

Osprey Approach: Convert2Client Setup

This help guide was last updated on
Jul 1st, 2024

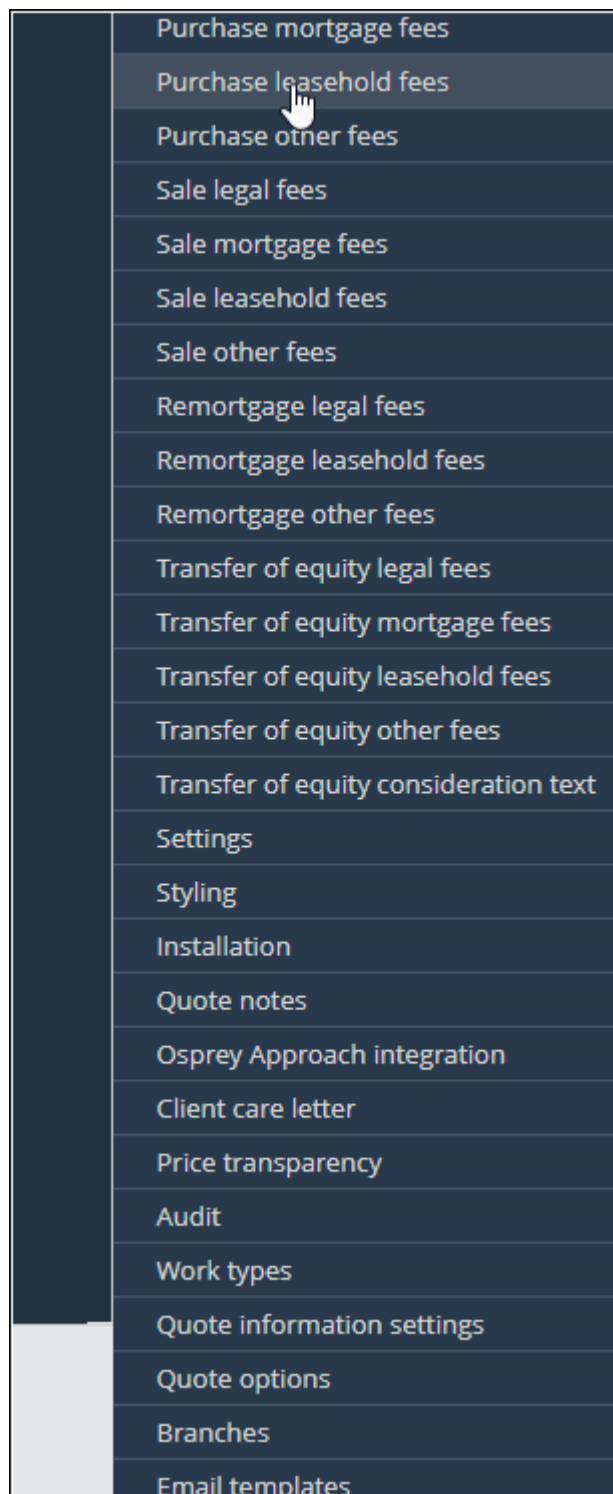
The latest version is always online at
<https://support.ospreyapproach.com/?p=52933>



This guide will look at the settings available to Supervisor users in the Convert2Client portal

Portal setup options

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

A screenshot of a dark-themed sidebar menu in the Convert2Client portal. The menu items are listed in white text on a dark blue background. A white mouse cursor is hovering over the 'Purchase leasehold fees' option, which is highlighted with a lighter blue background. The menu items are: 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, Styling, Installation, Quote notes, Osprey Approach integration, Client care letter, Price transparency, Audit, Work types, Quote information settings, Quote options, Branches, and Email templates.

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
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Settings
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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
support@pracctice.net	Chelsea Campbell	05/08/20
neil@pracctice.net	Neil Braithwaite	05/08/20
adamb@pracctice.net	Adam Buckley	18/08/20
daniel@pracctice.net	Daniel Hearne	18/08/20
mattw@pracctice.net	Matt Wood	18/08/20
mitzi@pracctice.net	Mitzi Broom	18/08/20
richard@pracctice.net	Richard Wood	18/08/20
tomg@pracctice.net	Tom Genever	18/08/20
tomp@pracctice.net	Tom Philpotts	18/08/20
info@pracctice.net	Fred Jones	25/11/20

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



Purchase legal fees

Branch

Collaborator

Start value

End value

Fee EXC. VAT

Start value	End value	Fee
£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.



