

# Osprey Approach: Completing Your Quote

This help guide was last updated on  
May 16th, 2024

The latest version is always online at  
<https://support.ospreyapproach.com/?p=60567>

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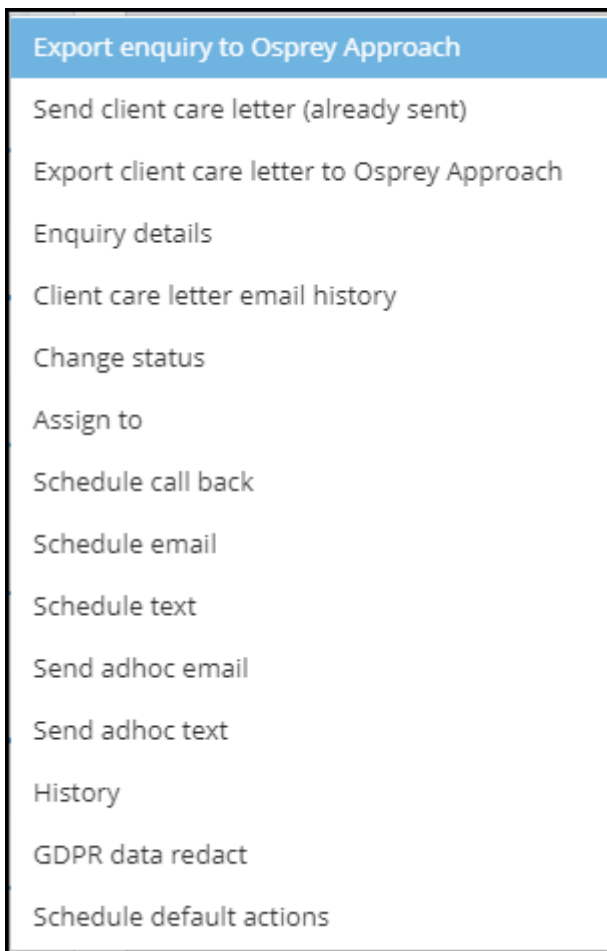
Convert2Client helps clients drive new & incremental revenue as your customers can go online 24/7 to get a quote without speaking with anyone.

## This guide will look at completing your quotes in Convert2Client and bring them into your Osprey Approach system.

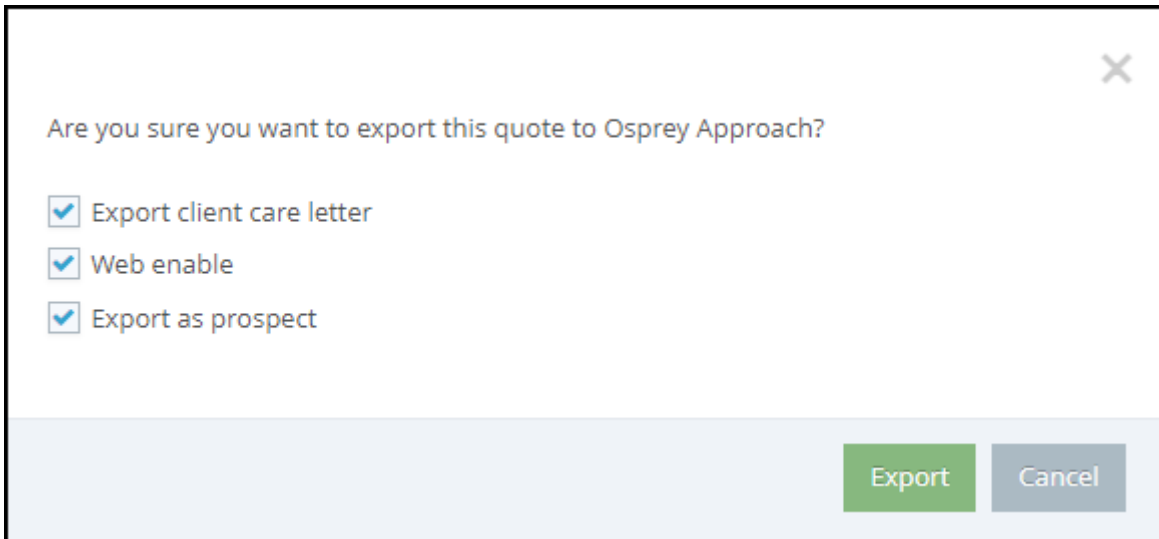
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# Export Quote to Osprey Approach

Once a quote has been instructed, and you are ready to bring them into Osprey, click on the Actions option, and select Export enquiry to Osprey Approach.



