

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

This help guide was last updated on
Apr 12th, 2024

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

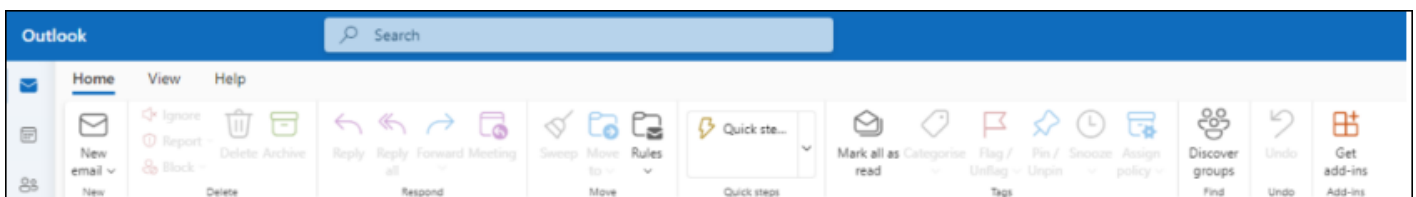


This guide will go through the steps required to install and use the Osprey Outlook add-in for Office 365

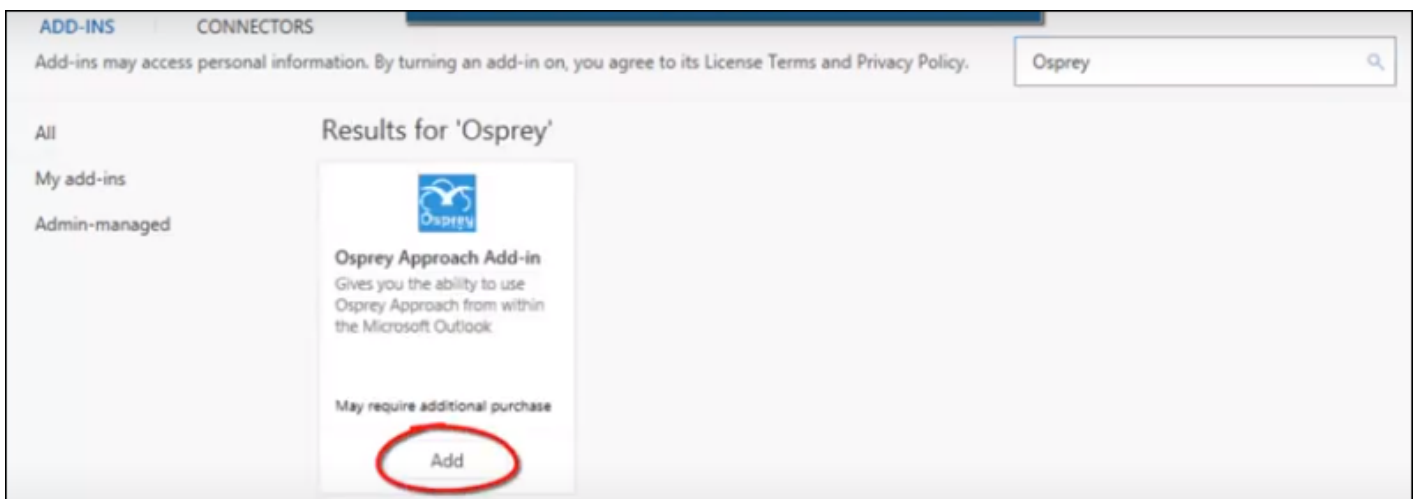
The Osprey Approach Outlook add-in can be installed from Office.com, or directly from Outlook, and will automatically be synced to all your devices.

Install from Outlook

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

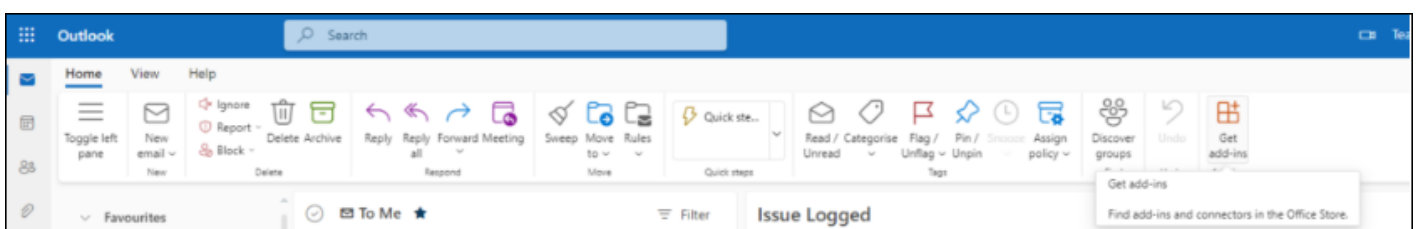


Search for Osprey and select **Add**.

