

Osprey Approach: Conditional Formatting

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The latest version is always online at
<https://support.ospreyapproach.com/?p=23833>

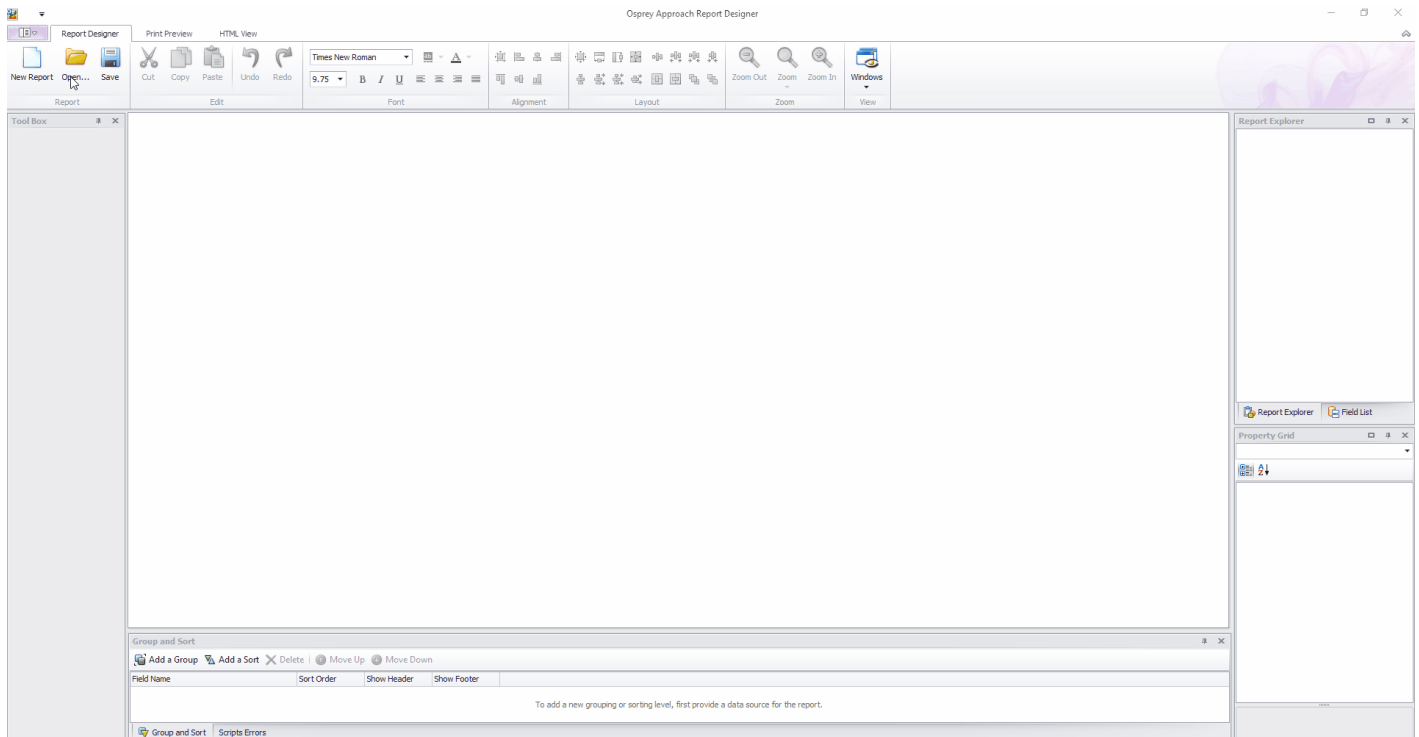
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Any reports you have written for your company can be set to display with Conditional Formatting - this enables you to highlight entries on reports based on specific criteria. Examples may be to highlight monetary values below a certain amount, or dates earlier than a particular date.

In the example below, we are using an introducer report to calculate the amounts of commission paid to each introducer. This amount is based on the fee quoted to the client. The conditional formatting will be set to highlight matters where the fee quoted has not been entered.

Open the report you wish to add the conditional formatting to.



