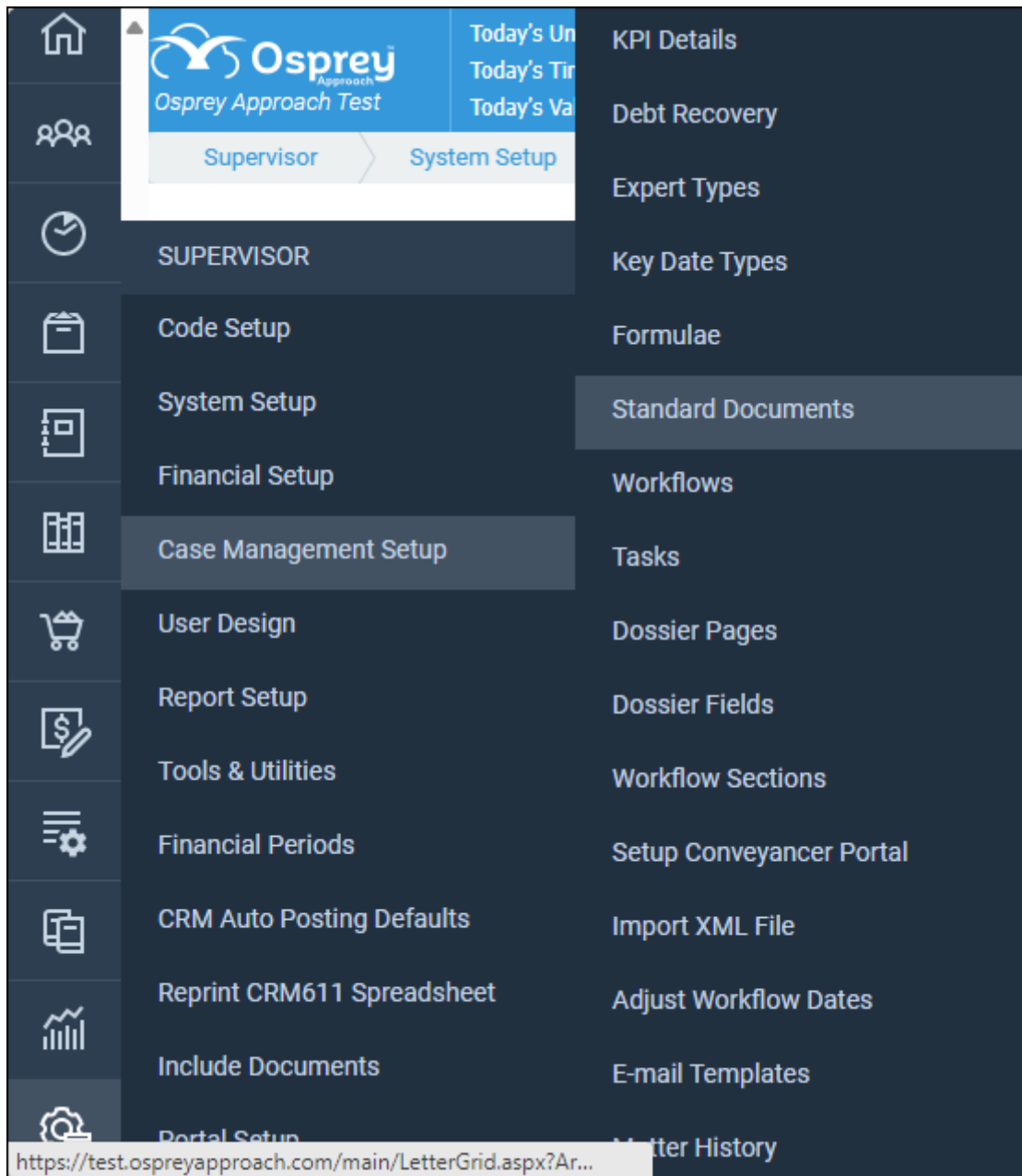
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Standard documents can be used to speed up your communication with your clients. This guide will take you through how to add a new one to Osprey

To add a new Standard Document or precedent letter to your system, follow the steps below.

