

# Osprey Approach: Communicating With Your Client

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The latest version is always online at  
<https://support.ospreyapproach.com/?p=60565>

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

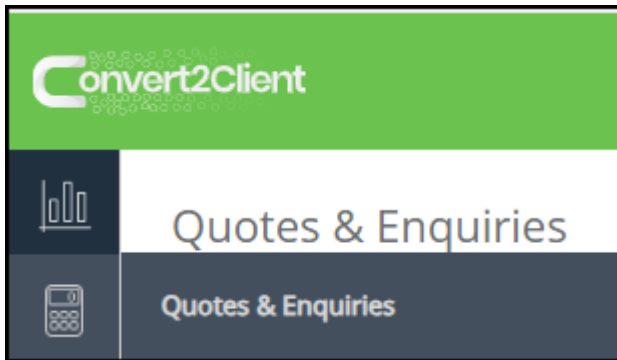


# Once a quote has been added into Convert2Client, there are a number of ways to be able to communicate with your potential client. This guide will go through these

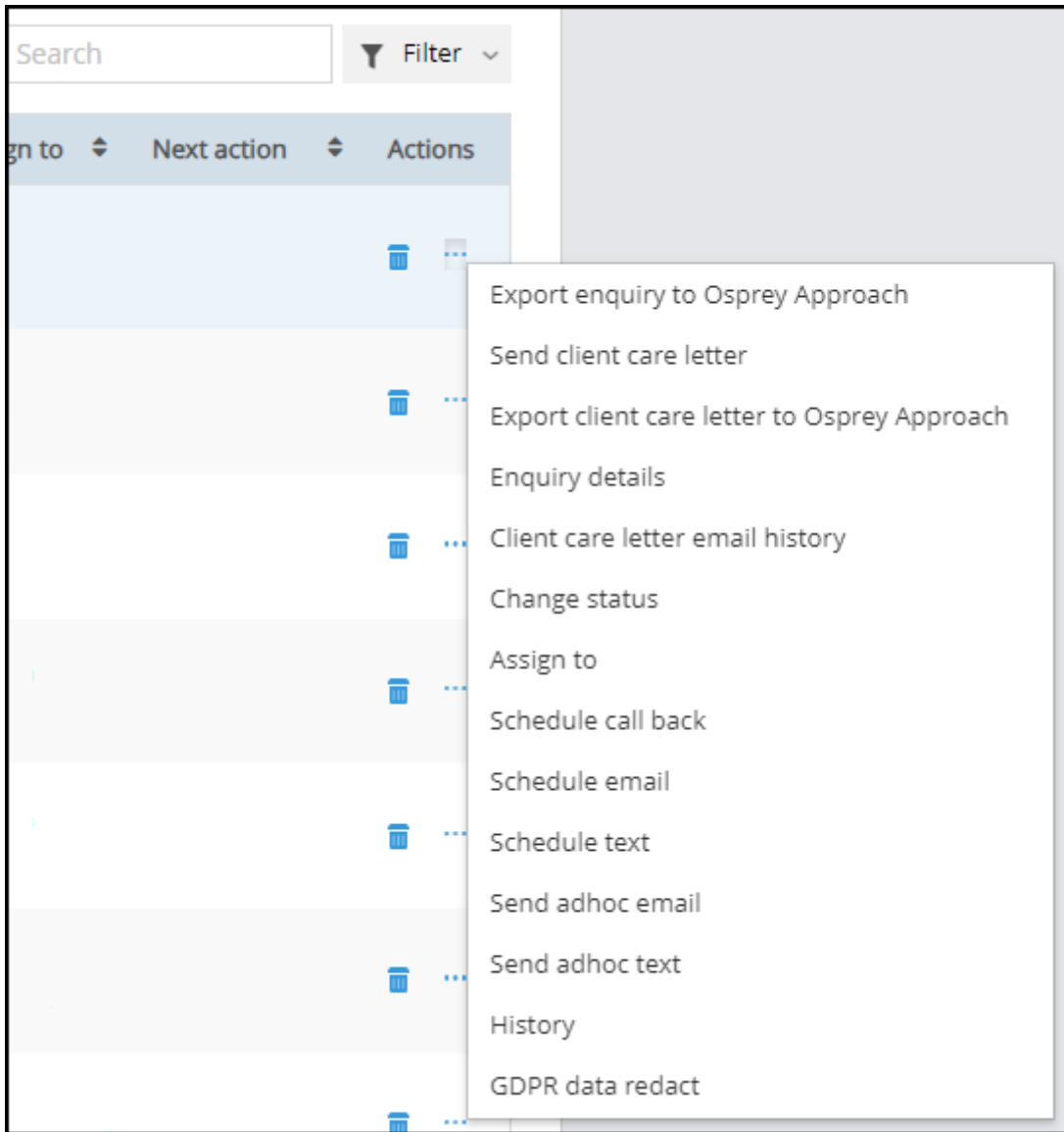
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## View Quotes

To be able to view your quotes, go to Quotes > Quotes & Enquires.



