



Osprey Approach: Searching for Clients

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



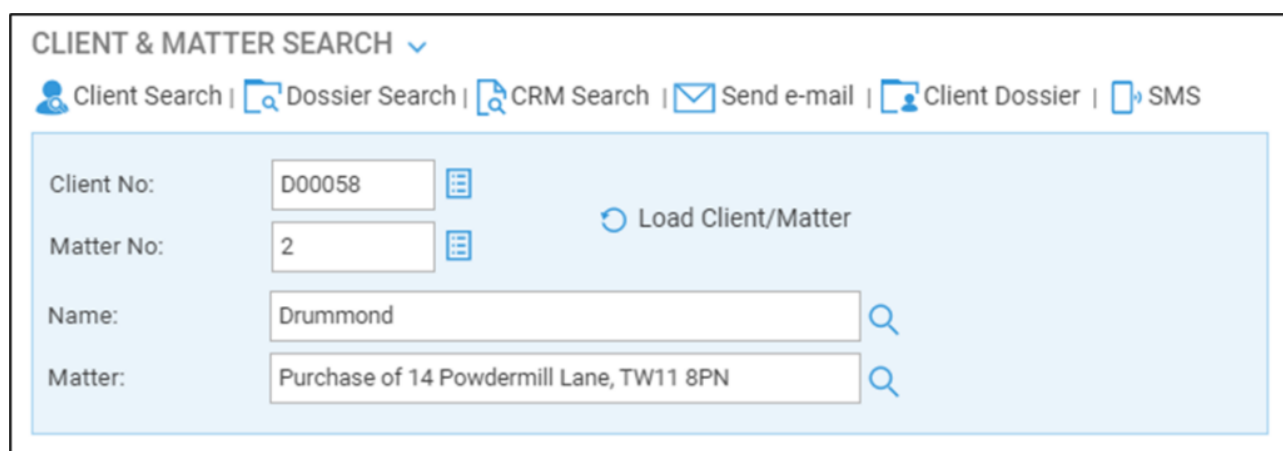
Osprey gives you several ways of searching for your clients in the system. This guide will take you through the best ways to perform searches

The main searches are the global search, name search, matter detail search and full client/matter search.

If you know the client and matter number, you can simply type these into the available Client No and Matter No boxes. Next to the Client No box is a small blue square, which allows you to view the last 20 matters you have selected.

Next to the Matter No box, the blue square will allow you to view all matters available for the selected client.

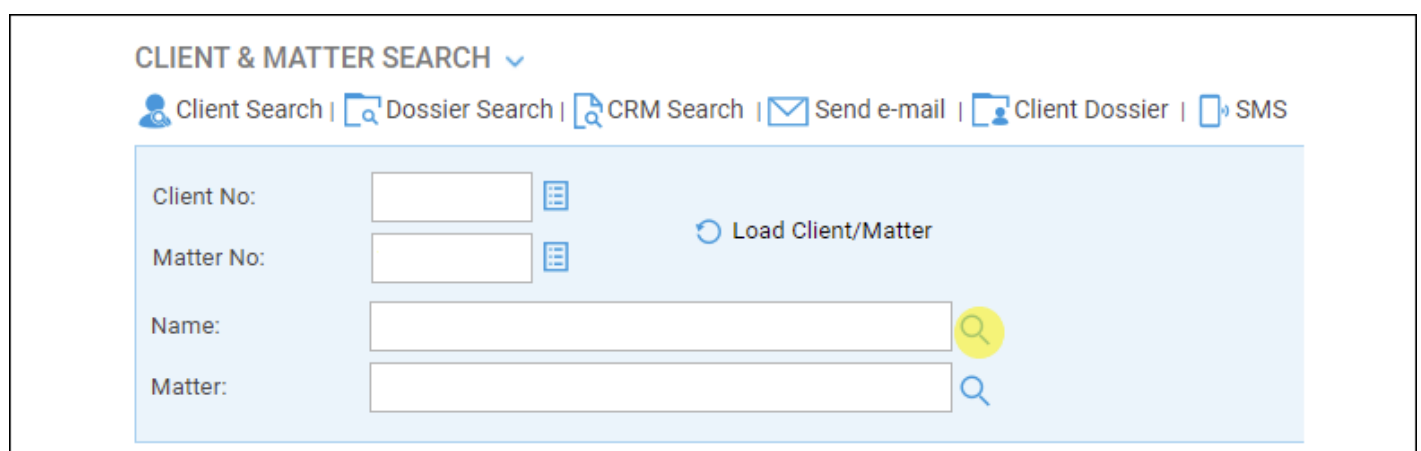
There are several ways of searching for a client.



The screenshot shows the 'CLIENT & MATTER SEARCH' interface. At the top, there are navigation links: Client Search, Dossier Search, CRM Search, Send e-mail, Client Dossier, and SMS. Below these are four search input fields: 'Client No:' with the value 'D00058', 'Matter No:' with the value '2', 'Name:' with the value 'Drummond', and 'Matter:' with the value 'Purchase of 14 Powdermill Lane, TW11 8PN'. To the right of the 'Client No:' and 'Matter No:' fields are small blue square icons. A 'Load Client/Matter' button is positioned between the 'Client No:' and 'Matter No:' fields. Magnifying glass icons are placed to the right of the 'Name:' and 'Matter:' fields.

Name search


First, select the 'Name' magnifying glass icon.



