



Osprey Approach: Communicating With Your Client

This help guide was last updated on
May 16th, 2024

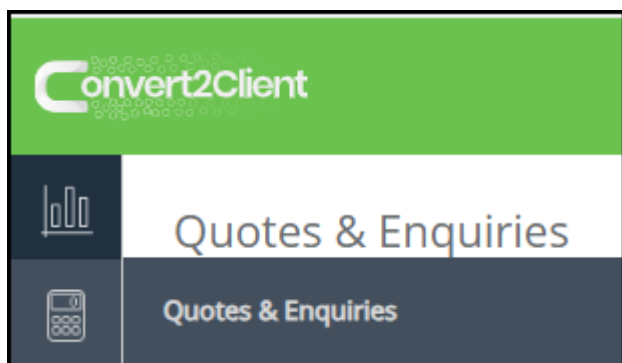
The latest version is always online at
<https://support.ospreyapproach.com/?p=60565>



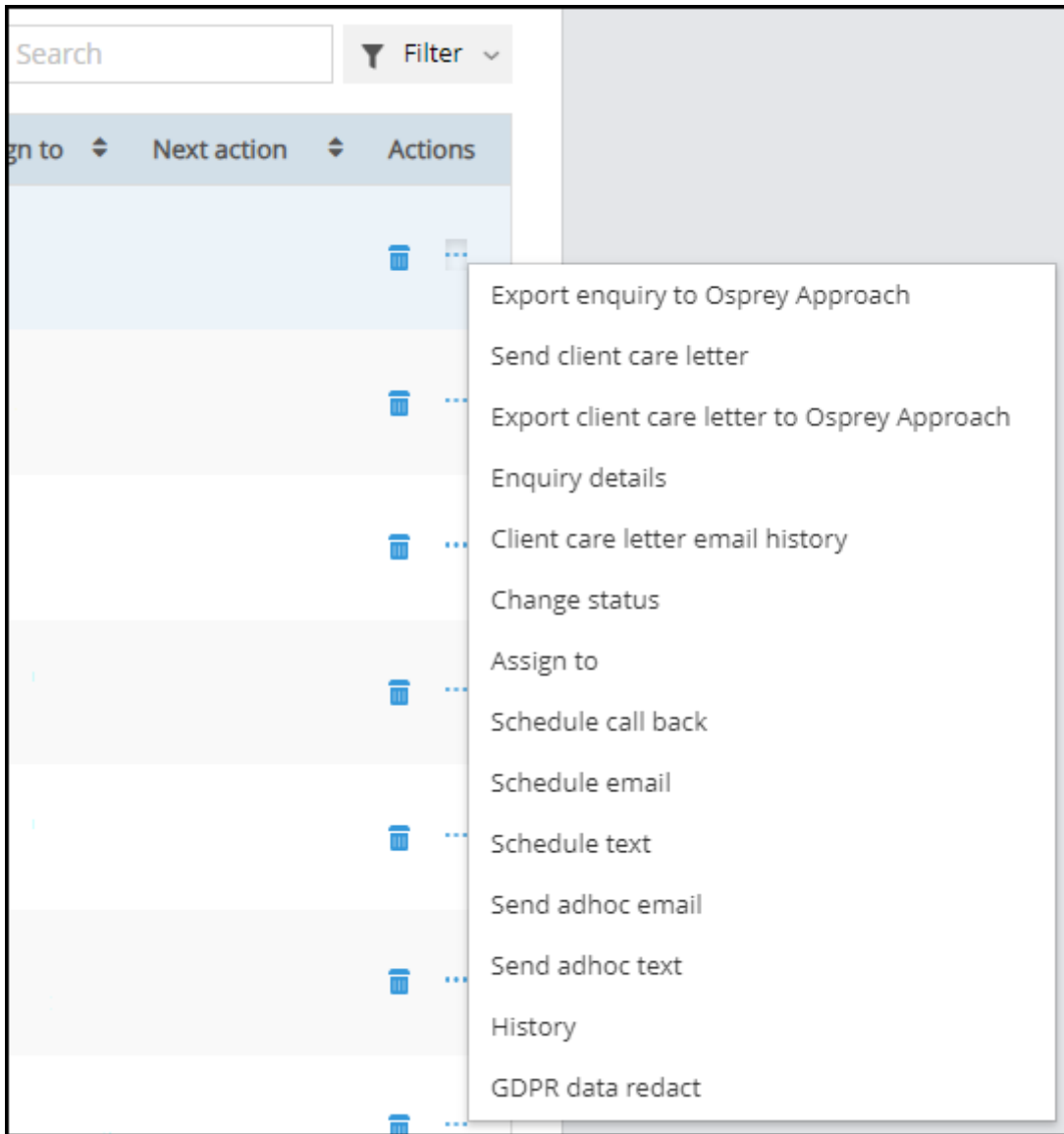
Once a quote has been added into Convert2Client, there are a number of ways to be able to communicate with your potential client. This guide will go through these

