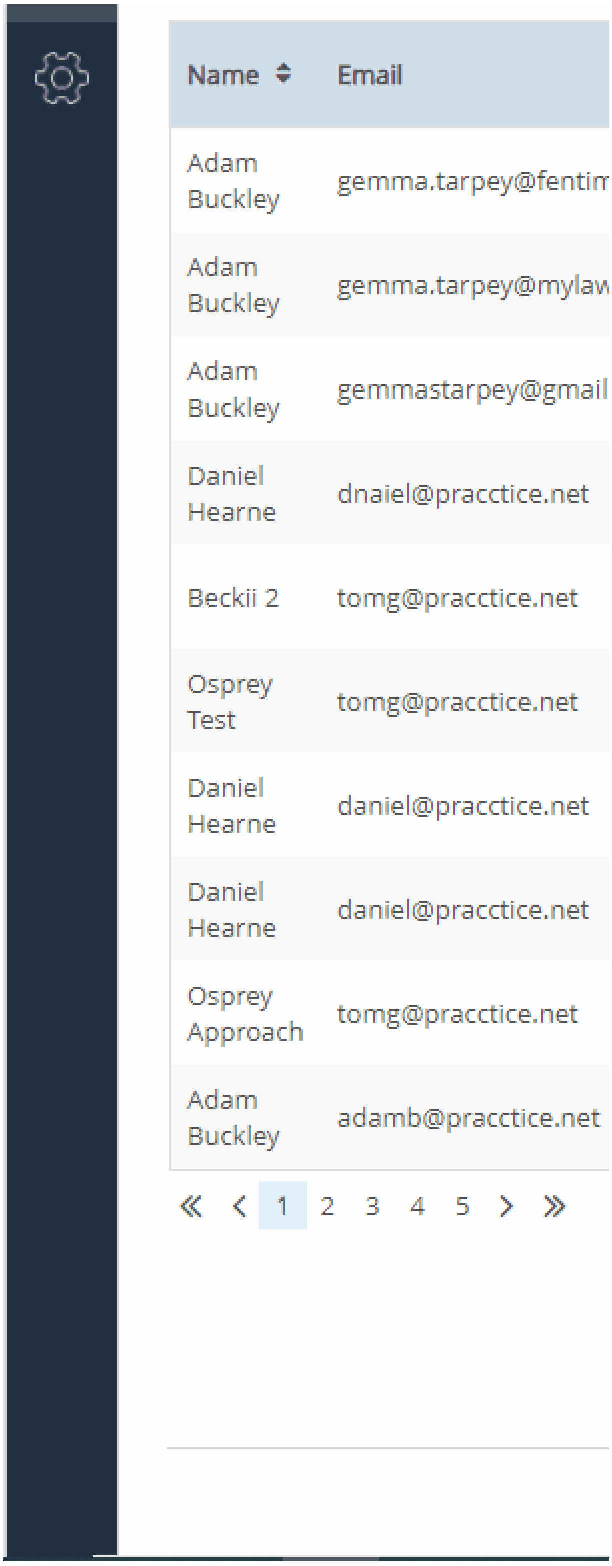
Osprey Approach: Convert2Client Setup

This help guide was last updated on
Mar 21st, 2024

The latest version is always online at
https://support.ospreyapproach.com/?p=52933

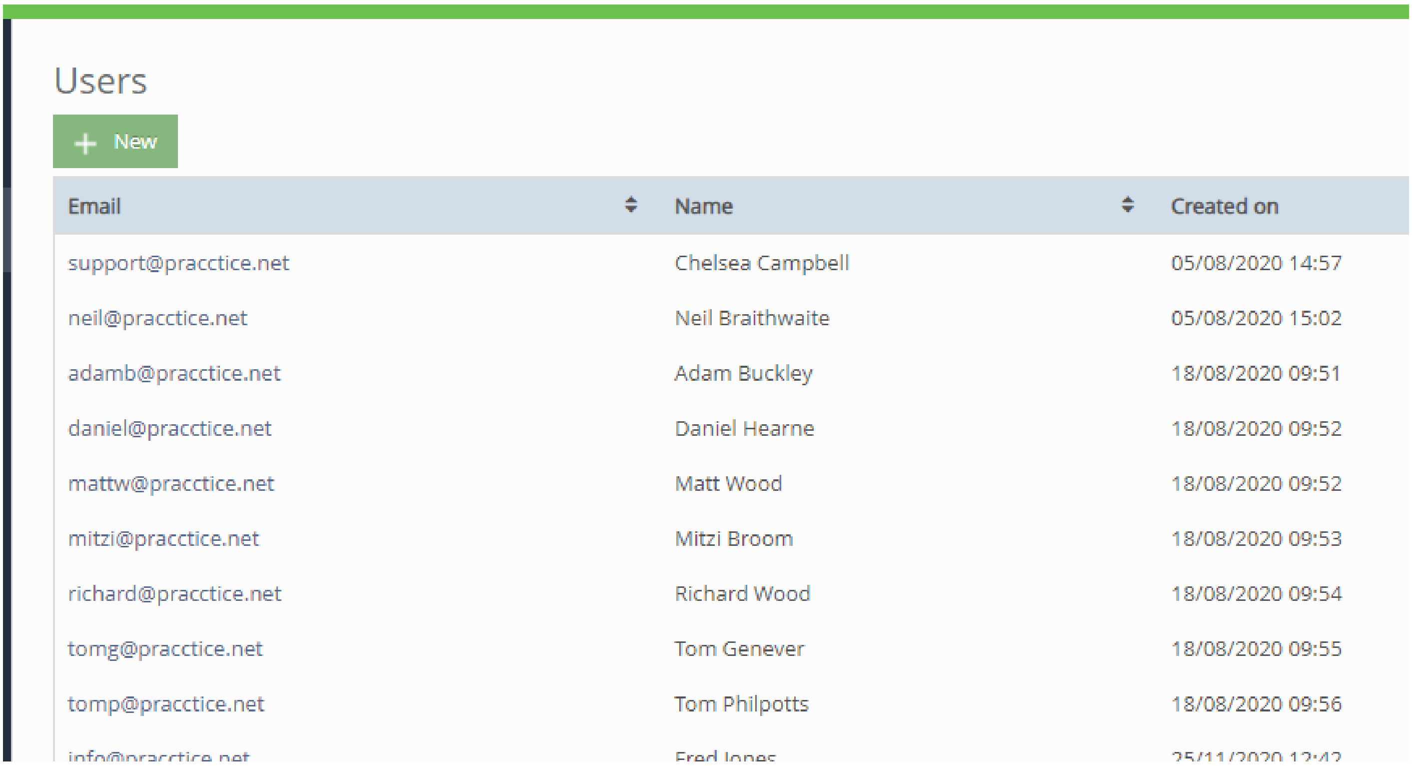
Portal Setup Options

Click Setup in Convert2Client portal, you will see a number of options



Managing Users

You may set up an unlimited number of users, by clicking Users and then selecting New. Simply enter the basic details and choose a role.



