

Osprey Approach: Searching for Clients (Browser)

This help guide was last updated on
Dec 22nd, 2022

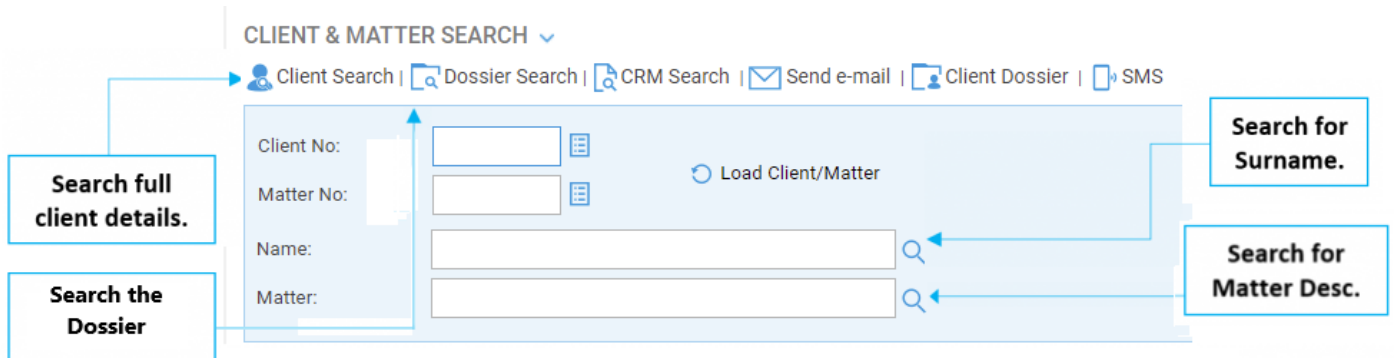
The latest version is always online at
<https://support.ospreyapproach.com/?p=874>

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



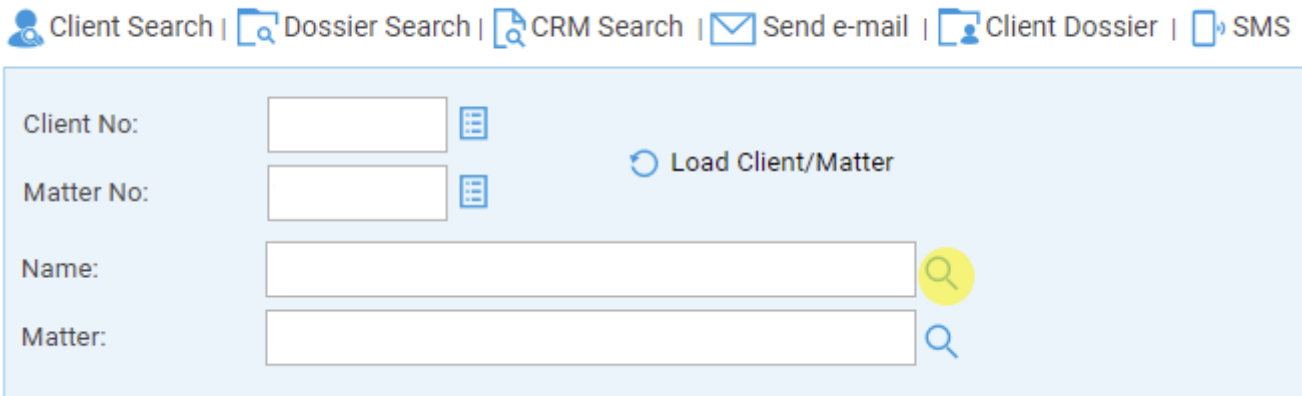
Osprey gives you several ways of searching for your clients in the system. Included in these are the Name Search, Matter Detail search and full client/matter search.

There are several ways of searching for a client.



