

Osprey Approach: Convert2Client

This help guide was last updated on
Apr 24th, 2024

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

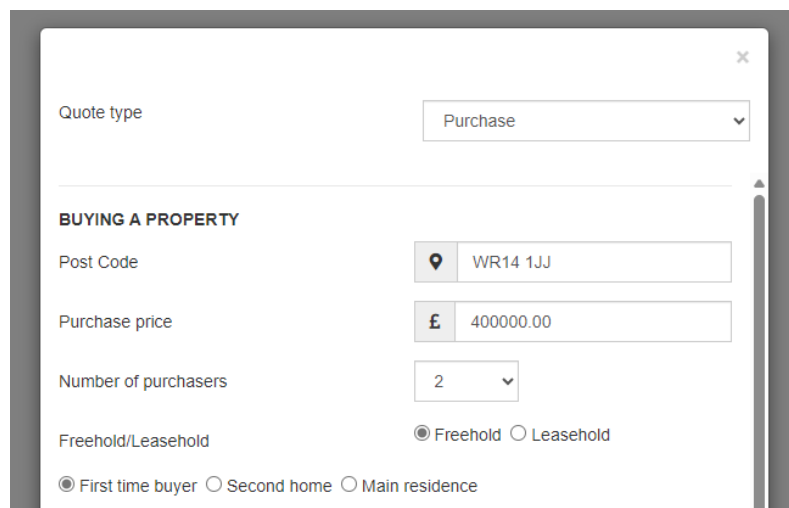
[Click here for a printer-friendly version](#)



This guide will go through our Convert2Client integration

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

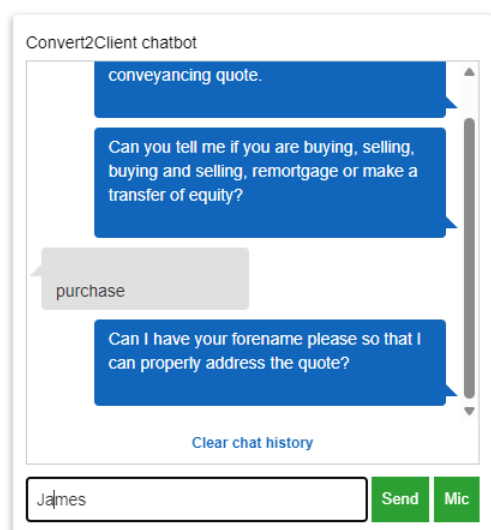
Clients can get a quick and easy conveyancing quote in seconds - just by entering the property details, their name and contact details. Clients can also raise enquiries for non-conveyancing matters.



A screenshot of a web form titled 'Quote type' with a dropdown menu set to 'Purchase'. Below this is a section titled 'BUYING A PROPERTY'. It contains several input fields: 'Post Code' with the value 'WR14 1JJ', 'Purchase price' with the value '£ 400000.00', and 'Number of purchasers' with a dropdown set to '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.



A screenshot of a chatbot interface titled 'Convert2Client chatbot'. It shows a conversation where the user has entered 'conveyancing quote.' and the chatbot has responded with 'Can you tell me if you are buying, selling, buying and selling, remortgage or make a transfer of equity?'. The user has then entered 'purchase' and the chatbot has responded with 'Can I have your forename please so that I can properly address the quote?'. At the bottom, there is a text input field containing '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.



Filter by Year

☒ 2024

☐ 2023

☐ 2022

☐ 2021

☐ 2020

Number Of Quotes Instructed Per Month

Month	2024 - Lost	2024 - Enquiry	2024 - Instructed
January	0	3	4
February	0	1	0
March	0	0	4
April	0	0	0
May	0	0	0
June	0	0	0
July	0	0	0
August	0	0	0
September	0	0	0
October	0	0	0
November	0	0	0
December	0	0	0

Export to Osprey

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

