

Osprey Approach: Searching for Clients

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

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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.

The screenshot shows the 'CLIENT & MATTER SEARCH' dropdown menu with options: Client Search, Dossier Search, CRM Search, Send e-mail, Client Dossier, and SMS. Below the menu is a search form with fields for Client No., Matter No., Name, and Matter. A 'Load Client/Matter' button is also present. Callout boxes point to specific fields: 'Search full client details.' points to the Client No. field; 'Search the Dossier' points to the Matter No. field; 'Search for Surname.' points to the Name field; and 'Search for Matter Desc.' points to the Matter field. There are also magnifying glass icons next to the Name and Matter fields.

Name Search

This screenshot shows the 'CLIENT & MATTER SEARCH' dropdown menu with the same options as the previous image. The search form below has fields for Client No., Matter No., Name, and Matter. A 'Load Client/Matter' button is located between the Matter No. and Name fields. A yellow magnifying glass icon is placed over the Name field, and a blue magnifying glass icon is placed over the Matter field.

Select the 'Name' Magnifying Glass

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

The dialog box has a 'Search' button with a magnifying glass icon and a 'Cancel' button with a close icon. Below these is a text input field labeled 'Enter Surname/Company Name Search Criteria:'. At the bottom, there is a warning icon and text: 'Please put "." for a likeness search. e.g Smi.. or ..son'.

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

Examples:

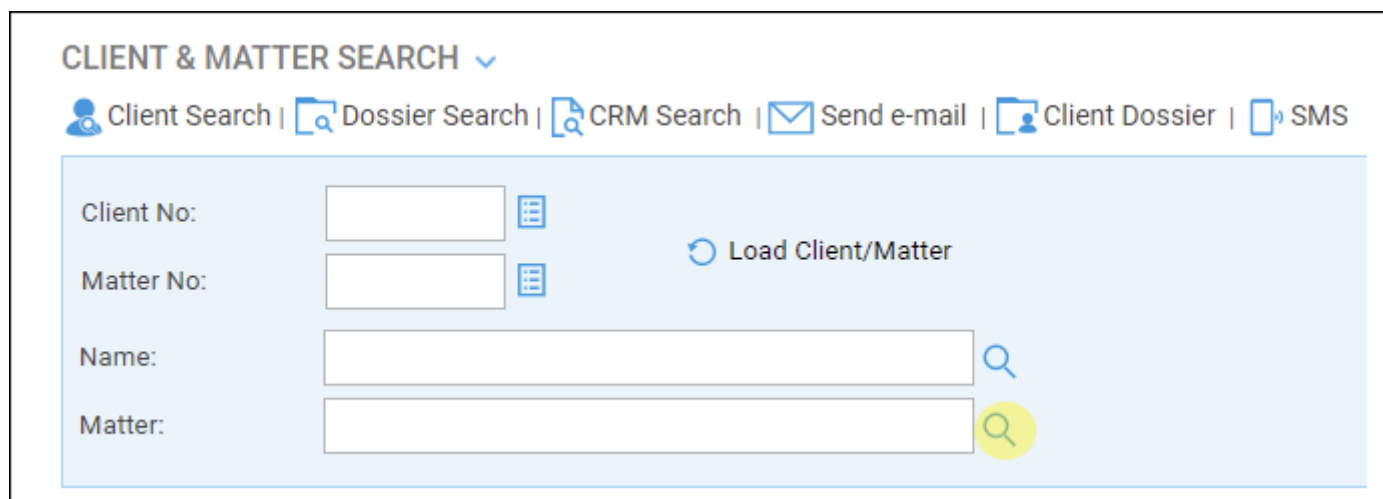
If you know that the client's surname is Smith, enter 'Smith'. This search will find clients whose names are exactly Smith.

