



Osprey Approach: Linking Fields to your Standard Documents

This help guide was last updated on
Feb 17th, 2026

The latest version is always online at
<https://support.ospreyapproach.com/?p=16941>

[Click here for a printer-friendly version](#)

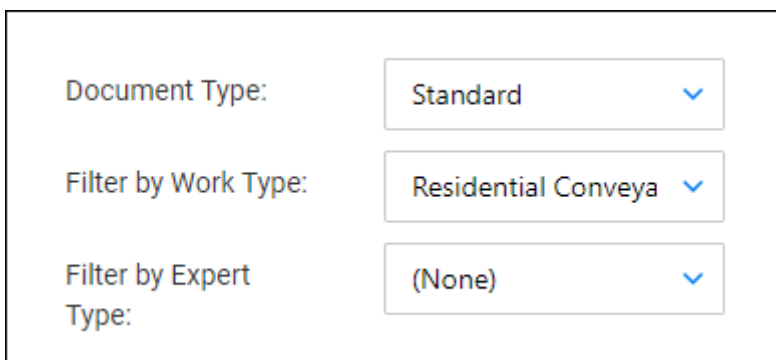


This guide explains how to link and unlink fields from your standard documents to include any information which you store within Osprey

Locating your document template

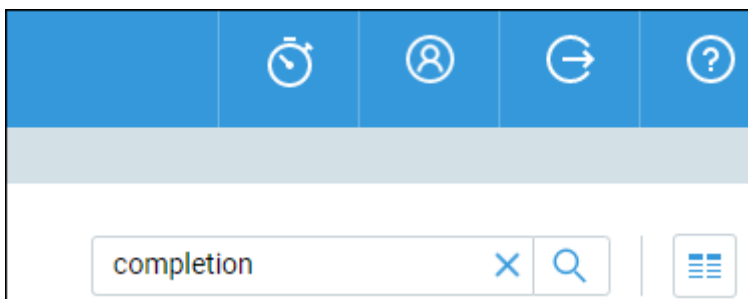
Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

You can filter the list down using the options at the top left of the screen:



A screenshot of a filter panel with three rows. Each row has a label on the left and a dropdown menu on the right. The first row is labeled 'Document Type:' and has a dropdown with 'Standard' selected. The second row is labeled 'Filter by Work Type:' and has a dropdown with 'Residential Conveya' selected. The third row is labeled 'Filter by Expert Type:' and has a dropdown with '(None)' selected.

Or, you can search for a specific template name using the search box in the top right corner:



A screenshot of a search bar in a document list. The search bar is located at the bottom of a list and contains the text 'completion'. To the right of the text are three icons: a close button (X), a search button (magnifying glass), and a list view button (three horizontal lines).

Linking fields to your document template


Right click on the document you wish to add fields to and select the Fields link button:


Document Type: Standard ▼


Filter by Work Type: Residential Conveya ▼


Filter by Expert Type: (None) ▼

WORK ID	DESCRIPTION
TK_RCS	RCS Cli Completion Statement TK_RCS
TK_RCS	RCS Cli Confirm Completion TK_RCS
TK_RCS	RCS Completion Statement TK_RCS
TK_RCS	RCS Sol Confirm Completion TK_RCS

 Edit

 **Fields**



 E-mails

 Rate

Use the radio buttons to select from the following table types:

- Client - contains all available tables relating to the client and matter
- Dossier - contains all Matter specific dossier page tables linked to the work type of the letter template
- Formula - contains all formula fields created under Supervisor > Case Management Setup > Formulae
- Client Dossier - contains all Global or Client Level dossier tables
- Ask - contains all Ask fields created under Supervisor > Case Management Setup > Formulae > Asks
- Include Document - contains all header and footer include documents created under Supervisor > Include Documents
- CDS - contains all fields relating to Contract Work forms under Case Management

Supervisor > Case Management Setup > Standard Documents > Standard Document:R

 Design Document  Preview Document

STANDARD DOCUMENT FIELDS

Client
 Dossier
 Formula
 Client Dossier
 Ask
 Include Document
 CDS

Now choose from the available tables:

Osprey Approach Test
 Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00
 Global search

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS Cli C

Design Document Preview Document

STANDARD DOCUMENT FIELDS

Client
 Dossier
 Formula
 Client Dossier
 Ask
 Include Document
 CDS

Available Tables

MANAGE FIELDS

Save

LINK/UNLINK	FIEL	LINKED?
<input type="checkbox"/>	USEF	<input checked="" type="checkbox"/>
<input type="checkbox"/>	EMA	<input checked="" type="checkbox"/>

Dropdown menu options: ACCUSER, CALCULATION, CLIENT, CONTACT, LASTMATTERDATES, LINKNAME, MATTER, ORGANISATION

Once you have selected the relevant table, the list of fields in this table will be displayed. Place a tick in the box alongside the fields you wish to link, and click Save.



