

Osprey Approach: Sending an Email from Osprey

This help guide was last updated on
Jun 17th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=53156>

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

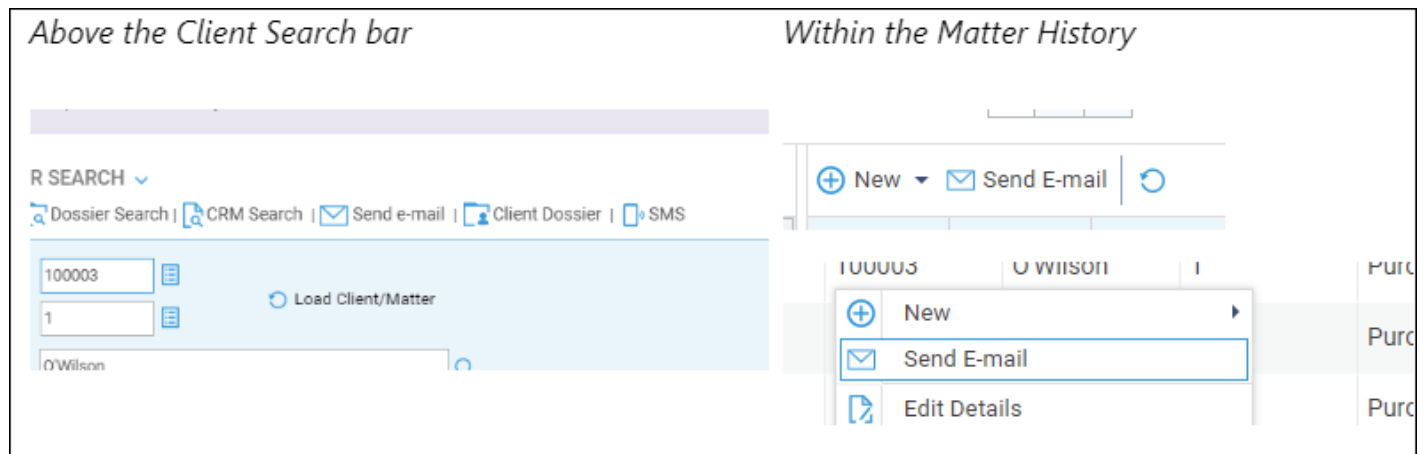


This guide will show you how to send emails directly from Osprey, with a copy saved directly into the matter history

Please ensure your SPF record is configured. Failure to do so may result in emails being flagged as illegitimate and may even be blocked by the recipient's email provider. Your domain hosts will be able to perform this.

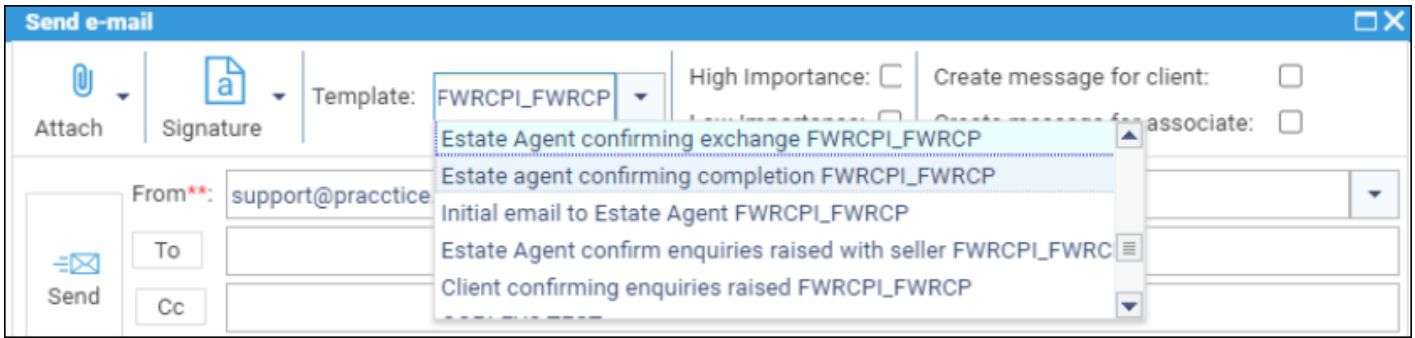
Accessing the send e-mail window

This can be accessed from various screens when a client is loaded.



Upon selecting, the Send Email window will appear.

Composing the email



Once sent, the email will automatically appear within the matter history.

The interface displays a list of emails with columns for Favorite, Type, CRMS/IND NUMBER, and CREATED BY. A context menu is open over the email with ID 120098. The detailed view on the right shows the following information:

General Info

- Ref Number: 120098
- Client No: 100003 (O'Wilson)
- Matter No: 1 (Purchase 6 Anfield Road)
- Folder Path: Matter History/Client Correspondence
- Custom Type: Email to Client
- Web Enabled: No
- Details: Email to Client

Email Info

- Date: 27-12-2023 16:21:09
- From: support@pracctice.net
- To: Daniel Hearne <support@pracctice.net>
- Subject: RE: The Channel 42 New Oaks Lane Shoredale Warchestershire AB12 3CD

Dear Sirs,

Property: The Channel 42 New Oaks Lane Shoredale Warchestershire AB12 3CD

Seller: J J Jones V2 Vendor vendor

Buyer: Second2 P2Surname

We are pleased to confirm that we have now exchanged, with completion set for 01/01/2024.

If you have any queries, please do not hesitate to contact us.