

Osprey Approach: Install and use the Osprey Outlook add- in for Office 365

This help guide was last updated on
Jul 30th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=16581>

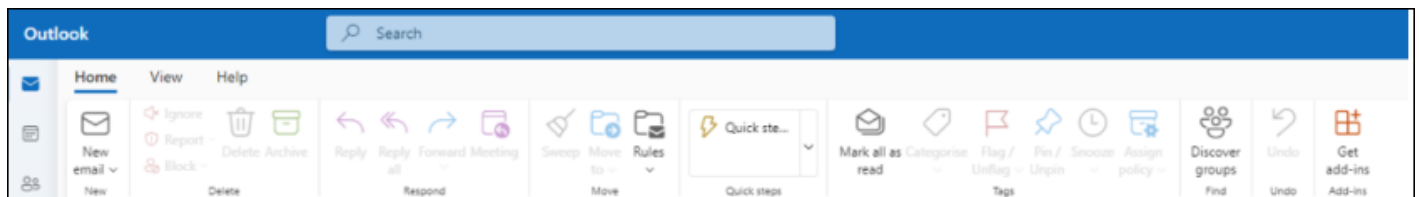


This guide will go through the steps required to install and use the Osprey Outlook add-in for Office 365

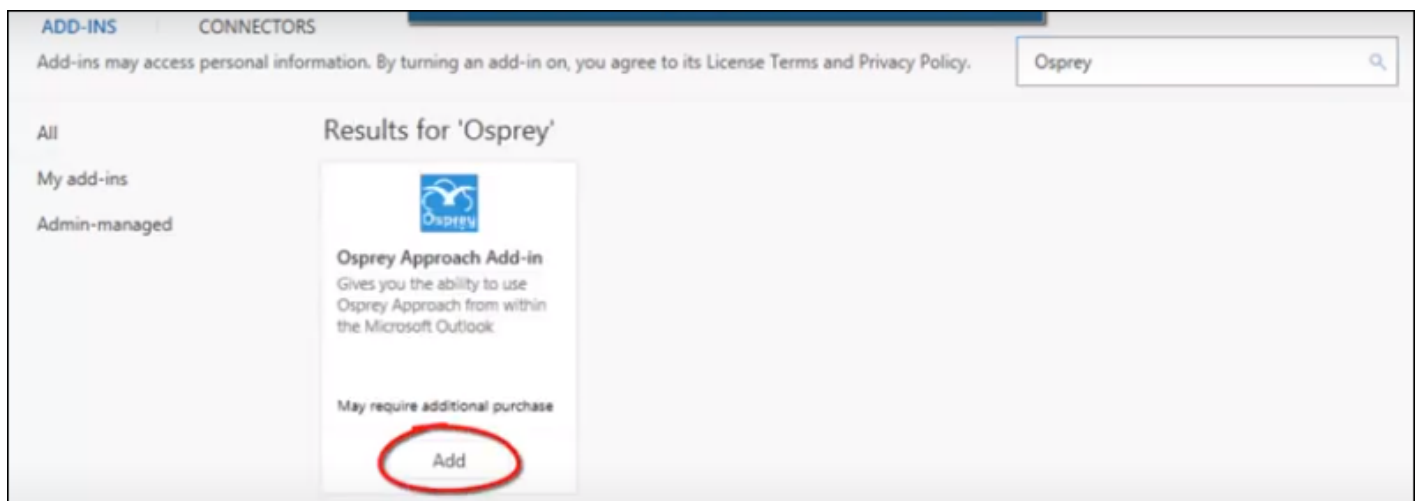
The Osprey Approach Outlook add-in can be installed from Office.com, or directly from Outlook, and will automatically be synced to all your devices.

Install from Outlook

To install the add-in, open Outlook, navigate to the Home tab and select **Get add-ins**.

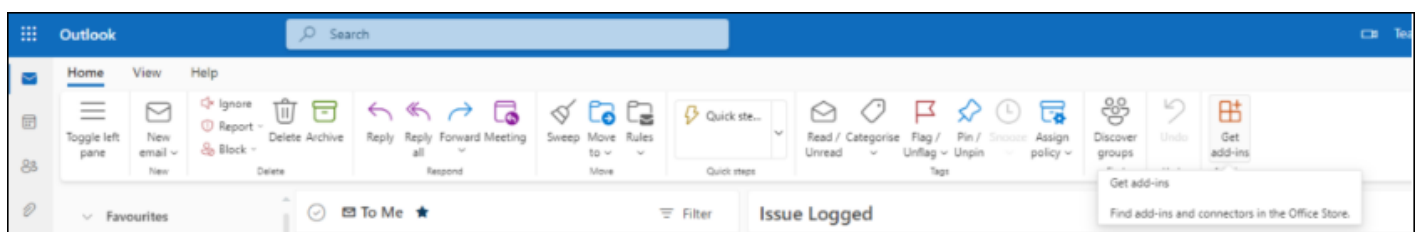


Search for Osprey and select **Add**.