MANAGE FIELDS

 Save

LINK/UNLINK	FIELD	LINKED? ↓
<input type="checkbox"/>	MATTER_DESCRIPTION	●
<input type="checkbox"/>	FEE_EARNER_ID	●
<input checked="" type="checkbox"/>	WORK_ID	●
<input type="checkbox"/>	WIP_LIMIT	●
<input checked="" type="checkbox"/>	UNIQUE_FILE_NO	●

Select Design Document:

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS

 Design Document  Preview Document

Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»



Dear &

RE: «MATTER MATTER DESCRIPTION»

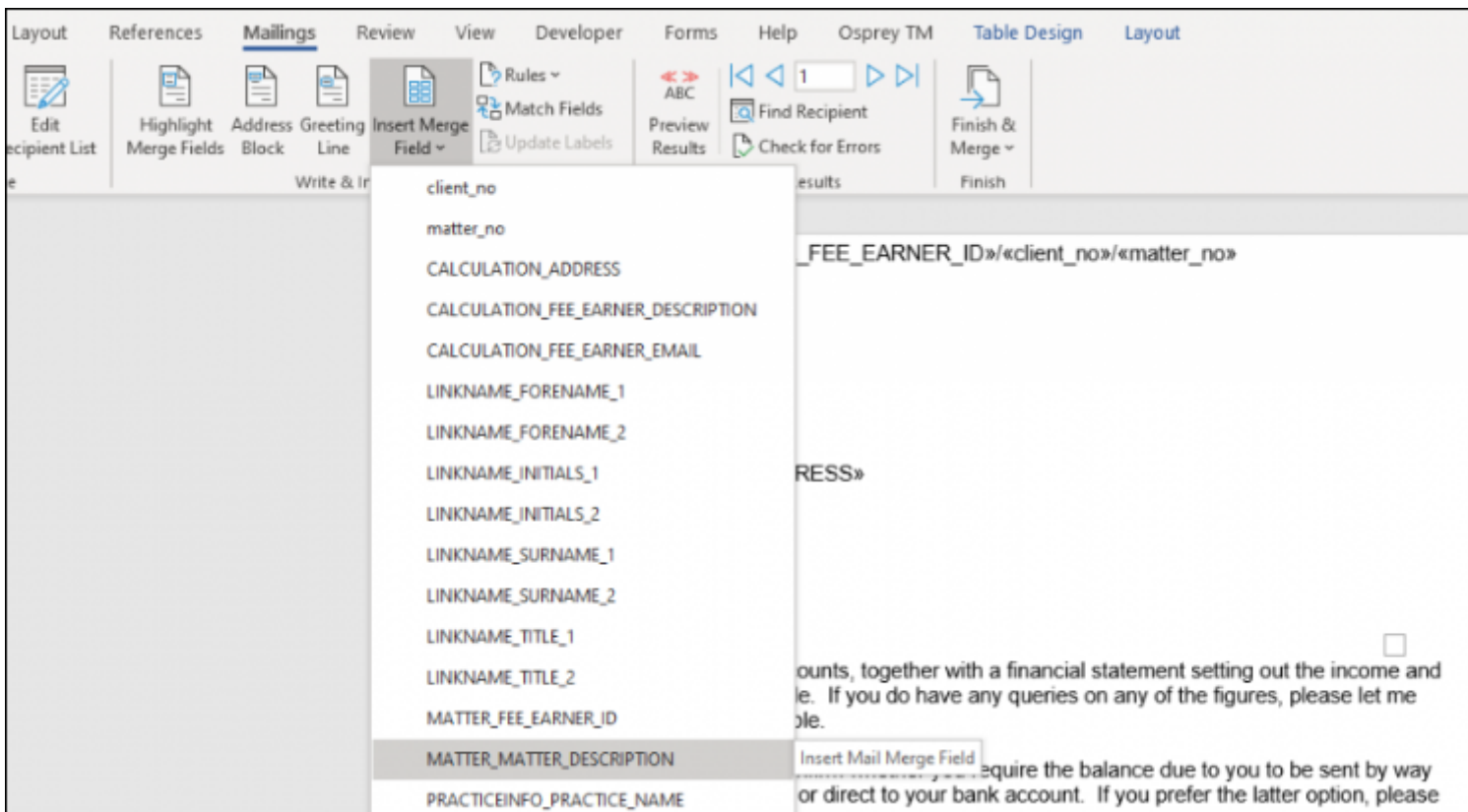
I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