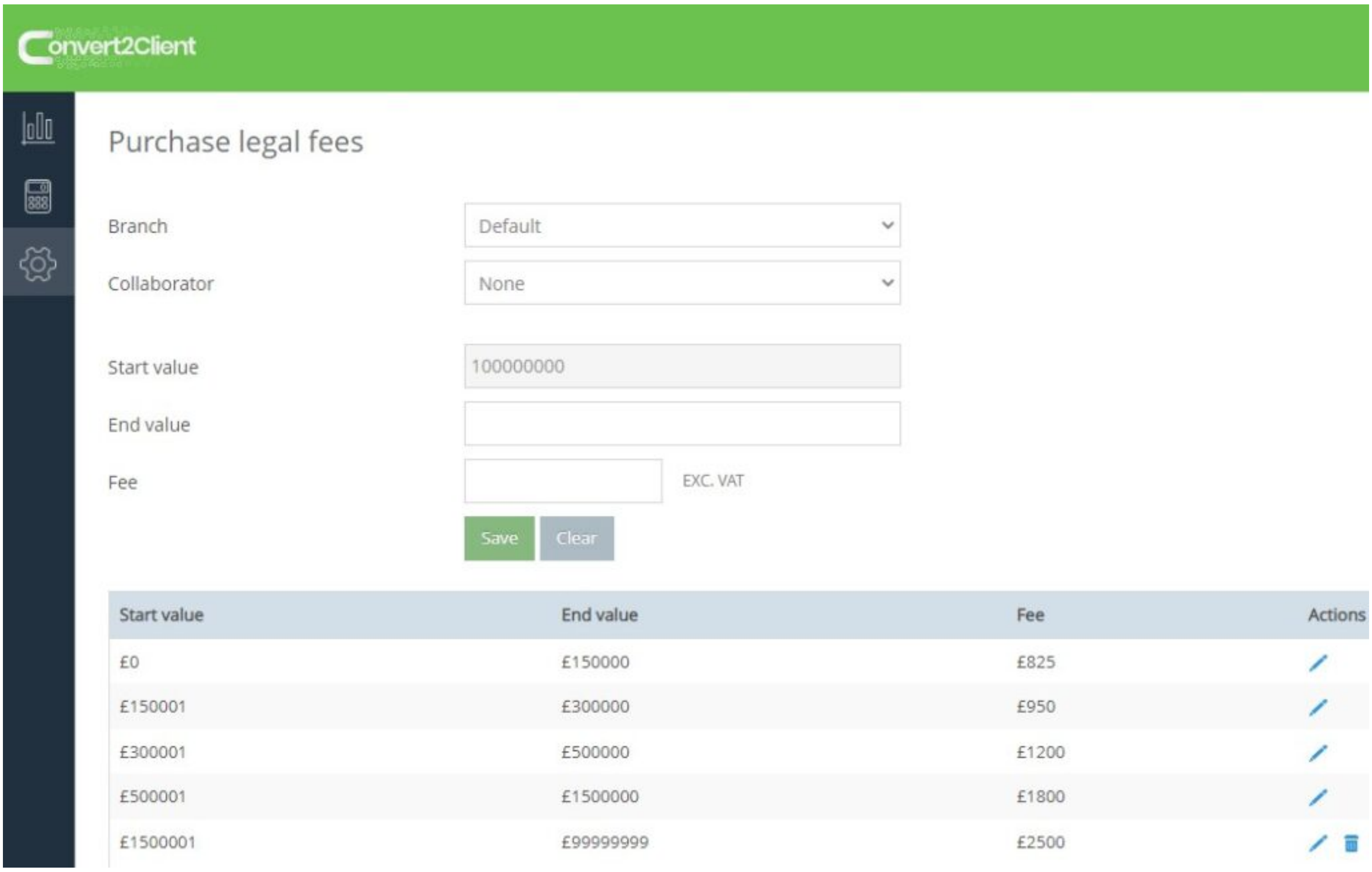
A Solicitor will be one of your internal users.

A Collaborator will be a third party, e.g. an Estate Agent, who would then be able to create quotations while the customer is with them.

An Administrator user will have access to the supervisor area and will be able to change any of the settings available.

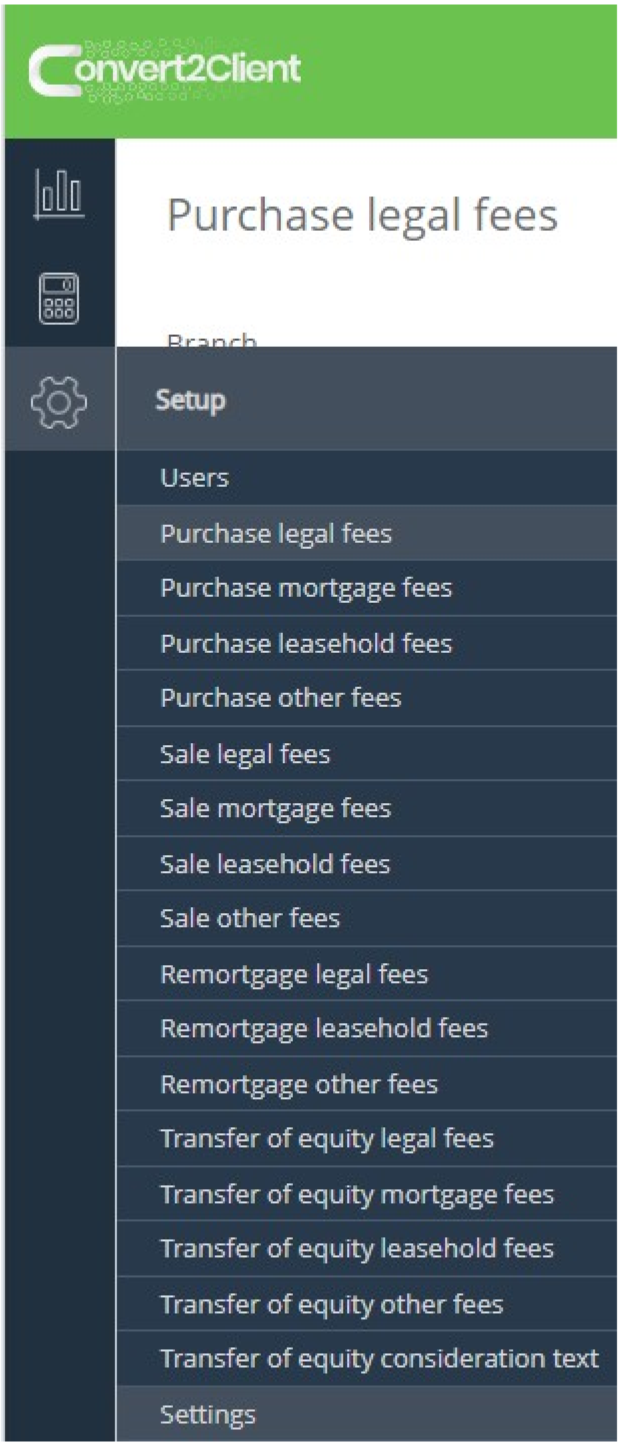
Setting Up Legal Fees

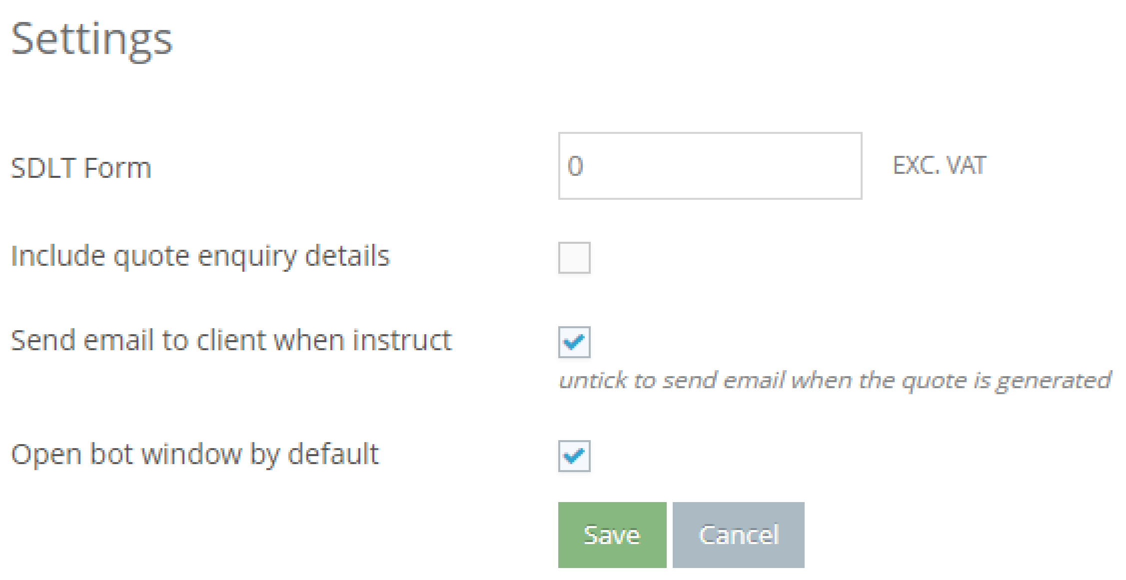
Supervisor level users can amend the fees areas to set up legal fees. Simply add an End Value and a Fee, then click Save.