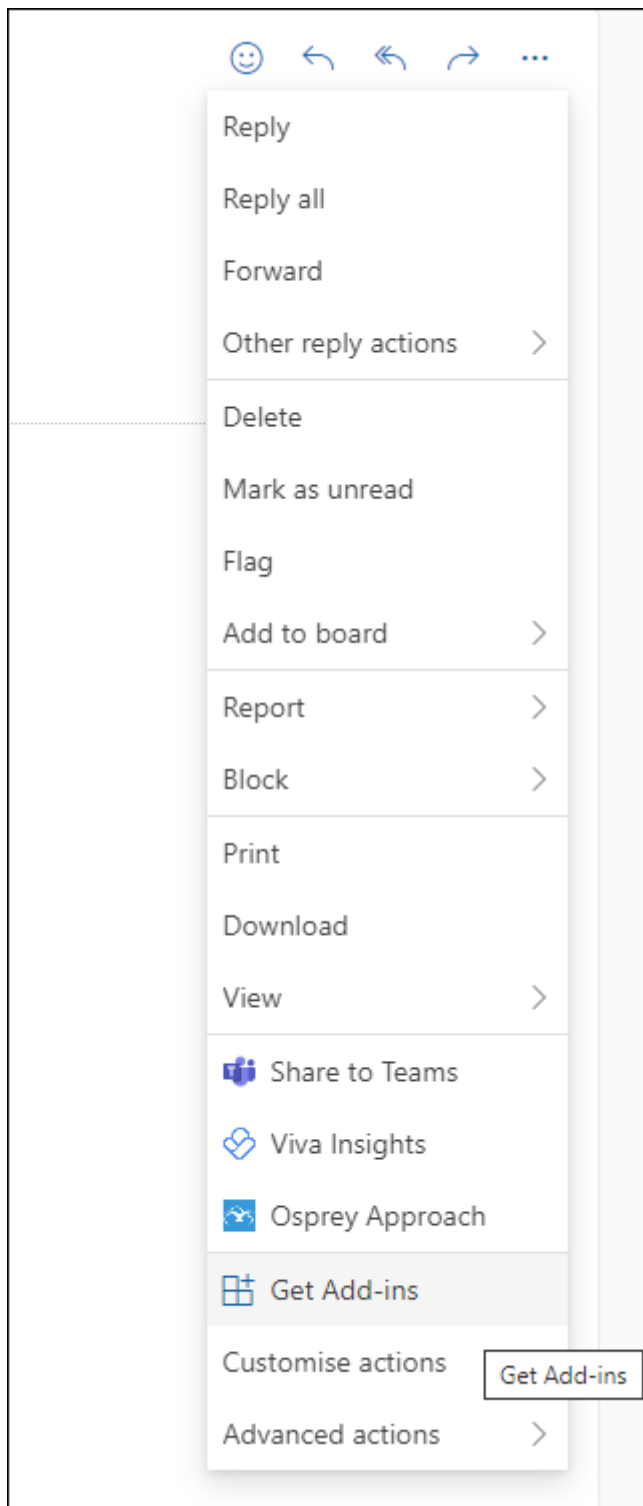


Install from Office online

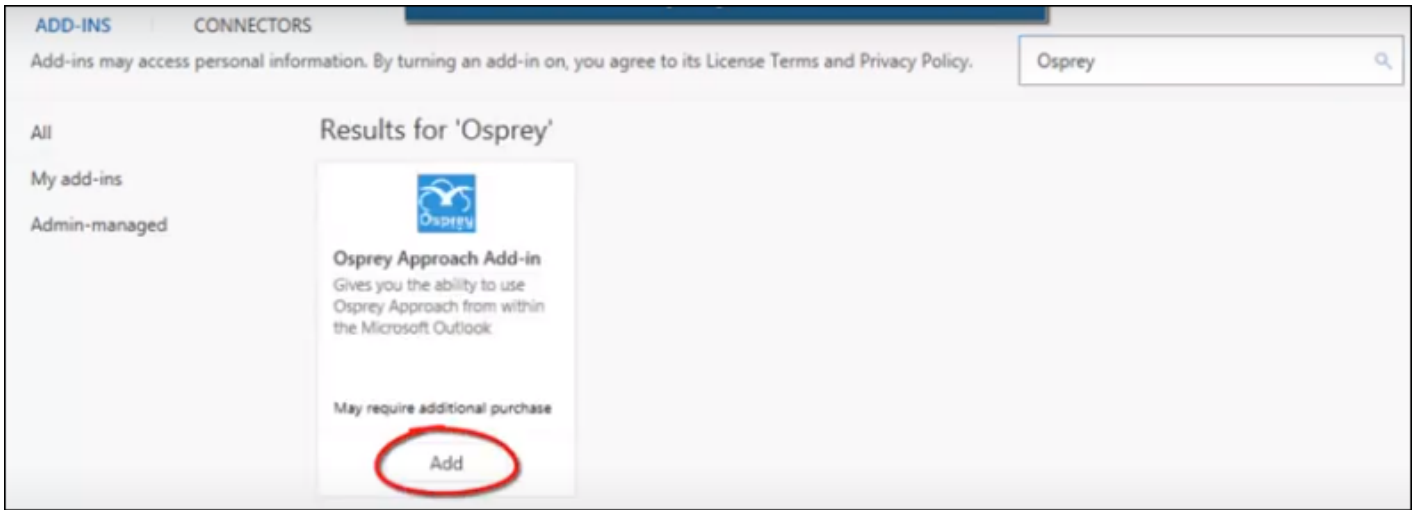
Go to <https://outlook.office.com/mail/> and select **Get Add-ins** from the Home ribbon.