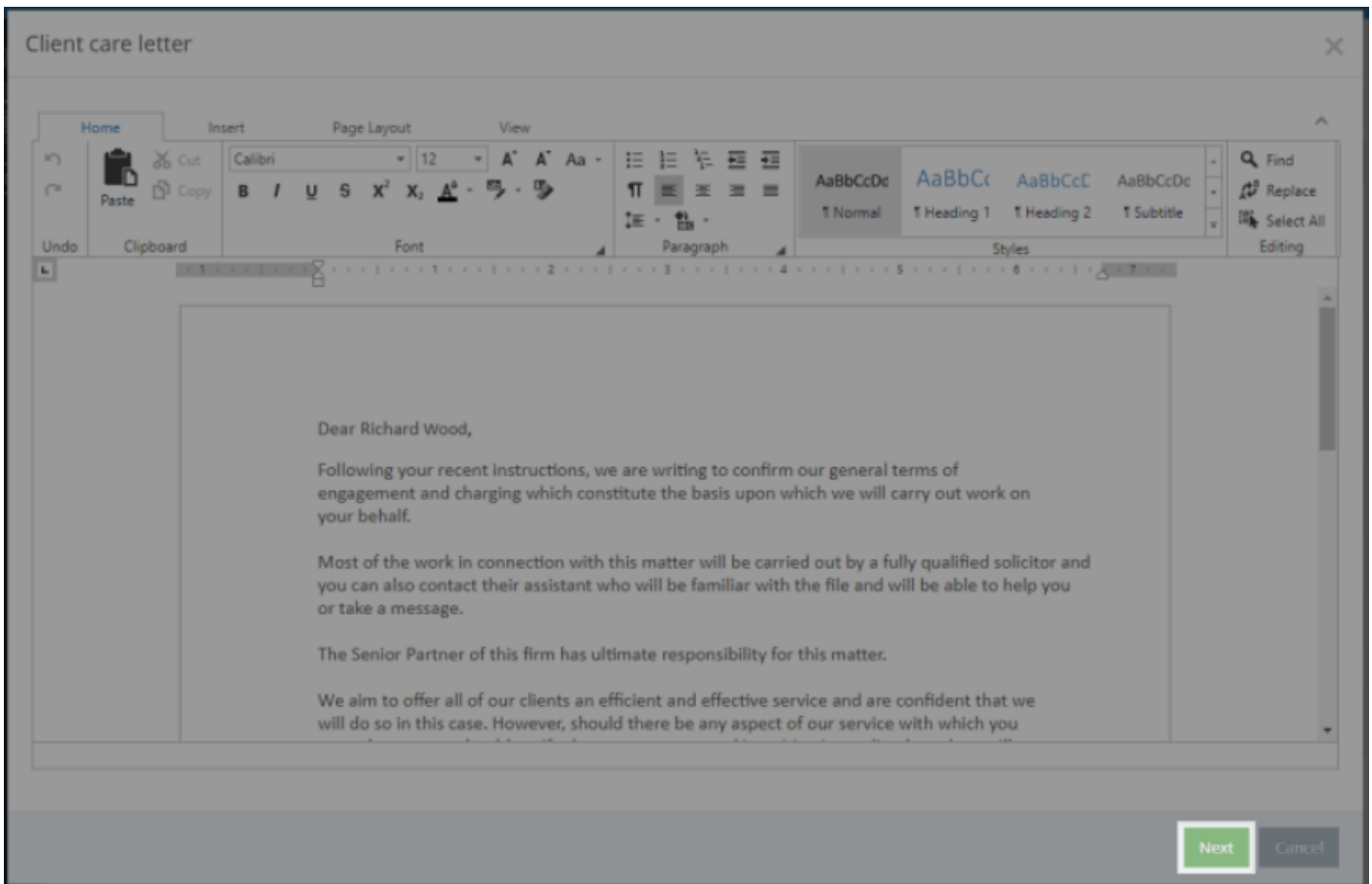
A list of quotes will be visible. Locate the Actions column and click the ... button to see a list of actions you can perform.



