

Osprey Approach: Creating a Formula to Record Postcodes

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<https://support.ospreyapproach.com/?p=62657>

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This guide will demonstrate how to split a postcode into individual characters by using a formula

Please note that this guide assumes you have knowledge of Case Management Supervisor in relation to formulae. [Please see Add and Use Formulae here >](#)

Some forms require the post code to be split into separate characters as below:

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Osprey stores the post code as one field, so you will need to create a formulae within Osprey which can be used to calculate a value based on other Osprey values.

These can then be displayed on dossier pages if required, or they can be used to link directly from the formula list in your letters or forms.

We will need to create 8 formulae here to work out each separate character of the post code.

Creating the formula

Navigate to the 'Supervisor' area of Osprey and select 'Case Management Setup'. Now select 'Formulae'.

 SUPERVISOR	–
Code Setup	+
System Setup	+
Financial Setup	+
Case Management Setup	–
KPI Details	+
Debt Recovery	+
Expert Types	+
Key Date Types	+
Formulae	+

You will need to set up the 8 separate postcode character formulae as follows:

PostCodeCharacter1	1st character of postcode	Left({!CLIENT.POSTCODE}, 1)
PostCodeCharacter2	2nd character of postcode	Mid({!CLIENT.POSTCODE}, 1, 1)
PostCodeCharacter3	3rd character of postcode	Mid({!CLIENT.POSTCODE}, 2, 1)
PostCodeCharacter4	4th character of postcode	Mid({!CLIENT.POSTCODE}, 3, 1)
PostCodeCharacter5	5th character of postcode	Mid({!CLIENT.POSTCODE}, 4, 1)
PostCodeCharacter6	6th character of postcode	Mid({!CLIENT.POSTCODE}, 5, 1)
PostCodeCharacter7	7th character of postcode	Mid({!CLIENT.POSTCODE}, 6, 1)
PostCodeCharacter8	8th character of postcode	Mid({!CLIENT.POSTCODE}, 7, 1)

The LEFT function allows us to get the specified number of characters from the left of the field – in this case 1 to only display the 1st character of the post code.

The MID function allows us to get characters from the middle of the field given a starting position, and number of characters. The first character in the field is character 0, so the formula Mid({!CLIENT.POSTCODE}, 1, 1) tells the system to look at the client postcode, second character, and return only one character from there.

If you wish, once the formula has been created, you can link these to new dossier fields. [Please see Creating new Dossier Fields and Pages here >](#)


This is not necessary if you only want to use these fields in letters or forms however.

If this is required, create these as POSTCODE1 through to POSTCODE8 set them as type 'Formula' and choose your relevant newly created formula.

The dossier page

If you wish to create a dossier page to view the results, as there are going to be 8 fields we don't want to clutter other dossier pages with this information. You can create this as a client level dossier page. Link all the fields created above to this page, Design the page and save your changes.

 Save

 Cancel

Position 1

POSTCODE1 

Position 2

POSTCODE2 

Position 3

POSTCODE3 

Position 4

POSTCODE4 

Position 5

POSTCODE5 

Position 6

POSTCODE6 

Position 7

POSTCODE7 

Position 8

POSTCODE8 

Position 9

Leave blank 

Position 10

Leave blank 

Position 11

Leave blank 

Position 12

Leave blank 

Position 13

Leave blank 

Position 14

Leave blank 

Position 15

Leave blank 

Position 16

Leave blank 

Position 17

Leave blank 

Position 18

Leave blank 

Position 19

Leave blank 

Position 20

Leave blank 