Alternatively, open an email, click the ... and select **Get Add-ins** from the list.



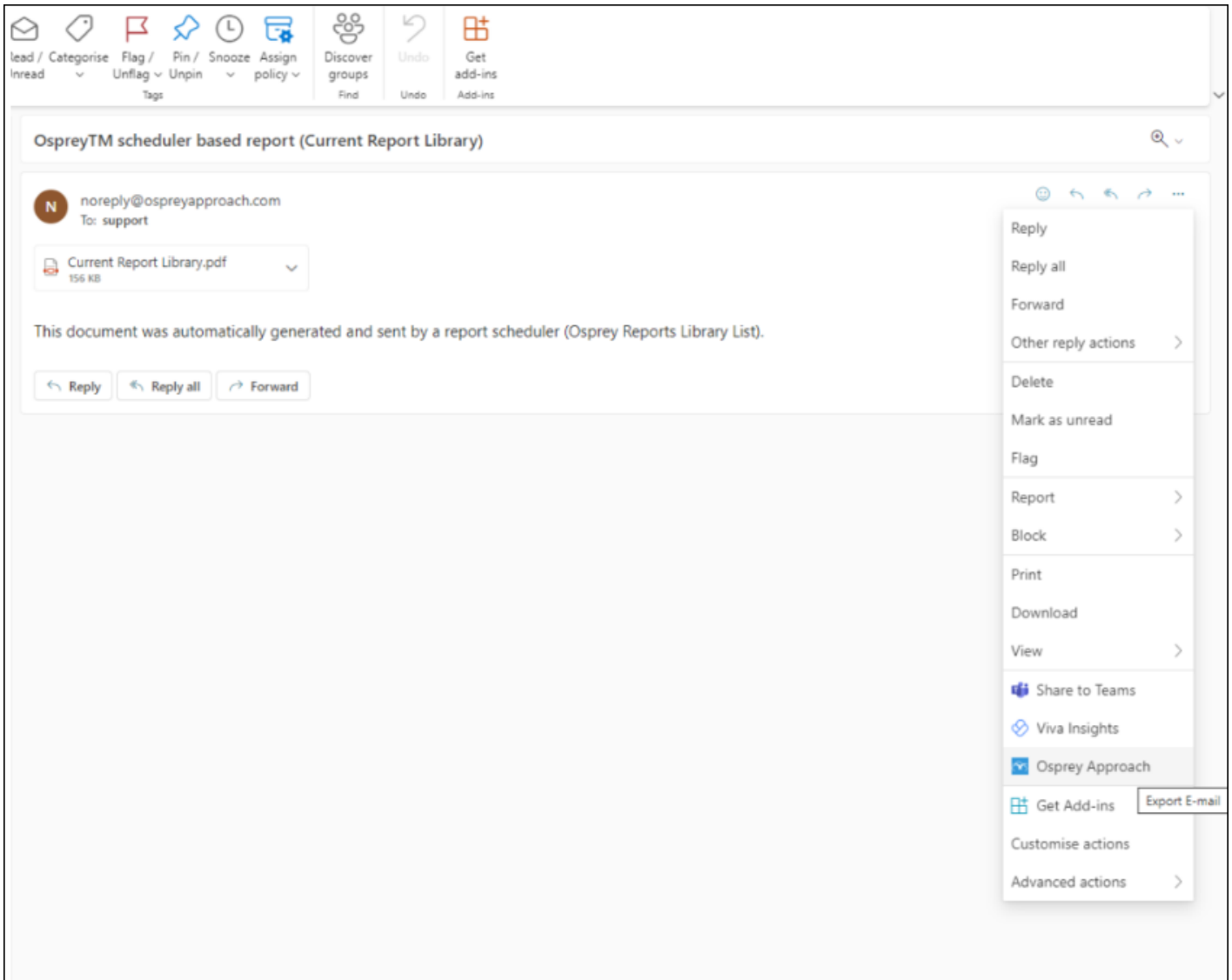
Search for 'Osprey', and click **Add**.