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. This 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+WXckhzcIco0wtjAoU8YZTY5qE0ld1GSseTk6S+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

Purchase Sale Purchase & Sale Remortgage Transfer of

The above quotation is based on a straightforward transaction, some cases however can be substantially more complex or have unexpected issues which in some 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

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

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

https://*****.ospreyapproach.com/main

Username

Password

Save

Cancel

Quote/enquiry type

Purchase

Work type

Res Conveyancing Purchase

Branch

Malvern

Department

Conveyancing

Fee earner

Mitzi Broom

Supervising fee earner

(None)

Remuneration

Standard Remuneration

Dossier page

01 Personal Cli Details - TK_RCP/RCS/REM

PostCode

None

Price

None

Freehold/Leasehold

None

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

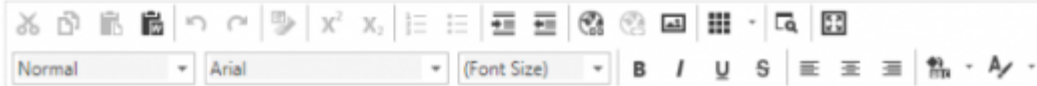
Please select...

Subject

E-mail template

Fields

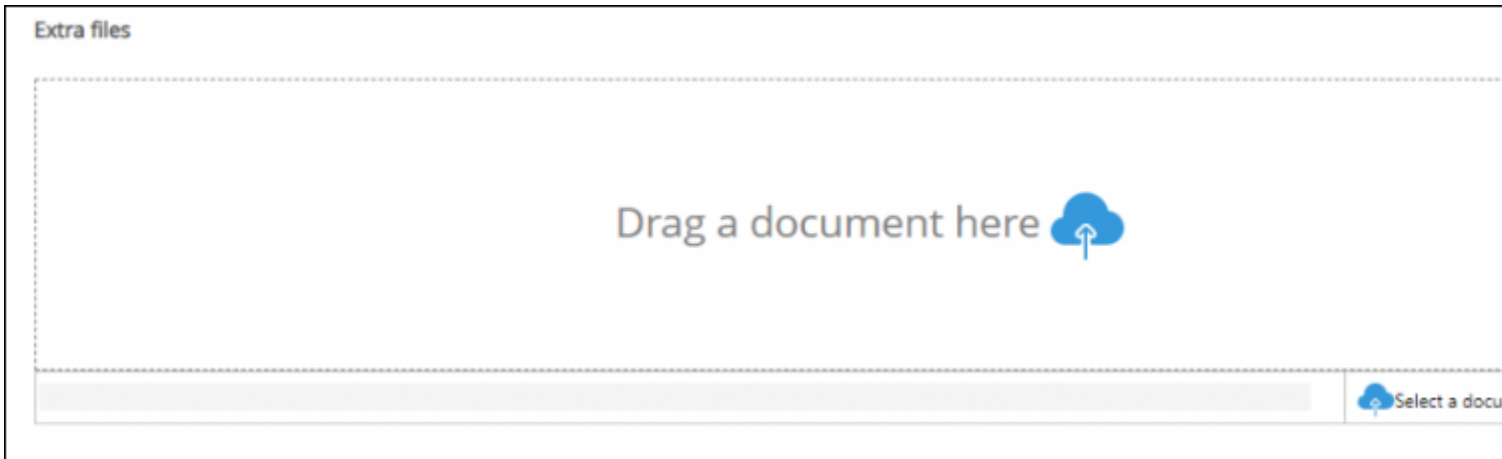
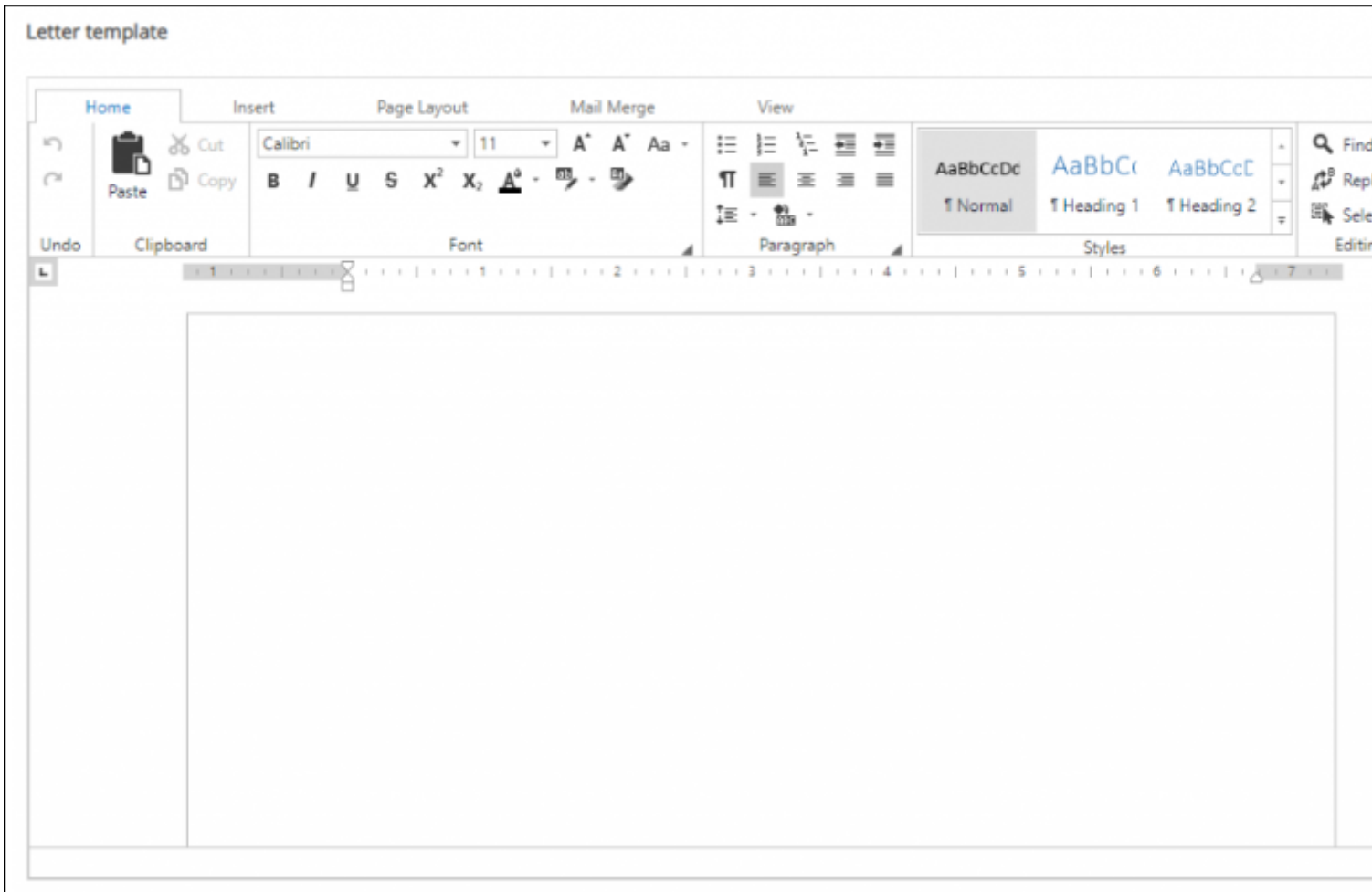
Please select...



