

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

Name	Email
Adam Buckley	gemma.tarpey@fentir
Adam Buckley	gemma.tarpey@mylaw
Adam Buckley	gemmastarpey@gmail
Daniel Hearne	dnaiel@pracctice.net
Beckii 2	tomg@pracctice.net
Osprey Test	tomg@pracctice.net
Daniel Hearne	daniel@pracctice.net
Daniel Hearne	daniel@pracctice.net
Osprey Approach	tomg@pracctice.net
Adam Buckley	adamb@pracctice.net

<<

<

1

2

3

4

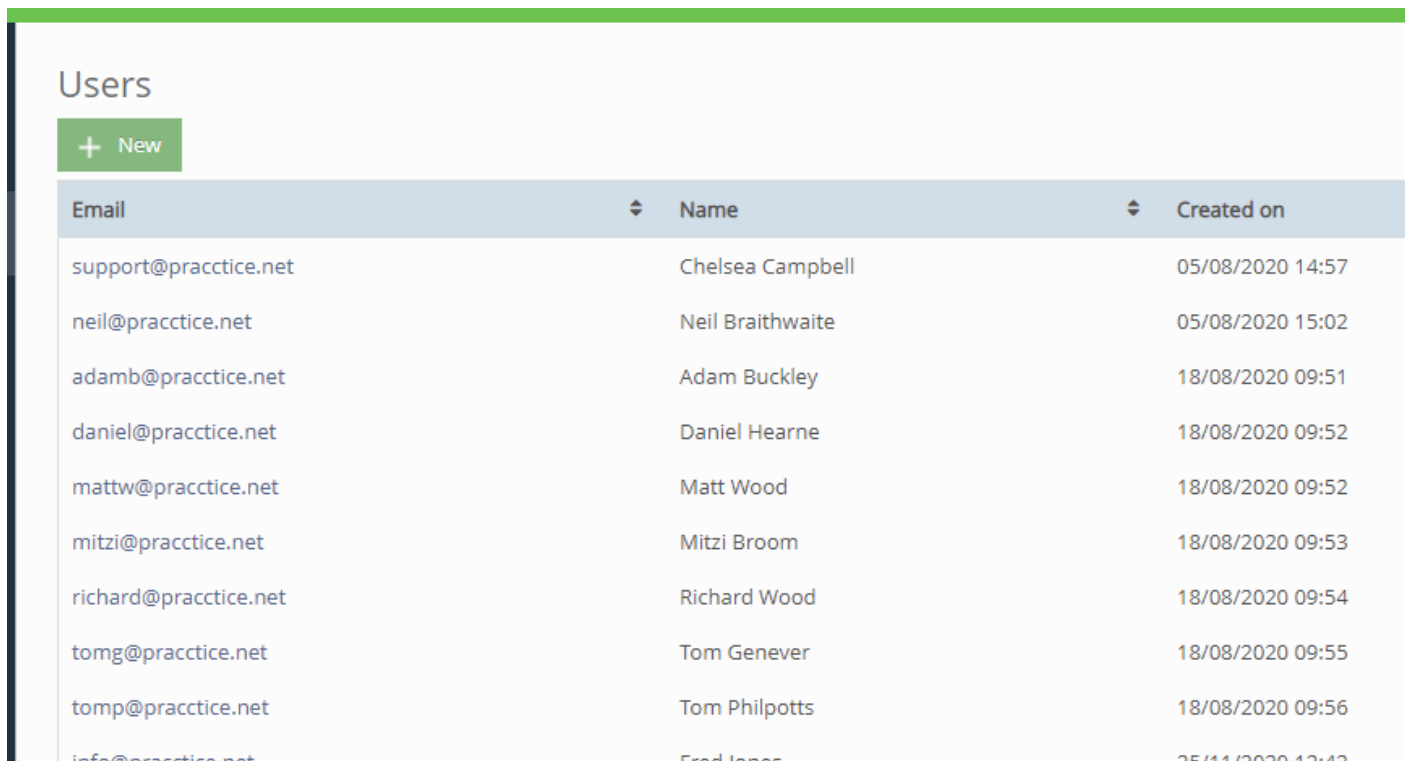
5

>

>>

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.



