

Osprey Approach: Setting up SearchFlow Integration

This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=638>

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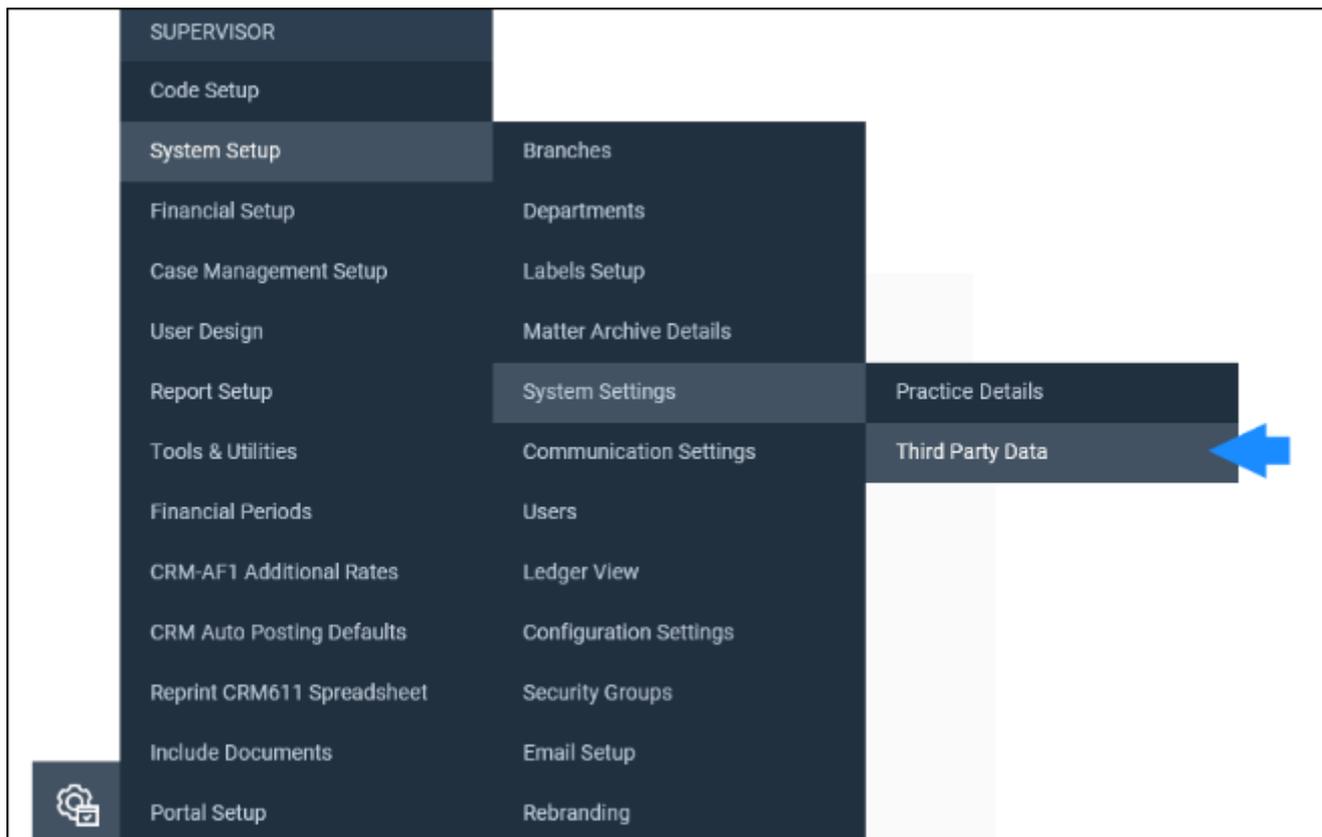


Osprey Approach offers integration with SearchFlow, allowing you to run SearchFlow searches directly from Osprey. This guide will take you through the options available

To submit SearchFlow searches through Osprey Approach, you will need an account with SearchFlow, along with your firm's SearchFlow username and password.

Entering your credentials

Navigate to Supervisor > System Setup > System Settings and click on Third Party Data.



In the Search area in the top right of the screen, type SEARCHFLOW to perform a search.

