

Osprey Approach: Using DocuSign (App)

This help guide was last updated on
Dec 28th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=52884>

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



You will need an active subscription with DocuSign to be able to benefit from Osprey's DocuSign integration.

Clients will need access to the client web portal to be able to sign in and review any pending signature requests.

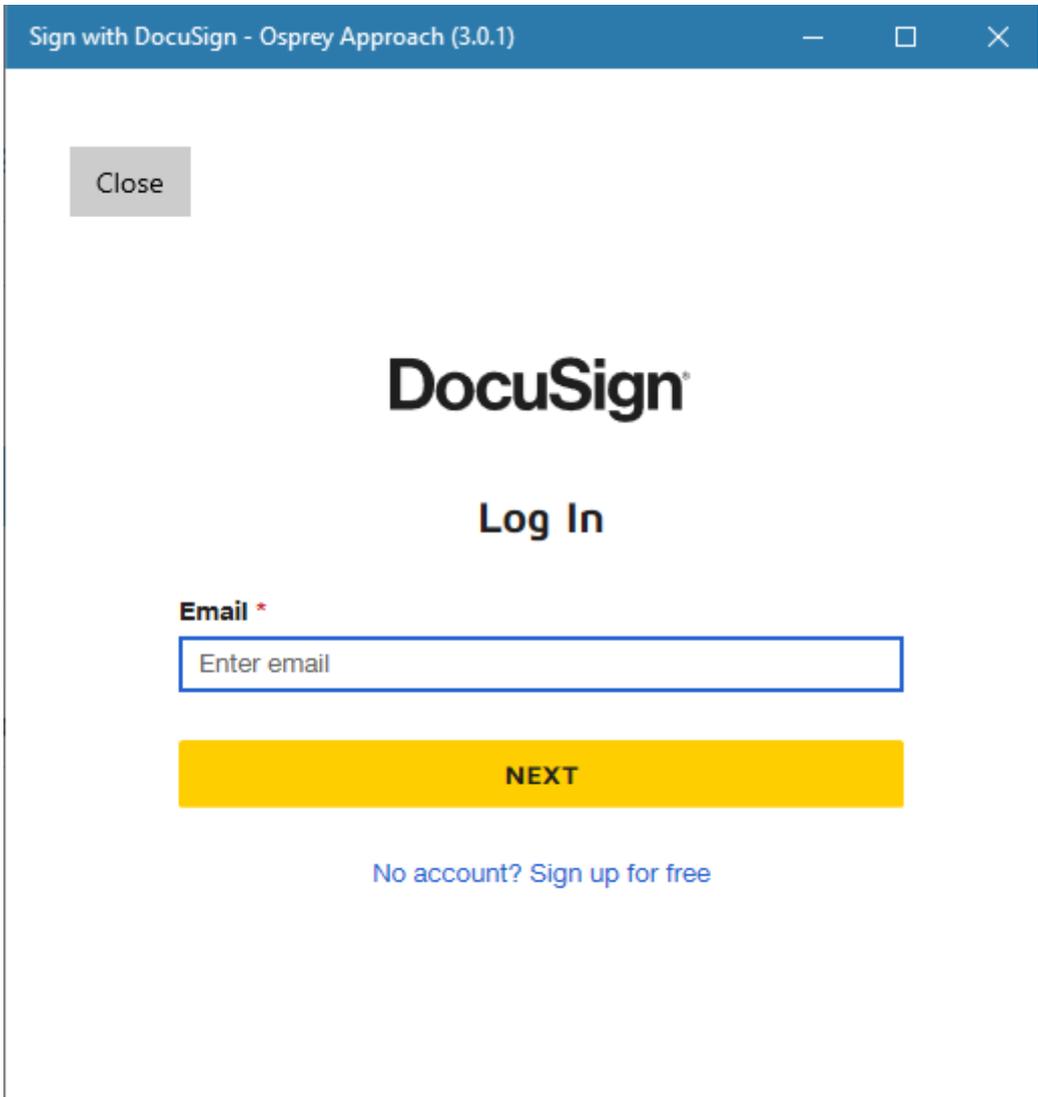
Logging in

To sign into DocuSign, left-click Case Management. This will load the Documents tab. Select a word document you wish to request a signature on, and select Request Signature (DocuSign)

KEYDATES **DOCUMENTS** **WORKFLOWS**

[+ Add Document](#) [+ Add Note](#) [Request Signature \(DocuSign\)](#) Global

A pop-up window will appear, asking for you to sign into DocuSign.