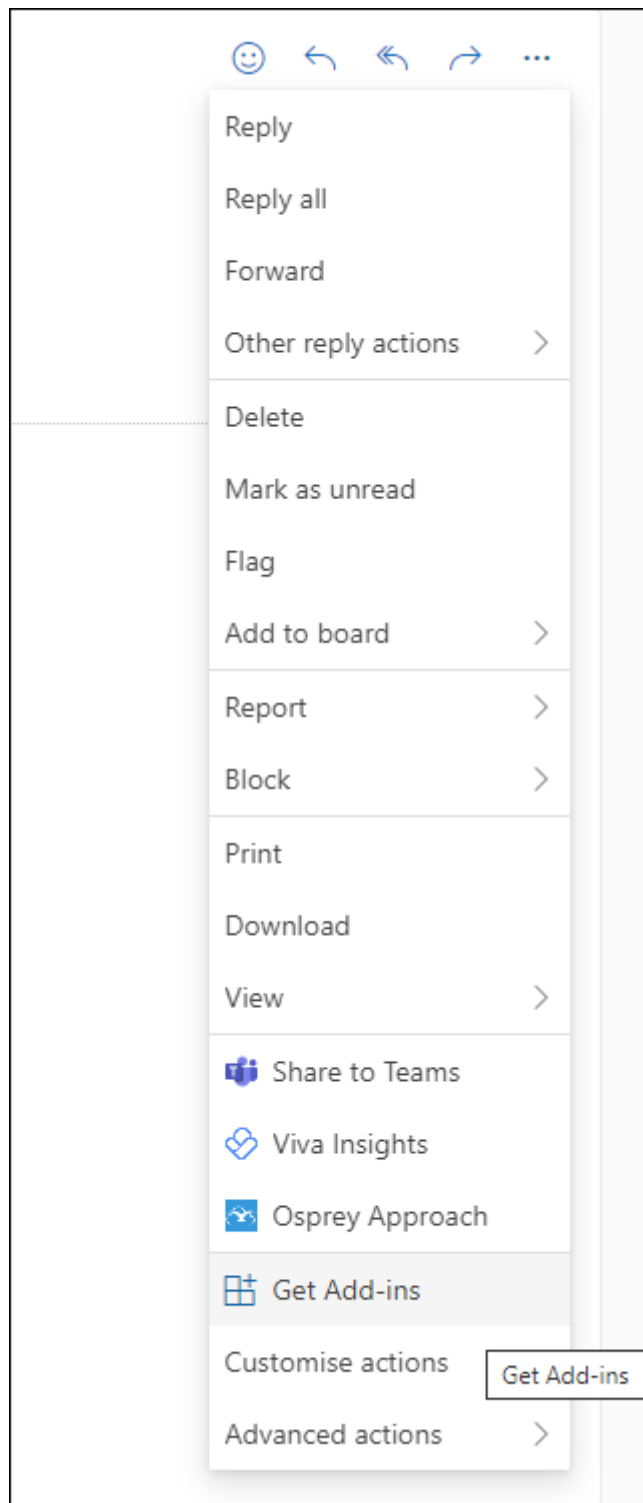


Install from Office online

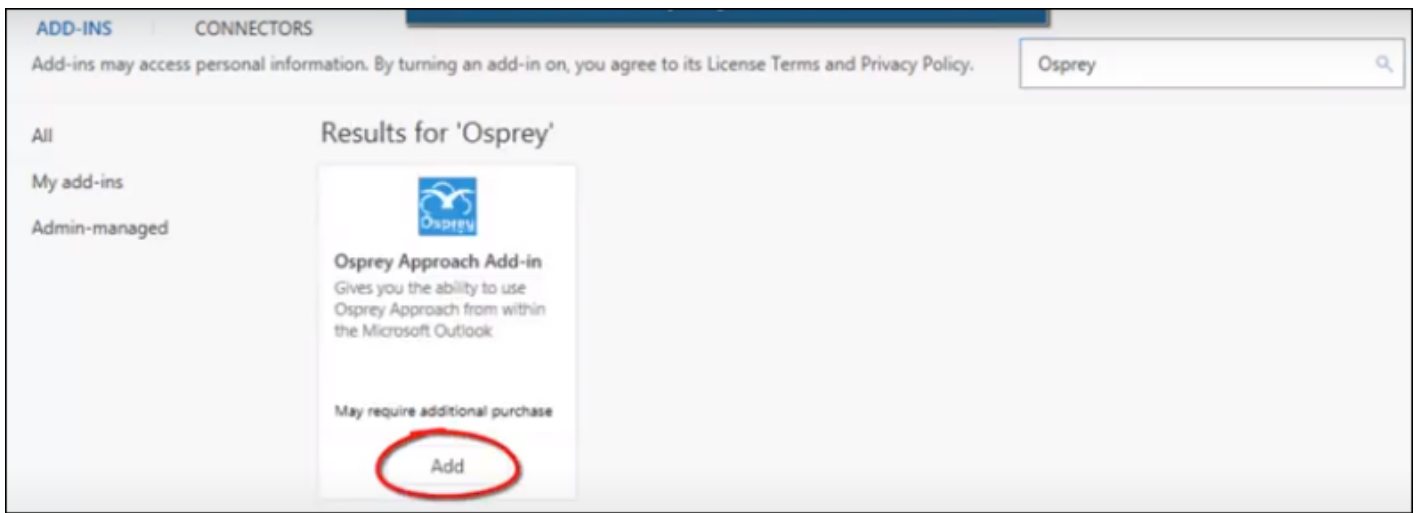
Go to <https://outlook.office.com/mail/> and select **Get