



# Osprey Approach: Run Aged Debtor Letters

This help guide was last updated on  
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The latest version is always online at  
<https://support.ospreyapproach.com/?p=574>

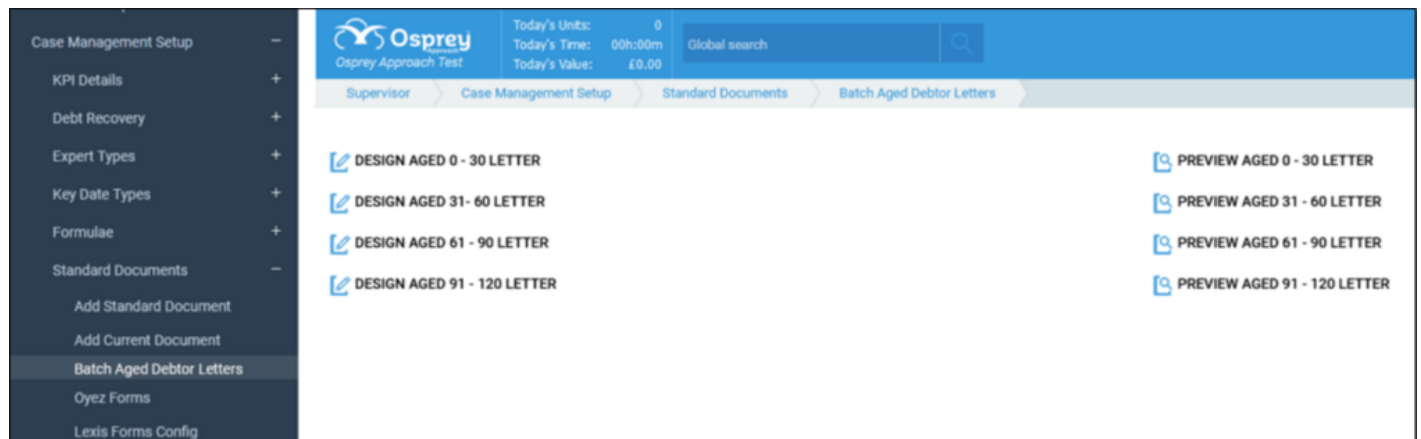


# This guide will demonstrate how to set up and run your aged debtor letters

Letters to clients who have not yet paid can be batched and printed out at defined intervals. You can design and preview the letters to be batched according to the age of the debt.

## Set up your Aged Debtor letters

Navigate to Supervisor and select Case Management Setup then Standard Documents, followed by Batch Aged Debtor Letters. You now have the option to Design or Preview each of the ageing letters.



Click the Design link on the relevant letter to open the template for the relevant grouping.

When the letter opens you can design the content as required. Simply add any text you wish. You may also add your headers and footers if required.

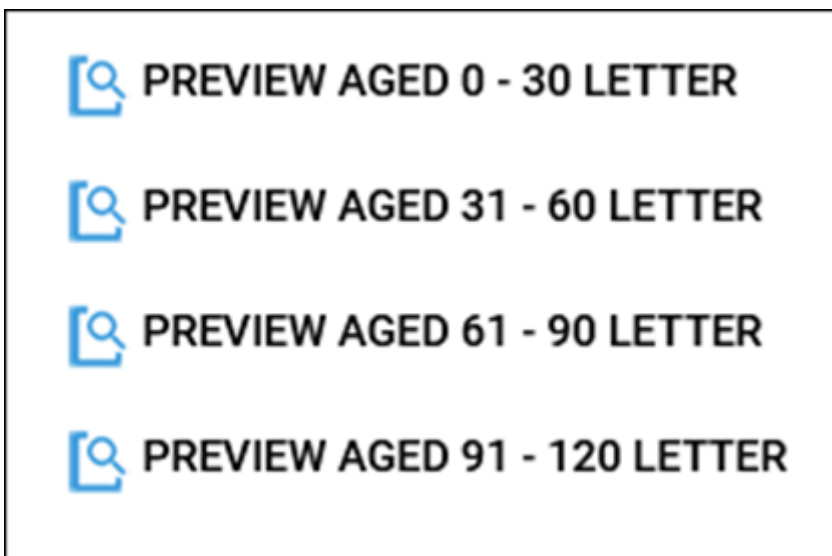
There are also a standard set of merge fields available under the Mailings tab which allow you to include data from Osprey in your Aged Debtor Letters.