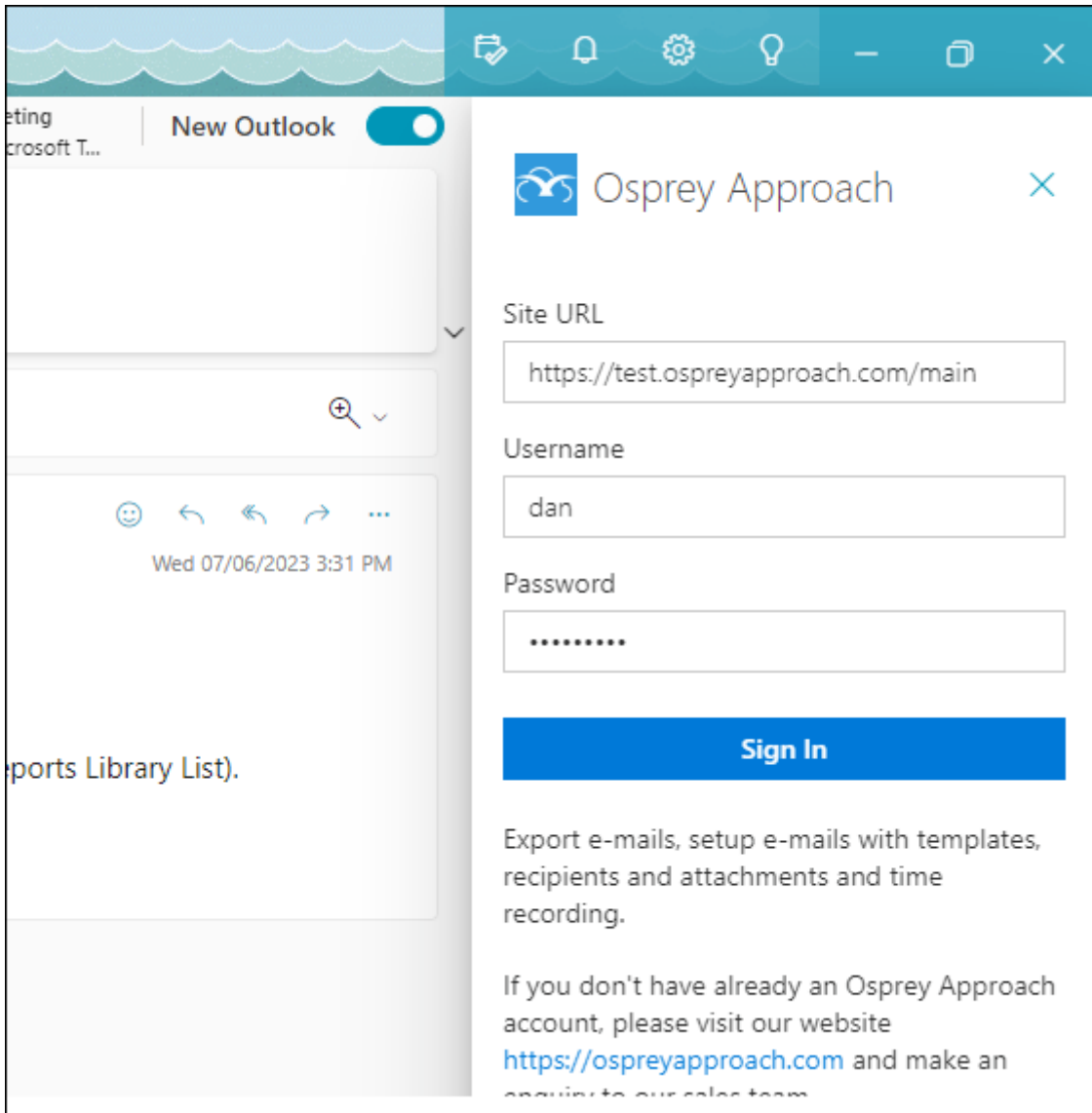
Export emails using the Office 365 add-in

