



Osprey Approach: Getting More Out of Osprey

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The latest version is always online at
<https://support.ospreyapproach.com/?p=53350>



This guide will show you how to get more out of the Osprey Approach case management system

Osprey offers a wide array of products and features, that can help users get even more out of Osprey, including onboarding tools, PowerBI reporting, bespoke mobile apps and more

Please contact the [Support Team](#) or [Account Manager](#) for further information on any of our additional products.

Convert2Client

Convert2Client is Osprey's onboarding tool, allowing prospective clients to enquire and instruct your services, 24/7.

Designed to be built directly into your firm's website, Convert2Client can provide accurate conveyancing quotes and capture initial inquiries via our interactive forms and chatbot.

Associates can also be provided access, so they can add and monitor enquiries. Exporting to Osprey is as easy as a few quick clicks.

Osprey web portal

The Osprey Web Portal offers a time-saving solution, allowing clients to log into a secure online portal, and view important information relating to their matters, including documents, emails, key dates and workflow progress.

Matter History items can be easily shared with clients, associates or both, offering complete control over what is shared.

Clients can also raise further enquiries, sign DocuSign documents, download and view shared correspondence and complete workflow questionnaires which can be fed directly back into Osprey.

For more information on the client web portal, or to book a demo click [here](#).

Web portal mobile apps

Including all the features of the Osprey Web Portal, firms can also have their own dedicated Web Portal app. It can be designed specifically for iOS and Android devices, providing further accessibility for your clients.

For more information on branded mobile apps, or to book a demo click [here](#).

Power BI

Producing in-depth reporting, with detailed graphs and a customisable dashboard. The combined power of Power BI and Osprey provides an amazing way to quickly view and monitor certain aspects of your firm such as converted opportunities, sales demographics and more.

For more information on Power BI or to book a demo click [here](#).

Focused workflows

Osprey's Focused Workflow packs cover various areas of law, from Asylum to Will Writing, and are constantly updated. These include dossier pages, documents, email templates and key dates, all ready to run within an intuitive workflow package.

Focused workflows can be used straight out-of-the-box, but also offer the flexibility to be tailored to meet your firm's requirements. This will drastically reduce the need for time and resources.

To view our suite of focused workflows click [here](#).