Once you are happy with the template, close Word using the X and then click the save button as you would with a normal Osprey Approach standard letter.

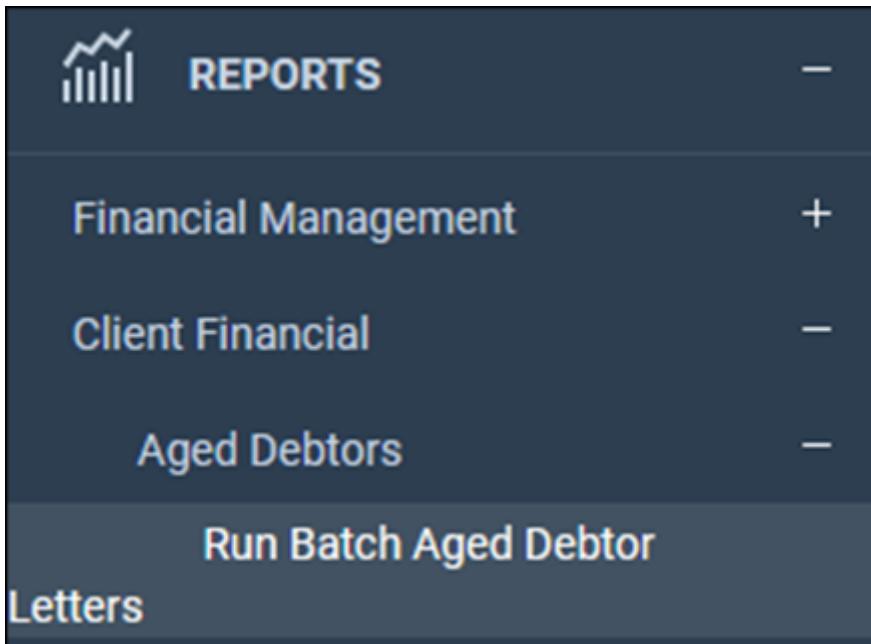
## Preview your Aged Debtor Letters

You can now preview what the letter will look like with some dummy information by clicking on the option to Preview the relevant one.