The Office 365 add-in features the ability to export any emails and attachments.

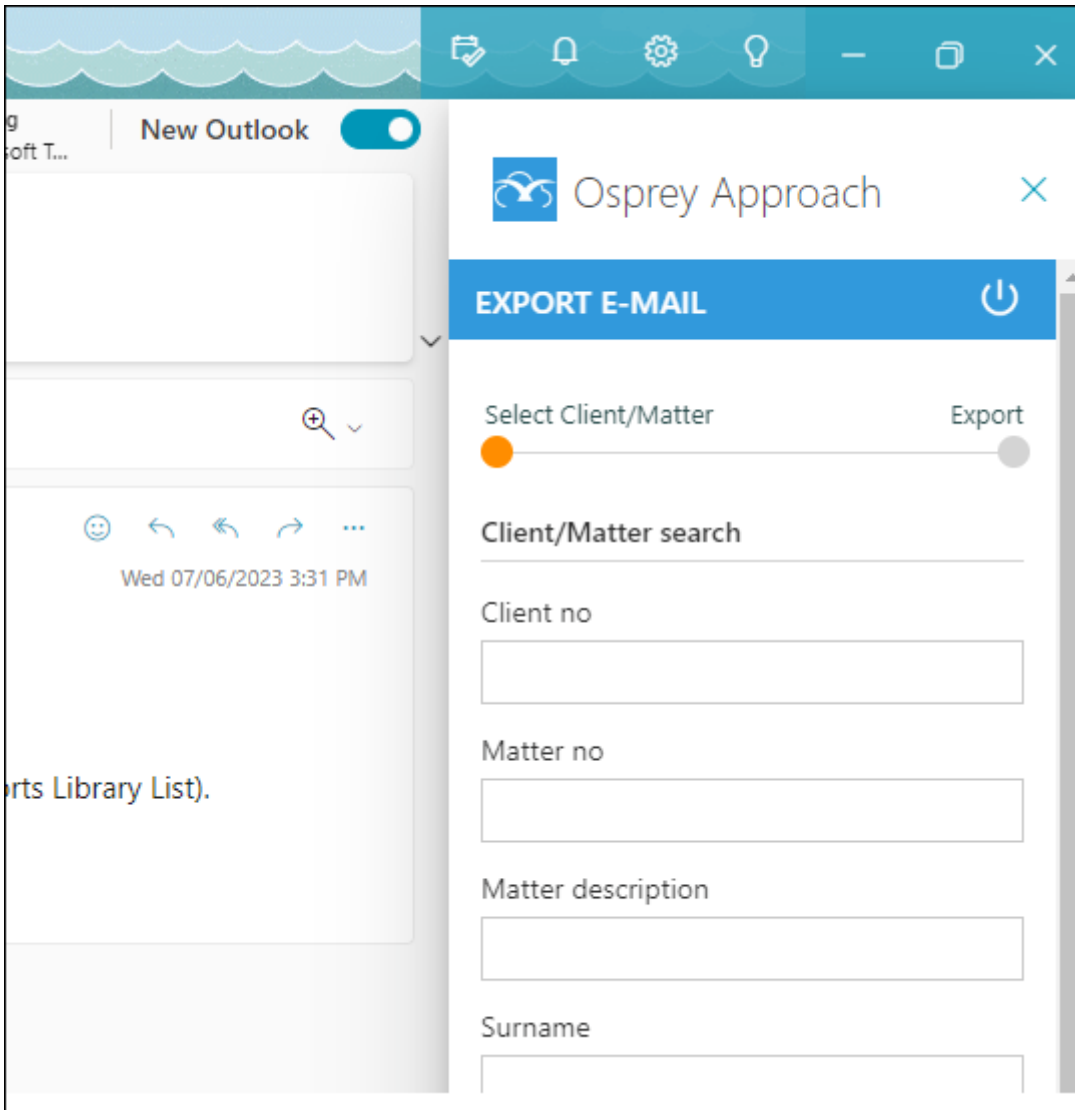
To Export, select the email and click the '...' icon in the right hand corner



Select Osprey Approach, and enter your Osprey URL and credentials.