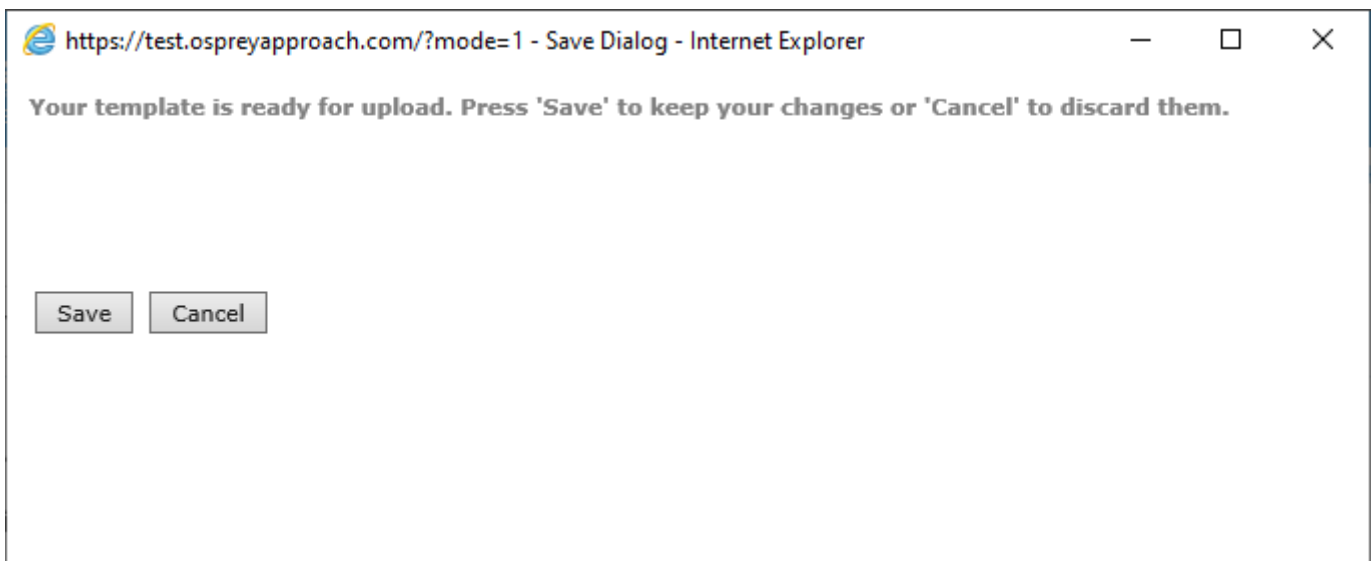
You may toggle field codes on or off by holding down the Alt key and pressing F9:

<p>Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»</p> <p>Your Ref:</p> <p>1 June 2020</p> <p>& «CALCULATION_ADDRESS»</p> <p>Dear &</p> <p>RE: «MATTER MATTER DESCRIPTION»</p> <p>I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.</p> <p>In any event, please confirm whether you require the balance due to you to be sent by way</p>	 Alt + F9 	<p>Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }</p> <p>Your Ref:</p> <p>{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d M MERGEFORMAT }</p> <p>{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_SURNAME_2 }" "{ MERGEFIELD LINKNAME_TITLE_1 LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } { LINKNAME_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_2 }" }</p> <p>Dear { IF { MERGEFIELD "TK_CLPERSONAL tk SALUTATION" } = MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" "{ MERGEFIELD LINKNAME_TITLE_1 LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_TITLE_1 LINKNAME_SURNAME_1 } and { MERGEFIELD LINKNAME_TITLE_1 LINKNAME_SURNAME_2 }" }</p> <p>RE: { MERGEFIELD MATTER MATTER DESCRIPTION }</p>
--	---	--

To link a new field to the document, position your mouse cursor in the place you would like the new field to appear, and from the Mailings menu tab select Insert Merge Field:



Once you have inserted all the required fields into the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:



Locating your document template

To remove a field from a document, you must first ensure that the field has been removed from the template.


