



Osprey Approach: Using Group Codes

This help guide was last updated on
Apr 26th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=344>

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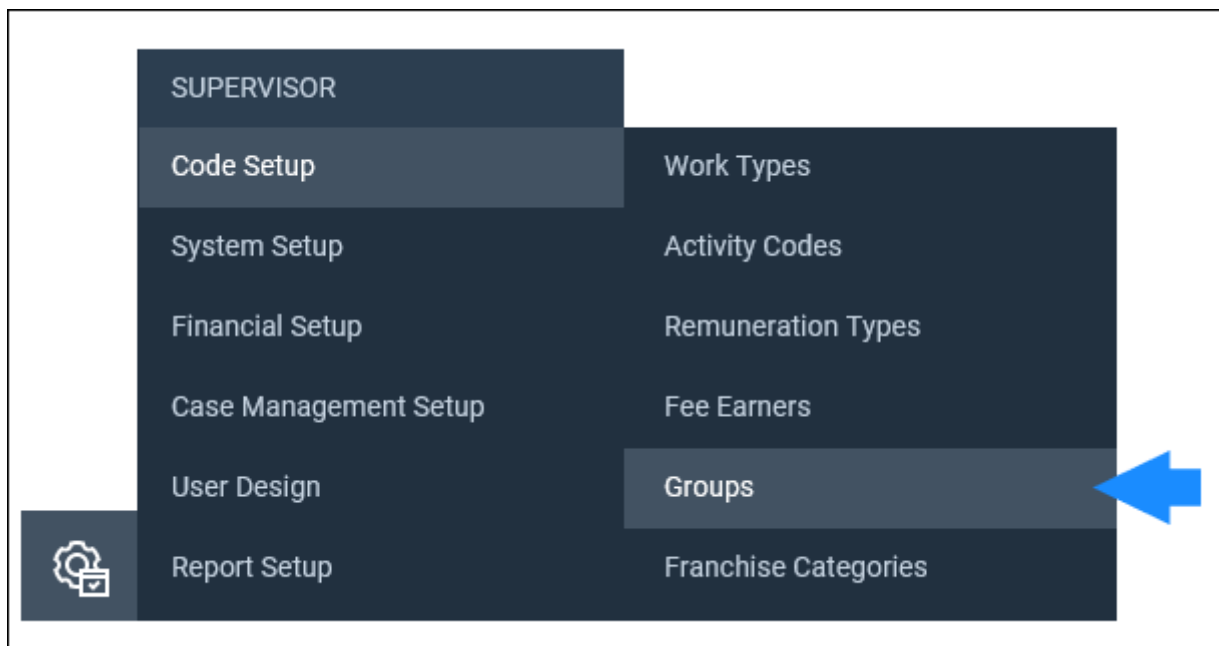
This guide will go through creating and using Group Codes to group certain clients together

This is useful in the event that you would like to search for or report on a specific group.

Creating Group Codes

You will need Supervisor access for this.

Navigate to your Supervisor area and select Code Setup, followed by Groups.



You can right-click on any of the groups and select edit should you wish to amend them, or simply select New to add a new one.

GROUP CODE	GROUP DESCRIPTION	IN USE
G1	Group 1	●
G2	Group 2	●

Assigning a Group Code to a Client in browser


Once a group has been set up, you will need to assign it to a relevant client.

Navigate to your Clients & Matters area and either add a new client or edit an existing one.

Under the Additional Details heading in the Add/Edit Client area, you can select a Group Code from the available drop-down list.

ADDITIONAL DETAILS ▾

Debtor Limit:	<input type="text" value="2000.00"/>	Disbursements Limit:	<input type="text" value="1000.00"/>
Wip Limit:	<input type="text" value="1000.00"/>	Group Code:	<input type="text" value="(None)"/> ▾



Now click Save when you have selected a group to assign the client to the selected group.

Assigning a Group Code to a Client in App



Tap Client/Matter > Client Details > Edit Client

← Save

Additional Details

Debtor Limit
0.00

Disbursements Limit
0.00

WIP Limit
0.00

Group Code
(None)

Client Extension

Tap Group Code and select as appropriate

Using Group Codes

You can use the client search to filter your clients by group.

Select the Client Search or Change Client/Matter option and you will be able to select a Group Code from the list of filters.

Search Client/Matter

Search Cancel

Client/Matter No: /

UFN:

Title:

Forename:

Initials:

Surname/Company Name:

House:

Area:

Postal Town:

County:

Post Code:

Tel/Fax:

Matter Details:

Prospect matter:

Fee Earner: (None) None Selected

Work Type: (None) None Selected

Group Code: (None) None Selected

P/L: All

Inc Archives?: No

Published Matters Only?: No

← Search All Matters Last 10 Accessed

Client No Matter No

Surname

Matter Description

Title

Forename

Initials

House

Area

Postal Town

County

Post Code

Fee Earner Select

Work Type Select

Group Code Select

Include Archives? No

Prospect

Collapse Options

Please Note: The Group Code does not form part of the filters in the Standard Reports and does not apply to matters or to the dossier, however it is an available field in the Client and Matter Details view within the Report Designer.