Amending Fixed Fees

Clicking Settings will allow you to amend fixed fees if needed.





Customisation

Styling will affect the button styling on your website,

Styling

Popup

```
/*quote modal header color*/
.quote-header > .quote-title-header {
   background-color: #56688c;
}

/*active switch button color & font*/
.ctm-btn-switch.active {
   background-color: #343a40;
   border-color: #343a40;
   color: #fff;
}

/*active switch button color & font on hover*/
.ctm-btn-switch.active:hover {
   background-color: #23272b;
```

Bot

```
/*bot button color*/
.st-btn-container {
   background: #16b;
}

/*bot response quote color*/
div.botResponse {
   background-color: #16b;
}
div.botResponse::after {
   border: solid 10px #16b;
   border-top-width: 0;
   border-left-color: transparent;
   border-right-color: transparent;
}
```

Save Cancel

Adding Convert2Client to your website

The Installation area shows the code to be copied to your website to use the Convert2Client services. The code in the Common box is required by both the chatbot and the form. The code in the Popup box relates to the form only. The code in the Bot box relates to the chatbot only.

Installation

Common

```
<!--please add this code at the bottom of your <head> tag-->
<script type="text/javascript">
   var rootUrl = 'https://app.convert2client.com/';
   var companyId = 'f2e6b1fe-2bd7-ea11-9ed2-005056a164b5';
</script>
<link rel="stylesheet" href="https://use.fontawesome.com/releases/v5.5.0/css/all.css" integrity="sha384-B4dIYHKNBt8Bc12p+WXckhzcICo0wtJAoU8YZTY5qE0Id1GSseTk6S+L3BlXeVIU" crossorigin="anonymous">
<link rel="stylesheet" href="https://maxcdn.bootstrapcdn.com/bootstrap/3.3.7/css/bootstrap.min.css">
<script src="https://ajax.googleapis.com/ajax/libs/jquery/3.3.1/jquery.min.js"></script>
<script src="https://maxcdn.bootstrapcdn.com/bootstrap/3.3.7/js/bootstrap.min.js"></script>
<script src="https://app.convert2client.com//Scripts/App/GetQuote.js"></script>
<meta name="viewport" content="width=device-width, initial-scale=1">

<!--please add this code at the bottom of your <body> tag-->
```

Popup

```
<!--please add a button having this event on its 'onclick' attribute-->
GetConveyancingQuote()
```

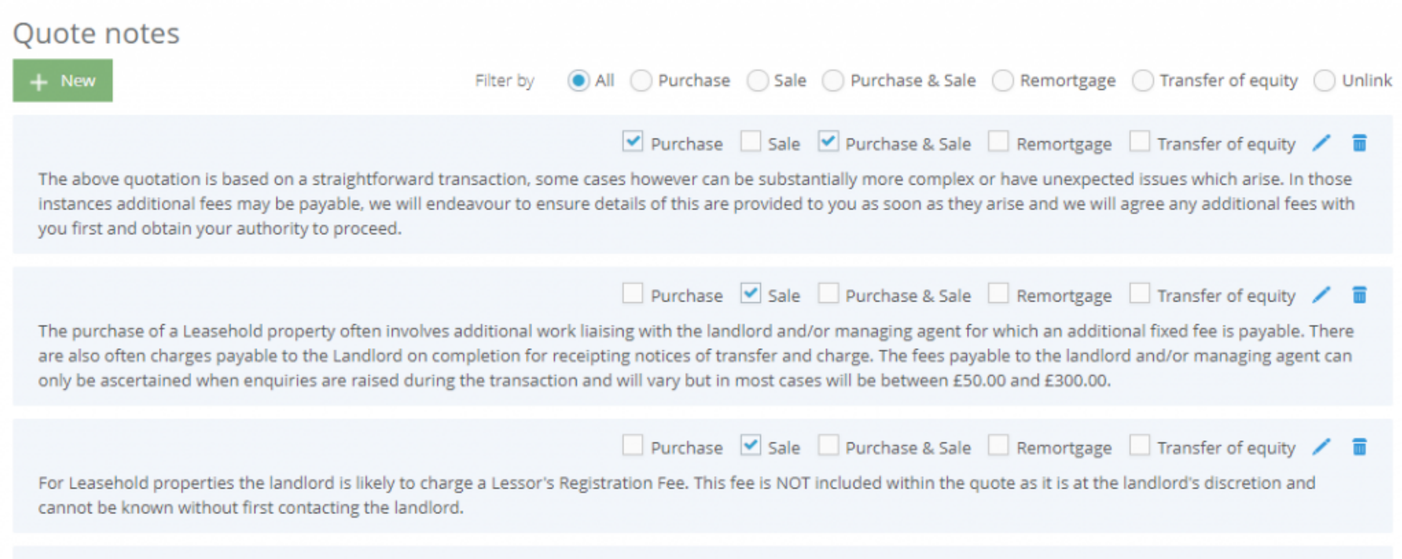
Bot

```
<!--please add this code at the bottom of your <head> tag-->
<link rel="stylesheet" href="https://app.convert2client.com//Content/css/bot.css" />
<link rel="stylesheet" href="https://app.convert2client.com//configurable-bot.ashx?cId=f2e6b1fe-2bd7-ea11-9ed2-005056a164b5">
<script src="https://sdk.amazonaws.com/js/aws-sdk-2.41.0.min.js"></script>
<script src="https://app.convert2client.com//Scripts/App/bot.js"></script>
<script src="https://app.convert2client.com//Scripts/jquery.printThis.js"></script>
```

Your domain hosts will be able to assist with amending this.