You will have options to Export a copy of the client care letter sent, to web enable the client for the Osprey Client Web Portal, and Export as a prospect matter.

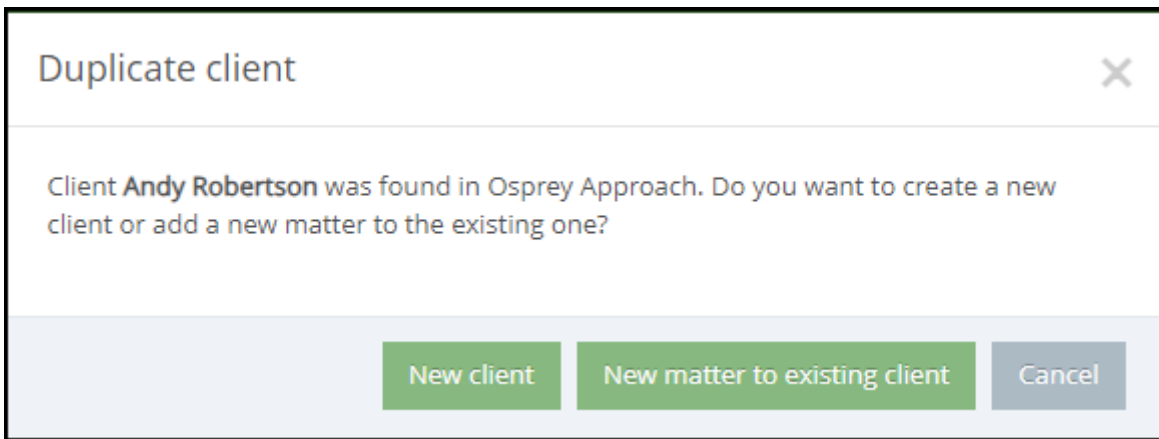


Are you sure you want to export this quote to Osprey Approach?

- Export client care letter
- Web enable
- Export as prospect

Export Cancel

If a client who matches the details already exists, you will be asked if you wish to create them as a new client or add onto an existing client as a new matter.



Duplicate client

Client **Andy Robertson** was found in Osprey Approach. Do you want to create a new client or add a new matter to the existing one?

New client New matter to existing client Cancel

## Export Client Care Letter to Osprey Approach

You can also export the client care letter at a later date. The quote must already be exported to Osprey.

|  |
|--|
| Export enquiry to Osprey Approach            |
| Send client care letter (already sent)       |
| Export client care letter to Osprey Approach |
| Enquiry details                              |
| Client care letter email history             |
| Change status                                |
| Assign to                                    |
| Schedule call back                           |
| Schedule email                               |
| Schedule text                                |
| Send adhoc email                             |
| Send adhoc text                              |
| History                                      |
| GDPR data redact                             |
| Schedule default actions                     |

# History

You may view the action history of a quote if you wish.

- Export enquiry to Osprey Approach
- Send client care letter (already sent)
- Export client care letter to Osprey Approach
- Enquiry details
- Client care letter email history
- Change status
- Assign to
- Schedule call back
- Schedule email
- Schedule text
- Send adhoc email
- Send adhoc text
- History
- GDPR data redact
- Schedule default actions

