



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>

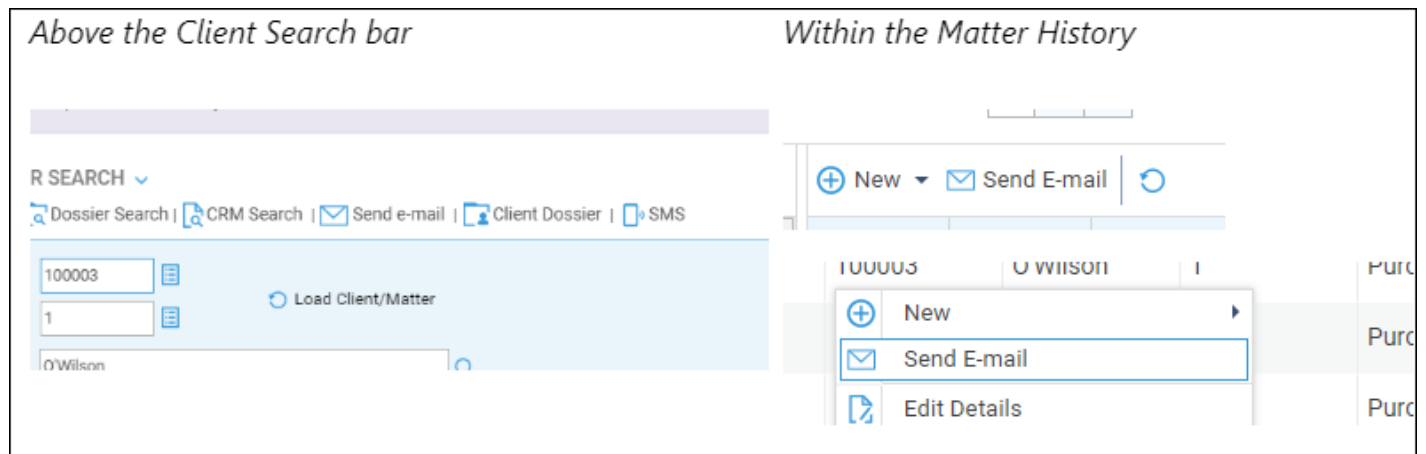


This guide will show you how to send emails directly from Osprey, with a copy saved directly into the matter history

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

Send e-mail □ ×

Attach | Signature | Template: Estate Agent cor | High Importance: | Create message for client:
Low Importance: | Create message for associate:

Send | **From**:** support@pracctice.net (Practice) | **To:** support@pracctice.net
Cc: | **Bcc:**

Subject: RE: The Channel 42 New Oaks Lane Shoredale Warchestershire AB12 3CD
Folder: Matter History/Client Correspondence | **Description:** Email to Client

Edit | Format | Tools | Table

RBC | ↶ | ↷ | Formats | **B** | *I* | [List Icons] | [Link Icon] | [Image Icon]

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.

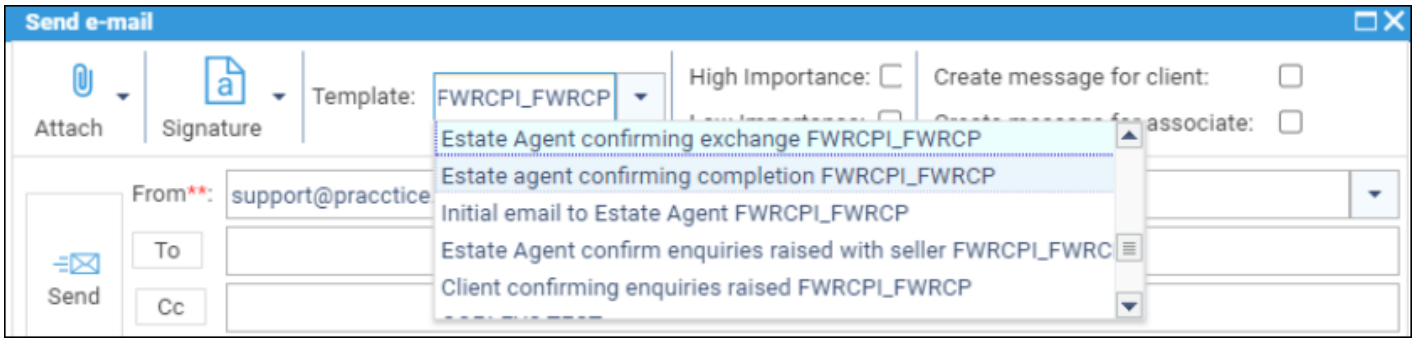
Kind regards,

Osprey Approach Test

- From: Select who the send the email from. Options are User, Fee Earner or Practice.
- To/CC/BCC: Clicking this will show a list of all email addresses linked to the matter. You can also select a contact or organisation from your Osprey system, or manually enter the email address.
- Subject Line: Subject line of the email
- Folder: Matter history folder to save a copy of the email into
- Description: Email description to appear within Matter History

You can also attach items from your PC or Matter history, by selecting the Attach toolbar icon.

If configured, you can also select a signature or email template to help compose your email. If you apply a template, any previous information within the Subject Line or Email Body will be overwritten.



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

FAVORITE	TYPE	CHRSTNDNUMBER	CREATED BY	DATE/TIME	USER
★	✉	120098	Email to Client	27/12/2023 16:21:09	dan
★	✉	120062	test	0:36	100003
★	✉	120050	Cheque Requisition Slip - Fee Earner Bill	4:44	matth
★	✉	120049	Cheque Requisition Slip - Fee Earner Bill	1:46	matth
★	✉	120030	Sent a text message to the number 0044777777	1:45	matth
★	✉	119943	email for processed date (ClientRef:100003/1)	5:10	dan
★	✉	119942	Specification form - Professional services work	9:50	dan
★	✉	119941	email for processed date	9:47	dan
★	✉	119927	Email test	0:26	Dan
★	✉	119926	Password reset successfully.msg	7:31	dan
★	✉	119925	excel	29/11/2023 11:36:31	dan
★	✉	119924	Client care letter FW2911	29/11/2023 11:33:28	dan
★	✉	119891	Password reset successfully.msg	28/11/2023 10:01:02	dan
★	✉	119890	Sent e-mail (Subject: Email Regarding Case : Purchase 6 Anfield R...	28/11/2023 09:59:44	dan
★	✉	119889	Two steps authentication code.msg	28/11/2023 09:59:07	dan
★	✉	119797	20 mb bis	22/11/2023 09:40:22	100003
★	✉	119796	20 MB PDF	22/11/2023 09:38:40	100003

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:
 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

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