Osprey Approach: Setting up InfoTrack Integration

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Feb 18th, 2025

The latest version is always online at
https://support.ospreyapproach.com/?p=71189

The new **InfoTrack Disbursement Feature** is available **exclusively in Osprey v1.5**. If you're not yet on **v1.5** , you'll need to upgrade to start using this powerful integration.

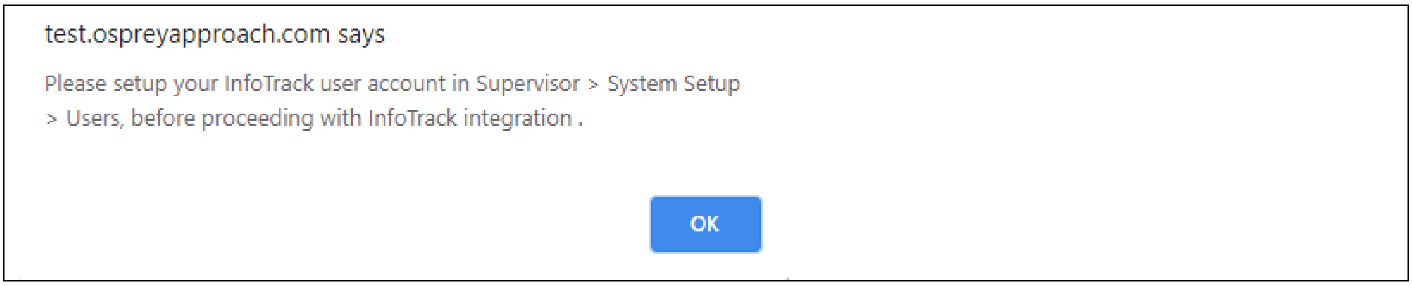
To activate the InfoTrack integration and begin using automatic disbursement posting, please contact your **Client Success Manager** or reach out to **Support** to schedule the update. Once you're on v1.5, you'll be able to streamline your financial workflow and unlock all the benefits this feature has to offer.

This guide will go through setting up the InfoTrack integration in Osprey

Osprey Approach offers integration with InfoTrack, allowing you to run InfoTrack searches. To use these, a supervisor level user will need to ensure that the integration has been set up.

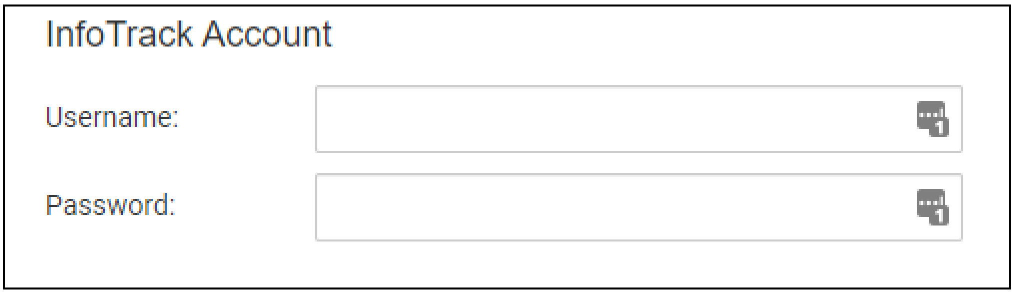
Setting up credentials

If you attempt to use InfoTrack without having your InfoTrack credentials set, a warning will appear.