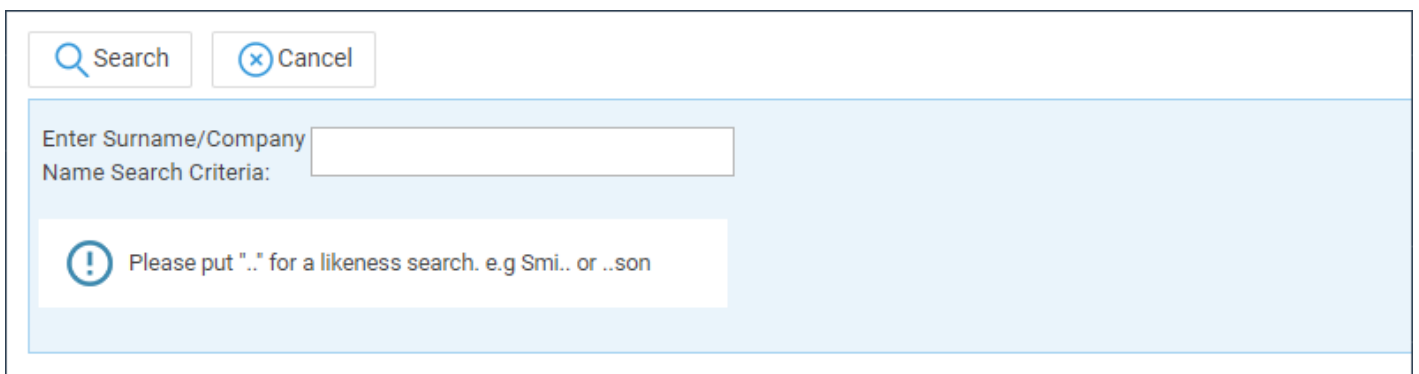
Name Search

CLIENT & MATTER SEARCH



Select the 'Name' Magnifying Glass

You may use this method if you know all or part of the client's surname.



Type into the 'Enter Surname Search Criteria' box and click 'Search'

Examples:

If you know that the client's surname is Smith, enter 'Smith'. This search will find clients whose names are exactly Smith.





If you think his name may end in son, then enter ..son and click search. This search would find Thomason, Jameson, Williamson, etc.


If you know his name contains a certain string of characters, but are not sure of the beginning and end, enter the characters in between the wildcard. For example, search criteria of ..one.. would find Jones, Monet etc.


Matter Description Search


Use this if you know all or part of the matter description.


CLIENT & MATTER SEARCH


 Client Search |  Dossier Search |  CRM Search |  Send e-mail |  Client Dossier |  SMS

Client No: 



Matter No: 

Name: 


Matter: 

 Load Client/Matter

Select the 'Matter' Magnifying Glass

 Search  Cancel

Enter Matter Search Criteria:







 Please put ".." for a likeness search. e.g Smi.. or ..son


Use the wildcards as above in the client name search – the example above will find any matter description containing “Sale of” – e.g. Sale of <property name>.


Full Client/Matter Search


Use this option for more advanced searching.


CLIENT & MATTER SEARCH


 Client Search |  Dossier Search |  CRM Search |  Send e-mail |  Client Dossier |  SMS

Client No: 

Matter No: 

Name: 

Matter: 

 Load Client/Matter

Select 'Client Search'



Use this screen to enter any information that you know about the client.

All fields that can be typed in can use the wildcard search as explained above.

This includes the client number box, so if your numbering convention is e.g. the first 3 letters of the surname, then a number, you could type e.g. BRO.. to find all client numbers beginning with BRO.

You can choose a certain work type and fee earner only if you know who is doing the work and what it relates to, as well as searching for legally aided or private matters only.

You can also choose to select whether or not to include archived matters in your search.

 Search Cancel

Client/Matter No: /

UFN:

Title:

Forename:

Initials:

Surname/Company Name:

House:

Area:

Postal Town:

County:

Post Code:

Tel/Fax:

Matter Details:

Prospect matter:

Fee Earner: None Selected


Work Type: None Selected

Group Code: None Selected

P/L:

Inc Archives?:

Published Matters Only?:

 Please put "." for a likeness search. e.g Smi.. or ..son

Dossier Search

If you are using the Dossier area to hold database information, you can search for specific records using these fields.

CLIENT & MATTER SEARCH ▼

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No:

Matter No:

Name:

Matter:

Load Client/Matter

Select Dossier Search

Filter Fields

Type: CRM Search Dossier Search

Pages:

Fields:

Operator: Equal

Value Between:

Include in Results

Prospect matters

Add

Pages:

Select a Dossier Page from the drop-down list.

Fields:

Select a field within that Dossier Page from the Dossier Fields drop-down list.

Operator: Equal

Value Between:

Include in Results

Equal
Not Equal
Like

Select either Equal (Exact Match), Not Equal (Not an Exact Match), or Like

Value Between:

Enter the Value to search for

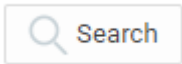


Select Add Filter

PAGE	FIELD	OPERATOR	VALUE	INCLUDE IN RESULTS	NEXT STATEMENT	DELETE
Dossier_TK_CLPERSONAL	tk_SALUTATION	=	Mr	<input type="checkbox"/>	AND <input type="text"/>	

The search criteria set will be displayed underneath.

You can add as many criteria as you require, and edit or delete any of the existing criteria.



Select Search

Print Export to Excel

CLIENT NO	MATTER NO	SURNAME	FORENAME	DESCRIPTION	FEE EARNER	WORK TYPE	PRIVATE/LA	SELECT
M00023	1	Matthews	Craig	Sale of 34 Upper Road, Malvern, WR14 5TY	CM	CLIN	P	<input checked="" type="checkbox"/>

The results will be displayed

Global search

You can also use the Global search option. The Global search searches all areas of Osprey with no requirement for a wildcard to be entered and returns all matches. For example to search for Mitzi Broom you can search for either Mitzi or Broom. Should you know the client number you may enter this instead.

	Today's Units:	0	<input type="text" value="Global search"/>
	Today's Time:	00h:00m	
	Today's Value:	£0.00	

Once you have entered your search details in the Global search box and clicked the magnifying glass icon to perform your search, you can further filter the results found, as well as amending the layout of the columns.