Add-ins** from the Home ribbon.



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



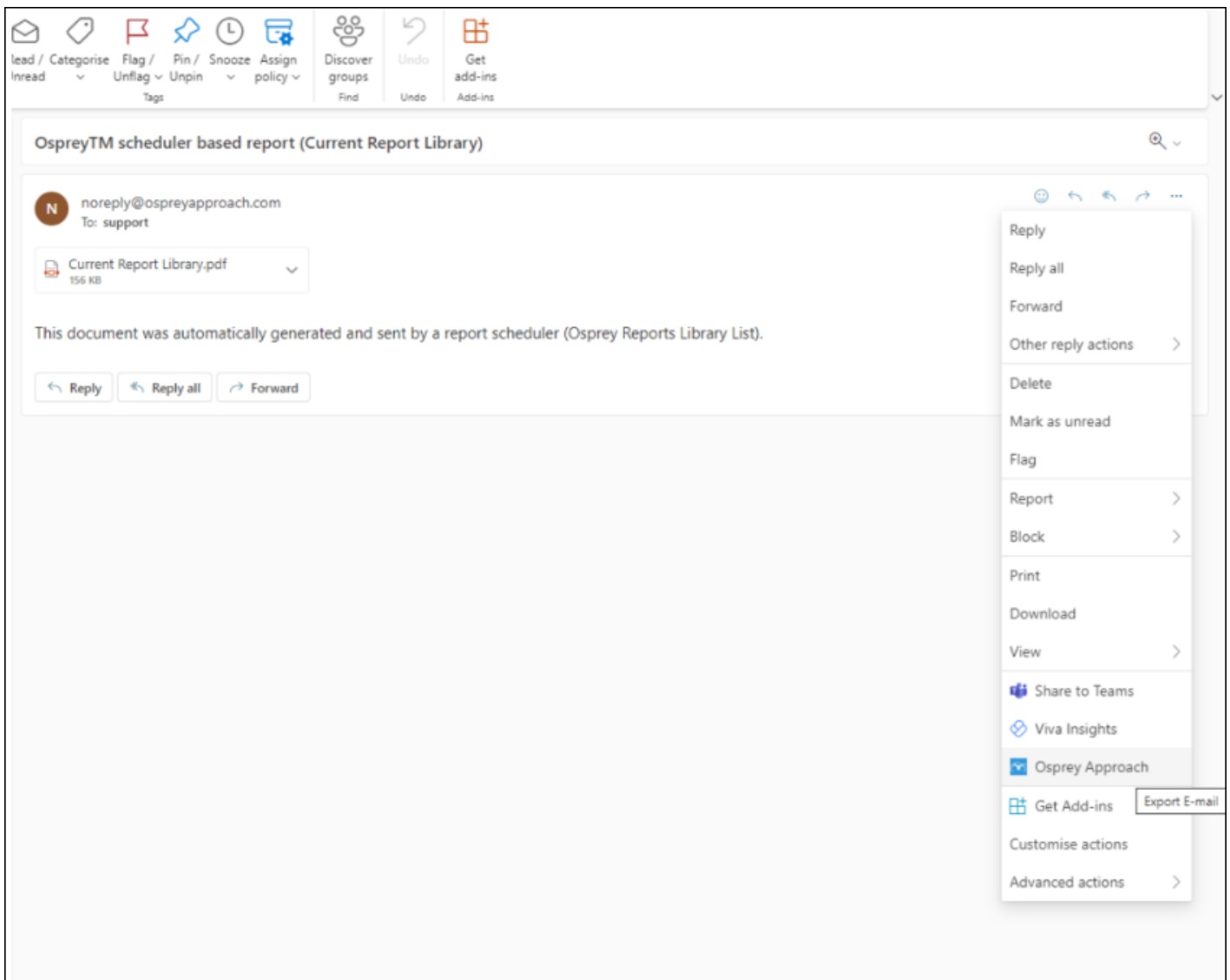
Search for 'Osprey', and click **Add**.