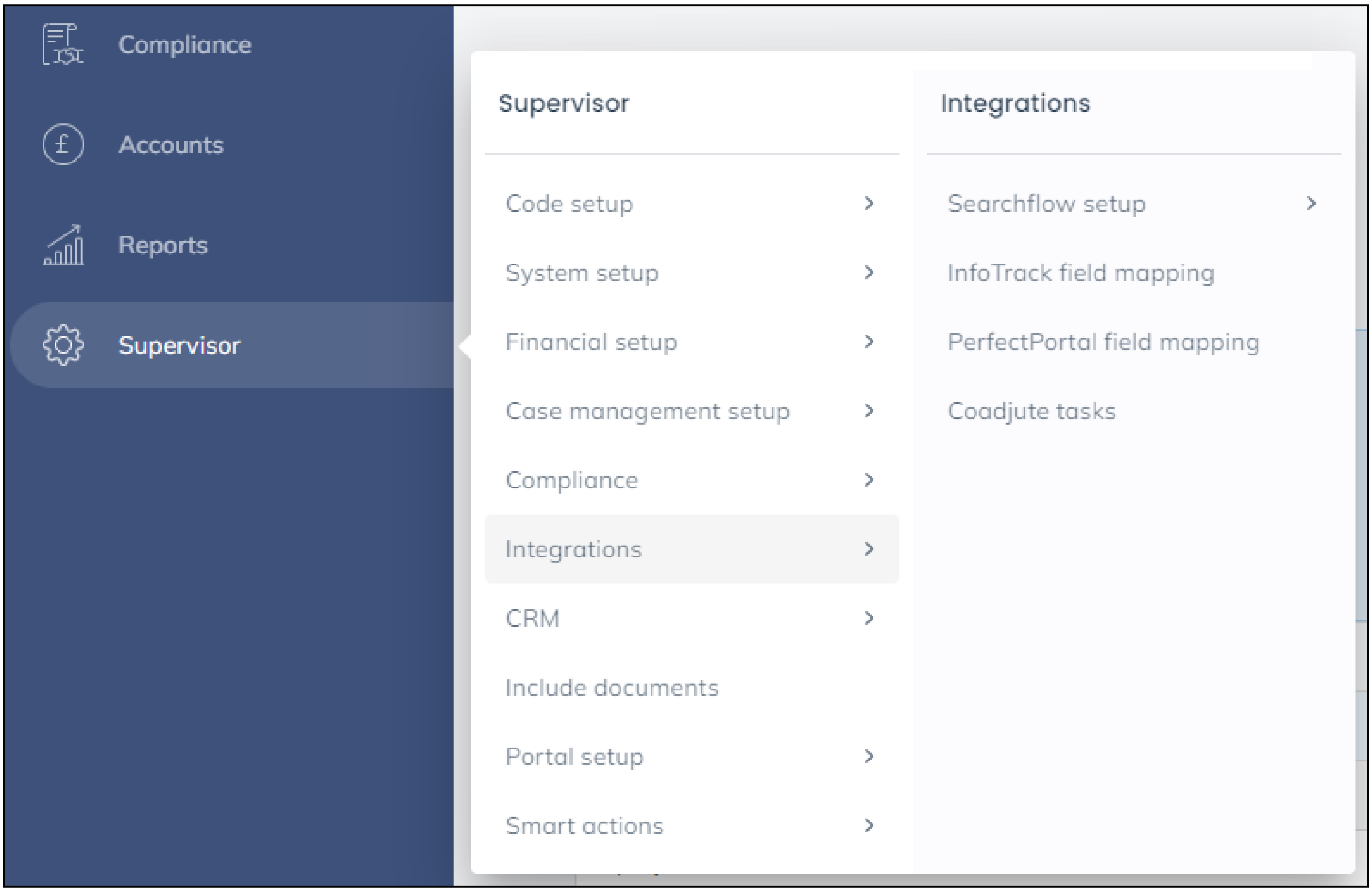
The credentials can be set by going to Supervisor > System Setup > Users, right click the user in question and click Edit.

Scrolling to the bottom of the page you can fill in the InfoTrack credentials and then click Save at the top.