Email	Name	Created on
support@pracctice.net	Chelsea Campbell	05/08/2020 14:57
neil@pracctice.net	Neil Braithwaite	05/08/2020 15:02
adamb@pracctice.net	Adam Buckley	18/08/2020 09:51
daniel@pracctice.net	Daniel Hearne	18/08/2020 09:52
mattw@pracctice.net	Matt Wood	18/08/2020 09:52
mitzi@pracctice.net	Mitzi Broom	18/08/2020 09:53
richard@pracctice.net	Richard Wood	18/08/2020 09:54
tomg@pracctice.net	Tom Genever	18/08/2020 09:55
tomp@pracctice.net	Tom Philpotts	18/08/2020 09:56
info@pracctice.net	Fred Jones	25/11/2020 12:42

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.

Purchase legal fees
Purchase mortgage fees
Purchase leasehold fees
Purchase other fees
Sale legal fees
Sale mortgage fees
Sale leasehold fees
Sale other fees
Remortgage legal fees
Remortgage leasehold fees
Remortgage other fees
Transfer of equity legal fees
Transfer of equity mortgage fees
Transfer of equity leasehold fees
Transfer of equity other fees
Transfer of equity consideration text

Convert2Client

Purchase legal fees

Branch

Default

Collaborator

None

Start value

100000000

End value

Fee

EXC. VAT

Save

Clear

Start value	End value	Fee	Actions
£0	£150000	£825	/
£150001	£300000	£950	/
£300001	£500000	£1200	/
£500001	£1500000	£1800	/
£1500001	£99999999	£2500	/ 🗑

Amending Fixed Fees

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

Convert2Client

Purchase legal fees

Branch

Setup

Users

Purchase legal fees

Purchase mortgage fees

Purchase leasehold fees

Purchase other fees

Sale legal fees

Sale mortgage fees

Sale leasehold fees

Sale other fees

Remortgage legal fees

Remortgage leasehold fees

Remortgage other fees

Transfer of equity legal fees

Transfer of equity mortgage fees

Transfer of equity leasehold fees

Transfer of equity other fees

Transfer of equity consideration text

Settings

Settings

SDLT Form

EXC. VAT

Include quote enquiry details

☐

Send email to client when instruct

☒

untick to send email when the quote is generated

Open bot window by default

☒

Save

Cancel

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+WXckhzcCo0wtjAoU8YZTY5qE0ld1GSseTk6S+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.



Quote notes

+ New



Filter by ☒ All ☐ Purchase ☐ Sale ☐ Purchase & Sale ☐ Remortgage ☐ Transfer of equity ☐ Unlink

☒ Purchase ☐ Sale ☒ Purchase & Sale ☐ Remortgage ☐ Transfer of equity  

The above quotation is based on a straightforward transaction, some cases however can be substantially more complex or have unexpected issues which arise. In those instances additional fees may be payable, we will endeavour to ensure details of this are provided to you as soon as they arise and we will agree any additional fees with you first and obtain your authority to proceed.

☐ Purchase ☒ Sale ☐ Purchase & Sale ☐ Remortgage ☐ Transfer of equity  

The purchase of a Leasehold property often involves additional work liaising with the landlord and/or managing agent for which an additional fixed fee is payable. There are also often charges payable to the Landlord on completion for receipting notices of transfer and charge. The fees payable to the landlord and/or managing agent can only be ascertained when enquiries are raised during the transaction and will vary but in most cases will be between £50.00 and £300.00.

☐ Purchase ☒ Sale ☐ Purchase & Sale ☐ Remortgage ☐ Transfer of equity  

For Leasehold properties the landlord is likely to charge a Lessor's Registration Fee. This fee is NOT included within the quote as it is at the landlord's discretion and cannot be known without first contacting the landlord.