CODE	USERNAME	URL	PRACCTICE ID	COMPANY NAME	THIRD PARTY ID	THIRD PARTY DESCI	THIRD PARTY VERSION
SEARCHFLOW_XIF_API	practicexif	https://sbx-searchflow.azure-api.net/sbx/xif	DEFAULT	Searchflow	35f034d5af9c46aa9b	API key	XIFv2.0
SEARCHFLOW_XIF_NOTIFICATION	username	https://test.ospreyapproach.com/searchflow/services/XIFResponse.ashx	DEFAULT	Searchflow	35f034d5af9c46aa9b	API key	XIFv2.0

The two areas available in which to input data are:

SEARCHFLOW_XIF_API

SEARCHFLOW_XIF_NOTICATION

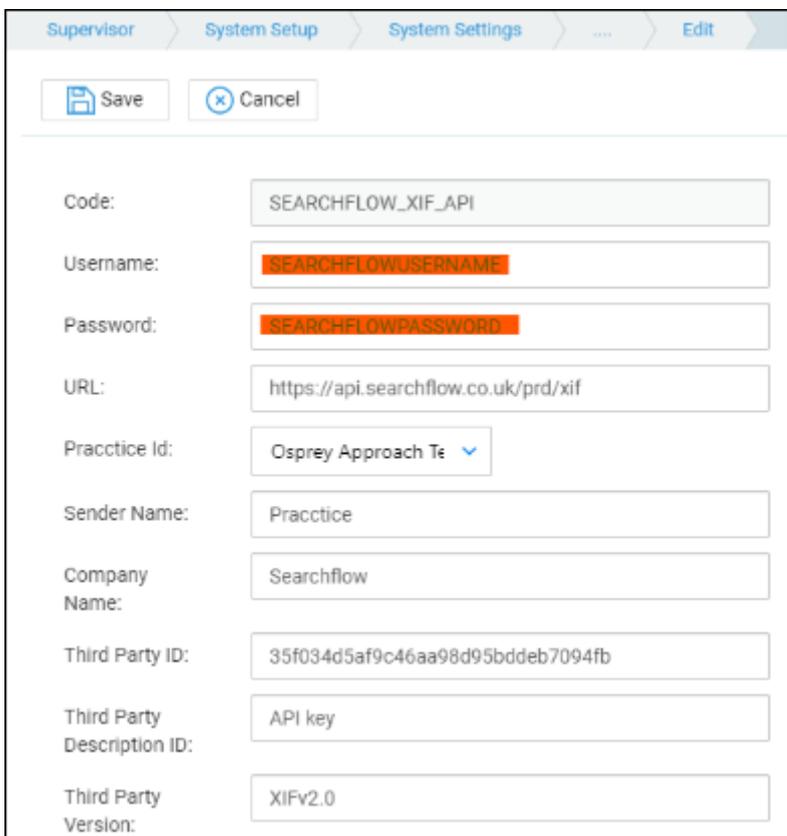
SEARCHFLOW_XIF_API

Right click on SEARCHFLOW_XIF_API and select Edit.

This is the area in which you need to input your username and password.

Enter your Searchflow username and password.

The URL should show: <https://api.searchflow.co.uk/prd/xif>



The screenshot shows a configuration form for SEARCHFLOW_XIF_API. At the top, there are navigation tabs: Supervisor, System Setup, System Settings, and Edit. Below the tabs are 'Save' and 'Cancel' buttons. The form contains the following fields:

Code:	SEARCHFLOW_XIF_API
Username:	SEARCHFLOW_USERNAME
Password:	SEARCHFLOWPASSWORD
URL:	https://api.searchflow.co.uk/prd/xif
Pracctice Id:	Osprey Approach Te
Sender Name:	Pracctice
Company Name:	Searchflow
Third Party ID:	35f034d5af9c46aa98d95bddeb7094fb
Third Party Description ID:	API key
Third Party Version:	XIFv2.0

Once all of the data has been added, select the Save button at the top of the screen.

SEARCHFLOW_XIF_Notification

Return to the Third Party Screen, and right click on SEARCHFLOW_XIF_Notification and select Edit.

On this screen, you **only** need to enter your Osprey URL.

Amend the URL to display as follows: <https://yourcompanyname.ospreyapproach.com/searchflow/services/XIFResponse.ashx>

Supervisor > System Setup > System Settings > > Edit

Save Cancel

Code:	SEARCHFLOW_XIF_NOTIFICATION
Username:	username
Password:	password
URL:	https://test.ospreyapproach.com/main/services/XIFRe
Pracctice Id:	Osprey Approach Te ▼
Sender Name:	Pracctice
Company Name:	Searchflow
Third Party ID:	35f034d5af9c46aa98d95bddeb7094fb
Third Party Description ID:	API key
Third Party Version:	XIFv2.0

Once you have edited both SEARCHFLOW_XIF_API and SEARCHFLOW_XIF_NOTIFICATION you will then be able to perform Searchflow searches through Osprey.