



Osprey Approach: Managing Your Quotes

This help guide was last updated on
Dec 20th, 2023

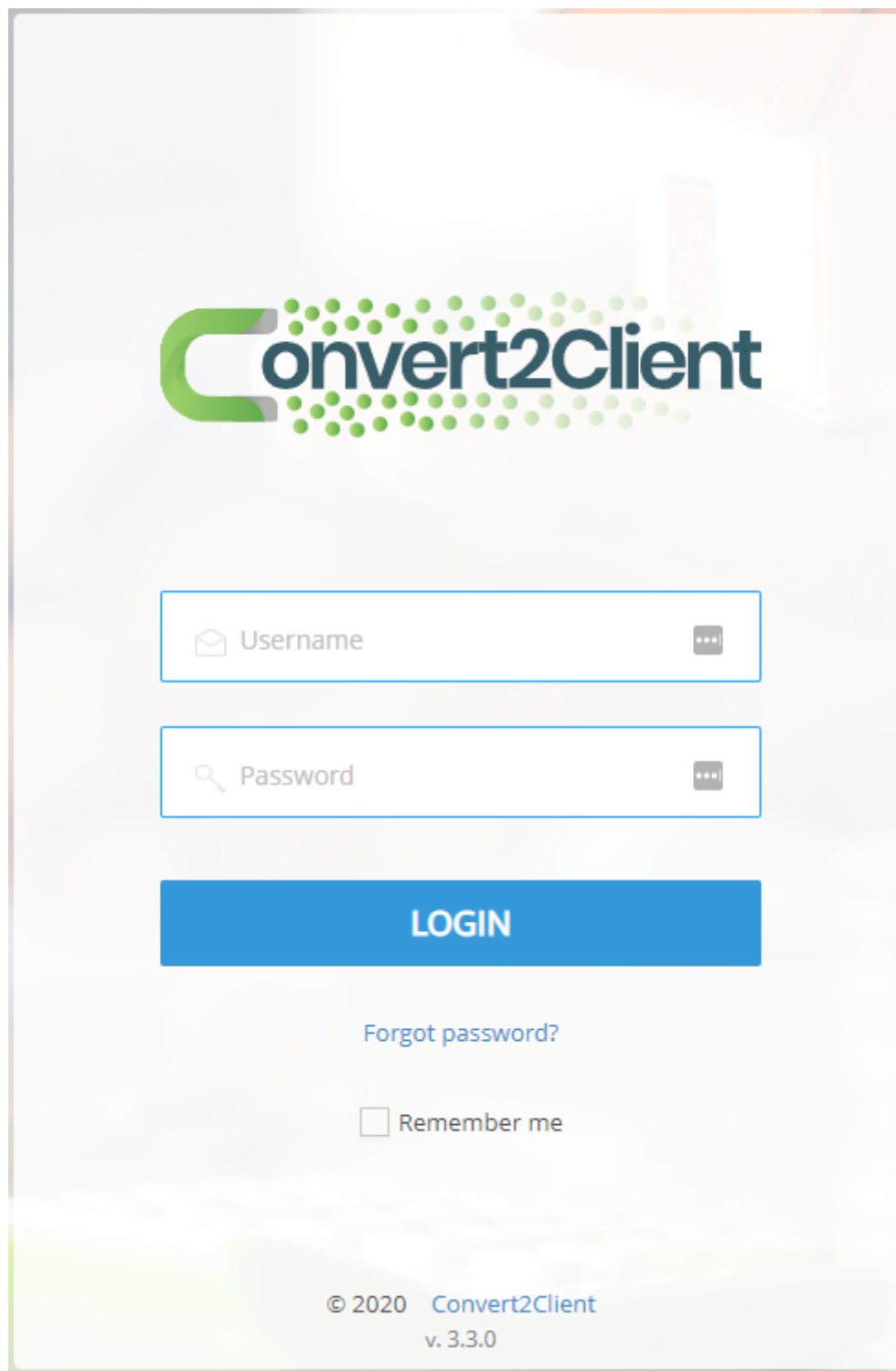
The latest version is always online at
<https://support.ospreyapproach.com/?p=33819>



Convert2Client helps clients drive new & incremental revenue as your customers can go online 24/7 to get a quote without speaking with anyone.