Navigate to Supervisor > Case Management Setup > Standard Documents.



Add Standard Document - use this if you want to create a completely new letter from scratch.

Current Document - use this if you want to create a new document based on an existing document.

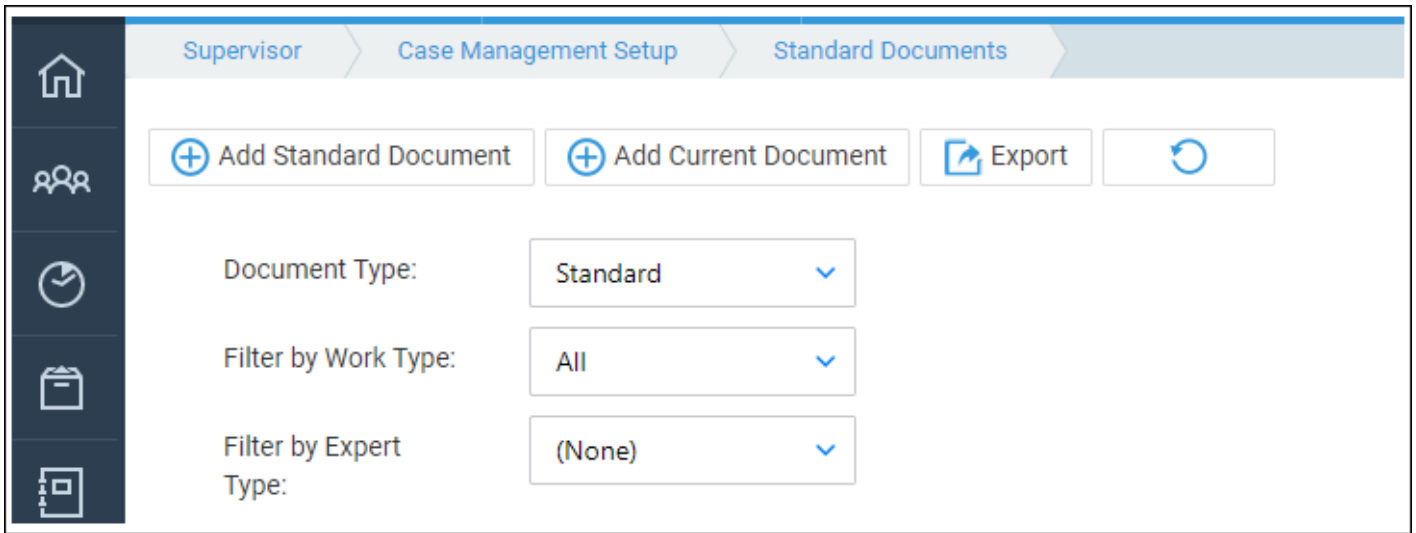
Supervisor > Case Management Setup > Standard Documents

+ Add Standard Document + Add Current Document Export Refresh

Document Type: Standard

Filter by Work Type: All

Filter by Expert Type: (None)



Add Standard Document

Supervisor
Case Management Setup
Standard Documents
Add Standard Document

Save
 Cancel

Document Type Standard

Work Type Global

Description

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

Batch Print

TIME RECORDING OPTIONS

Automatically Time Record on Matters:

Document Type - leave this as Standard for a Word document to send to your clients. Choose Excel/PDF for the option to upload one of these documents, or choose General to save this document to the General File system.

Work Type - choose the work type you wish this letter to be available for, or Global if the letter is to be available for all clients. Remember that if you have dossier pages specific to your different work types, these will only be available to link into your letter if you have selected the correct work type.

Description - enter a description for the letter e.g. Blank Letter to Estate Agent.

Expert Type - if required, select the expert type to which you would like to send this letter, or leave as None Selected if you wish.

Retention Period - set the retention period for any documents created using this template. If a retention period is set, all letters created using this template will be deleted from the matter history after the set period.

