

Osprey Approach: Convert2Client

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The latest version is always online at
<https://support.ospreyapproach.com/?p=62808>

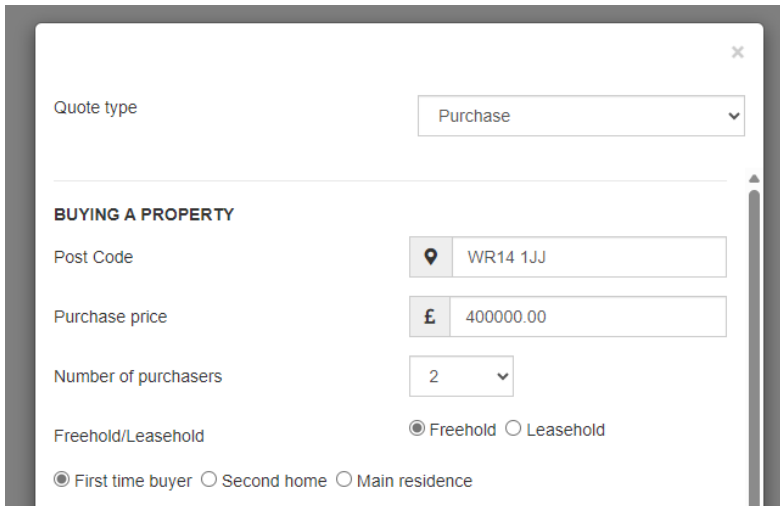
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This guide will go through our Convert2Client integration

Convert 2 Client helps clients get instant conveyancing quotes and raise enquires directly from your website.

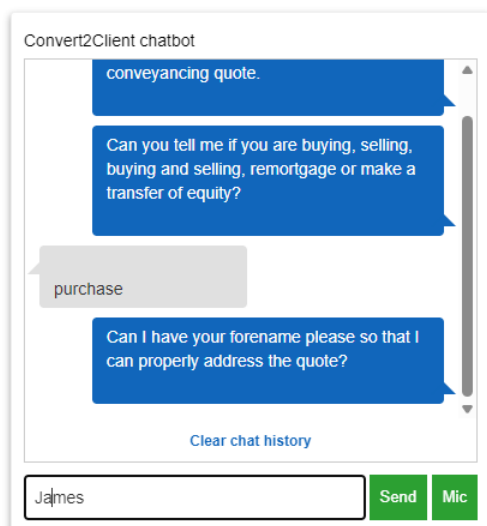
Clients can get a quick and easy conveyancing quote in seconds - just by entering the property details, their name and contact details. Clients can also raise enquiries for non-conveyancing matters.



The screenshot shows a web form for requesting a conveyancing quote. At the top, there is a 'Quote type' dropdown menu set to 'Purchase'. Below this, a section titled 'BUYING A PROPERTY' contains several input fields: 'Post Code' with the value 'WR14 1JJ', 'Purchase price' with the value '£ 400000.00', and 'Number of purchasers' with the value '2'. There are also radio button options for 'Freehold/Leasehold' (with 'Freehold' selected) and 'First time buyer / Second home / Main residence' (with 'First time buyer' selected).

Conveyancing Chatbot

The Convert2Client chatbot can also be embedded into your website, providing a number of ways clients can obtain a quote.

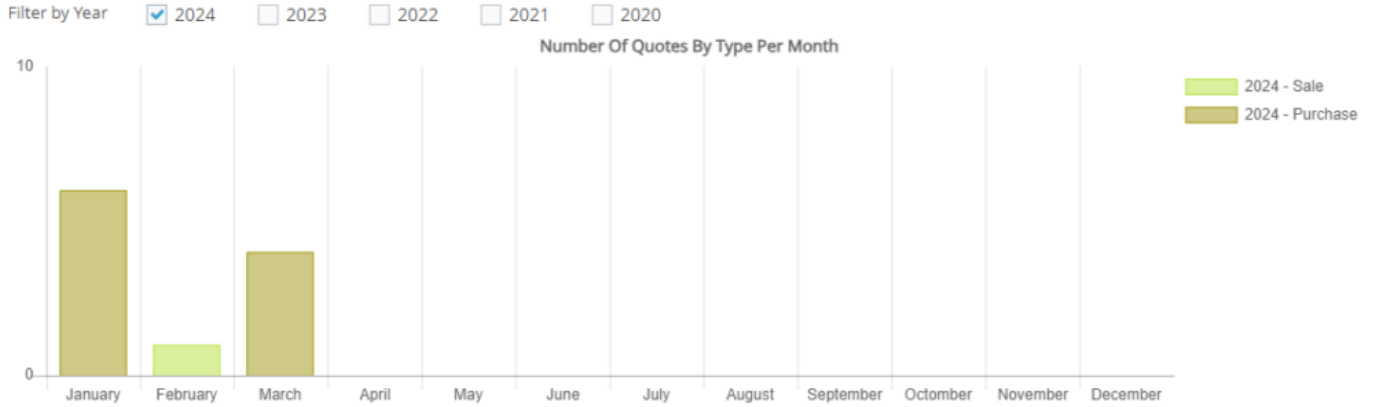


The screenshot shows a chatbot interface titled 'Convert2Client chatbot'. The chat history shows a user asking for a 'conveyancing quote', followed by a bot response asking if the user is buying, selling, remortgaging, or making a transfer of equity. The user replies 'purchase', and the bot asks for the user's forename. At the bottom, there is an input field with the name 'James', a 'Send' button, and a 'Mic' button. A 'Clear chat history' link is also visible.



Management tools

The dashboard provides detailed overviews of statics vital for a company, including number of enquiries converted, lost opportunities, number of quotes by work types, and more.



Export to Osprey

When quotes are instructed, users can easily export the quotes into Osprey, creating a new matter in seconds.