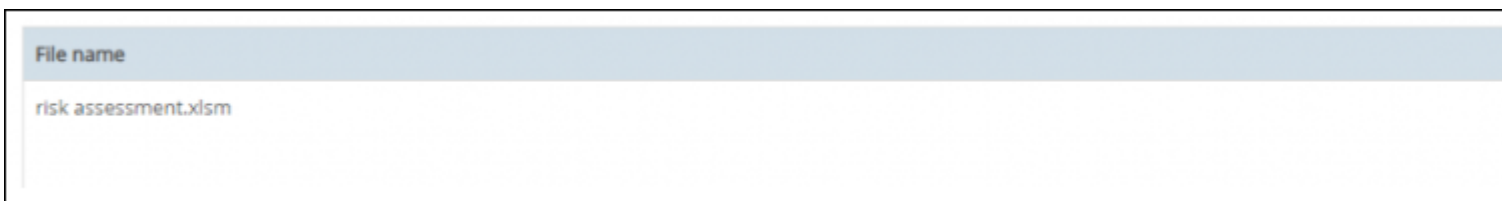
Design

HTML

Preview

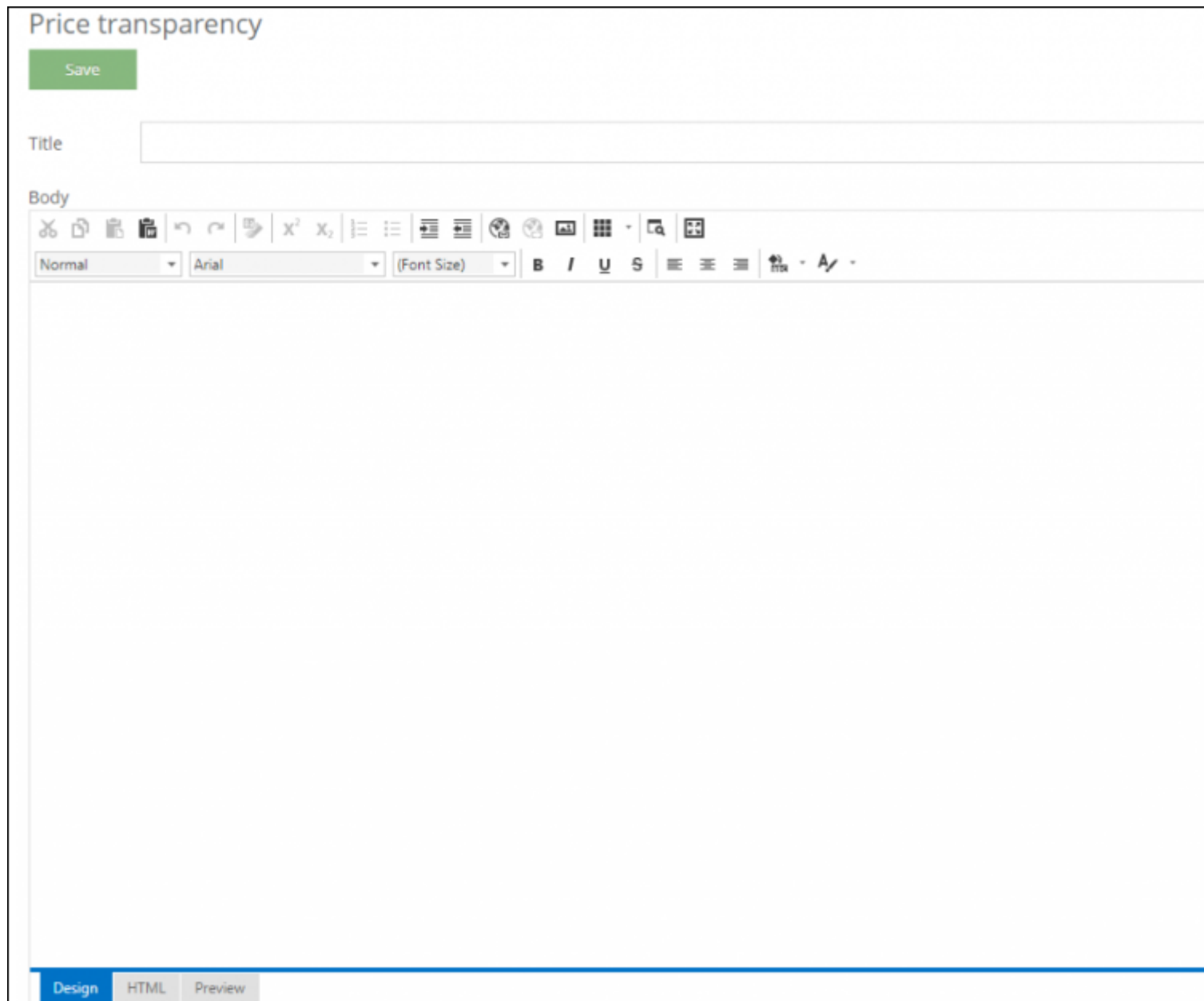


Additional documents will be listed which can be downloaded or removed.



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.



The screenshot shows a web editor interface for a page titled "Price transparency". At the top left, there is a green "Save" button. Below the title, there is a "Title" label followed by an empty text input field. Underneath is a "Body" label followed by a rich text editor toolbar. The toolbar includes icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, table, and search. Below the toolbar, there are dropdown menus for "Normal" (text style), "Arial" (font family), and "(Font Size)" (font size). To the right of these are buttons for bold (B), italic (I), underline (U), strikethrough (S), and alignment options (left, center, right). The main editing area is a large, empty white space. At the bottom of the editor, there are three tabs: "Design" (which is active and highlighted in blue), "HTML", and "Preview".