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.

The screenshot shows a Microsoft Outlook window with a teal header bar containing icons for a folder, notifications, settings, and a lightbulb. The main content area is split into two panes. The left pane shows an email header with a 'New Outlook' toggle switch, a search icon, and a timestamp 'Wed 07/06/2023 3:31 PM'. The right pane is titled 'Osprey Approach' and contains a login form. The form includes fields for 'Site URL' (containing 'https://test.ospreyapproach.com/main'), 'Username' (containing 'dan'), and 'Password' (masked with dots). A blue 'Sign In' button is positioned below the password field. Below the button, there is a paragraph of text: 'Export e-mails, setup e-mails with templates, recipients and attachments and time recording.' followed by a line: 'If you don't have already an Osprey Approach account, please visit our website' and a link: '<https://ospreyapproach.com> and make an enquiry to our sales team'.

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New Outlook ☒

Osprey Approach

Site URL

Username

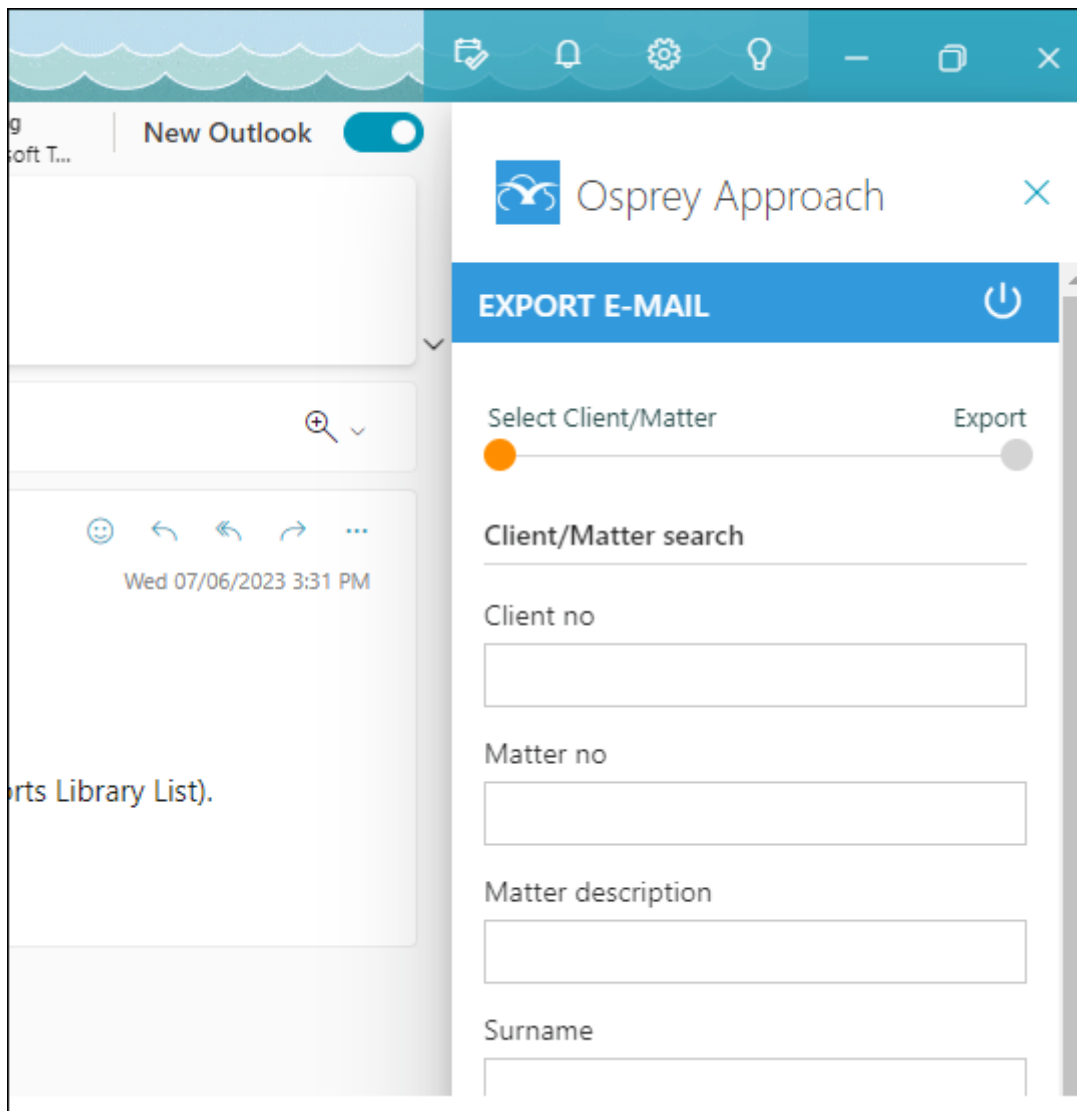
Password

Sign In

Export e-mails, setup e-mails with templates, recipients and attachments and time recording.

