

Osprey Approach: Resetting Portal Password (Clients & Associates)

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The latest version is always online at
<https://support.ospreyapproach.com/?p=53651>

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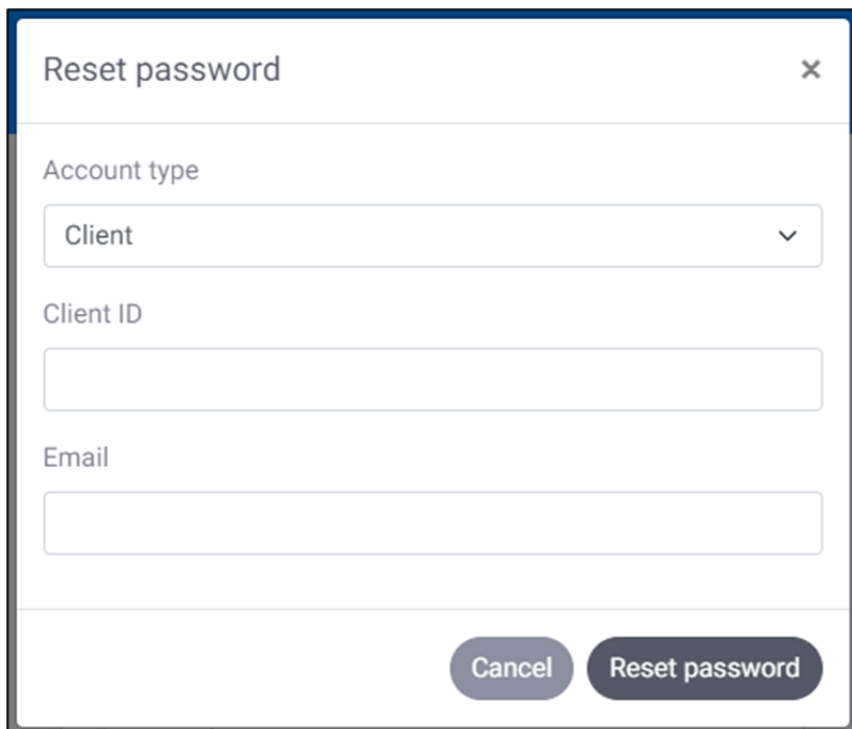


This guide will assist your clients and associates with resetting their passwords for the web portal

Resetting the password (client)

To reset a password your client will need to go to the log in page of the web portal and click Reset Password. The client will need to choose client from the available drop-down list.

They can then enter their client ID and email, then click Reset Password. This will email them a new one.



The image shows a 'Reset password' modal form. At the top, it has the title 'Reset password' and a close button (X). Below the title is a section labeled 'Account type' with a dropdown menu currently showing 'Client'. Underneath is a section labeled 'Client ID' with an empty text input field. Below that is a section labeled 'Email' with an empty text input field. At the bottom right of the form are two buttons: 'Cancel' and 'Reset password'.

Resetting the password (associate)

To reset the password, your associate will need to go to the log in page of the web portal and click reset password. To reset the password for an associate choose Associate from the drop-down list.

They can then enter the relevant ID and click Reset Password. This will email them a new one.

Reset password



Account type

Associate



Client ID

Cancel

Reset password