## Send a client care letter

- Export enquiry to Osprey Approach
- Send client care letter**
- Export client care letter to Osprey Approach
- Enquiry details
- Client care letter email history
- Change status
- Assign to
- Schedule call back
- Schedule email
- Schedule text
- Send adhoc email
- Send adhoc text
- History
- GDPR data redact

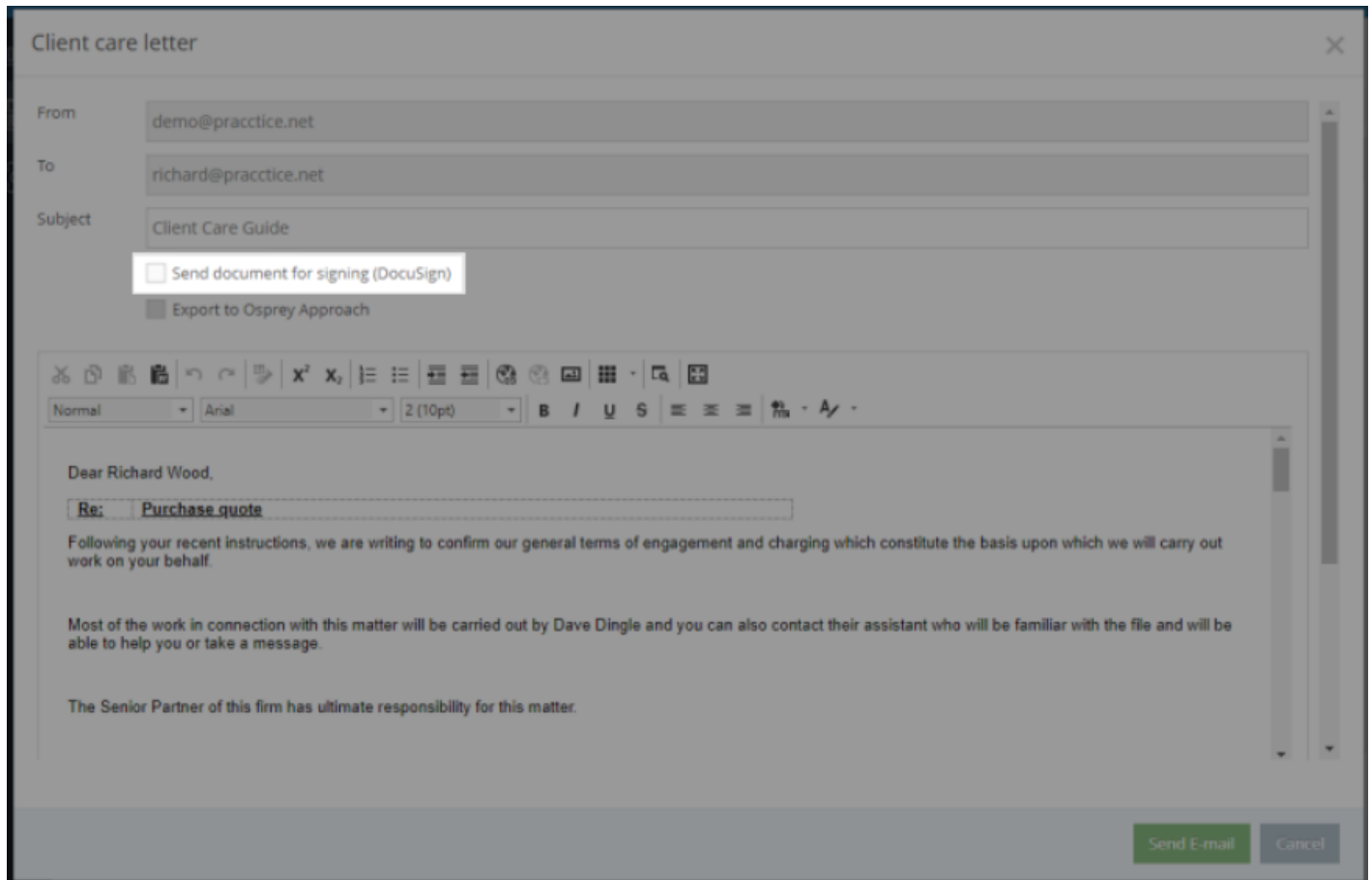
Running the client care letter displays the configured Client Care Letter within Convert2Client. Make any amendments required and click Next.



You will then be brought to the Client Care Letter Email template, to accompany your Client Care Letter.

DocuSign users can request for digital signatures.

Please note that you will need a DocuSign account to use the DocuSign integration.




Make any amendments to the email, if required, and then click Send.


#### Client care letter email history

You can view if a care letter has been sent, along with the accompany email, from Client care letter email history.