This reduces the amount of administration needed and saves your firm time and money.

You can access your own Convert2Client portal, with the supplied credentials.

A screenshot of the Convert2Client login portal. The background is a light gray with a faint image of a hand holding a smartphone. The Convert2Client logo is centered at the top, featuring a green 'C' and the text 'onvert2Client' in a dark blue font. Below the logo are two input fields: 'Username' with an envelope icon and 'Password' with a magnifying glass icon. Both fields have a blue border and a small 'eye' icon on the right. Below these fields is a blue 'LOGIN' button. Under the button is a link for 'Forgot password?'. Below that is a checkbox labeled 'Remember me'. At the bottom, the copyright notice '© 2020 Convert2Client v. 3.3.0' is displayed.

Convert2Client

Username

Password

LOGIN

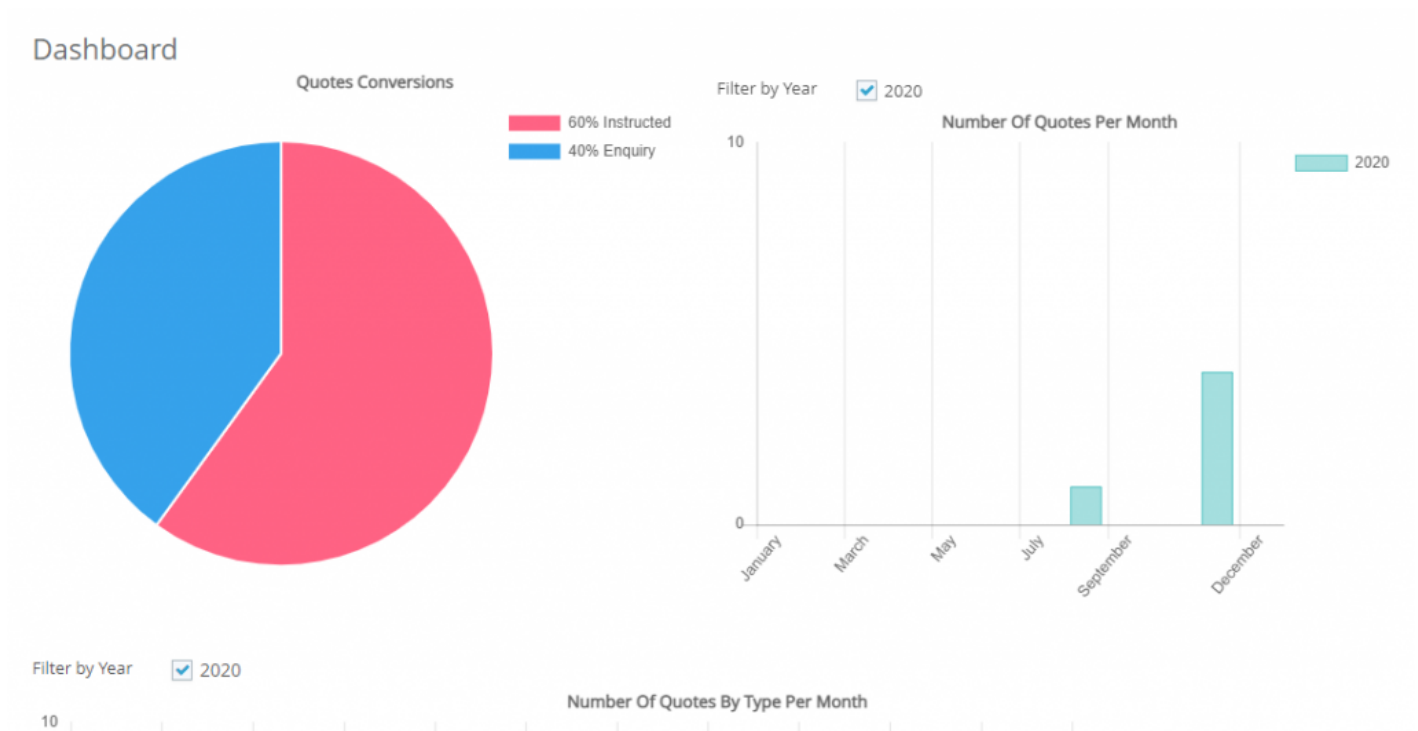
[Forgot password?](#)

☐ Remember me

© 2020 [Convert2Client](#)
v. 3.3.0

Dashboard

The first page will display your dashboard. You have a pie chart displaying Enquiries vs Instructions.

