

Osprey Approach: Sending an Email (App)

This help guide was last updated on
Dec 27th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=44485>

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You can send emails directly from Osprey, with a copy saved right into the matter history automatically.

Please ensure your SPF record is configured. Failure to do so may result in emails being flagged as illegitimate and may even be blocked by the recipient's email provider.

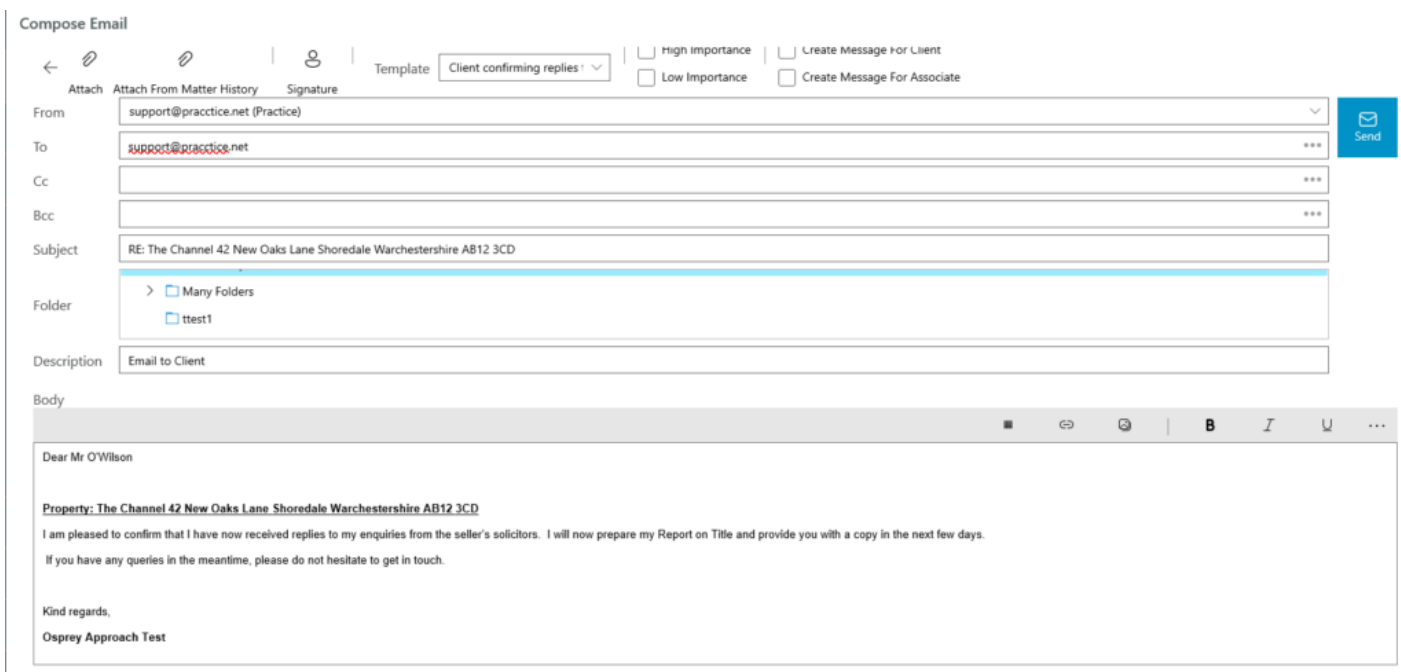
Accessing the Send E-Mail Window

This can be accessed from the top of the page, when a client is loaded.

 Change Client/Matter  **Email**  Conflict of Interest  Enable Client Web Access  Send SMS  Document Production
 Add Matter  Edit Matter  Client Contact Details  Dossier Matter Level  Notes Matter Level  Client Details  Archive

Upon selecting, the Send Email window will appear.

Composing the Email



- From: Select who the send the email from. Options are User, Fee Earner or Practice.
- To/CC/BCC: Clicking the ... on the right will show a list of all email addresses linked to the matter. You can also select a contact or organisation from your Osprey system, or manually enter the email address.
- Subject Line: Subject line of the email
- Folder: Matter history folder to save a copy of the email into
- Description: Email description to appear within Matter History

You can also attach items from your PC or Matter history, by selecting the Attach toolbar icon.

If configured, you can also select a signature or email template to help compose your email. If you apply a template, any previous information within the Subject Line or Email Body will be overwritten.

Change template?

Are you sure you want to change the template? The existing content will be overwritten. Please click OK to continue or Cancel to quit the action.

OK

Cancel











Once sent, the email will automatically appear within the matter history.

[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







[Refresh](#) [Filter](#)

TYPE	REF NUMBER	DETAILS	CREATED DATE	CREATED BY
	120098	Email to Client	27/12/2023	dan
	120062	test	15/12/2023	100003
	120050	Cheque Requisition Slip - Fee Earner	14/12/2023	mattw
	120049	Cheque Requisition Slip - Fee Earner	14/12/2023	mattw
	120030	Sent a text message to the number 00 ...	08/12/2023	mattw
	119943	email for processed date (ClientRef: ...)	01/12/2023	dan
	119942	Specification form - Professional services	01/12/2023	dan
	119941	email for processed date	01/12/2023	dan
	119927	Email test	29/11/2023	Dan
	119926	Password reset successfully.msg	29/11/2023	dan

Details

Revision History

Attachments



Forward Web Enabled ...

From

support@practice.net

To

Daniel Hearne <support@practice.net>

Subject

RE: The Channel 42 New Oaks Lane Shoredale Warchestershire AB12 3CD

Dear Sirs,

Property: The Channel 42 New Oaks Lane Shoredale Warchestershire AB12 3CD

Seller: J J Jones V2 Vendor vendor

Buyer: Second2 P2Surname

We are pleased to confirm that we have now exchanged, with completion set for 01/01/2024.

If you have any queries, please do not hesitate to contact us.

Kind regards,

Osprey Approach Test