View Quotes

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



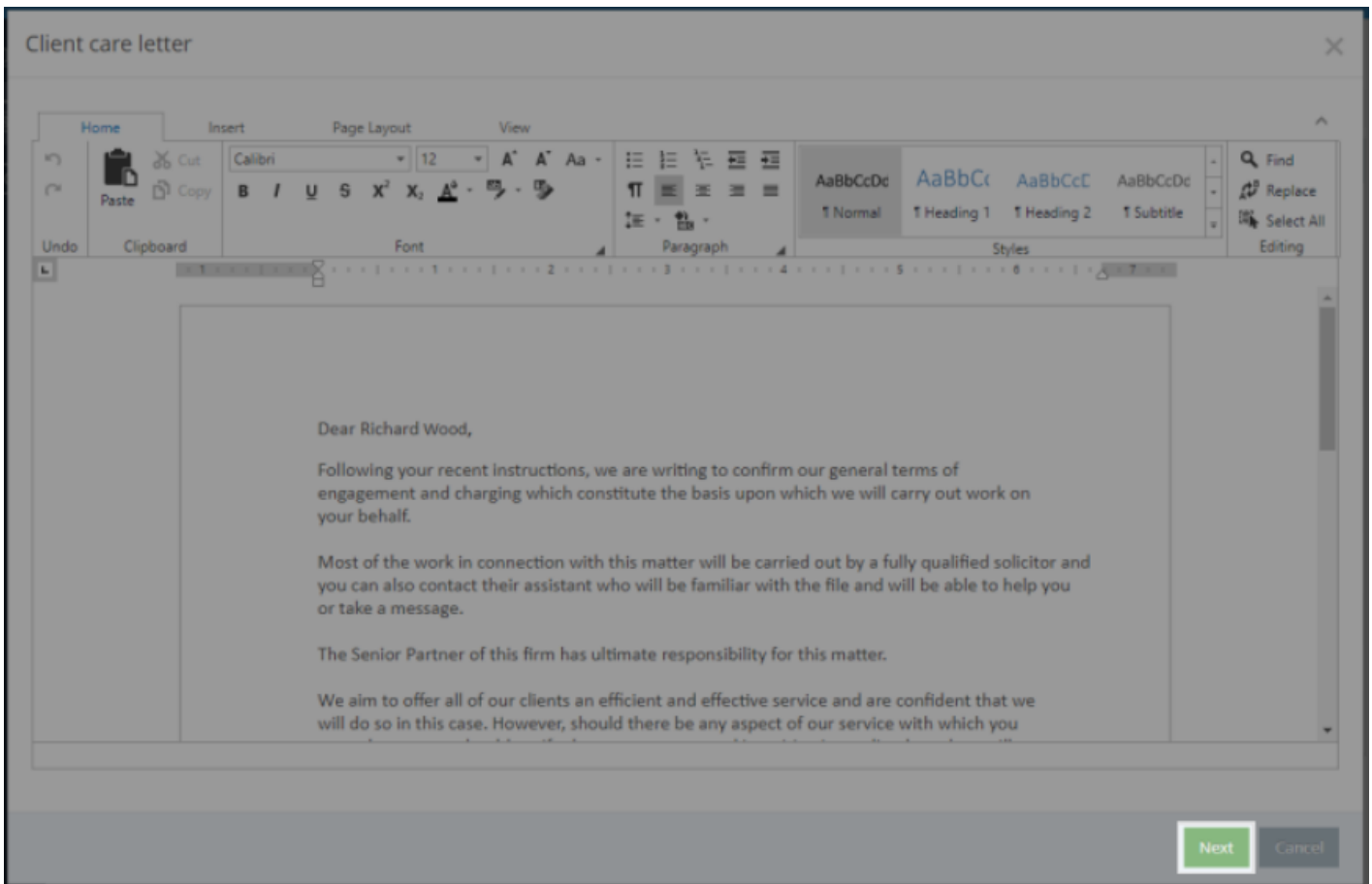
A list of quotes will be visible. Locate the Actions column and click the ... button to see a list of actions you can perform.