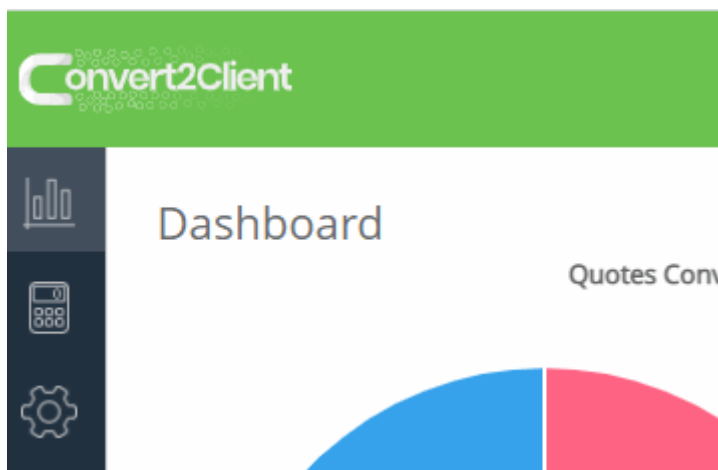


You will also see a graph showing number of quotes per month. You may select other years to view should you wish by ticking the relevant boxes. Further graphs are available underneath.

These will assist you with keeping track of the types of quotes being received, number of instructed quotes and instructed quotes by type.

Creating a New Quote

Clicking Quotes you will see a list of all quotations with their respective statuses will be displayed. Select New will allow you to create a new enquiry or new quote.



×

QUOTE DETAILS

Quote type

Purchase

Collaborator

None

BUYING A PROPERTY

Post Code

📍

📄

Purchase price

£

0.00

Number of purchasers

1

Freehold/Leasehold

☒ Freehold ☐ Leasehold

☐ First time buyer

☐ Second home

☐ Main residence

☐ Buying with mortgage

MAIN CONTACT

Name

Mr

Forename

Surname

Email

✉

Phone

📞

Generate quote

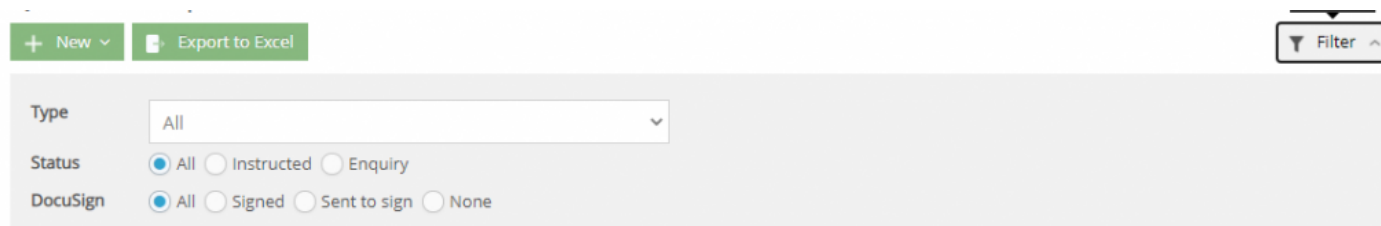
as ☒ Instructed ☐ Enquiry

When generating a quote, you will be able to select a collaborator.

If the selected Collaborator fees are set, these fees will be applied in quote calculations. Otherwise, the Company fees are applied.

Reviewing Outstanding Quotes

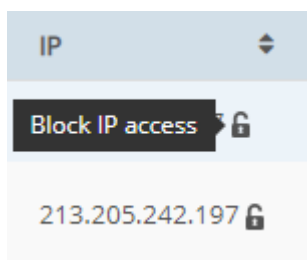
From the Quotes and Enquiries tab you may filter the results, there are options to filter by the type of quote, status of the quote and whether you have used the DocuSign integration when sending the quote.



