



Osprey Approach: Setting an Overdrawn Client or Office Credit Password

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The latest version is always online at
<https://support.ospreyapproach.com/?p=63731>



This guide will show you how to set a password for overdrawn funds or office credit

Under specific circumstances, you may need to temporarily put the client into an overdrawn state or put the office in credit on a client ledger.

Only proceed if you have the relevant permission to do so.

Warnings

Before entering the credentials, ensure the posting dates are correct. If you are making a payment from the client account on a date before a client bank receipt, this may overdraw the client, and cause the below confirmations.

When posting to the client ledger, if the client balance becomes overdrawn, a supervisor will need to enter a Client Overdrawn password.

Likewise, if the Office balance becomes in credit, an Office Credit Password must be entered to complete the posting.

CONFIRMATIONS NEEDED

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Confirm Office Credit (With Password)

Setting your passwords

Navigate to Supervisor > System Setup > System Settings. Your default passwords should be visible.

Overdraw Password	<input type="text"/>
Office Credit Password	<input type="text"/>

To update, click Edit, enter your new passwords, and click Save.