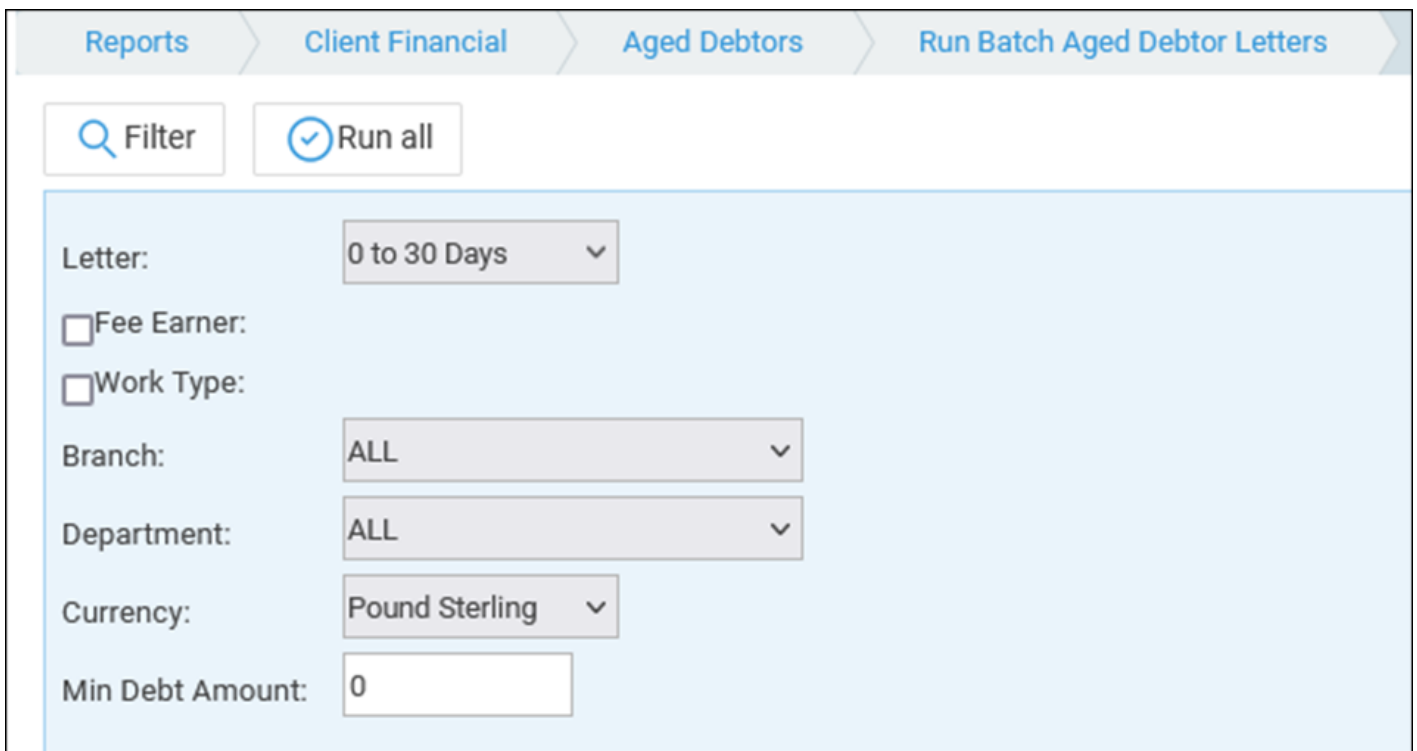


# Run the Aged Debtor letters as a batch

You can now run the letters as a batch. Navigate to Reports, Client Financial, Aged Debtors and then Run Batch Aged Debtor Letters.



You can use the drop-down list to select the letter grouping you wish to run the letters for and can also filter the clients you wish to run the letters for before running them.

A screenshot of a web application's configuration screen for running batch aged debtor letters. The page has a breadcrumb trail at the top: 'Reports' > 'Client Financial' > 'Aged Debtors' > 'Run Batch Aged Debtor Letters'. Below the breadcrumb are two buttons: 'Filter' with a magnifying glass icon and 'Run all' with a checkmark icon. The main configuration area contains several fields: 'Letter:' with a dropdown menu set to '0 to 30 Days'; two checkboxes for 'Fee Earner' and 'Work Type', both of which are unchecked; 'Branch:' with a dropdown menu set to 'ALL'; 'Department:' with a dropdown menu set to 'ALL'; 'Currency:' with a dropdown menu set to 'Pound Sterling'; and 'Min Debt Amount:' with a text input field containing the number '0'.

A list of clients that match the criteria will now be shown. You can deselect/select individual clients as you wish and select 'Run'. This will run the letters for the selected clients only.

Clicking on 'Run All' will run all of the debtor letters for the group you have selected.

| CLIENT NO | MATTER NO | SURNAME          | FORENAME | MATTER DESCRIPTION              | FEE EARNER | BRANCH | DEPARTMENT | DEBT AMOUNT | SELECT                              |
|-----------|-----------|------------------|----------|---------------------------------|------------|--------|------------|-------------|-------------------------------------|
| 100003    | 1         | OWilson          |          | Purchase 6 Anfield Road         | AG         | 16     | 1          | 12000.0000  | <input checked="" type="checkbox"/> |
| 12400001  | 1         | 1 24 5           | Regr OA  | priv regr 1 24 5                | MH GRD     | 1      | 4          | 120.0000    | <input checked="" type="checkbox"/> |
| SEL025    | 2         | Gustav           |          | Legal Matter for Company Client | GG         | 1      | 2          | 340.0000    | <input checked="" type="checkbox"/> |
| WIP02     | 1         | WIP02SN WIP 2000 | WIP02FN  | M1P WIP 500                     | MH GRD     | 1      | 4          | 1530.0000   | <input checked="" type="checkbox"/> |
| WIP02     | 3         | WIP02SN WIP 2000 | WIP02FN  | M3P WIP 0                       | MH GRD     | 1      | 4          | 1000.0000   | <input checked="" type="checkbox"/> |