The filter interface shows the following options:

- + New** (button)
- Export to Excel** (button)
- Filter** (button)
- Type**: All (dropdown)
- Status**: ☒ All, ☐ Instructed, ☐ Enquiry
- DocuSign**: ☒ All, ☐ Signed, ☐ Sent to sign, ☐ None

There is also an option to block specific IP addresses should it be desired.



The IP blocking interface shows the following options:

- IP** (section header)
- Block IP access** (button with lock icon)
- 213.205.242.197** (IP address with lock icon)

Quotes can also be deleted. Other options can also be performed, view details entered previously, as well as view the client care letter history and resend the quote by email. You can also export the quote and the client care letter to Osprey.

| | |
|---|--|
| Export Quote to Osprey Approach | This Export the Quote directly into Osprey |
| Send Client Care Letter | This gives you the ability to send the Client Care Directly from Convert2Client |
| *Export Client Care Letter to Osprey Approach | this allows you to Export the Client Care letter into osprey |
| *Quote Enquiry Details | This will give you an overview of the Quote enquiry. |
| *Quote Details | This give you an overview of the Quote Details. |
| *Client Care Letter email history | this gives you a record of the emails sent on the client care letter |
| *Send Quote by email | this will send the Quote via email directly from Convert2Client |
| *Change Status | This has the ability to change it from prospect to Instructed or lost from the Enquiry stage. |
| Assign to | allows you to assign to any Convert2Client User |
| Schedule call back | Schedules a call back and then adds it to your Outlook Calendar |
| Schedule Email | Schedules an Email to be sent from Convert2Client and will automatically sent on the time and date you have set. |

| | |
|------------------|--|
| Schedule text | Schedules a Text to be sent from Convert2Client and will automatically sent on the time and date you have set. |
| Send adhoc email | sends an email directly from Convert2Client |
| Send adhoc text | sends an Text directly from Convert2Client |
| History | Shows you the History of the Quote |
| GDPR data redact | Redacts the Personal data from the quote but keeps the quote |
| Apply Discount | This allows you to apply a discount either on monetary value or as a percentage. |

Quote Enquiry Details

This will Bring up the overview of the Quote Enquiry

| Contact | Created on | Branch | Type | Status | Assign to | Next action | Actions |
|--|---|-------------|------------------|------------|----------------|-------------|---------|
| m w mattw@practice.net 07840848052 | 15/12/2022 14:21 from IP 109.157.110.167 | Default | Purchase | Enquiry | Matt Wood | 23/12/2022 | ... |
| Matthew Wood mattw@practice.net 03300604940 | 11/11/2022 11:04 from IP 81.158.73.115 | Default | Purchase | Enquiry | Matt Wood | | ... |
| Daniel Hearne daniel@practice.net 03300 604940 | 02/11/2022 12:25 from IP 94.7.196.74 | Default | Purchase | Lost | Daniel Hearne | | ... |
| Peter Smith support@practice.net 03300 604940 | 06/10/2022 17:27 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| Alexandra Hiscutt alexh@practice.net 0121111111 | 11/08/2022 11:02 from IP 178.255.64.142 | Default | Purchase | Enquiry | Daniel Hearne | | ... |
| Auto Numbering support@practice.net 03300 604940 | 27/07/2022 19:04 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Test Branch | Family - Divorce | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Default | Family - Divorce | Enquiry | Daniel Hearne | | ... |
| | 23/05/2022 15:11 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |
| | 23/05/2022 15:09 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |

Click More Actions>Quote Enquiry Details

Quote Details

This give you an overview of the Quote Details

Convert2Client

George

Quotes & Enquiries

New

Export to Excel

Search

Filter

| Contact | Created on | Branch | Type | Status | Assign to | Next action | Actions |
|---|---|-------------|------------------|------------|----------------|-------------|---------|
| m w mattw@practicen.net 07840848052 | 15/12/2022 14:21 from IP 109.157.110.167 | Default | Purchase | Enquiry | Matt Wood | 23/12/2022 | ... |
| Matthew Wood mattw@practicen.net 03300604940 | 11/11/2022 11:04 from IP 81.158.73.115 | Default | Purchase | Enquiry | Matt Wood | | ... |
| Daniel Hearne daniel@practicen.net 03300 604940 | 02/11/2022 12:25 from IP 94.7.196.74 | Default | Purchase | Lost | Daniel Hearne | | ... |
| Peter Smith support@practicen.net 03300 604940 | 06/10/2022 17:27 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| Alexandra Hiscutt alexh@practicen.net 01211111111 | 11/08/2022 11:02 from IP 178.255.64.142 | Default | Purchase | Enquiry | Daniel Hearne | | ... |
| Auto Numbering support@practicen.net 03300 604940 | 27/07/2022 19:04 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Test Branch | Family - Divorce | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Default | Family - Divorce | Enquiry | Daniel Hearne | | ... |
| | 23/05/2022 15:11 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |
| | 23/05/2022 15:09 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |

Page 1 of 9 (86 items)

Click More Actions>Quote Details