Select the field you wish to change the formatting of, dependent on the conditions. Click the chevron button in the top right hand corner of the field, and select the ellipsis (...) button alongside Formatting Rules. Then click Edit Rule Sheet.

The screenshot displays the 'Conveyancing Sources' report. The bar chart shows the following data points:

Category	Commission Received	Matters Introduced
A	2.6	4.5
B	7.4	4.5
C	6.8	7.1
D	3.7	3.4
E	0.9	9.4

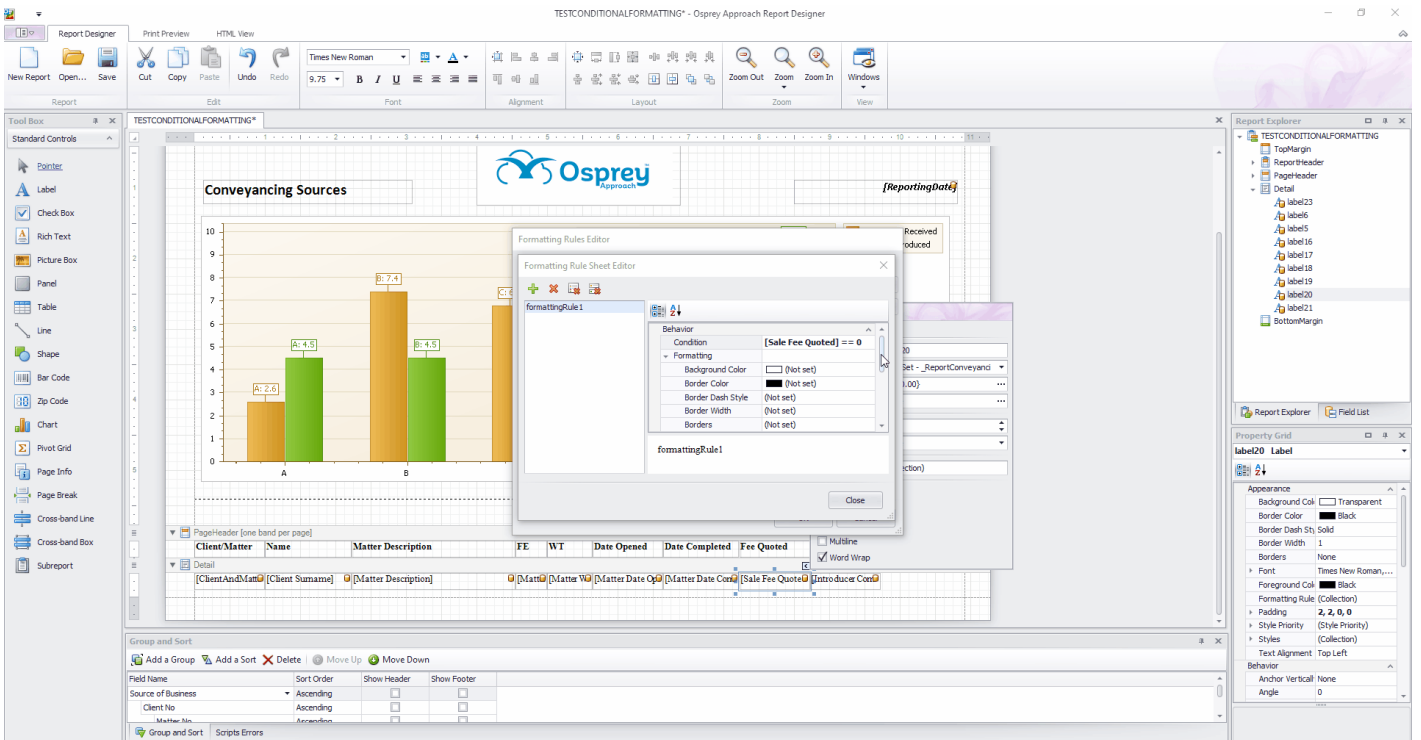
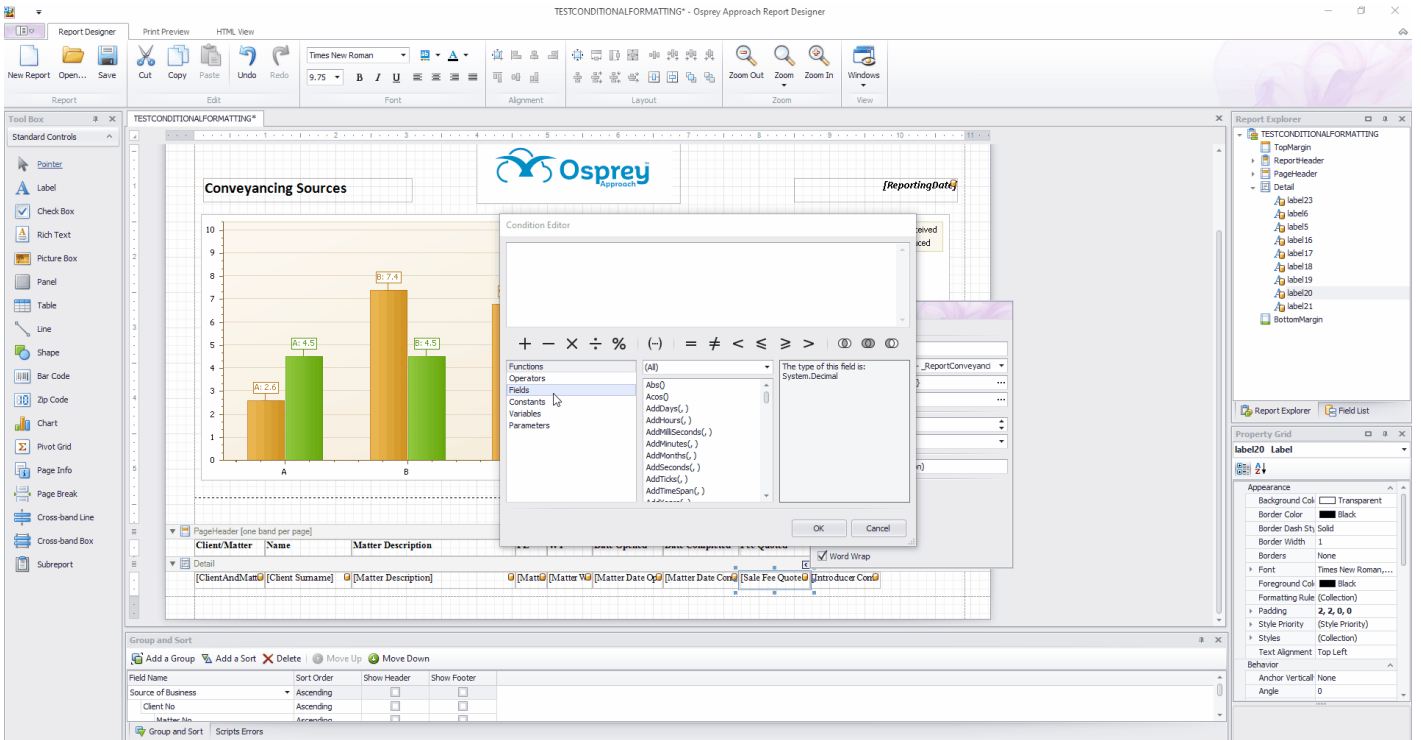
The data table below the chart has the following structure:

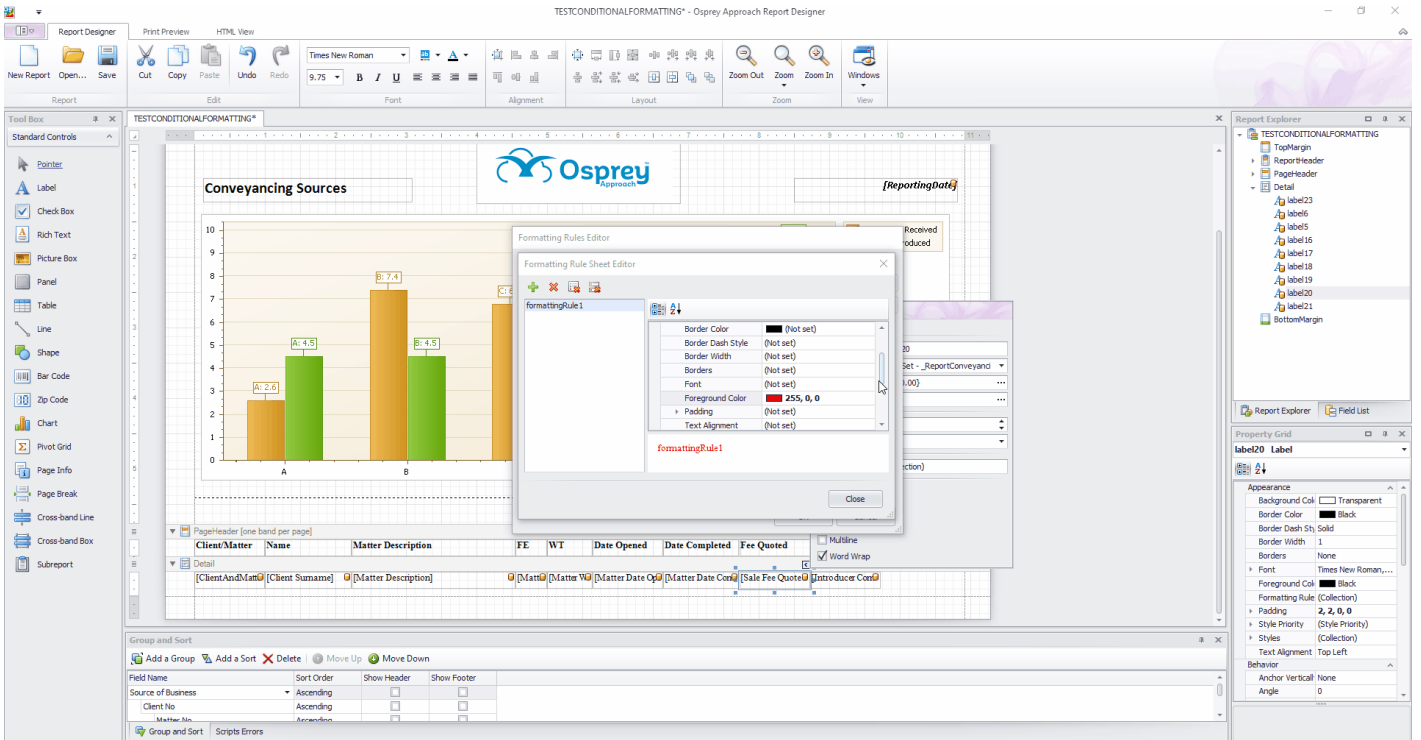
Client/Matter	Name	Matter Description	FE	WT	Date Opened	Date Completed	Fee Quoted	Commission
[ClientAndMatter]	[Client Surname]	[Matter Description]	[Matter FE]	[Matter WT]	[Matter Date Opened]	[Matter Date Completed]	[Sale Fee Quoted]	[Introducer Commission]