If you don't have already an Osprey Approach account, please visit our website <https://ospreyapproach.com> and make an enquiry to our sales team

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

Email from Client

Custom type

Scanned item

Folder

Matter History\Emails

Retention period

3 years

Retention date

Calculate retention date on archive

☐ 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'.

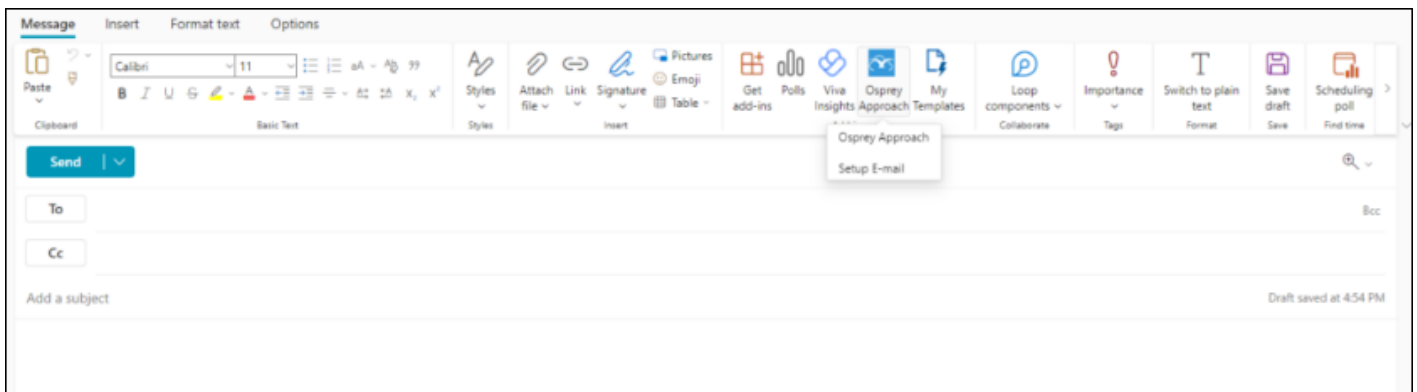
Your email and, if selected, any attachments will now have been saved to the Matter History.

<div> <div>New</div> <div>Send E-mail</div> <div>Reply</div> <div>Reply all</div> <div>Forward</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>						
FAVORITE	TYPE	REF NUMBER	MATTER DESCRIPTION	DETAILS	RETENTION PERIOD	
<div> <div>All</div> <div></div> </div>	<div> <div></div> <div></div> </div>	<div> <div></div> <div></div> </div>	<div> <div></div> <div></div> </div>	<div> <div></div> <div></div> </div>	<div> <div></div> <div></div> </div>	
★	✉	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


Get add-ins

Polls


Viva Insights

Osprey Approach

My Templates


Loop components

Collaborate



Bcc

Draft saved at 4:55 PM

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 addresss 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

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.