Client Care Letter email history

this gives you a record of the emails sent on the client care letter

Convert2Client

George

Quotes & Enquiries

New

Export to Excel

Search

Filter

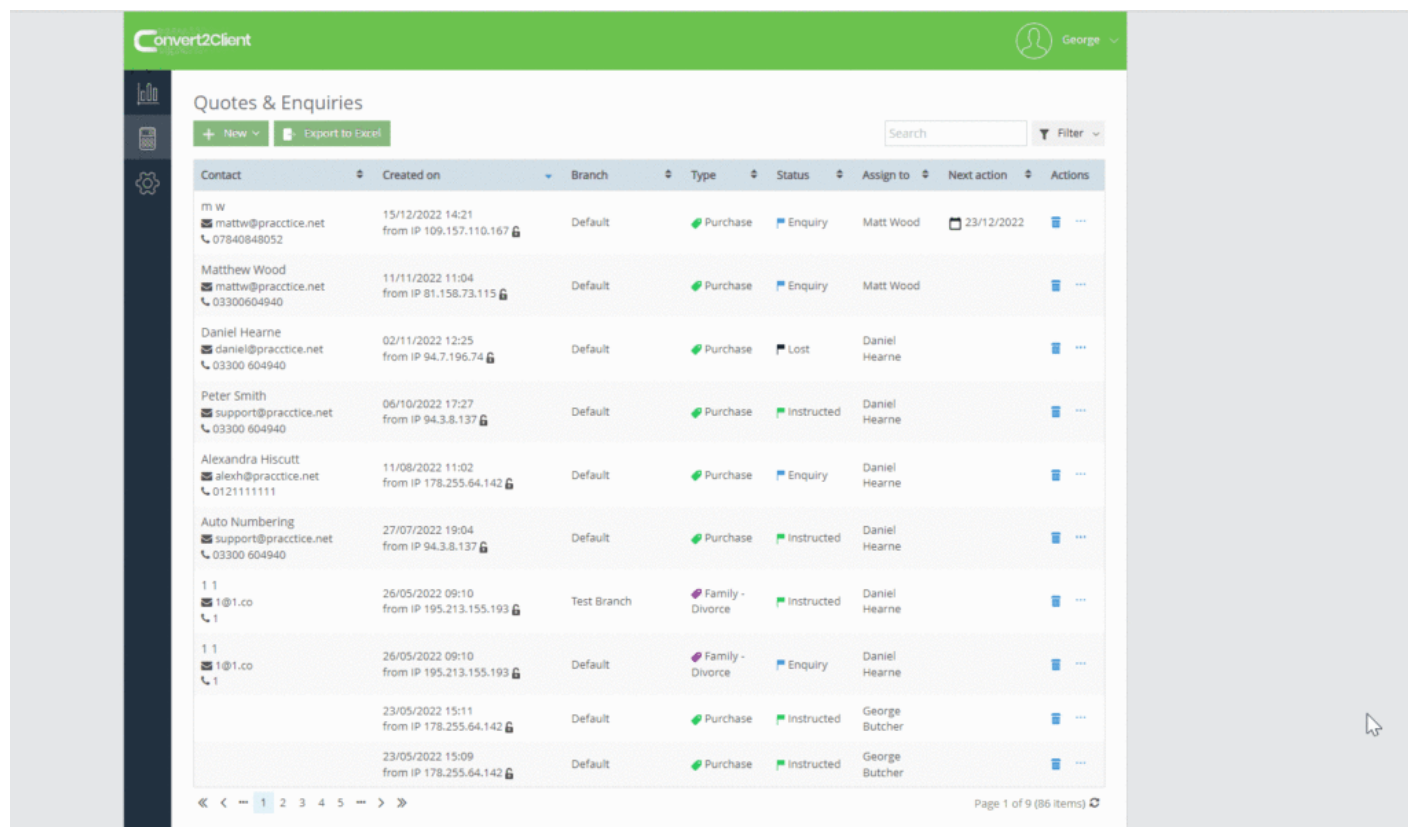
| Contact | Created on | Branch | Type | Status | Assign to | Next action | Actions |
|---|---|-------------|------------------|------------|----------------|-------------|---------|
| m w mattw@practicen.net 07840848052 | 15/12/2022 14:21 from IP 109.157.110.167 | Default | Purchase | Enquiry | Matt Wood | 23/12/2022 | ... |
| Matthew Wood mattw@practicen.net 03300604940 | 11/11/2022 11:04 from IP 81.158.73.115 | Default | Purchase | Enquiry | Matt Wood | | ... |
| Daniel Hearne daniel@practicen.net 03300 604940 | 02/11/2022 12:25 from IP 94.7.196.74 | Default | Purchase | Lost | Daniel Hearne | | ... |
| Peter Smith support@practicen.net 03300 604940 | 06/10/2022 17:27 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| Alexandra Hiscutt alexh@practicen.net 01211111111 | 11/08/2022 11:02 from IP 178.255.64.142 | Default | Purchase | Enquiry | Daniel Hearne | | ... |
| Auto Numbering support@practicen.net 03300 604940 | 27/07/2022 19:04 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Test Branch | Family - Divorce | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Default | Family - Divorce | Enquiry | Daniel Hearne | | ... |
| | 23/05/2022 15:11 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |
| | 23/05/2022 15:09 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |

Page 1 of 9 (86 items)

Click More Actions>Client Care Letter Email History

Change Status

This has the ability to change it from prospect to Instructed or lost from the Enquiry stage.

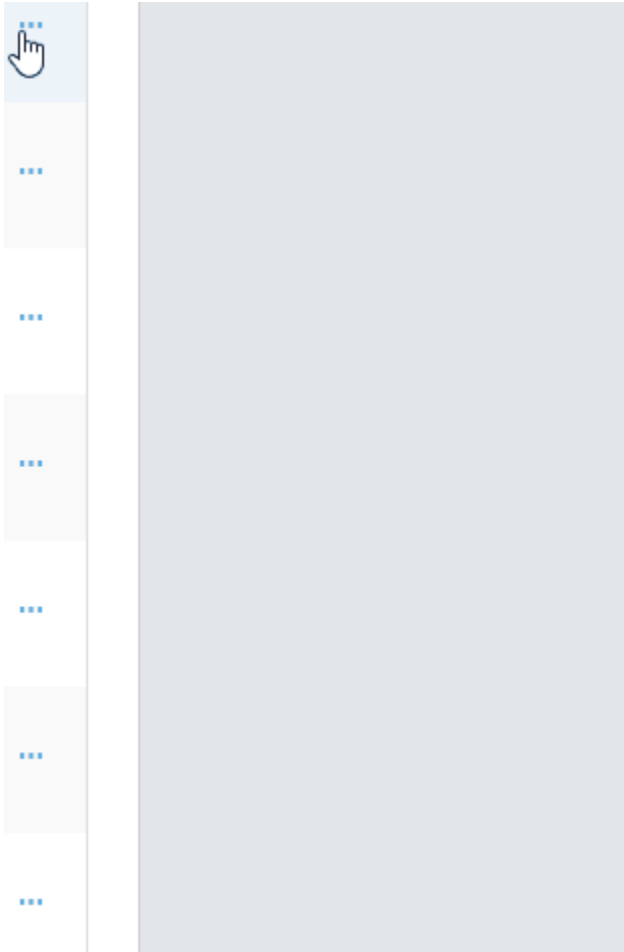


| Contact | Created on | Branch | Type | Status | Assign to | Next action | Actions |
|--|---|-------------|------------------|------------|----------------|-------------|---------|
| m w mattw@practice.net 07840848052 | 15/12/2022 14:21 from IP 109.157.110.167 | Default | Purchase | Enquiry | Matt Wood | 23/12/2022 | ... |
| Matthew Wood mattw@practice.net 03300604940 | 11/11/2022 11:04 from IP 81.158.73.115 | Default | Purchase | Enquiry | Matt Wood | | ... |
| Daniel Hearne daniel@practice.net 03300 604940 | 02/11/2022 12:25 from IP 94.7.196.74 | Default | Purchase | Lost | Daniel Hearne | | ... |
| Peter Smith support@practice.net 03300 604940 | 06/10/2022 17:27 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| Alexandra Hiscutt alexh@practice.net 01211111111 | 11/08/2022 11:02 from IP 178.255.64.142 | Default | Purchase | Enquiry | Daniel Hearne | | ... |
| Auto Numbering support@practice.net 03300 604940 | 27/07/2022 19:04 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Test Branch | Family - Divorce | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Default | Family - Divorce | Enquiry | Daniel Hearne | | ... |
| | 23/05/2022 15:11 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |
| | 23/05/2022 15:09 from IP 178.255.64.142 | Default | Purchase | Instructed | George Butcher | | ... |

Click More Actions>Change Status

Assign to

You are able to assign the Quotes to any exiting Convert2Client users.



Click More Actions > Assign to

Assign to ×

Adam Buckley ▼

Assign

Cancel

Use the list to select a user and click Assign

At the bottom of the received email there will be a link to click to add a signature and send it back automatically.

Apply Discount

You are able to apply either a discount of a value or of a percentage of the fee, when applying the discount enter the value and then click out of it to see how much the quote will be after the discount.



Quotes & Enquiries

+ New ▾

Export to Excel

Search

Filter ▾

| Contact | Created on | Branch | Type | Status | Assign to | Next action | Actions |
|---|---|-------------|------------------|------------|----------------|-------------|---------|
| | 22/12/2022 11:53 from IP 81.158.73.115 | Default | Purchase | Instructed | Matt Wood | | ... |
| m w mattw@practtice.net 07840848052 | 15/12/2022 14:21 from IP 109.157.110.167 | Default | Purchase | Enquiry | Matt Wood | 23/12/2022 | ... |
| | 18/11/2022 10:33 from IP 81.158.73.115 | Default | Purchase | Instructed | Rebecca Cowell | | ... |
| Matthew Wood mattw@practtice.net 03300604940 | 11/11/2022 11:04 from IP 81.158.73.115 | Default | Purchase | Enquiry | Matt Wood | | ... |
| Daniel Hearne daniel@practtice.net 03300 604940 | 02/11/2022 12:25 from IP 94.7.196.74 | Default | Purchase | Lost | Daniel Hearne | | ... |
| Peter Smith support@practtice.net 03300 604940 | 06/10/2022 17:27 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| Alexandra Hiscutt alexh@practtice.net 01211111111 | 11/08/2022 11:02 from IP 178.255.64.142 | Default | Purchase | Enquiry | Daniel Hearne | | ... |
| Auto Numbering support@practtice.net 03300 604940 | 27/07/2022 19:04 from IP 94.3.8.137 | Default | Purchase | Instructed | Daniel Hearne | | ... |
| 1 1 1@1.co 1 | 26/05/2022 09:10 from IP 195.213.155.193 | Test Branch | Family - Divorce | Instructed | Daniel Hearne | | ... |
| 1 1 | 26/05/2022 09:10 | | Family - | | Daniel | | ... |

More Actions>Apply Discount