Osprey Approach: Managing Your Quotes

This help guide was last updated on
Dec 20th, 2023
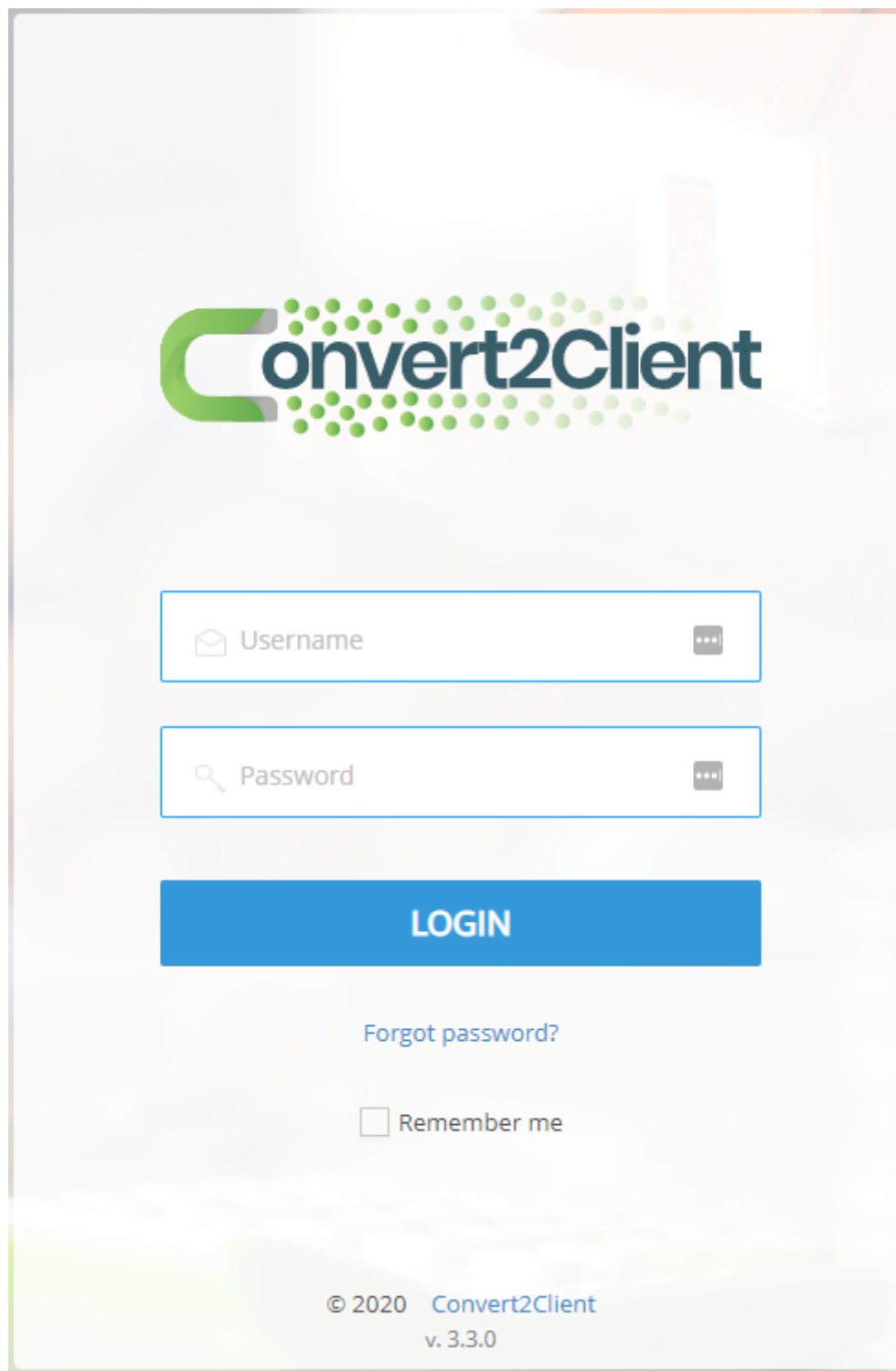
The latest version is always online at
https://support.ospreyapproach.com/?p=33819

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.