Copy to Client - setting this to Yes will automatically email a copy of the letter to the client's email address on saving. Setting to No will not give you the option. Setting to Ask provides you with a tick box on the save screen when saving a letter based on this template so that you can decide whether to automatically email the letter to the client.

Copy to Associate - as Copy to Client, but relating to the linked associate if you are using the web portal.

Auto Web Enabled Client - tick this box if you are using the web portal and want all letters based on this template to be web published automatically for your client.

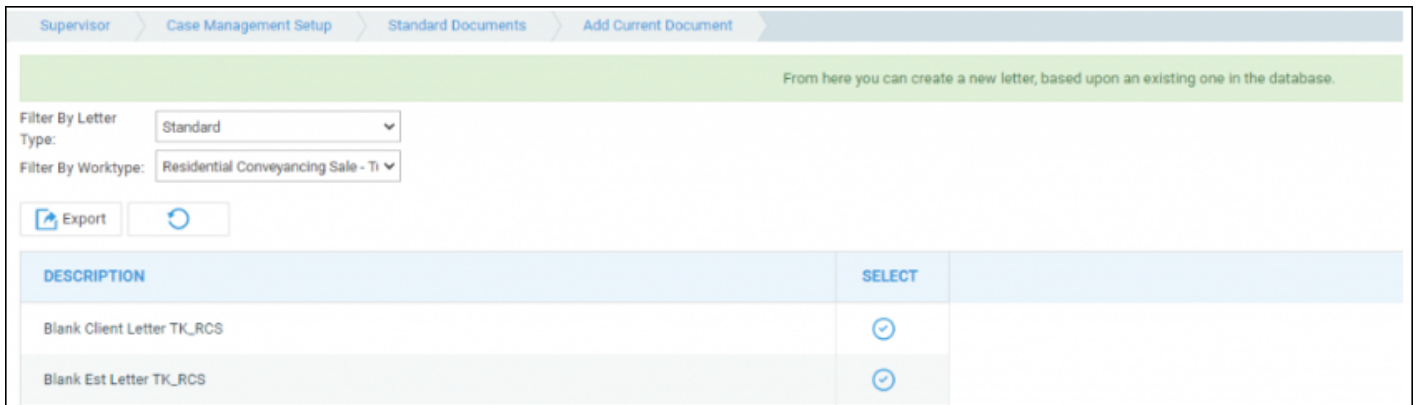
Auto Web Enabled Associate - tick this box if you are using the web portal and want all letters based on this template to be web published automatically for the Associate.

Server Side Merge functions - defunct.

Automatically Time Record on Matters - tick this if you wish to time record your letters easily. (The option to time record can be amended at the point of save).

Click Save when you are done. Next, Link fields to your documents >

Add Current Document



The screenshot shows a web interface for adding a current document. At the top, there are navigation tabs: Supervisor, Case Management Setup, Standard Documents, and Add Current Document. Below the tabs is a green banner with the text: "From here you can create a new letter, based upon an existing one in the database." Below the banner are two filter dropdowns: "Filter By Letter Type:" set to "Standard" and "Filter By Worktype:" set to "Residential Conveyancing Sale - Ti". There are two buttons: "Export" and a refresh icon. Below these is a table with two columns: "DESCRIPTION" and "SELECT".

DESCRIPTION	SELECT
Blank Client Letter TK_RCS	<input type="radio"/>
Blank Est Letter TK_RCS	<input type="radio"/>

Select the work type you wish to search for existing documents within to base your new letter template on, and click the Select option once you have located it.

Supervisor > Case Management Setup > Standard Documents > Add Current Document

Save Cancel

The worktype can't be changed because the letter has dossier fields linked.

Selected Letter	TK_RCS_1 - Blank Client Letter TK_RCS
Link To Worktype	Residential Conveyancing Sale - T1 ▼
Description	<input type="text"/>

The work type will not be editable, but you can enter a new description for the document template and click Save. This will save an exact replica of the letter you chose to base your new template on. You can now progress to linking fields > and editing the text of the letter.