Osprey Approach: Completing Your Quote

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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.

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.

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.

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.

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Schedule default actions

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

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.

Export enquiry to Osprey Approach
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A confirmation will appear.

GDPR data redact ✕

Are you sure you want to redact data for this quote?

Yes   Cancel

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 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.