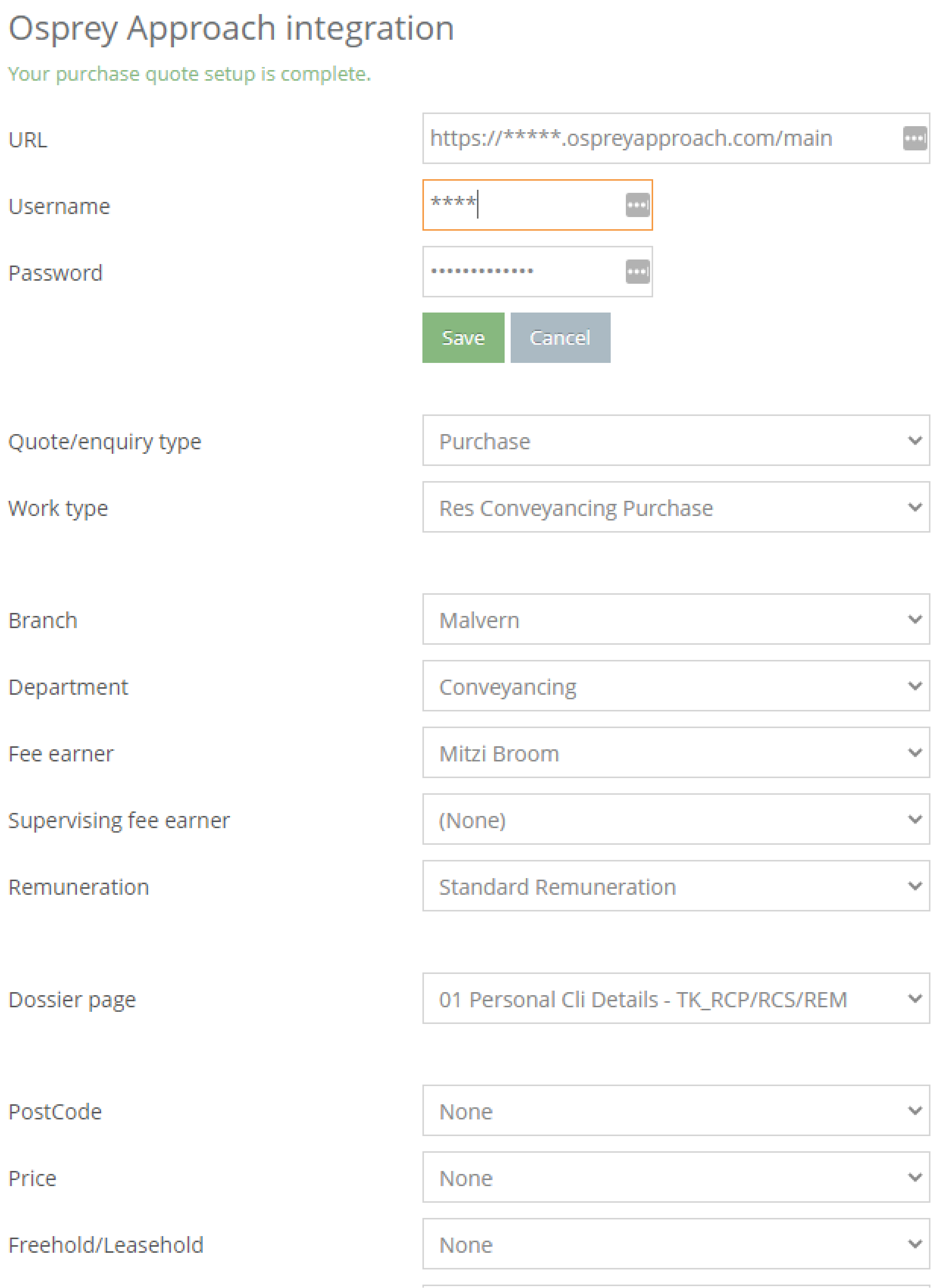
Quote Notes

The Quote Notes are the notes which appear on the pop-up quote. You may add new notes, and customise the existing notes as required and define which type of quote they will appear on.



Setting up Osprey Integration

You can set up Osprey integration by clicking here. Fill in the relevant fields, e.g. work type and dossier page, and then click Save to set up the integration.



Email Templates

C2C has email templates that can be amended as required, as well as the Client Care Letter. You can also include extra files to be sent alongside the client care letter should you wish. Simply drag and drop them.

Client care letter

Save

Quote type Purchase

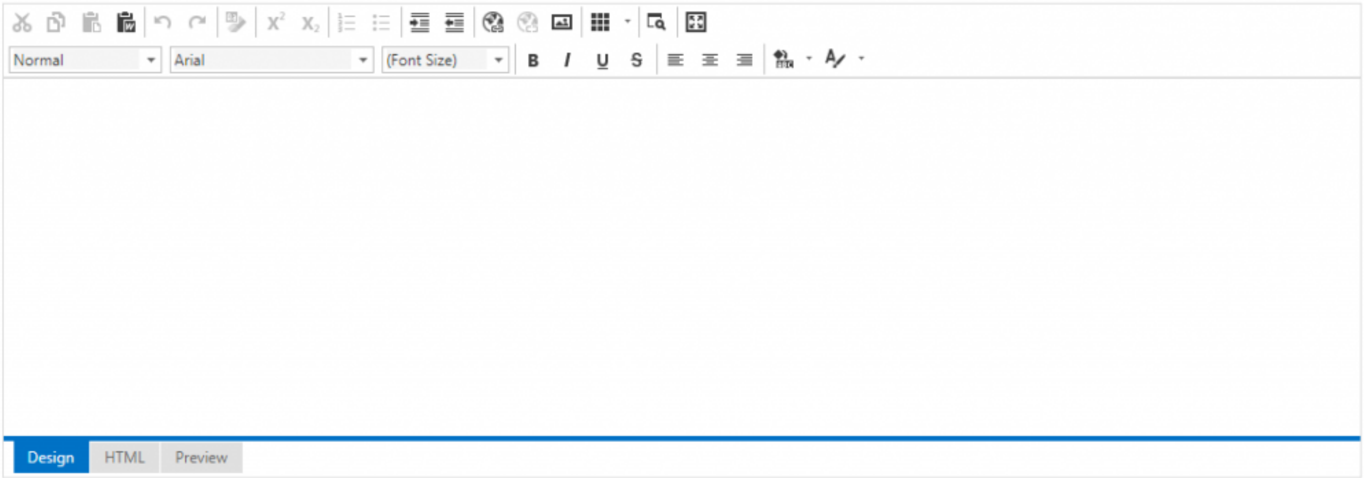
Subject

Fields Please select...