If you know the client and matter you wish to export the email to, enter the information when prompted. Alternatively, you may perform a search.



Once a client has been selected, you have several options to export.

Export details

Detail

Custom type

Folder

Retention period

Retention date

Export e-mail only

Time posting

Export

Enter the detail of the email, which will display in the matter history.

You can also assign a custom type, select a Matter history folder and set a retention period.

To export the email only, tick the option. Ticking 'Time Posting' will display the time recording options. Once completed, click 'Export'.

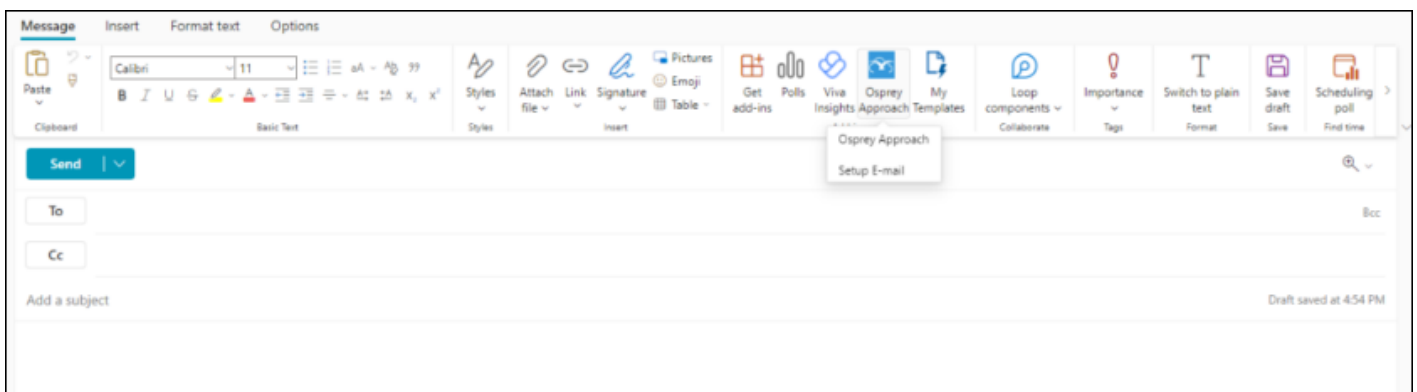
Your email and, if selected, any attachments will now have been saved to the Matter History.

FAVORITE	TYPE	REF NUMBER	MATTER DESCRIPTION	DETAILS	RETENTION PERIOD
☆		98048	Purchase 6 Anfield Road	Email from Client	3 years

Compose emails using the Office 365 add-in

When composing a new email, you can use the add-in to pull through information from Osprey, into Outlook.

First, open a new email, and locate the Osprey Approach icon. If you are not signed in, you will be asked to enter your credentials.



Now search for and select the appropriate matter

Osprey Approach

SETUP E-MAIL

Select Client/Matter Setup

Client/Matter search

Client no

Matter no

Matter description

Surname

[Show advanced search](#)

Search

Results

CLIENT NO	MATTER	DETAILS
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Once a client is selected, you can access any email templates, email addresses, matter history items or packages to bring into your email.

Left-click any email addresses to add them to the To/Cc fields

Choose e-mail address destination:

To **Cc**

Scrolling down you can also choose an email address from your Contacts & Organisations.

Contacts/Organisations

Filter by

Estate Agent ▼

E-MAIL	CONTACT
tednugent@localhost.com	Easy Mov (Osprey)
tednugent@localhost	Ted Nuge
tednugent@localhost.host	Ted Nuge
tednugent@localhost	Ted Nuge

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Scrolling further you can also attach any document or package available in Osprey.

Attachments

Convert Word to PDF

REF NUMBER	DETAILS	TYPE	CREATED
98048	Email from Client		07/06/2016:51:50
97964	ta13	pdf	10/05/2009:00:41
97963	ta13	pdf	10/05/2008:59:07
97945	ta13	pdf	09/05/2017:05:00
97922	Transfer of part of registered title	pdf	09/05/2013:45:47
97915	Transfer of part of registered title	pdf	09/05/2012:18:49
97914	LPF1 No Merge	pdf	09/05/2012:18:35

Export sent emails

Once an email has been sent, users will need to export from their Sent Folder.