Dashboard

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

Dashboard

Quotes Conversions

- 60% Instructed
- 40% Enquiry

Filter by Year ☑ 2020

Number Of Quotes Per Month

☐ 2020

10

0

January March May July September December

Filter by Year ☑ 2020

10

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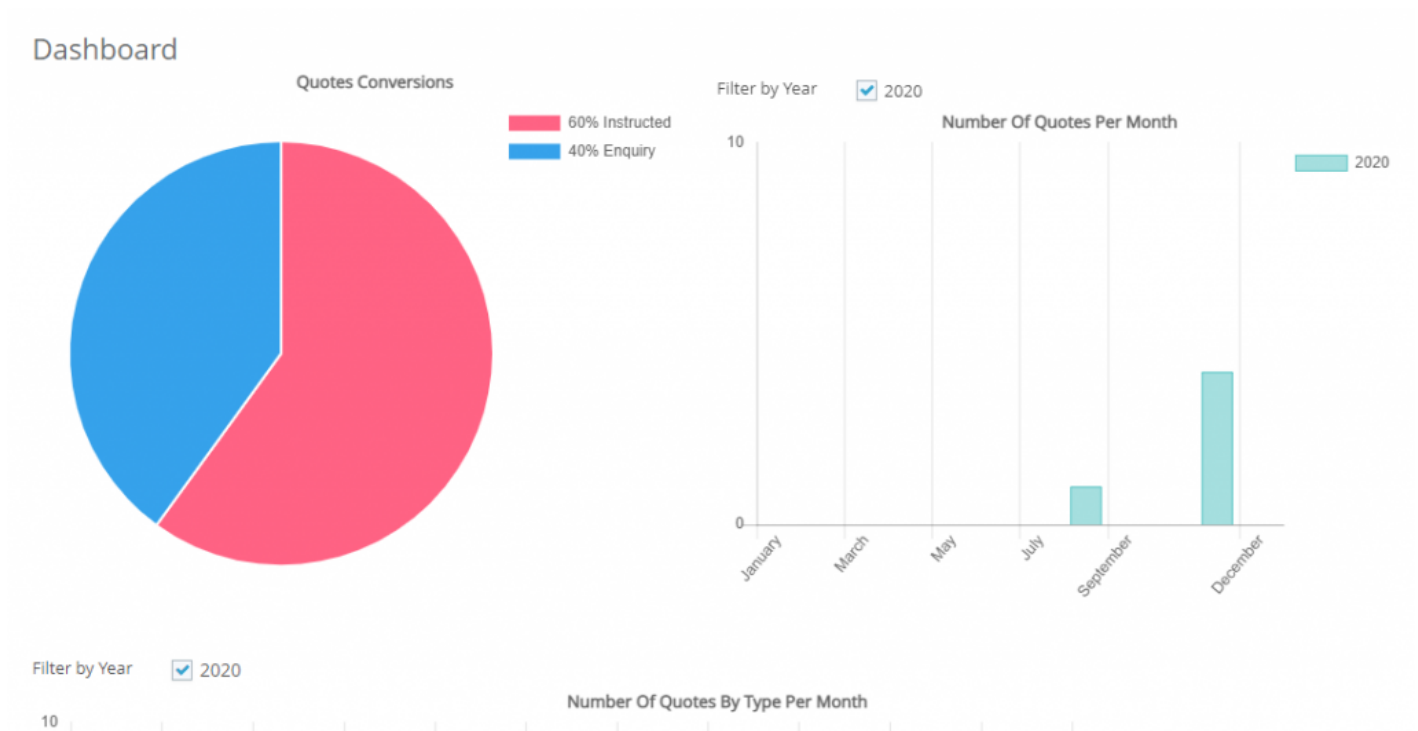
You will also see a graph showing number of quotes per month. You may select other years to view should you wish by ticking the relevant boxes. Further graphs are available underneath.

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.