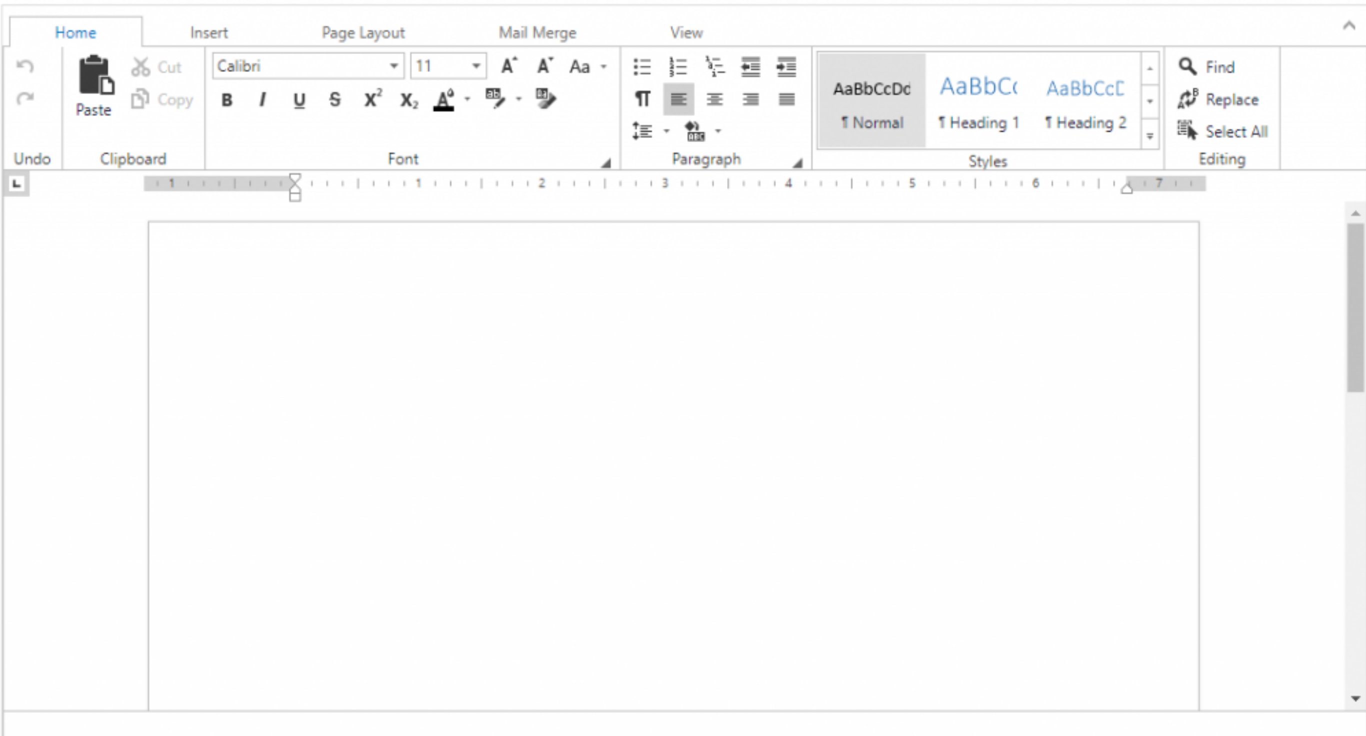
Subject

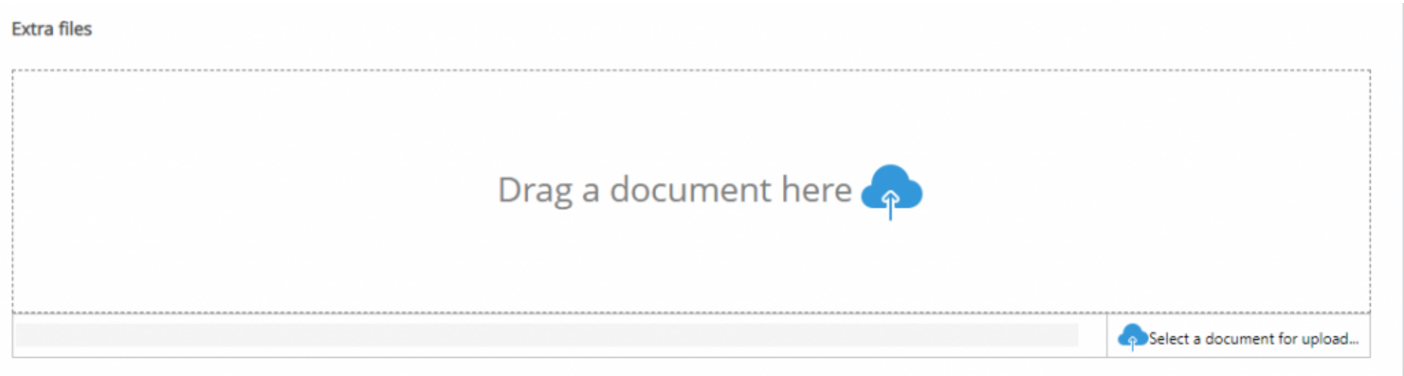
E-mail template

Fields Please select...



