



Osprey Approach: Sending an Email (App)

This help guide was last updated on
Dec 22nd, 2022

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



Sending an Email

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Click Email

Compose Email

←  ▼ |  | Template | High Importance | Create Message For Client
 Low Importance | Create Message For Associate



From 


To 





Select the From address, User/ Fee Earner / Practice


Compose Email


←  ▼ |  | Template | High Importance | Create Message For Client
 Low Importance | Create Message For Associate

From 

To 

Cc 

Bcc 



Click ... to Address the message

Client & Matter Contacts & Organizations

NAME	EMAIL	TYPE
Neil Braithwaite	craig@pracctice.net	Matter
Neil Braithwaite	neil@pracctice.net	LinkedClient
Matthew Cox	njbraithwaite@btinternet.com	LinkedClient
NJB	neil@pracctice.net	Associate
NJBSOLS	neil@pracctice.net	Associate
0	0	DossierPage
neil@pracctice.net	neil@pracctice.net	DossierPage

To

Cc




Bcc

OK Cancel

Select either To, Cc or Bcc and double click the recipient to insert it.

Subject

Body

Rich text editor toolbar:    | **B** / U ...

Fill in the Subject and Body

Compose Email

Compose Email interface showing fields for Attach, Signature, Template, From, and To, along with checkboxes for High/Low Importance and Create Message For Client/Associate, and a Send button.

← Attach | Signature | Template (none) | High Importance | Create Message For Client
 Low Importance | Create Message For Associate

From: craig@practice.net (Fee Earner) | Send

To: craig@practice.net

Email templates can assist completing the message, select Template

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

Click OK to confirm the change of Subject and Body

High Importance |
 Low Importance

You may select a High or Low Importance

Create Message For Client
 Create Message For Associate

Selecting Create Message also adds a message to the Web Portal

You may attach items from Matter History to the email

Compose Email

Compose Email interface showing fields for Attach, Signature, Template, From, and To, along with checkboxes for High/Low Importance and Create Message For Client/Associate, and a Send button.

← Attach | Signature | Template (none) | High Importance | Create Message For
 Low Importance | Create Message For

From: neil@practice.net (Fee Earner) | Send

To: | ...

Click Attach > Attach from Matter History

Select the items to attach

hold down Ctrl on the keyboard to select more than one

Word documents can be converted to pdf when the message is sent

Attachments

00001 - Standar(...).docx 

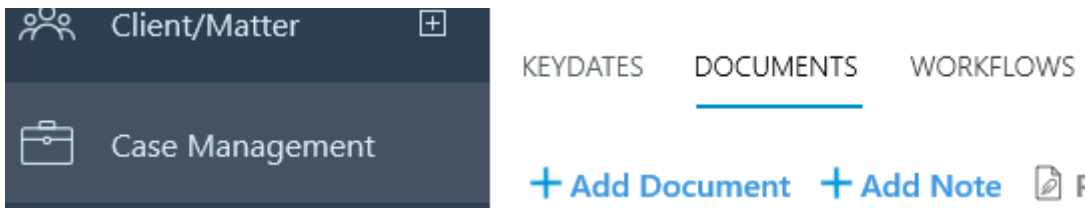


Convert Word to Pdf

Tick Convert Word to Pdf

Click Send when ready

Emails are saved into Matter History



The screenshot shows the Matter interface. On the left is a dark navigation menu with 'Client/Matter' and 'Case Management' (with a briefcase icon). To the right are tabs for 'KEYDATES', 'DOCUMENTS' (which is underlined), and 'WORKFLOWS'. Below the tabs are two blue buttons: '+ Add Document' and '+ Add Note', followed by a document icon and a small 'F' icon.

Select Case Management > Documents

Viewing an Email in Matter History

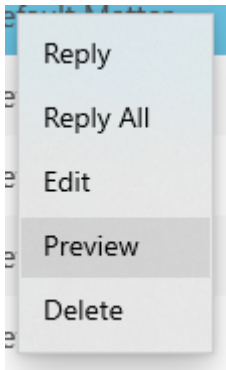
Email Info

Date 23/11/2021 10:31:40
From no-reply@ospreyapproach.com <no-reply@ospreyapproach.com>
To Neil Braithwaite <neil@pracctice.net>
Subject Case Tracking by Supervisor

Dear Supervisor,

Welcome to our case tracking facility.
Your login details are as follows:
UserID = Supervisor
Password = PY8KXJjeJ5
To access our case tracking facilities please follow the link: <https://eur03.safelinks.protection.outlook.com/?url=http%3A%2F%2Ftanantech.ospreyapproach.com%2Fm>

Select an email to open the preview panel.



Alternatively, right click an email and select Preview

Preview email



From: no-reply@ospreyapproach.com <no-reply@ospreyapproach.com>
To: Neil Braithwaite <neil@pracctice.net>
Date: 10:31 AM 23 November 2021
Subject: Case Tracking by Supervisor

Dear Supervisor,

Welcome to our case tracking facility.

Your login details are as follows:

UserID = Supervisor

Password = PY8KXJjeJ5

To access our case tracking facilities please follow the link: [https://eur03.safelinks.protection.outlook.com/?](https://eur03.safelinks.protection.outlook.com/?url=http%3A%2F%2Ftanantech.ospreyapproach.com%2Fmain&data=04%7C01%7Cneil%40pracctice.net%7)

[url=http%3A%2F%2Ftanantech.ospreyapproach.com%2Fmain&data=04%7C01%7Cneil%40pracctice.net%7](http%3A%2F%2Ftanantech.ospreyapproach.com%2Fmain&data=04%7C01%7Cneil%40pracctice.net%7)



Attachments

Click Print

On 23/11/2021 10:31:40 no-reply@ospreyapproach.com wrote:

Dear Supervisor,

Welcome to our case tracking facility.

Your login details are as follows:

UserID = Supervisor

Password = PY8KXJeJ5

To access our case tracking facilities please follow the link:

<https://eur03.safelinks.protection.outlook.com/?url=http%3A%2F%2Ftanantech.ospreyapproach.com%2Fmain&data=04%7C01%7Cneil%40practice.net%7Ceb56a72d10934986e61408d9ae6c6f36%7C5625775e192b418a8b26e9f914a70fad%7C0%7C0%7C637732603005856496%7CUnknown%7CTWFpbGZsb3d8eyJWljiMC4wLjAwMDAiLCJQIjJjIiV2luMzliLCJBTiI6I1haWwiLCJXVCi6Mn0%3D%7C3000&data=L5j7xeghT5mGHMfE8%2F2hZDJScb8ke0z8fdK2LCyn7Bk%3D&reserved=0>

Compose your reply and click Send