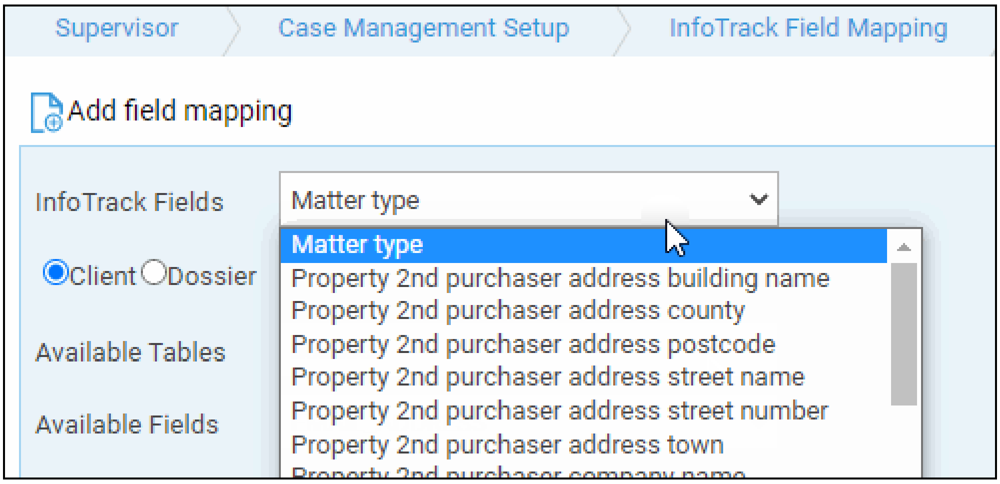


InfoTrack mapping

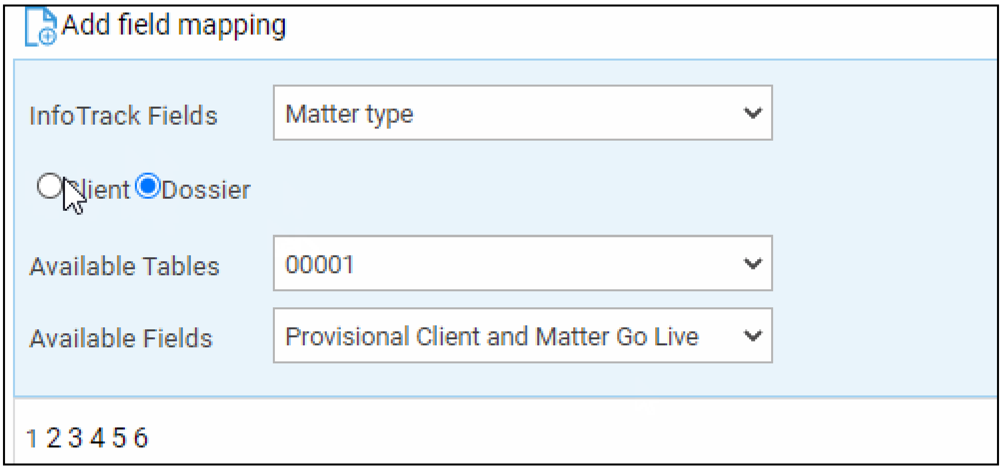
You can map the Osprey fields to the fields of InfoTrack, automatically populating the InfoTrack screen. Select Supervisor > Integrations > InfoTrack Field Mapping



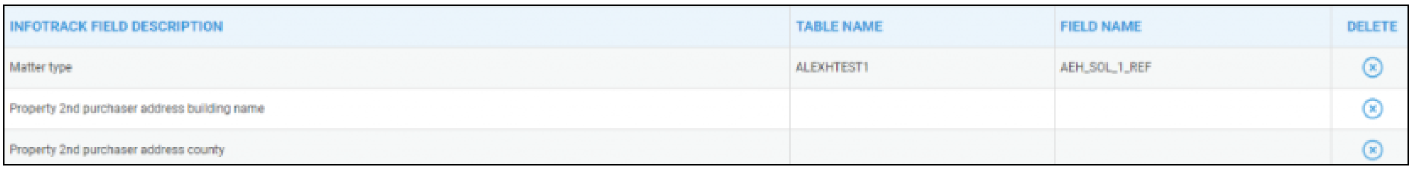
Select the InfoTrack Field.



Choose either Client or Dossier and then select the appropriate Available Table and Field to map to.



