



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>



Full Client & Matter Search

Osprey Approach (3.0.0)

≡

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 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

Unique File No
N/A

Registration Type

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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