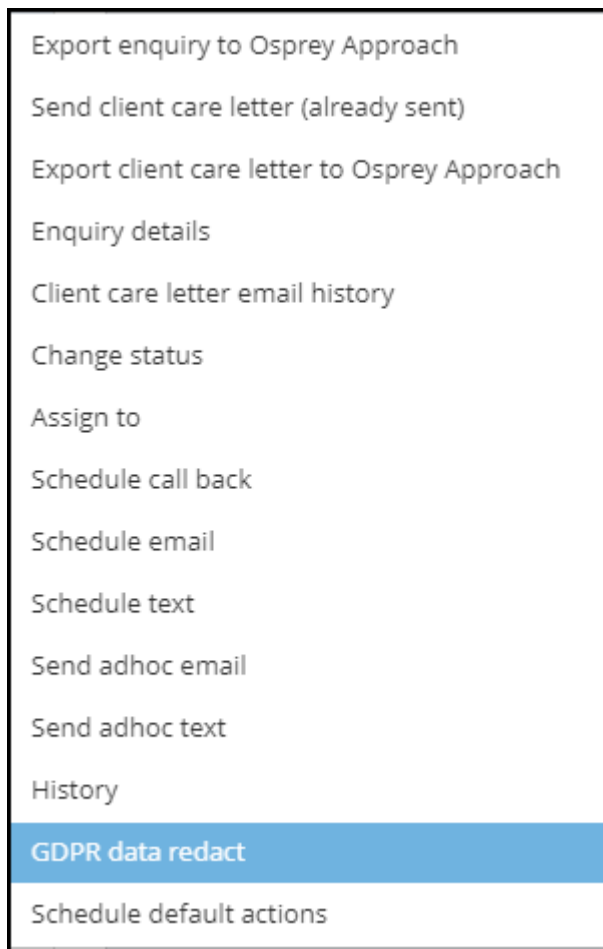
Any actions performed will be visible, and you can view details, or add a note against each action.

| History <span style="float: right;">✕</span> |                                    |   |      |           |                  |         |  |
|--|------------------------------------|---|------|-----------|------------------|---------|--|
| User   | Description                        | Details                                   | Note | Status    | Date             | Actions |  |
| Daniel Hearne                                | Email scheduled                    | Scheduled time: 02/05/2024 13:30:09 To... |      | completed | 02/05/2024 14:29 |         |  |
| Daniel Hearne                                | Enquiry generated by Daniel Hearne | Contact Name: Daniel Hearne Email: da...  |      |           | 02/05/2024 14:21 |         |  |

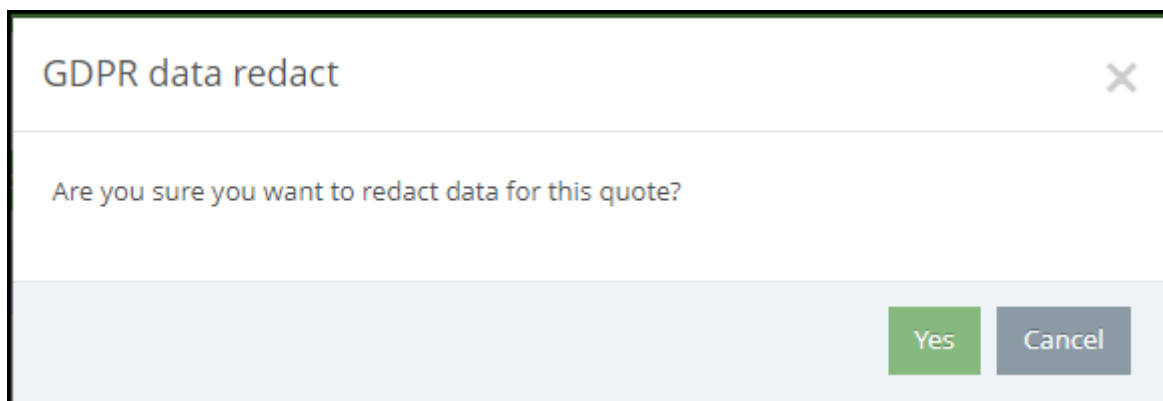
Close

# GDPR Data Redact

You are able redact all personal data from a quote, whilst retaining the quote itself.



A confirmation will appear.



The entry will still be visible, however any personal data relating to the client will no longer be visible

| Contact | Created on                               | Branch  | Type             | Status     | Assign to     | Next action | Actions |
|---------|--|---------|------------------|------------|---------------|-------------|---------|
|         | 02/05/2024 14:21<br>from IP 150.143.16.2 | Default | Family - Divorce | Instructed | Daniel Hearne |             | ...     |

# Convert2Client exported matters in Osprey

Once exported to Osprey Approach, the matter can be located by any normal means.

Any exported documents, such as the client care letter, will appear within the Matter History.