Letter template

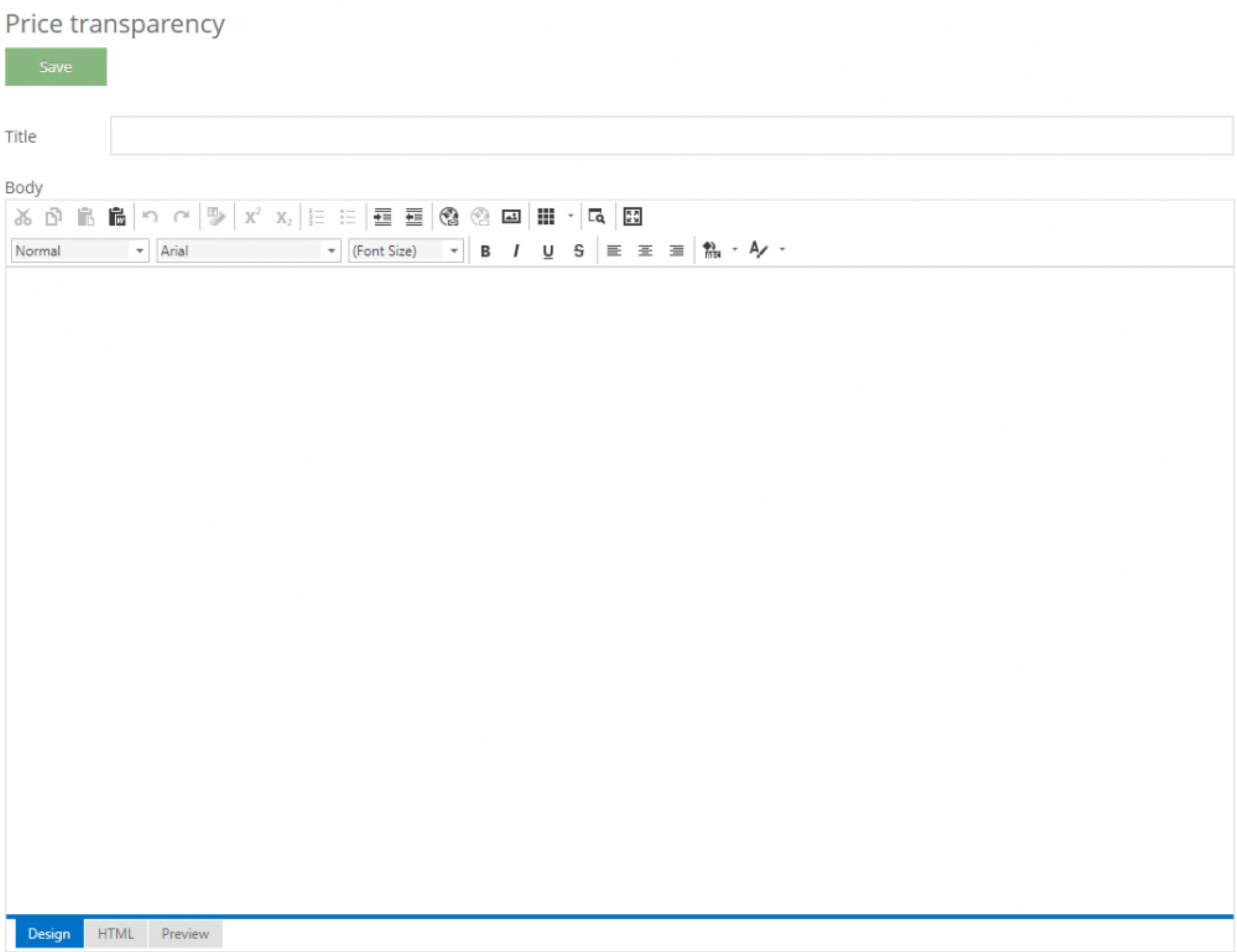




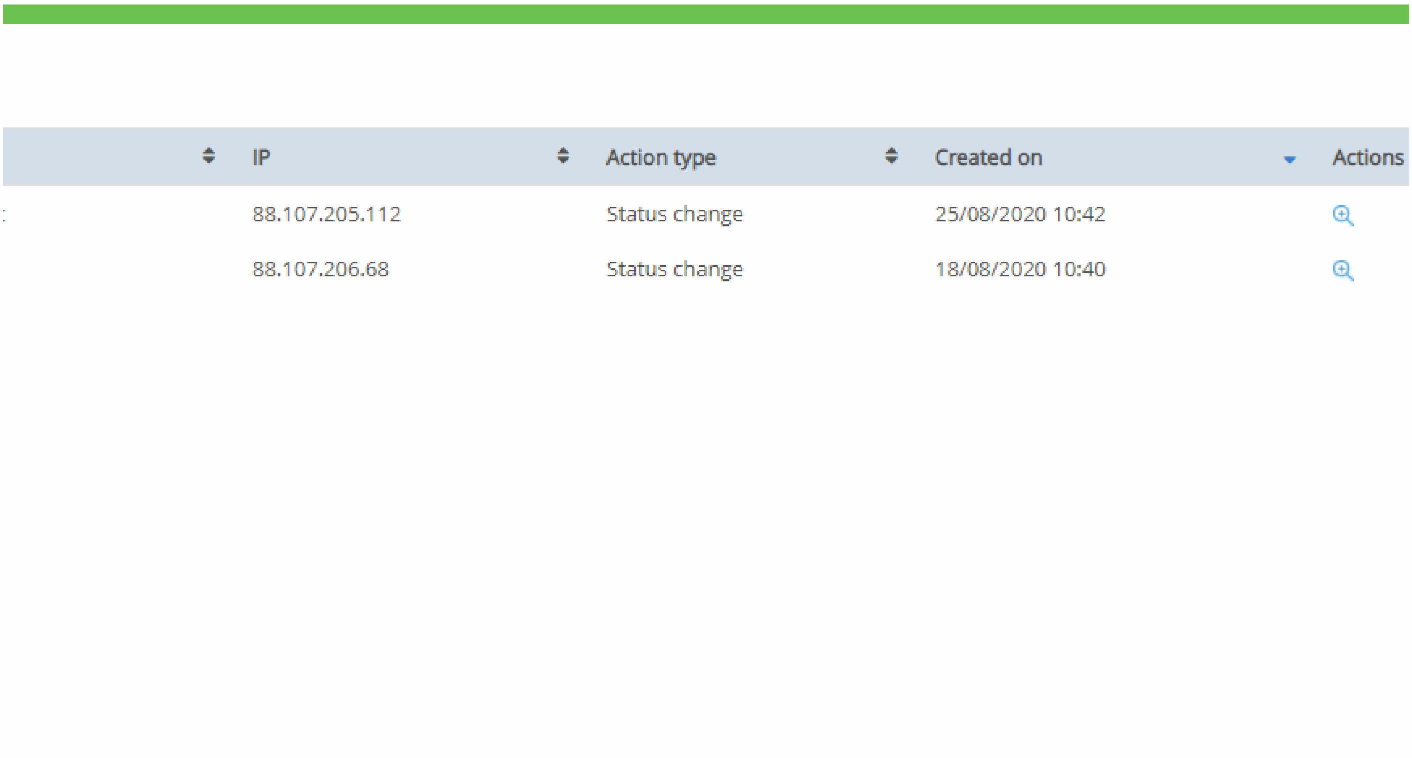
Additional documents will be listed which can be downloaded or removed.

Price Transparency

Price Transparency allows you to link to a page containing price information, which is a legal requirement from the SRA. You can amend and save this as required.

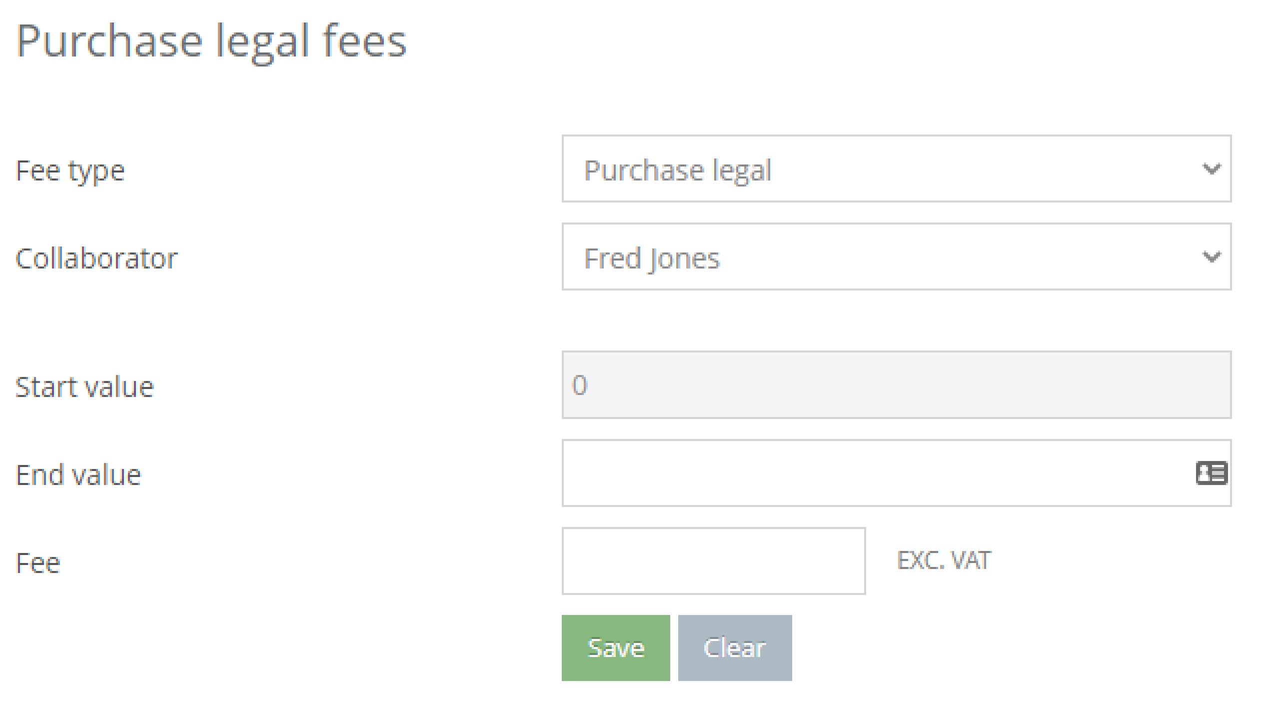


You also have access to an Audit area, select the Action buttons for more information.