This screenshot shows the same 'CLIENT & MATTER SEARCH' interface as above, but with the search fields empty. A yellow magnifying glass icon is highlighted over the magnifying glass icon next to the 'Name:' field, indicating the selection of the name search method.

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

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 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. 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: Equal

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. You can also search for a client and matter combination e.g. B00002/1.

Osprey Approach Test
Osprey Approach Test

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... [magnifying glass] [filter] [list]

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

SHOW FILTER ROW [checkbox checked]

SHOW/HIDE COLUMNS

- MATTER
- SURNAME
- FORENAME
- MATTER DESCRIPTION
- F/E
- WORKTYPE
-

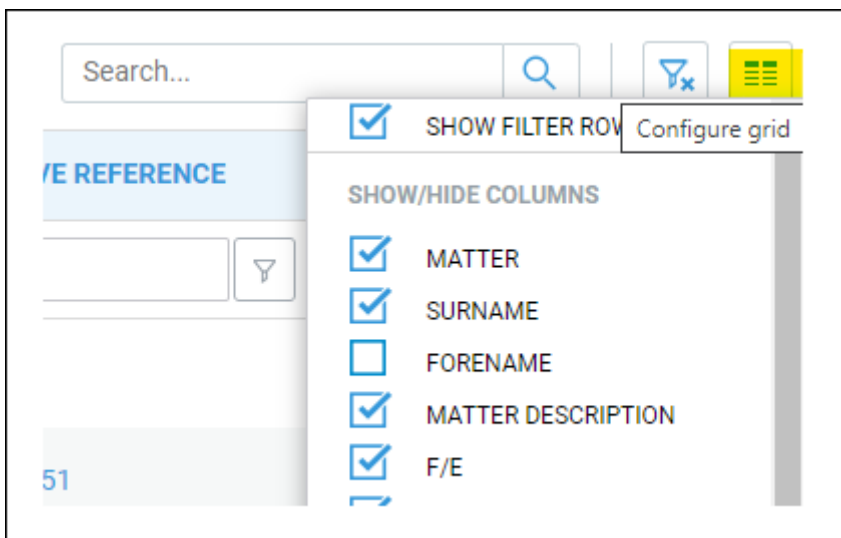
When the filter row is turned on, you can search for additional values within each column of your search results:

MATTER	FORENAME	SURNAME	MATTER DESCRIPTION	F/E	WORKT
	<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

Export Refresh Cancel

CLIENT NO	MATTER	SURNAME	FORENAME	SURNAME	MATTER DESCRIPTION
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

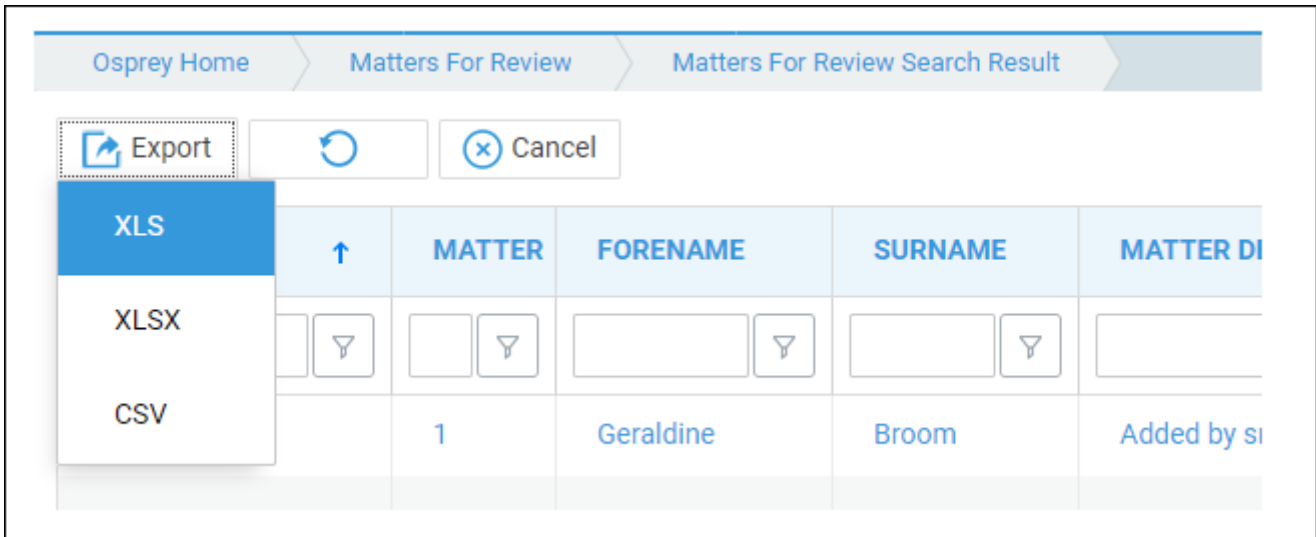
Export Refresh Cancel

CLIENT NO	MATTER	FORENAME	SURNAME	MATTER DESCRIPTION	F/E
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:



Please note that search results will now show an icon if there is a record for the client in COLP / COFA.

COLP/COFA	CLIENT NO	MATTER	SURNAME
		1	Tester
	0303	1	Broker
	0303	2	Broker

Next to the Global Search area is a hover-over Client Details button. This displays the current client details as you hover over it so there is no need to move away from the current page.