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: 

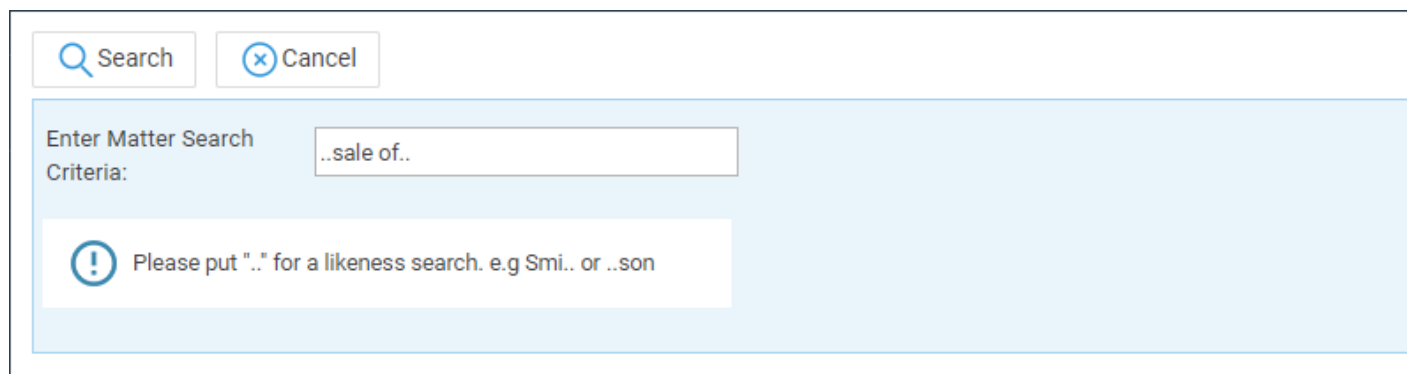
Matter No: 



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:



 Load Client/Matter

Name:



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) ▼

None Selected

Work Type:

(None) ▼

None Selected

Group Code:

(None) ▼

None Selected

P/L:


All ▼

Inc Archives?:

No ▼

Published Matters Only?:


No ▼


 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

 Search



 Cancel

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:

Equal

Not Equal

Include in Results

Like


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

Value Between:

Enter the Value to search for

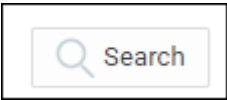


Select Add Filter


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


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	

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

Today's Time:00h:00m





Today's Value:£0.00

Global search






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:



Search...



F/E	WORKTYPE	ADDRESS	ARCHIVE LOCATION	ARCHIVE REF
MB	ADMIN			
MB	TK_RCS	Suite 1, Falstaff House Malvern Worcestershire WR11 4BG		
MB	FAMILY		Bucharest Office	REF0001
		4 Foley Street Hereford		

SHOW FILTER ROW

SHOW/HIDE COLUMNS

☒MATTER

☒SURNAME

☒FORENAME






☒MATTER DESCRIPTION

☒F/E

☒WORKTYPE

☐-----

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
<div><div></div><div></div></div>	<div><div>mitz</div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	
1	Mitzi	Broom	Sale of [5 Main Road, Clenchwarton]	MB	TK_RCS
1	Mitzi	Broom	Sale of Badger's Crossing, Hampton Bishop	MBCQS	TK_RCS
1	Mitzi	Broom	Test new matter	ADAMB	A1000
1	Mitzi	Broom	Matter description here	ADAMB	A1000
1	Mitzi	Broom	New Will for Testing	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:

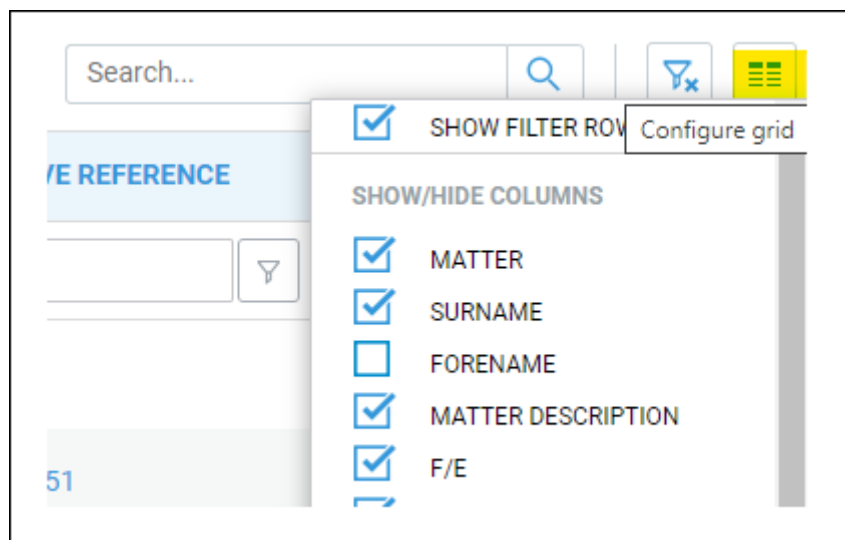
Search...



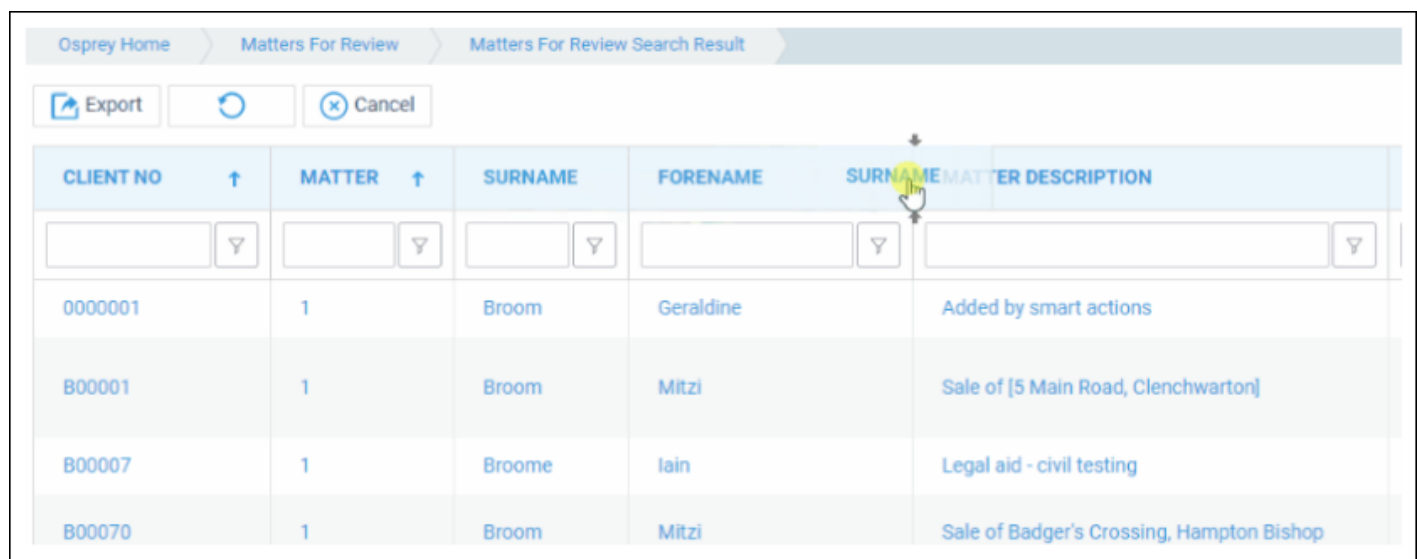




To change the columns that are displayed in the Global search, click the Configure Grid icon, and tick / untick the columns that you want to show/hide:



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



You can also resize columns to fit:

Osprey Home

Matters For Review

Matters For Review Search Result

Export

Cancel

CLIENT NO	↑	MATTER	↑	FORENAME	SURNAME	MATTER DESCRIPTION	F/E
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
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:

Osprey Home

Matters For Review

Matters For Review Search Result

Export

Cancel

XLS

XLSX

CSV

	↑	MATTER	FORENAME	SURNAME	MATTER DI
	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
		1	Geraldine	Broom	Added by si