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

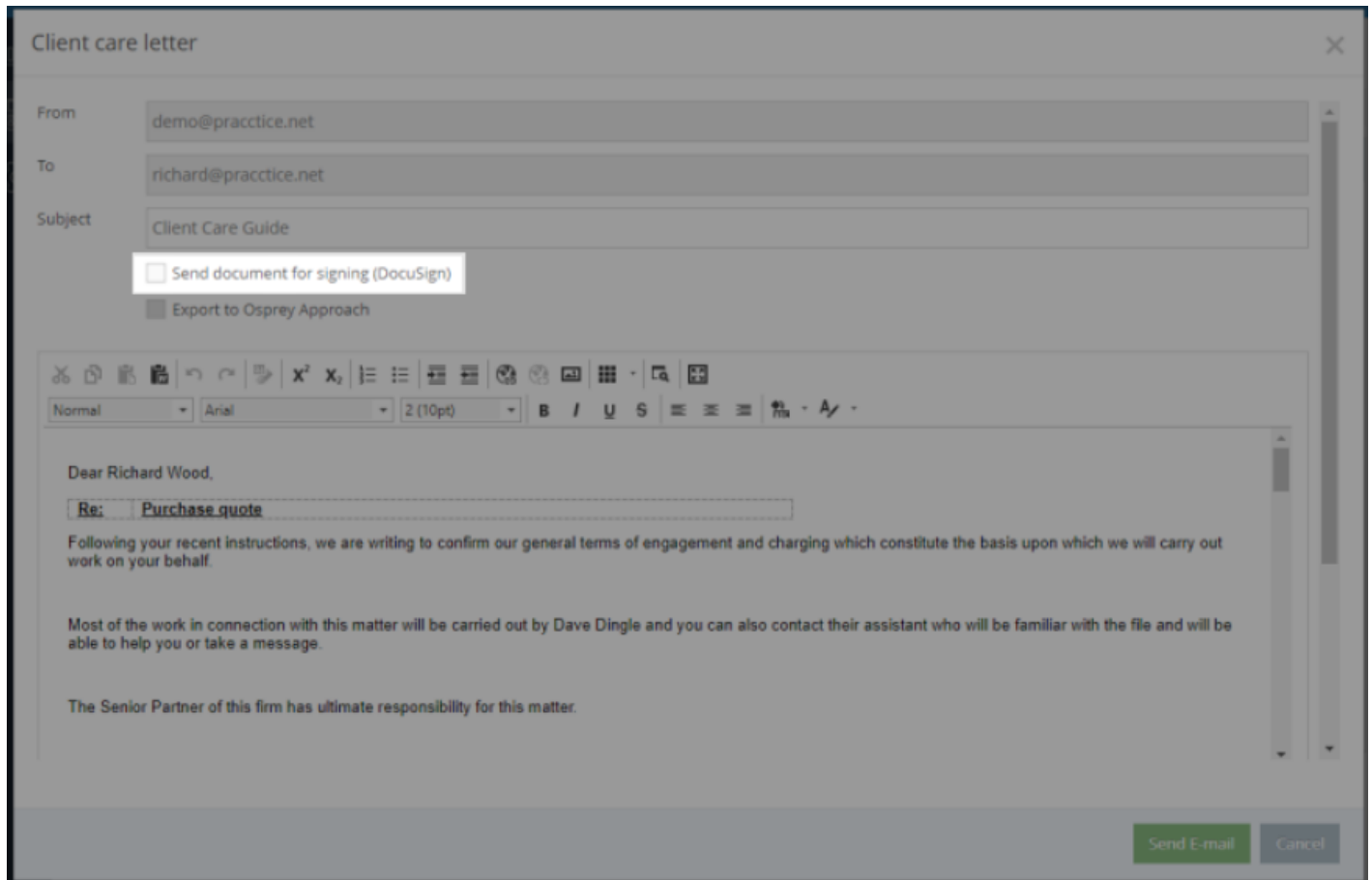
Running the client care letter displays the configured Client Care Letter within Convert2Client. Make any amendments required and click Next.



