

Osprey Approach: Searching for Clients (App)

This help guide was last updated on
Feb 1st, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=34223>

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



Full Client & Matter Search

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

Client/Matter - A123456/1 (Hiscutt Alex/Default Matter) FE: 01 WT: AEH

Change Client/Matter

Email

Conflict of Interest

Enable Client Web Access

Send SMS

Document Production

Add Matter

Edit Matter

Client Contact Details

Dossier Matter Level

Notes Matter Level

Client Details

Archive

Print

Branch

Aberdeen - userId: 044837853251

Department

Civil Department

Fee Earning

S P Jennings

Supervising Fee Earning

N/A

Work Type

Alex H Test

Private/Legal Aid

Private

La Version

N/A

Franchise Category

N/A

Unique File No

N/A

Registration Time

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Tap Change Client/Matter, which is available from Clients & Matters, Case Management, or Client Ledgers

Search Client/Matter

←

Search

All Matters

Last 10 Accessed

Client No

Matter No

Surname

Matter Description

More Options

Use any of the basic search fields or tap More Options, from here you can perform a full search using the purple search button, View all Matters for the currently selected file using the grey all matters button and

finally you can view the last 10 accessed by using the blue button.

More Options shows:

Forename

Initials

House

Area

Postal Town

County

Post Code

Fee Earner

Select

Work Type

Select

Group Code

Select

Include Archives?

No

Prospect

☐

[Collapse Options](#)

You may search for the clients full name, and/or address. It's also possible to filter for a specific fee earner, or work type.

Should wish to search archives, set Include Archives? to Yes

To search through Prospect Matters, tick Prospect.

Search Results:

[Search Again](#)

CLIENT/MATTER	MATTER DESCRIPTION	FEE EARNER	CLIENT NAME	ARCHIVED	WORK TYPE
MAT00008/1	Default Matter	S P Jennings	Matthews	No	GLOBAL
A00001/7	Default matter	AdamB	Matthews	No	ADO
A00001/8	K123456	Marcel	Matthews	No	FAMILY

Scroll through results and left click to load it.

You can use the [Conflict of Interest](#) to search for duplicate clients

Global Search

The Global search searches all areas of Osprey with no requirement for a wildcard to be entered and returns all matches. For best results, you should enter as much information as you can.

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

Step 2

[Search Again](#)

CLIENT/MATTER	MATTER DESCRIPTION	FEE EARNER	CLIENT NAME	ARCHIVED	WORK TYPE
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