Right click on the document you wish to remove fields from and select the Fields link button:


Document Type:


Filter by Work Type:


Filter by Expert Type:

WORK ID	DESCRIPTION
TK_RCS	RCS Cli Completion Statement TK_RCS
TK_RCS	RCS Cli Confirm Completion TK_RCS
TK_RCS	RCS Completion Statement TK_RCS
TK_RCS	RCS Sol Confirm Completion TK_RCS

 Edit


 Fields


 E-mails

 Rate

Select Design Document:

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS

 Design Document

 Preview Document

Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»



Dear &

RE: «MATTER MATTER DESCRIPTION»

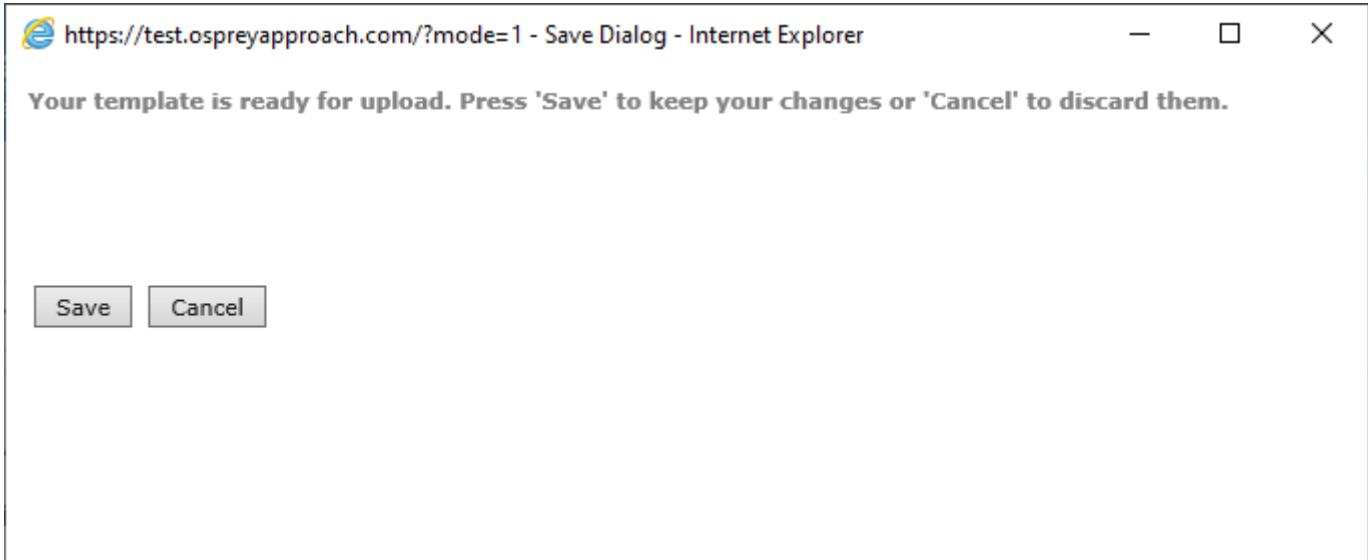
I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Select the field you want to remove and delete it from the template. If you are unable to see the field, you may toggle field codes on or off by holding down the Alt key and pressing F9:

<p>Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»</p> <p>Your Ref:</p> <p>1 June 2020</p> <p>& «CALCULATION_ADDRESS»</p> <p>Dear &</p> <p>RE: «MATTER MATTER DESCRIPTION»</p> <p>I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.</p> <p>In any event, please confirm whether you require the balance due to you to be sent by way</p>	 Alt + F9 	<p>Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }</p> <p>Your Ref:</p> <p>{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d MM MERGEFORMAT }</p> <p>{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_SURNAME_2 }" "{ MERGEFIELD LINKNAME_TITLE_1 } LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_TITLE_1 } LINKNAME_SURNAME_1 } and { MERGEFIELD LINKNAME_TITLE_1 } LINKNAME_SURNAME_2 }" }" "{ MERGEFIELD "TK_CLPERSONAL" }</p> <p>RE: { MERGEFIELD MATTER MATTER DESCRIPTION }</p>
--	---	--

Once you have deleted the field from the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:



To unlink the field you have removed from the template, select the relevant Standard Document Fields radio button and Available Table, place a tick in the Link/Unlink box, and click Save:

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS Cl

Design Document Preview Document

STANDARD DOCUMENT FIELDS

Client Dossier Formula Client Dossier Ask Include Document CDS

Available Tables

MANAGE FIELDS

Save

LINK/UNLINK	FIELD	LINKED?
<input checked="" type="checkbox"/>	TITLE_2	<input checked="" type="checkbox"/>
<input type="checkbox"/>	TITLE_1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	SURNAME_2	<input checked="" type="checkbox"/>