



Osprey Approach: Searching for Clients

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



Osprey gives you several ways of searching for your clients in the system. This guide will take you through the best ways to perform searches

The main searches are the global search, 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. It contains several options: 'Client Search' (with a person icon), 'Dossier Search' (with a magnifying glass icon), 'CRM Search' (with a magnifying glass icon), 'Send e-mail' (with an envelope icon), 'Client Dossier' (with a person icon), and 'SMS' (with a mobile phone icon). Below these options is a search form with the following fields: 'Client No:' (with a list icon), 'Matter No:' (with a list icon), 'Name:' (with a magnifying glass icon), and 'Matter:' (with a magnifying glass icon). A 'Load Client/Matter' button is located between the 'Client No:' and 'Matter No:' fields. Four callout boxes are present: 'Search full client details.' points to the 'Client Search' option; 'Search the Dossier' points to the 'Dossier Search' option; 'Search for Surname.' points to the 'Name:' field; and 'Search for Matter Desc.' points to the 'Matter:' field.


Name Search

First, select the 'Name' magnifying glass icon.


This screenshot shows the same 'CLIENT & MATTER SEARCH' dropdown menu as the previous one. The 'Name:' field is now highlighted with a yellow magnifying glass icon, indicating that the 'Name' search method has been selected. The other fields and options remain the same.

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

 Search

 Cancel

Enter Surname/Company
Name Search Criteria:

 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. Select the 'Matter' magnifying glass icon.


CLIENT & MATTER SEARCH 


 Client Search

 Dossier Search


 CRM Search

 Send e-mail


 Client Dossier

 SMS


Client No:




Matter No:




Name:



Matter:



 Load Client/Matter

Search Cancel

Enter Matter Search
Criteria: ..sale of..

! 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. Select Client Search.

CLIENT & MATTER SEARCH ▾

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

Client No: [] []

Matter No: [] []

Name: [] []

Matter: [] []

Load Client/Matter


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. Select Dossier Search.


CLIENT & MATTER SEARCH ▾


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


Client No: 

Matter No: 


Name: 

Matter: 

 Load Client/Matter

 Search



 Cancel

Filter Fields

Type: ☐ CRM Search ☒ Dossier Search

Pages:


Fields:

Operator:

Value Between:

Include in Results ☐

Prospect matters ☐

 Add



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

After a field and page have been chosen, select an appropriate Operator. You can choose either Equal (Exact Match), Not Equal (Not an Exact Match), or Like. Then enter the Value to search for.

Select Add Filter. The search criteria set will be displayed underneath.

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



You can add as many criteria as you require, and edit or delete any of the existing criteria. Select Search to perform the 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	✓





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	<div>Global search</div> 
	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:



Search...   

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

☒ SHOW FILTER ROW

SHOW/HIDE COLUMNS

☒ MATTER

☒ SURNAME

☒ FORENAME

☒ MATTER DESCRIPTION

☒ F/E

☒ WORKTYPE

☐ -----

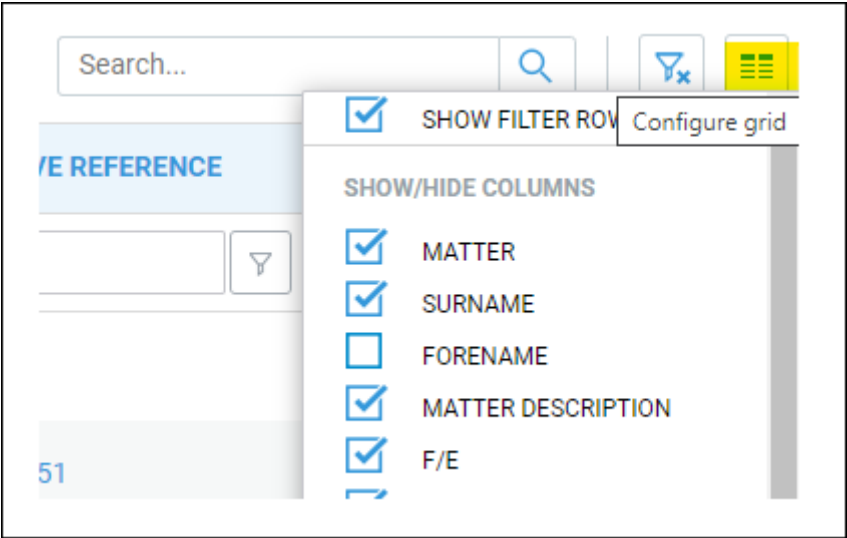
When the filter row is turned on, you can search for additional values within each column of your search results:

MATTER	FORENAME	SURNAME	MATTER DESCRIPTION	F/E	WORK
	<input type="text" value="mitz"/>				
1	Mitzi	Broom	Sale of [5 Main Road, Clenchwarton]	MB	TK_RC:
1	Mitzi	Broom	Sale of Badger's Crossing, Hampton Bishop	MBCQS	TK_RC:
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:



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					
<div> <div>Export</div> <div>Refresh</div> <div>Cancel</div> </div>					
CLIENT NO	MATTER	SURNAME	FORENAME	SURNAME	MATTER DESCRIPTION
<input type="text"/>	<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					
<div> <div>Export</div> <div>Refresh</div> <div>Cancel</div> </div>					
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:

 Export Cancel

XLS

XLSX

CSV



MATTER

FORENAME

SURNAME

MATTER DI



1

Geraldine

Broom

Added by si