

# Osprey Approach: Sending an Email from Osprey

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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.	

Above the Client Search bar	Within the Matter History
R SEARCH 🗸 CRM Search   🔁 CRM Search   💟 Send e-mail   💽 Client Dossier   🗋 SMS	⊕ New ▼ ⊠ Send E-mail O
100003 Dead Client/Matter	New
0Wilson	Send E-mail
	Edit Details Pur

Upon selecting, the Send Email window will appear.

## Composing the email

Send e-n	nail		□×						
0 Attach	Sign	Template: Estate Agent cor  High Importance: Create message for client: Create message for sociate: Create message for associate: Create message for associa	נ						
-≡⊠ Send	From**:       support@pracctice.net (Practice)         To       support@pracctice.net         Send       Cc         Bcc       Image: Support Section								
Subject:		RE: The Channel 42 New Oaks Lane Shoredale Warchestershire AB12 3CD							
Folder:		Matter History/Client Correspondence	× -						
Descripti	on:	Email to Client							
Edit + Format + Tools + Table +         HBL       Image: Formats + B I E E E E E E E E E E E E E E E E E E									
Seller:	J J Jone	s V2 Vendor vendor							
We are	Buyer: Second2 P2Surname We are pleased to confirm that we have now exchanged, with completion set for 01/01/2024.								
If you h Kind reg Osprey	ave any o jards, <b>Approa</b> e	queries, please do not hesitate to contact us. ch 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.

Send e-m	nail					□×
Û, Attach	Signa	ture	Template:	FWRCPI_FWRCP       High Importance:       Create message for clie         Estate Agent confirming exchange FWRCPI_FWRCP       Associated	ent: sociate:	
	From**:	suppor	t@pracctice	Estate agent confirming completion FWRCPI_FWRCP		-
-≡⊠ Send	To Cc			Estate Agent confirm enquiries raised with seller FWRCPI_FWRC		

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

New •	🔄 Send E-n	nail Reply Reply	rall Forward [ 🕽 📘 🛆 🖾 🛃 🔿						Item Details Security				
AVORITE	TYPE	CREATEDRATE	CREATED BY										
All •	٩	٩	٩						General Info				
	â	120098	Email to Client	o Client 27/12/2023 16:21:09 dan Ref Number 1200		Ref Number 120098							
*	Ð	120062	test	New     Send E-mail		0:36	100003		Client No 100003 (O'Wilson)				
*	Ð	120050	Cheque Requisition Slip - Fee Earner Bill	Reply	43	4:44	mattw		Natter No 1 (Purchase 6 Antield Road) Folder Path Matter History/Client Correspondence				
*	Ð	120049	Cheque Requisition Slip - Fee Earner Bill	Reply all Forward		1:46	mattw		Custom Type				
*	D	120030	Sent a text message to the number 0044777777	Edit Details		1:45	mattw		Web Enabled No				
*		119943	email for processed date (ClientRef:100003/1)	Delete		5:10	dan		Details Email to Client				
	P	119942	Specification form - Professional services work.	View Details	s ty	9:50	dan		Email Info				
+		119941	email for processed date	Subscribe to f	Notifications	9:47	dan	-	B Date 27-12-2023 16:21:09				
1		110027	Email test	Add Retenti	on Policy	0.26	Dao		To Daniel Hearne <support@practice.net></support@practice.net>				
		110026	Dassword raset successfully men	2 Change Ow	ner	7-91	dan		Subject RE: The Channel 42 New Oaks Lane Shoredale Warchestershire AB12 3CD				
		119920	resolution reset succession, may	O Refresh	00/11/0000 11	1.31	dan		Dear Sirs,				
*	10	119925	excel		29/11/2023 11	30.31	dan			н			
*	E	119924	Client care letter FW2911		29/11/2023 11:	33:28	dan		Property: The Channel 42 New Oaks Lane Shoredale Warchestershire	н			
*		119891	Password reset successfully.msg		28/11/2023 10	01:02	dan		AB12 3CD				
$^{*}$	â	119890	Sent e-mail (Subject: Email Regarding Case : Pu	rchase 6 Anfield R	28/11/2023 09:	59:44	dan		Seller: J J Jones V2 Vendor vendor	н			
*		119889	Two steps authentication code.msg	28/11/2023 09	59:07	dan		Buyer: Second2 P2Surname	н				
*	₽	119797	20 mb bis		22/11/2023 09:	40:22	100003		We are pleased to confirm that we have now exchanged, with completion set for 01/01/2024.	1			
*	Ð	119796	20 MB PDF		22/11/2023 09	38:40	100003		-				
Pa	oe 1 of	36 2 2 2	Show 20 Per page				Showing 1 - 20 of	703	If you have any queries, please do not hesitate to contact us.	Ŧ			