Convert2Client

Dashboard

Quotes Conv
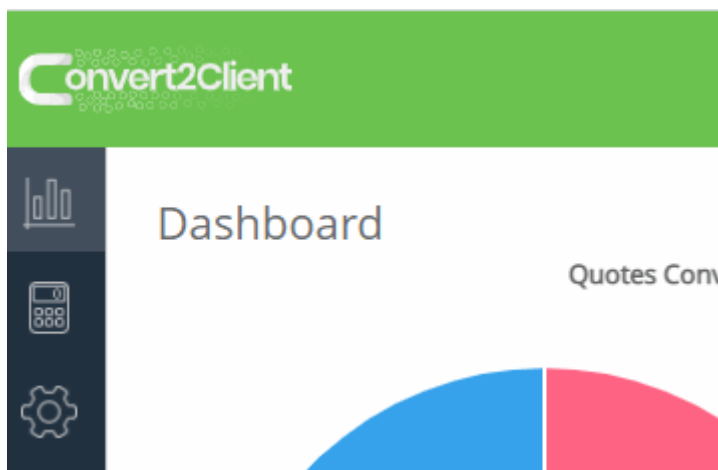
QUOTE DETAILS

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
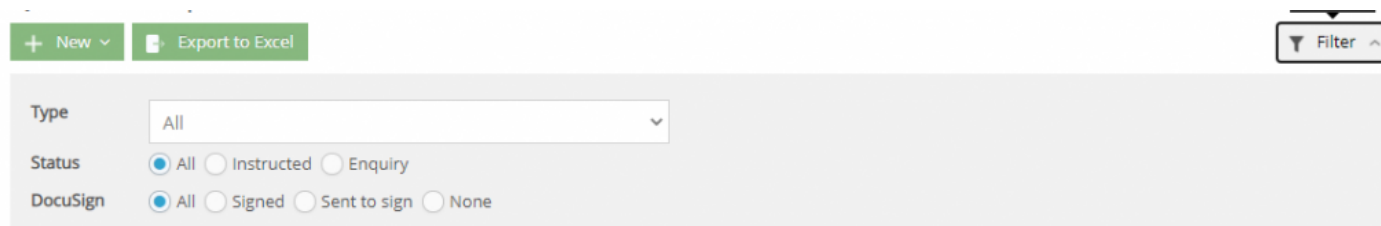
Email   ✉

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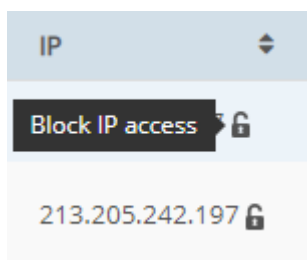
From the Quotes and Enquiries tab you may filter the results, there are options to filter by the type of quote, status of the quote and whether you have used the DocuSign integration when sending the quote.

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

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 is will Bring up the overview of the Quote Enquiry

Click More Actions>Quote Enquiry Details

Quote Details

This give you an overview of the Quote Details

Click More Actions>Quote Details

Client Care Letter email history

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

Click More Actions>Client Care Letter Email History

Change Status

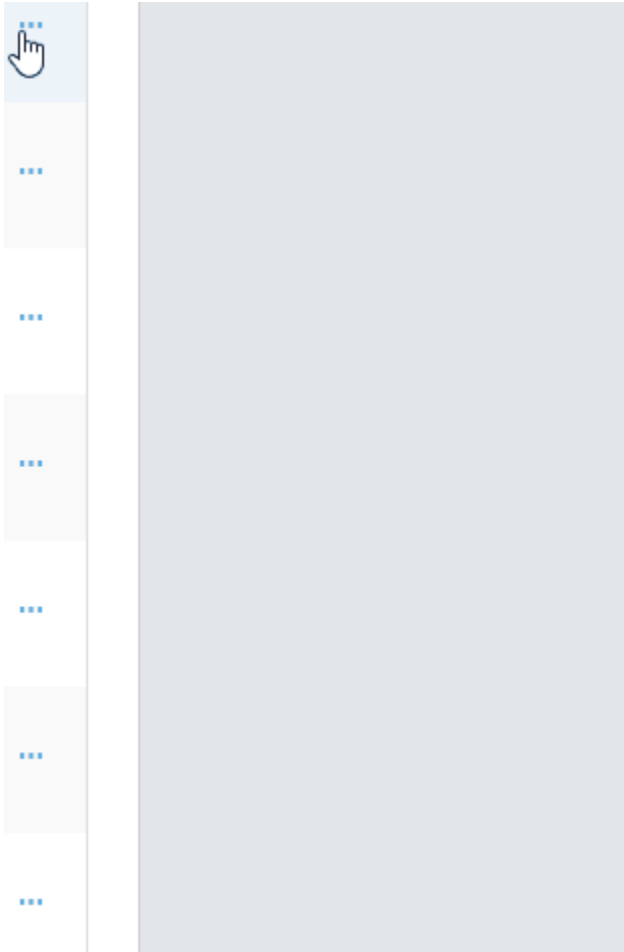This has the ability to change it from prospect to Instructed or lost from the Enquiry stage.

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.

More Actions>Apply Discount