

Osprey Approach: Osprey Integrations

This help guide was last updated on
Apr 24th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=45200>

[Click here for a printer-friendly version](#)



This guide advises on how our business partners can help your firm make the most out of Osprey

Integrating your essential digital tools with Osprey will help you to manage your firm efficiently. By connecting your tools and centralising your data and files your processes will be more streamlined, organised, accurate and efficient.

Avoid disparate, disconnected system and gain control over your legal processes with integrations that enable you to get more work done, faster.

Whether you already use these tools and want to find out how the integration works, or whether you're looking for new productivity-enhancing solutions to modernise your firm, Osprey integrations with the software solutions below and you can book a demo or get started at any time.

You can also view our Integrations Webinar Series on-demand which goes through each solution in more detail. Watch the webinars here.

InfoTrack



InfoTrack offers a suite of digital conveyancing solutions from client verification checks and property searches, to digital AP1s and property reports. When integrated with Osprey, you'll have access to a connected powerful platform to deliver an efficient conveyancing service.

Remove the admin-heavy tasks involved in the conveyancing process to reduce lawyers' workloads and increase efficiency. All accessible in the Osprey case management solution, you can easily navigate to the InfoTrack portal so you can complete searches and reports quicker and easier.

Data is auto populated into the InfoTrack forms, from the case and client data you hold in Osprey, forms and searches are automatically saved back into Osprey, and you can implement the integration into the Osprey workflows.

For more information, please visit the InfoTrack section of our web page;
<https://ospreyapproach.com/integrations/infotrack/>

Coadjute



Coadjute is digitally connecting conveyancers to all parties involved in the property transaction. This means conveyancers can easily collaborate and share key details to other parties including estate agents, mortgage brokers and lenders, from within Osprey when they're integrated with Coadjute.

Coadjute is currently in development and isn't integrated into Osprey at the moment.

When the integration is live we'll be hosting a live webinar with Coadjute to show the integration in action. This will be announced in due course but keep an eye out on the splash pages for registration details and further information on the Coadjute integration.

For further information, please visit the Coadjute section of our web page;

<https://ospreyapproach.com/integrations/coadjute/>

Searchflow

SEARCHFLOW

Streamline your conveyancing processes by using Searchflow, the leading UK property search provider in residential and commercial markets.

When integrated with Osprey Approach, law firms have access to one centralised platform for ordering and storing searches to help improve the efficiencies of your conveyancing process.

Searchflow allows users to manage all of their searches by creating search bundles and favourite searches. It then allows for getting a quote and submitting search orders directly through your matter within Osprey. Once the search is completed it is automatically returned into the matter history for the client.

For more information, please visit the Searchflow section of our web page;

<https://ospreyapproach.com/integrations/searchflow/>

Lexis Smart Forms

Lexis® Smart Forms

The LexisSmart Forms integration allows users to generate over 4000 forms which can be generated from any location or device. Forms can be mapped to pre-populate data captured within Osprey, which will save time filling out forms.

All forms are frequently updated, ensuring you will always be using the latest versions.

For more information, please visit the Lexis Smart Forms section of our web page;
<https://ospreyapproach.com/integrations/lexis-smart-forms/>

DocuSign

DocuSign

DocuSign allows for clients or associated parties to sign a document electronically. The e-signatures are legally binding in many areas of law and allow for a matter to be progressed quickly, as clients have instant access to sign rather than having to wait for the post.

Signing is easy on any device and helps push towards a paperless environment and the associated cost-savings with that.

The DocuSign integration helps to modernise your client onboarding and case management processes by providing your clients with a quick, effective, and convenient service using DocuSign and the Osprey Web Portal.

For more information, please visit the DocuSign section of our web page;
<https://ospreyapproach.com/integrations/docusign/>

Text Anywhere



Text Anywhere gives you the ability to send SMS Text Messages directly to your clients. Standard SMS templates can be created for commonly used messages such as updates, reminders, and completions, along with the ability to free type SMS messages, they can also be built into your workflow processes.

For more information, or to book a demo, please visit the TextAnywhere web page;
<https://ospreyapproach.com/integrations/textanywhere/>

Loqate (Formerly Postcode Anywhere)



This functionality allows users to complete a postcode lookup at the point of opening a new client within Osprey.

For more information, please visit the TextAnywhere web page;
<https://ospreyapproach.com/integrations/loqate/>