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.



The screenshot shows a web-based email composition window titled "Client care letter". The "From" field is "demo@pracctice.net", "To" is "richard@pracctice.net", and "Subject" is "Client Care Guide". Below the subject field, there are two checkboxes: "Send document for signing (DocuSign)" which is currently unchecked, and "Export to Osprey Approach" which is checked. A rich text editor toolbar is visible, showing options for font style (Normal), font face (Arial), font size (2 (10pt)), and text formatting (Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Undo, Redo). The email body text reads: "Dear Richard Wood, **Re: Purchase quote** Following your recent instructions, we are writing to confirm our general terms of engagement and charging which constitute the basis upon which we will carry out work on your behalf. Most of the work in connection with this matter will be carried out by Dave Dingle and you can also contact their assistant who will be familiar with the file and will be able to help you or take a message. The Senior Partner of this firm has ultimate responsibility for this matter." At the bottom right, there are two buttons: "Send E-mail" and "Cancel".

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.

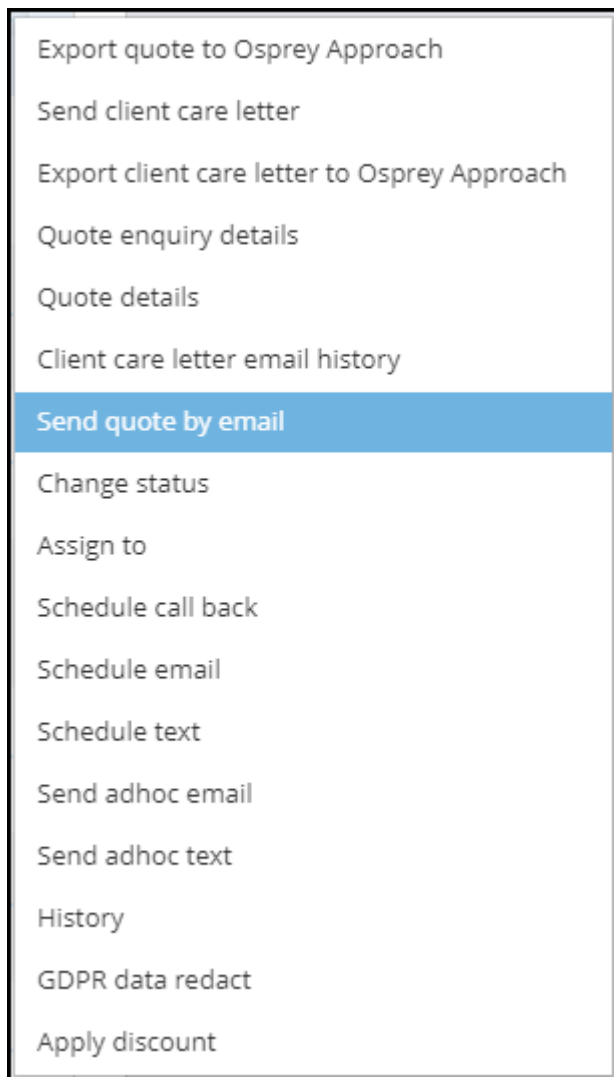
| Client care letter email history | | | | | | |
|----------------------------------|---|----------------------|---|------------------|---|--------------------------------|
| From | ↕ | To | ↕ | Sent on | ▼ | Actions |
| daniel@pracctice.net | | daniel@pracctice.net | | 02/05/2024 15:21 | | View Details 🔍 |

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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 (Font Size) **B** *I* U ~~S~~   

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 Cancel

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, Pracctice Solicitors

757 characters remaining

Send

Cancel