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

IP	Action type	Created on	
88.107.205.112	Status change	25/08/2020 10:42	View D
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:

Collaborator:

Start value:

End value:

Fee: EXC. VAT

Predefined Email Templates can be created to make communication more efficient

- 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
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- Transfer of equity consideration text
- Settings
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- Client care letter
- Price transparency
- Audit
- Work types
- Quote information settings
- Quote options
- Branches
- Email templates
- SMS templates

Email templates

Branch

[+ New](#)

Name	Actions
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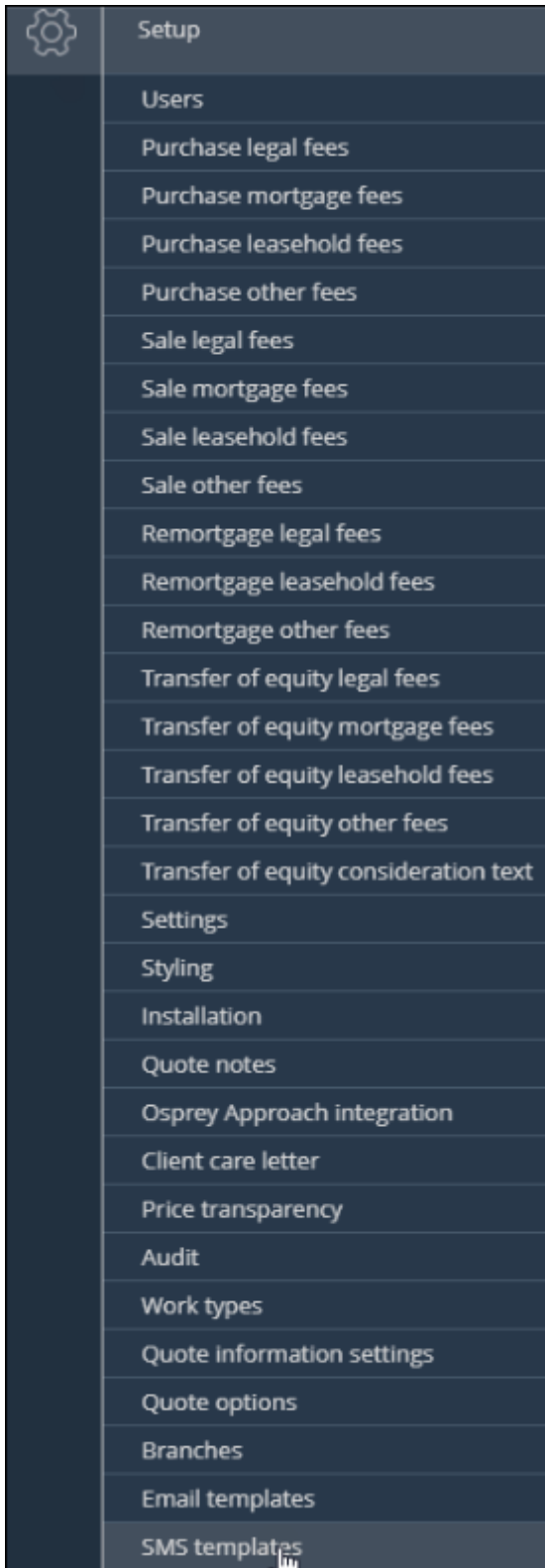
The image shows a web-based editor for creating email templates. At the top left, there are two buttons: "Save" (green) and "Cancel" (grey). Below these are several input fields: "Name" (a text box with a lock icon), "Description" (a larger text box), "Subject" (a text box), and "Fields" (a dropdown menu showing "Please select..."). Below the "Subject" field is another "Subject" text box. Underneath is the "Email template" section, which includes another "Fields" dropdown menu. The main body of the editor is a large text area with a rich text toolbar above it. The toolbar contains icons for undo, redo, copy, paste, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, table, and a font color picker. Below the toolbar, there are dropdown menus for "Normal" (text style), "Arial" (font), and "(Font Size)" (font size). The text area itself is currently empty. At the bottom of the editor, there are three tabs: "Design" (active), "HTML", and "Preview".



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



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

Click 'New' to create a template

SMS templates

Branch

[+ New](#)

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

[Save](#) [Cancel](#)

Name

Description

Fields

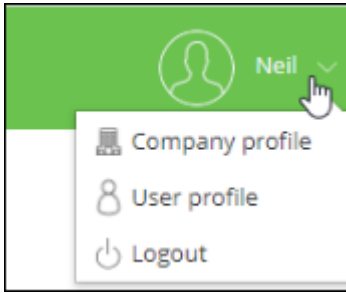
Text

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.



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