Complete signing in, and once completed, you will see the DocuSign Request Signature window.

Sending a Request

After you have initially signed in, you will be taken directly to the DocuSign Request Signature window when requesting a signature.

A list of any clients or linked associates will be available to select. Confirm any additional required signers, and click Send.

Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

Home - P00052/1 (Practice Osprey/Purchase of 354 Hulk Avenue) FE: AEH WT: FW_RCP

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	REVIEW DATE	TYPE	PERIOD	TIME LMD	LMD	SUP F/E
D00019	10	Douglas Dave	CRIME: Theft	DD			14		05/07/2021	●
D00019	22	Douglas Dave	IMMIGRATION: Visa Application	DD	29/11/2022		0		05/05/2019	●
D00058	7	Drummond Samuel	EMPLOY: Unfair Dismissal	DD	16/12/2022		0		04/12/2019	●
P00044	2	Price Dominic	WILL: Mirror Will	DD	16/12/2022		0		12/09/2022	●
S00069	11	Stevens Jamie	PROBATE: Estate of late James Stevens	DD	17/12/2022		0		14/07/2020	●
P00044	9	Price Dominic	PERS INJURY: Litigation	DD	21/12/2022		0		02/01/2023	●
P00044	13	Price Dominic	PURCHASE: 1711 Leek Road, Stoke ST2 7AA	DD	22/12/2022		0		12/09/2022	●
P00044	15	Price Dominic	SALE: 73 High Street, Twickenham, TW11 8PM	DD	17/01/2023		5		28/07/2022	●

YOUR KEY DATES

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	KEY DATE	TYPE	NOTES	SUP F/E
D00058	1	Drummond Samuel	SALE: 98 Thames Street, TW12 FE	DD	24/03/2022	CHASECLI	CHASE CLIENT - Ensure Documents Received.	●
P00044	11	Price Dominic	SALE: 12 High Street, Hampton, TW11 8PM	DD	08/09/2022	REMINDER	PREP: Contract Pack	●
P00044	8	Price Dominic	DIVORCE: Price v Price	DD	16/12/2022	CHASESOL	Awaiting response from o/s solicitor	●
P00044	2	Price Dominic	WILL: Mirror Will	DD	16/12/2022	O2CCD	Client needs to confirm attendance at Court	●

Signing a Document

The Document will then be available from the Client Web Portal.

The Client will need to sign in and navigate to the DocuSign area.

Any pending requests, as well as completed requests, will be visible to Sign or View respectively.

https://sales.portal.ospreyapproach.com/main/publisher/docusign/clientNo=P00052&matterNo=1

Current cases My details New enquiry File Sharing/Upload Contact

Purchase of 354 Hulk Avenue

Handled by Alex Hiscott Residential Purchase

Status Documents Messages DocuSign Contact

Show 10 entries Search:

Status	Documents	Actions
Completed	Client care letter	
Pending	Blank doc	
Pending	Blank Doc 2	

Showing 1 to 3 of 3 entries Previous 1 Next

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Once the document has been signed by all signees, the completed document will then be uploaded as a PDF into the matter history.

- OSPREY BROWSER
- OSPREY HOME
- CLIENT & MATTERS +
- TIME RECORDING +
- CASE MANAGEMENT +
- CLIENT LEDGERS
- BANKS & JOURNALS +
- REPORTS +
- SUPERVISOR +

Workflow Status Bar

Case Management - P00052/1 (Practice Osprey/Purchase of 354 Hulk Avenue) FE: AEH WT: FW_RCP

Change Client/Matter Email Conflict of Interest Enable Client Web Access Send SMS Document Production

KEYDATES DOCUMENTS WORKFLOWS

+ Add Document + Add Note Request Signature (DocuSign) Global

- In Tray Items
- Matter History
- Call Credit Reports
- Client Correspondence
- Contracts
- Court Forms
- Emails
- Forms
- Key Documents
- My folder
- Personal Injury
- Proof of Identification
- Quotations
- Requests for Information
- Scanned Documents
- Signature Requests

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS	CREATED DATE
	37052	P00052	Practice	1	Blank Doc 2	21/12/2022
	37051	P00052	Practice	1	Sent a text message to the number 00447581394488 ...	21/12/2022
	37050	P00052	Practice	1	Sent a text message to the number 00447755140235 ...	21/12/2022
	37049	P00052	Practice	1	Sent a text message to the number 00447881304147 ...	21/12/2022
	37048	P00052	Practice	1	Client care letter	21/12/2022
	37047	P00052	Practice	1	Blank doc	20/12/2022