- Export enquiry to Osprey Approach
- Send client care letter (already sent)
- Export client care letter to Osprey Approach
- Enquiry details
- Client care letter email history
- Change status
- Assign to
- Schedule call back
- Schedule email
- Schedule text
- Send adhoc email
- Send adhoc text
- History
- GDPR data redact
- Schedule default actions

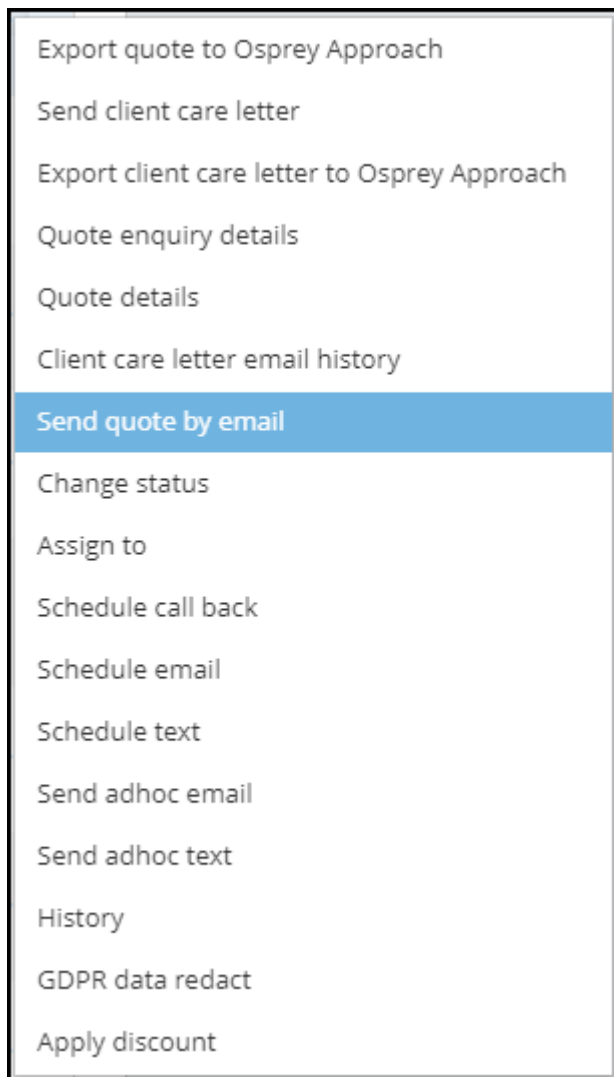
This will show you any care letters previously sent out. Click the View Details option to be able to view the email and care letter attachment.

Client care letter email history			
From	To	Sent on	Actions
daniel@pracctice.net	daniel@pracctice.net	02/05/2024 15:21	<a href="#">View Details</a> 

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# Send quote by email

Selecting to send the quote by email will automatically resend the quote to the client's email address.



## Schedule a call back

If you have Office 365, you can add a diary appointment to call the client. This will appear within your Outlook Calendar.

- Export enquiry to Osprey Approach
- Send client care letter
- Export client care letter to Osprey Approach
- Enquiry details
- Client care letter email history
- Change status
- Assign to
- Schedule call back**
- Schedule email
- Schedule text
- Send adhoc email
- Send adhoc text
- History
- GDPR data redact

Once selected, a window will appear allowing you to add any details to your calendar reminder.



### Schedule call back ✕

**Time**  🕒

**Title**

**Body**

Call George Butcher regarding the purchase quote you are assigned to.

Mobile no: 03300604940  
Email address: georgeb@pracctice.net

Click Schedule to add the reminder.

## Schedule email

Using Schedule Email will allow you to compose an email to be sent at a specific time and date.

Schedule email ✕

Time  🕒

Template  ▼


From

To

Subject

no attachments

☁️ Add attachment



Normal ▼ Arial ▼ (Font Size) ▼ **B** *I* U ~~S~~

Schedule Clear scheduled emails Cancel

It will also allow you to compose an SMS Text Message to be sent at a specific time and date.

To use Text messaging in Convert2Client, you must have a subscription with TextAnywhere.

### Schedule text message ✕

Time  🕒

Template  ▼

To

Text

1000 characters remaining

## Send Adhoc Email

Send an email to your client. You may use an email template if available.

### Send email ✕


Template: Initial Follow up email

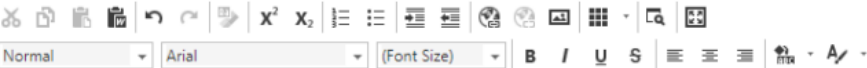
From: None  
Initial Follow up email

To:

Subject: Daniel Hearne

no attachments

 Add attachment



## Send Adhoc Text

Text messages may be sent to the potential client. You may use a text template if available.

To use Text messaging in Convert2Client, you must have a subscription with TextAnywhere.

## Send text message



Template

Call back confirmation



To

07766571662

Text

Dear John, further to your recent enquiry this is confirmation that a call to discuss your requirements is scheduled for 23/04 @ 2pm

Dave Dingle will be your solicitor and looks forward to speaking with you then.

Regards, Practice Solicitors

757 characters remaining

Send

Cancel