To turn on the filter row, click the column chooser icon, and tick the Show Filter Row box:

F/E	WORKTYPE	ADDRESS	ARCHIVE LOCATION	ARCHIVE REFERENCE	WIP BALANCE	C
MB	ADMIN				1.67	
MB	TK_RCS	Suite 1, Falstaff House Malvern Worcestershire WR11 4BG			1,206.66	
MB	FAMILY		Bucharest Office	REF0001	0.00	
		4 Foley Street Hereford				

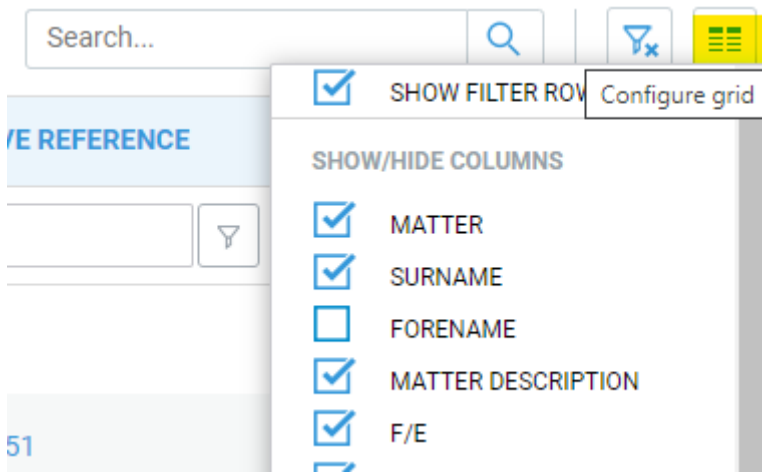
When the filter row is turned on, you can search for additional values within each column of your search results:

MATTER ↑	FORENAME	SURNAME	MATTER DESCRIPTION	F/E	WORKTYPE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	Geraldine	Broom	Added by smart actions	MB	ADMIN
1	Mitzi	Broom	Sale of [5 Main Road, Clenchwarton]	MB	TK_RCS
1	Iain	Broome	Legal aid - civil testing	MB	FAMILY
1	Mitzi	Broom	Sale of Badger's Crossing, Hampton Bishop	MBCQS	TK_RCS
1	Kathleen	Broom	Will storage with amendments	MB	WILLS

In the top right of the search results screen, you can clear any grid filters you have added by clicking the Clear Grid Filters icon:



To change the columns that are displayed in the Global search, click the Configure Grid icon, and tick / untick the columns that you want to show/hide:



To reorder columns in the display, simply click and drag the column heading you want to move, and drag it to the required position:

Osprey Home > Matters For Review > Matters For Review Search Result

Export Refresh Cancel

CLIENT NO ↑	MATTER ↑	SURNAME	FORENAME	MATTER DESCRIPTION
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
0000001	1	Broom	Geraldine	Added by smart actions
B00001	1	Broom	Mitzi	Sale of [5 Main Road, Clenchwarton]
B00007	1	Broome	Iain	Legal aid - civil testing
B00070	1	Broom	Mitzi	Sale of Badger's Crossing, Hampton Bishop

You can also resize columns to fit:

Osprey Home > Matters For Review > Matters For Review Search Result

Export Refresh Cancel

CLIENT NO ↑	MATTER ↑	FORENAME	SURNAME	MATTER DESCRIPTION	F/E
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
0000001	1	Geraldine	Broom	Added by smart actions	MB
B00001	1	Mitzi	Broom	Sale of [5 Main Road, Clenchwarton]	MB
B00007	1	Iain	Broome	Legal aid - civil testing	MB
B00070	1	Mitzi	Broom	Sale of Badger's Crossing, Hampton Bishop	MBCQS

To select a matter, simply click one of the columns of data for the relevant matter.

- Clicking any client information will take you to the Client Details page
- Clicking any matter information will take you to the Matter Details page
- If you have enabled the WIP Balance column, clicking this will take you to the Time Recording page.

- If you have enabled the Client Balance column, clicking this will take you to the client ledger.

You can also export your results to Excel/CSV using the Export button in the top left hand corner:

The screenshot shows a navigation bar with three items: "Osprey Home", "Matters For Review", and "Matters For Review Search Result". Below the navigation bar, there are three buttons: "Export" (with a download icon), a refresh button, and "Cancel" (with a close icon). The "Export" button is highlighted, and a dropdown menu is open, showing three options: "XLS", "XLSX", and "CSV". Below the dropdown menu, there is a table with the following columns: "MATTER", "FORENAME", "SURNAME", and "MATTER DI". The table contains one row of data: "1", "Geraldine", "Broom", and "Added by si".

	↑	MATTER	FORENAME	SURNAME	MATTER DI
	⌵	⌵	⌵	⌵	
		1	Geraldine	Broom	Added by si