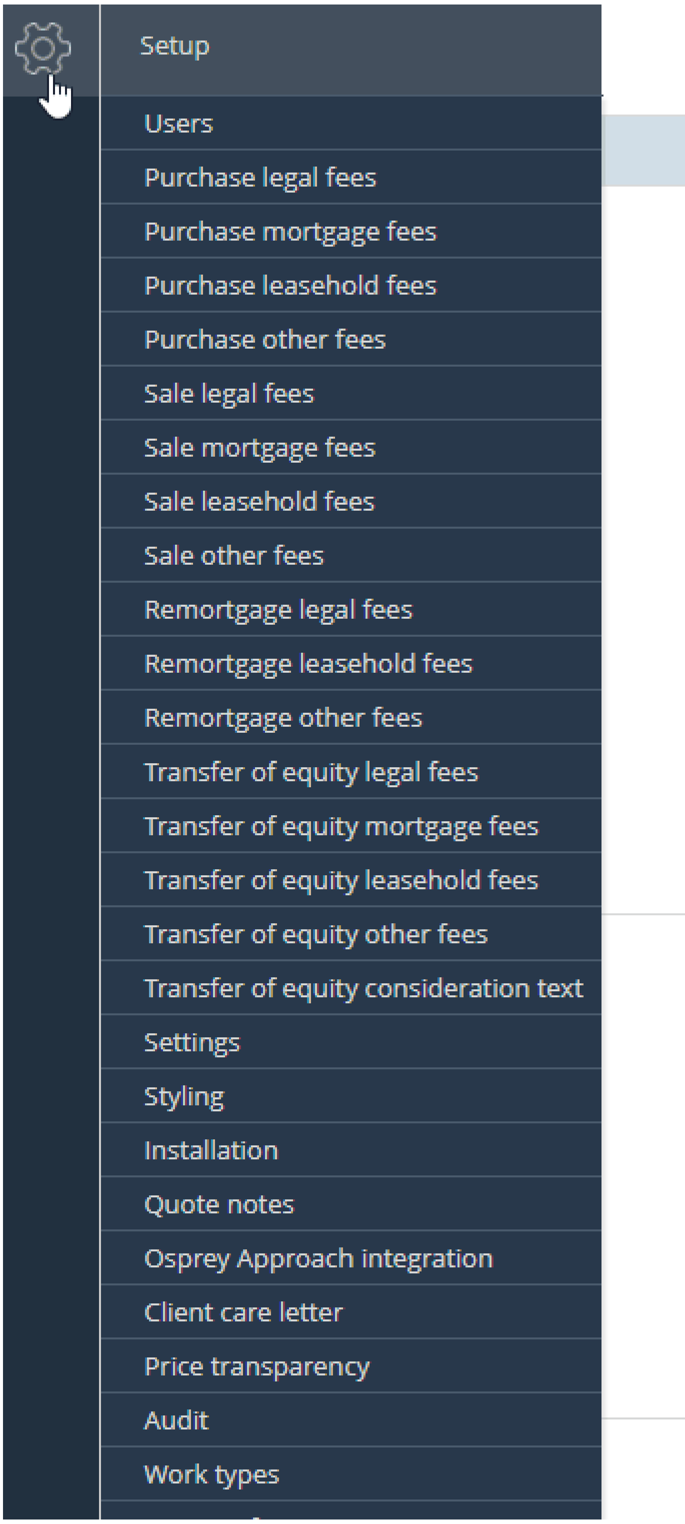


Collaborator Fees

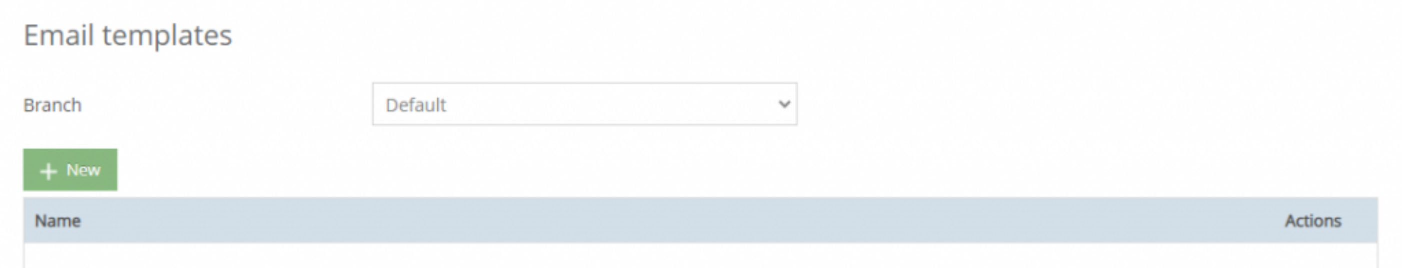
Collaborator Fees can be set so their fees are applied rather than yours when the quote or enquiry is made. Select a Fee Type and Collaborator and add a Start Value, an End Value and a Fee, then click Save.



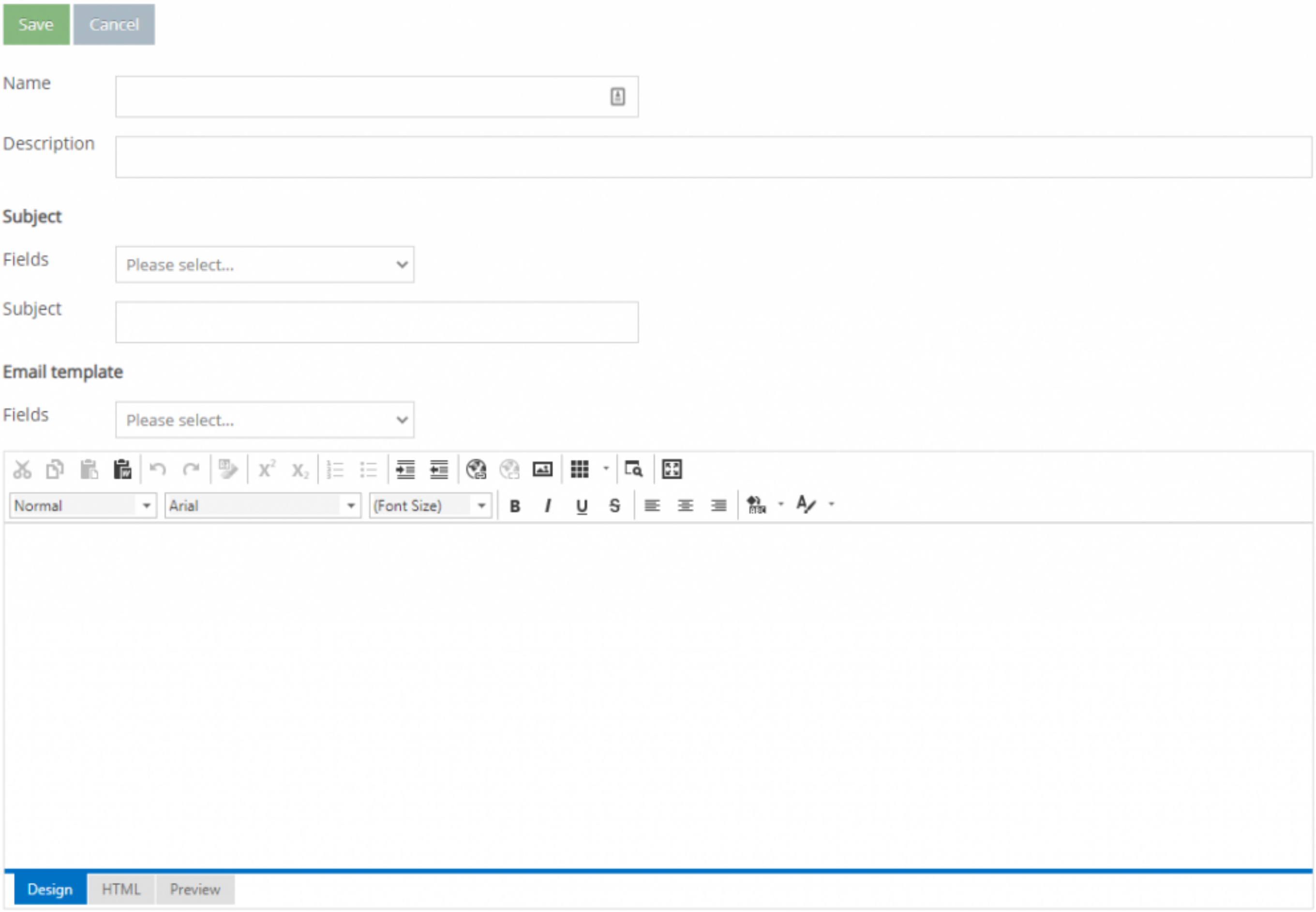
Predefined Email Templates can be created to make communication more efficient



