

Osprey Approach: Searching for Clients (App)

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

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This guide will take you through searching for clients in the case management app

Full Client & Matter Search

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

The screenshot displays the Osprey Approach (3.0.0) application interface. On the left is a dark navigation sidebar with menu items: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS (with a plus sign), TIME RECORDING (with a plus sign), CASE MANAGEMENT (with a plus sign), CLIENT LEDGERS, BANKS & JOURNALS (with a plus sign), REPORTS (with a plus sign), and SUPERVISOR (with a plus sign). The main content area at the top shows 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. A 'Global search' input field is present. Below this is a purple 'Workflow Status Bar'. The main header reads 'Client/Matter - A123456/1 (Hiscutt Alex/Default Matter) FE: 01 WT: AEH'. A red box highlights the 'Change Client/Matter' button, which is accompanied by an envelope icon. Other buttons include 'Email', 'Conflict of Interest', 'Enable Client Web Access', and 'Send SMS'. Below these are 'Document Production', '+ Add Matter', 'Edit Matter', 'Client Contact Details', 'Dossier Matter Level', 'Notes Matter Level', and 'Client Details'. A 'Print' button is also visible. The main content area lists details for the selected client/matter: Branch (Aberdeen - userId: 044837853251), Department (Civil Department), Fee Earner (S P Jennings), Supervising Fee Earner (N/A), Work Type (Alex H Test), Private/Legal Aid (Private), La Version (N/A), Franchise Category (N/A), and Unique File No (N/A). At the bottom, there is a chatbot prompt: 'I'm Posit, your virtual assistant! Please, tell me what you want to do...' with a microphone icon.

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.

Search Client/Matter

[←](#) [Search](#) [All Matters](#) [Last 10 Accessed](#)

Client No

Matter No

Surname

Matter Description

[More Options](#) 

More Options shows:

Forename

Initials

House

Area

Postal Town

County

Post Code

Fee Earner

Work Type

Group Code

Include Archives?

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.

When the results appear, Scroll through results and left click to load a file.

[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

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

Once you have entered your search details in the Global search box and clicked the magnifying glass icon to perform your search. Scroll through results and left click to load a file.

[Search Again](#)

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