Click the + button to add a new formatting rule. On the right hand side of the resulting box, click the ellipsis (...) button alongside Condition.

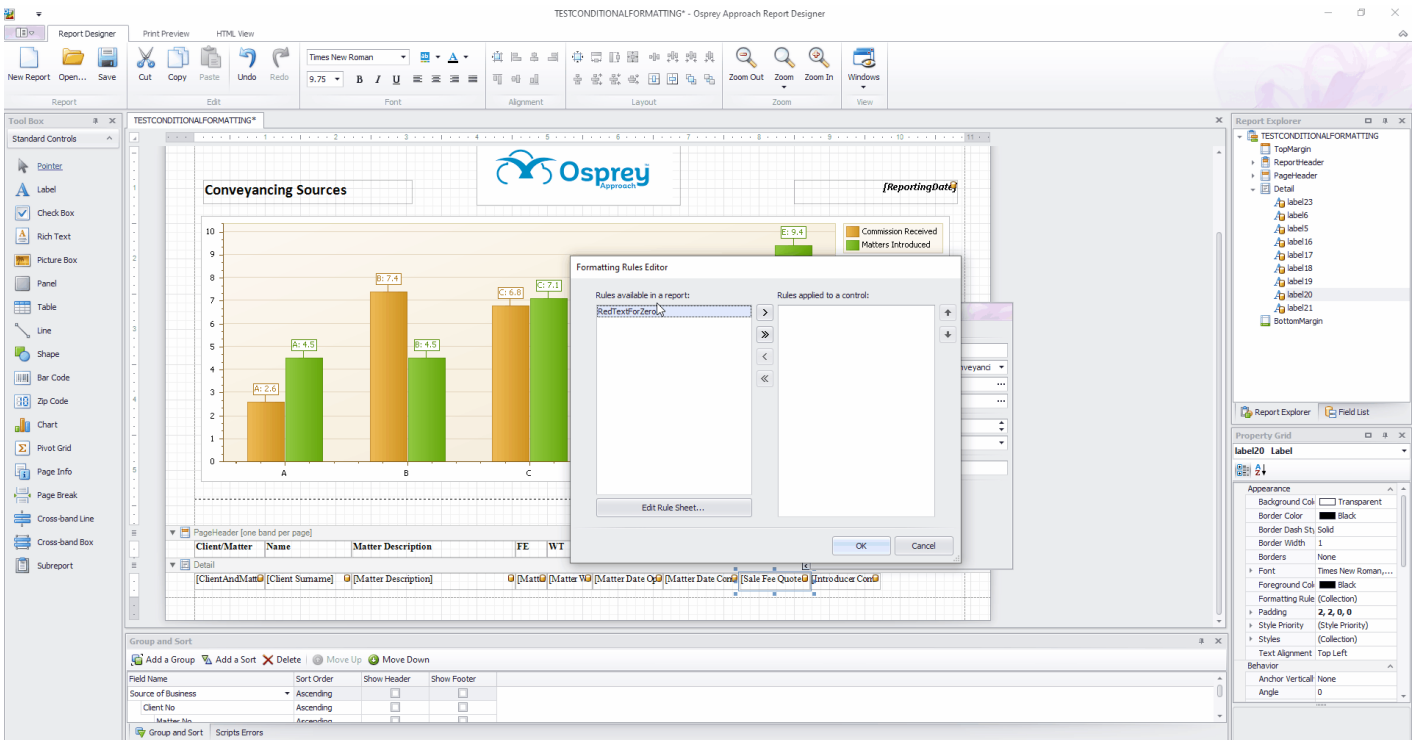
The screenshot shows the 'Formatting Rules Editor' dialog box with the 'Condition' tab selected. The dialog contains a text input field for the condition and a list of formatting rules. The 'Add a formatting rule' button is highlighted.

Use the condition editor to enter the condition for which you'd like to format your field differently. In this example we will look for a Fee Quoted of 0 and apply a format to it.





To apply this conditional format to the field, move the new rule you have created into the Rules applied to a control box on the right, by selecting and using the single > button. Click OK:



Now preview your report. The Fee Quoted field now appears in red text if it is zero:

Client/Matter	Name	Matter Description	FE	WT	Date Opened	Date Completed	Fee Quoted	Commission
THO001/29	Thomas	Default Matter	JM	RCP	27/06/2013		£0.00	£43.00
LAN001/11	Lancaster	Purchase of 9A Bridge Street, Hereford	JM	TK_RCP	25/06/2015	07/12/2016	£0.00	£35.00
THO001/4	Thomas	Purchase - 25 New Street	JMT	RCP	30/01/2012		£0.00	£36.00
HAS002/1	Hastings	Purchase of 1 Hallow Road	RSM	TK_RCP	04/12/2016		£1450.00	£29.00
THO001/50	Thomas	Test Workflows - Full Criteria	JM	TK_RCP	24/02/2014		£0.00	£27.00
THO001/33	Thomas	Sale - The Old School House, Hay	JM	TK_RCS	24/09/2013		£2500.00	£50.00
LAN001/10	Lancaster	New RCS Matter	JM	TK_RCS	24/06/2015	09/10/2019	£1475.00	£30.00