Click Setup > Email Templates



Click New to create a new template

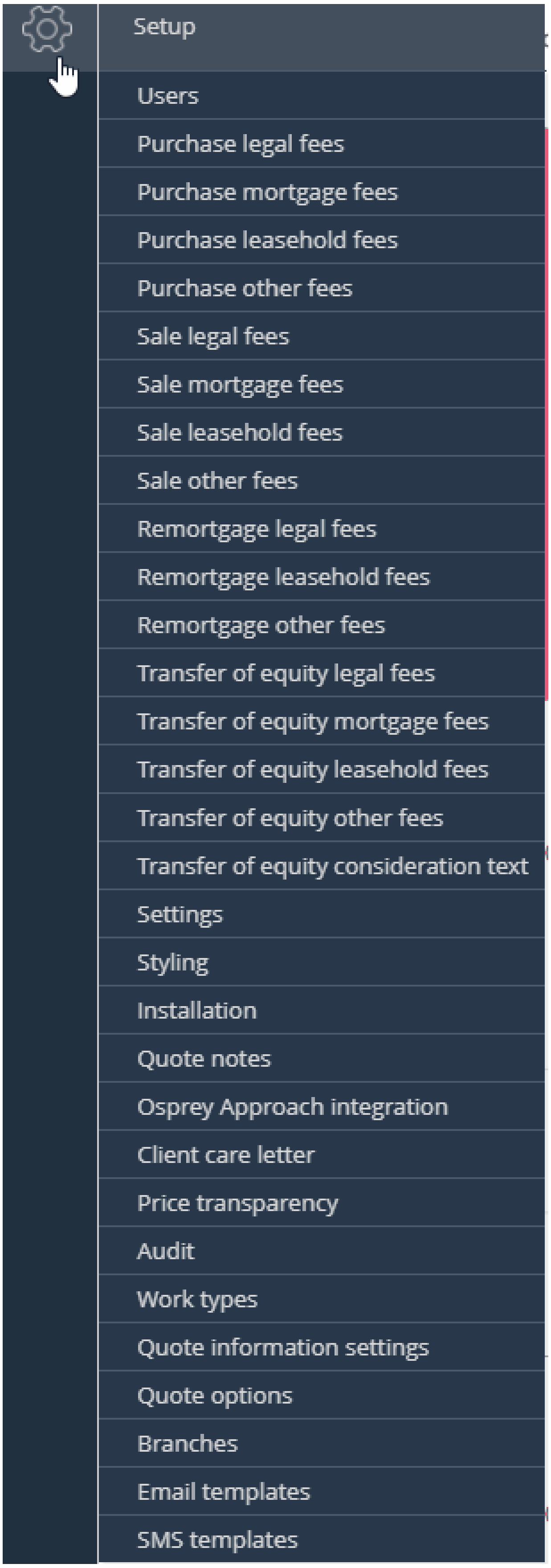


Please fill in a name and description, you may then fill in the subject and body content to use, to insert merge fields place the cursor and from the Field list select the desired field

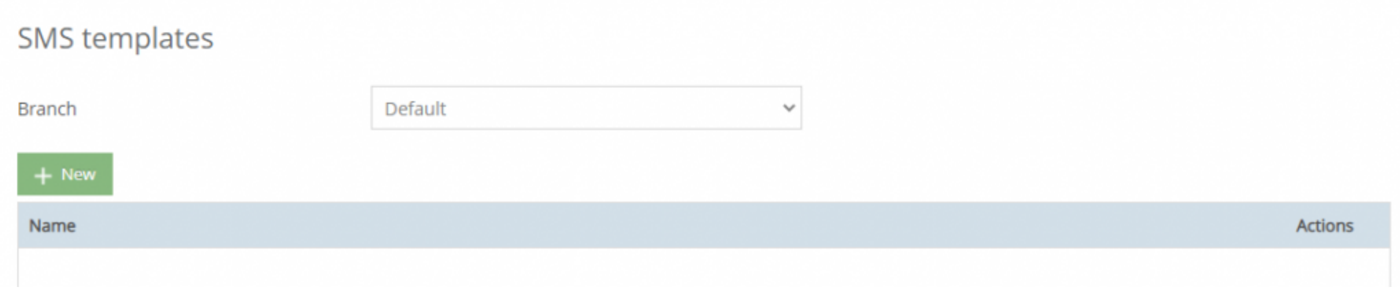
Click Save when finished

SMS Text Templates

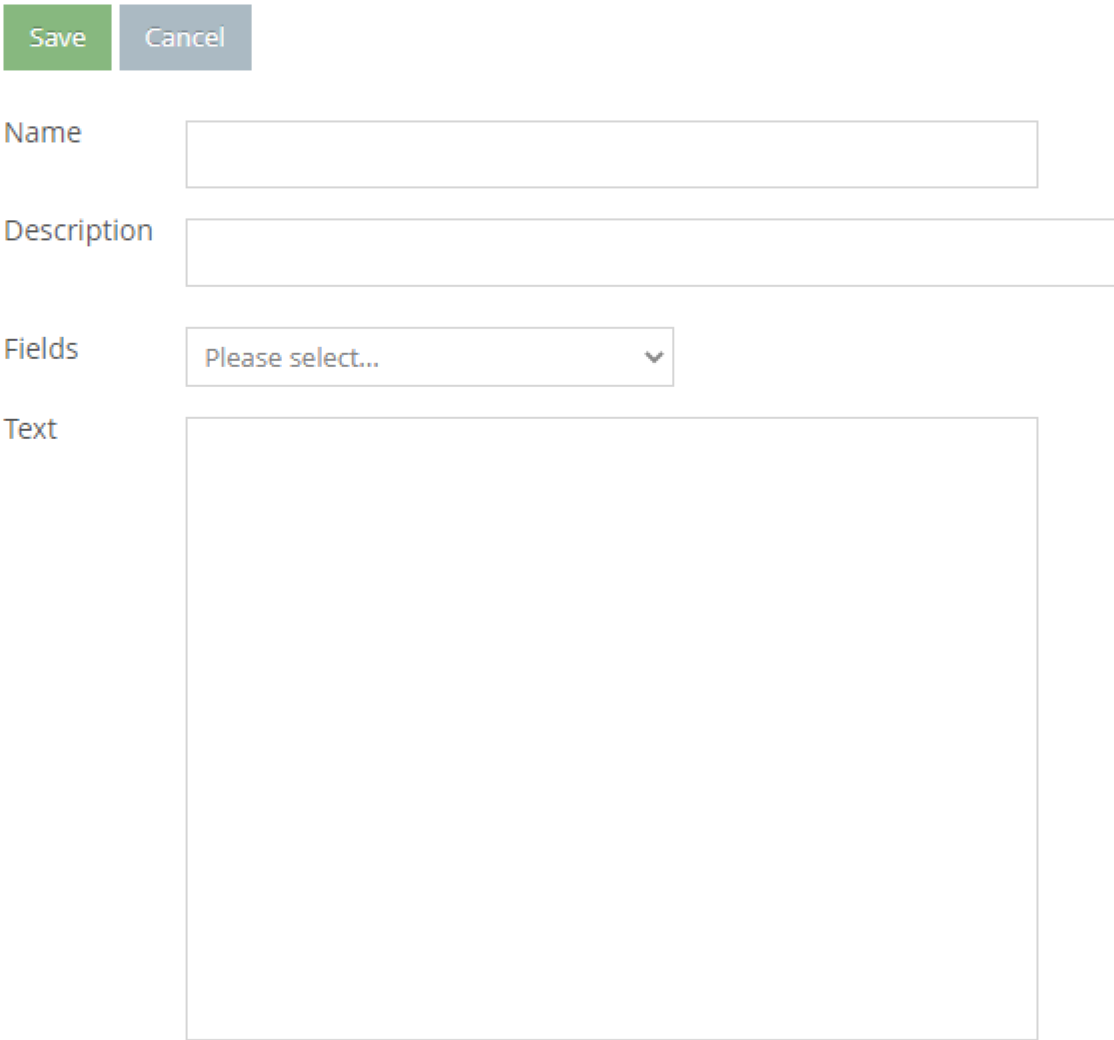
Predefined SMS Templates can be created to make communication more efficient



Click Setup > SMS templates



Click New to create a new template

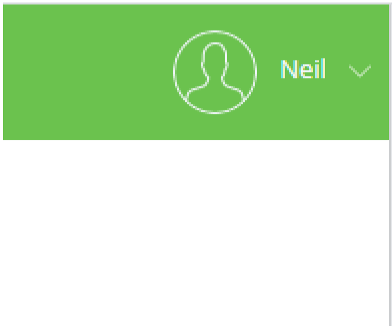


Please fill in a name and description, you may then the content to use, to insert merge fields place the cursor and from the Field list select the desired field

Click Save when finished

Updating Details

Select the drop-down arrow next to your username to view your user and company profile options.



The Company Profile will allow you to amend your firms details, including contact details and Text Anywhere credentials. You can also specify where instructions and enquiries are sent.

Don't forget to click Logout to end the session in portal