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.

Osprey Approach integration

Your purchase quote setup is complete.

URL	<input type="text" value="https://*****.ospreyapproach.com/main"/>
Username	<input type="text" value="****"/>
Password	<input type="password" value="....."/>
	<div><div>Save</div><div>Cancel</div></div>
Quote/enquiry type	<div>Purchase</div>
Work type	<div>Res Conveyancing Purchase</div>
Branch	<div>Malvern</div>
Department	<div>Conveyancing</div>
Fee earner	<div>Mitzi Broom</div>
Supervising fee earner	<div>(None)</div>
Remuneration	<div>Standard Remuneration</div>
Dossier page	<div>01 Personal Cli Details - TK_RCP/RCS/REM</div>
PostCode	<div>None</div>
Price	<div>None</div>
Freehold/Leasehold	<div>None</div>

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

Quote type

Purchase

Subject

Fields

Please select...

Subject

E-mail template

Fields


Please select...

The image shows the Microsoft Word ribbon with the Design tab selected. The Font group is expanded, showing options for Normal, Arial, and (Font Size). The Paragraph group shows Bulleted List, Numbered List, and Indent List. The Styles group shows Paragraph, List Group, and Table. The Font group also includes Bold (B), Italic (I), Underline (U), Strikethrough (S), and Font Color (A). The Paragraph group includes Bulleted List, Numbered List, and Indent List. The Styles group includes Paragraph, List Group, and Table. The Font group also includes Bold (B), Italic (I), Underline (U), Strikethrough (S), and Font Color (A). The Paragraph group includes Bulleted List, Numbered List, and Indent List. The Styles group includes Paragraph, List Group, and Table. The Font group also includes Bold (B), Italic (I), Underline (U), Strikethrough (S), and Font Color (A).

Letter template

The screenshot displays the Microsoft Word ribbon with the 'Home' tab selected. The ribbon is divided into four main sections: Font, Paragraph, Styles, and Editing. The Font section includes options for font face (Calibri), size (11), and various formatting options like bold, italic, underline, and text color. The Paragraph section includes options for bullet points, numbering, and indentation. The Styles section shows the 'Normal' style selected. The Editing section includes options for Find, Replace, and Select All. The ribbon is set against a light gray background.

Extra files

Drag a document here 

Select a document for upload...

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

File name	Actions
risk assessment.xlsm	 

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.

Price transparency

Save

Body

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

	↕ IP	↕ Action type	↕ Created on	▼ Actions
:	88.107.205.112	Status change	25/08/2020 10:42	
	88.107.206.68	Status change	18/08/2020 10:40	



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.

Purchase legal fees

Fee type	<div>Purchase legal▼</div>
Collaborator	<div>Fred Jones▼</div>
Start value	<div>0</div>
End value	<div><div></div><div></div></div>
Fee	<div><div></div>EXC. VAT</div>
	<div><div>Save</div><div>Clear</div></div>

Predefined Email Templates can be created to make communication more efficient



Setup

Users

Purchase legal fees

Purchase mortgage fees

Purchase leasehold fees

Purchase other fees

Sale legal fees

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Transfer of equity consideration text

Settings

Styling

Installation

Quote notes

Osprey Approach integration

Client care letter

Price transparency

Audit

Work types

Click Setup > Email Templates

Email templates



Branch

Default

+ New

Name	Actions
------	---------

Click New to create a new template

	Setup
	Users
	Purchase legal fees
	Purchase mortgage fees
	Purchase leasehold fees
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	Sale legal fees
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	Transfer of equity consideration text
	Settings
	Styling
	Installation
	Quote notes
	Osprey Approach integration
	Client care letter
	Price transparency
	Audit
	Work types
	Quote information settings
	Quote options
	Branches
	Email templates
	SMS templates

Click Setup > SMS templates

SMS templates

Branch Default

+ New

Name	Actions
------	---------

Click New to create a new template

Save Cancel

Name

Description

Fields Please select...



Text

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.

 Neil 

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