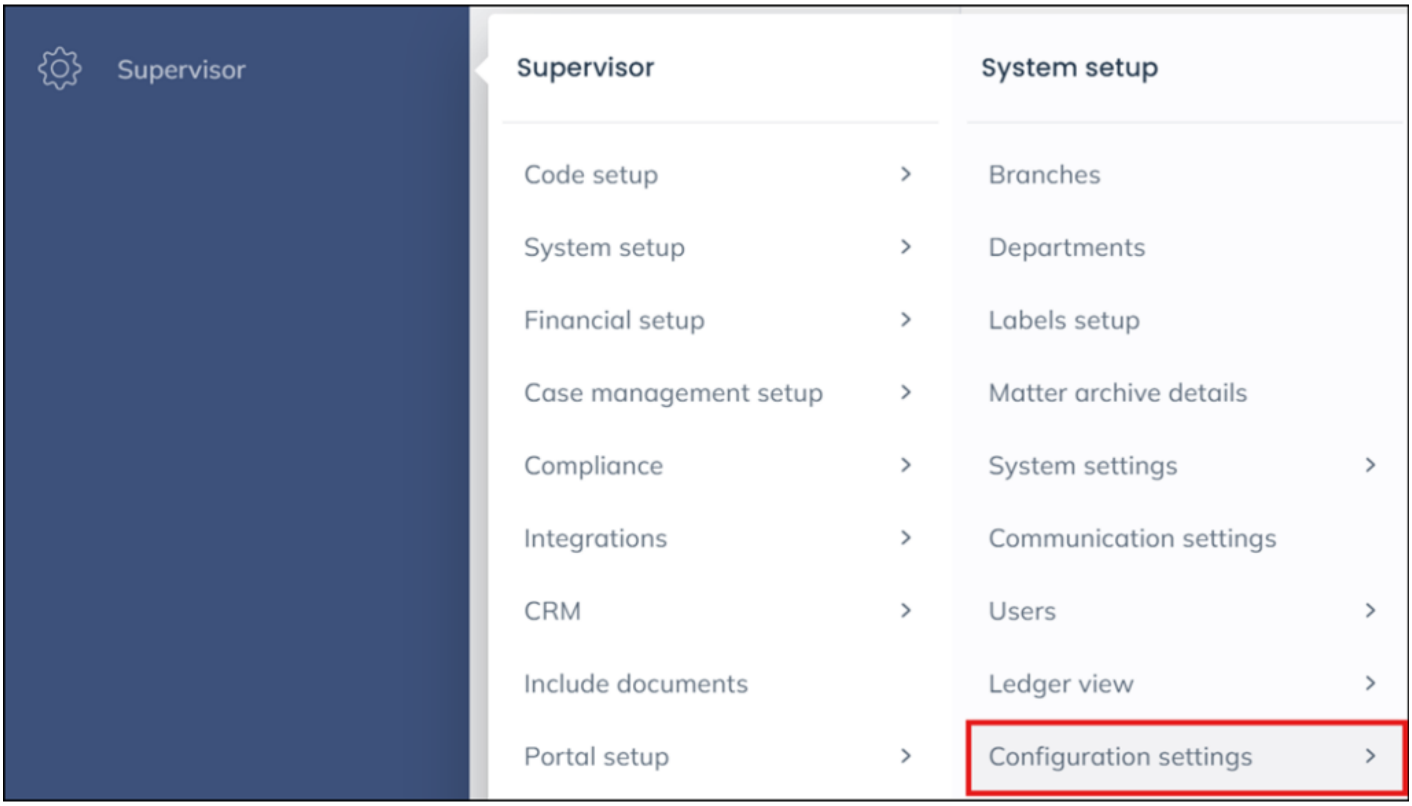
Click Add field Mapping. The mapping will appear underneath, repeat the process with any further fields.



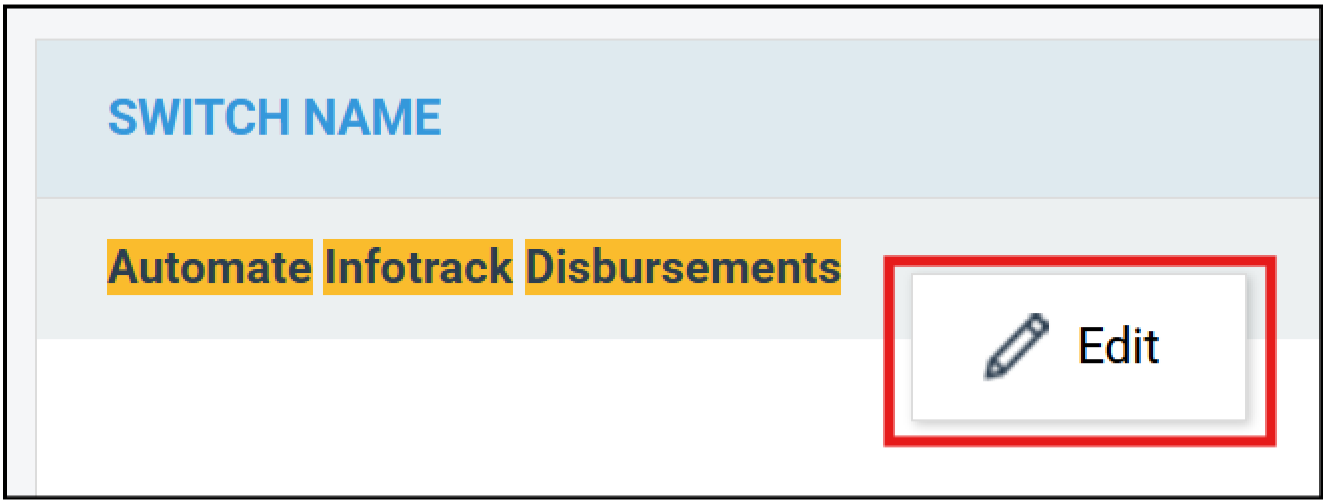
INFOTRACK FIELD DESCRIPTION	TABLE NAME	FIELD NAME	DELETE
Matter type	ALEXHTEST1	AEH_SOL_1_REF	
Property 2nd purchaser address building name			
Property 2nd purchaser address county			

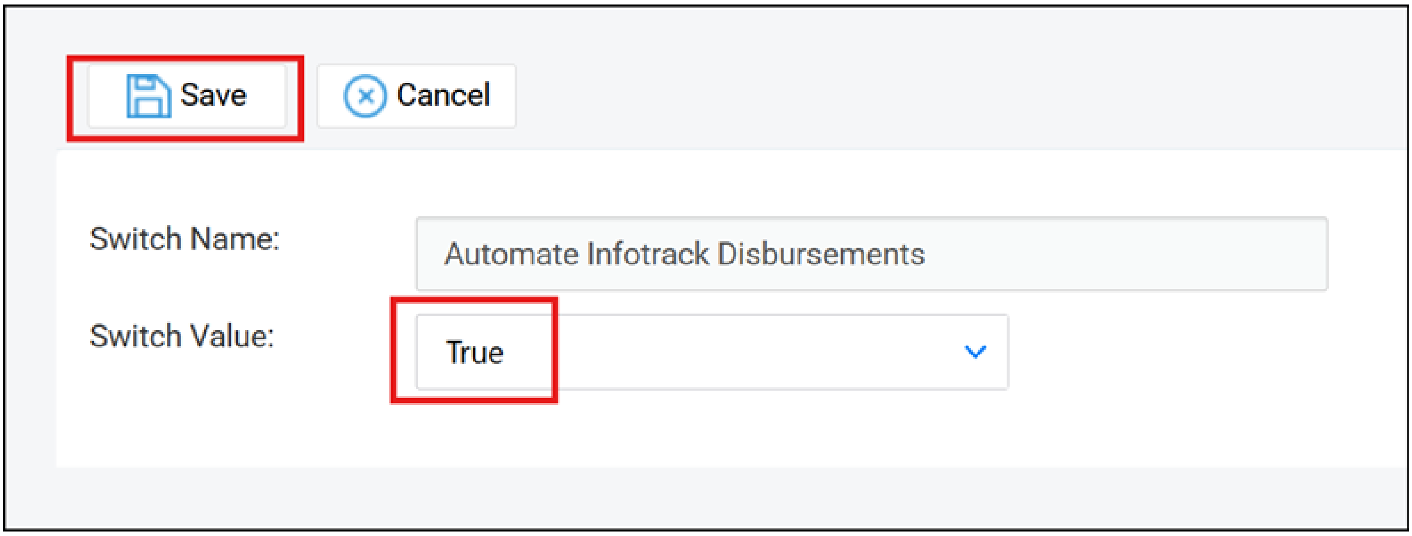
Auto posting disbursements

To allow Osprey to automatically post the costs of the searches as office bank payments go to Supervisor > System Setup > Configuration Settings.



Search for the setting Automate InfoTrack Disbursements, right click it and select Edit to set it to True and click Save.


SWITCH NAME
Automate Infotrack Disbursements
Edit


Save
Cancel
Switch Name:
Automate Infotrack Disbursements
Switch Value:
True