



Osprey Approach: Setting up InfoTrack Integration

This help guide was last updated on
Jul 10th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=29963>

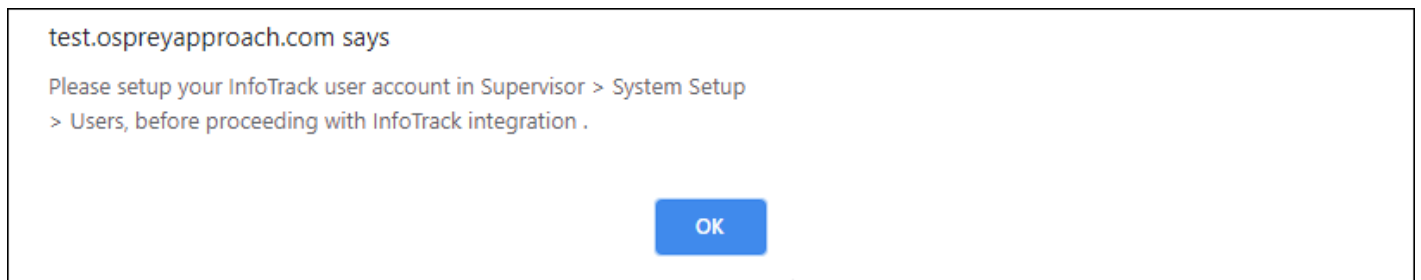


This guide will go through setting up the InfoTrack integration in Osprey

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.

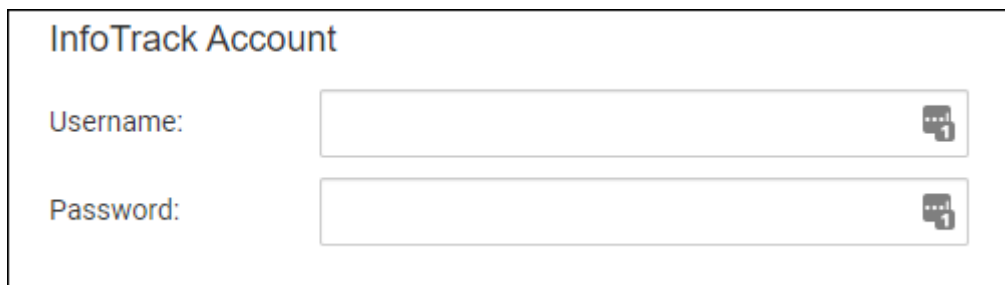
Setting up credentials

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



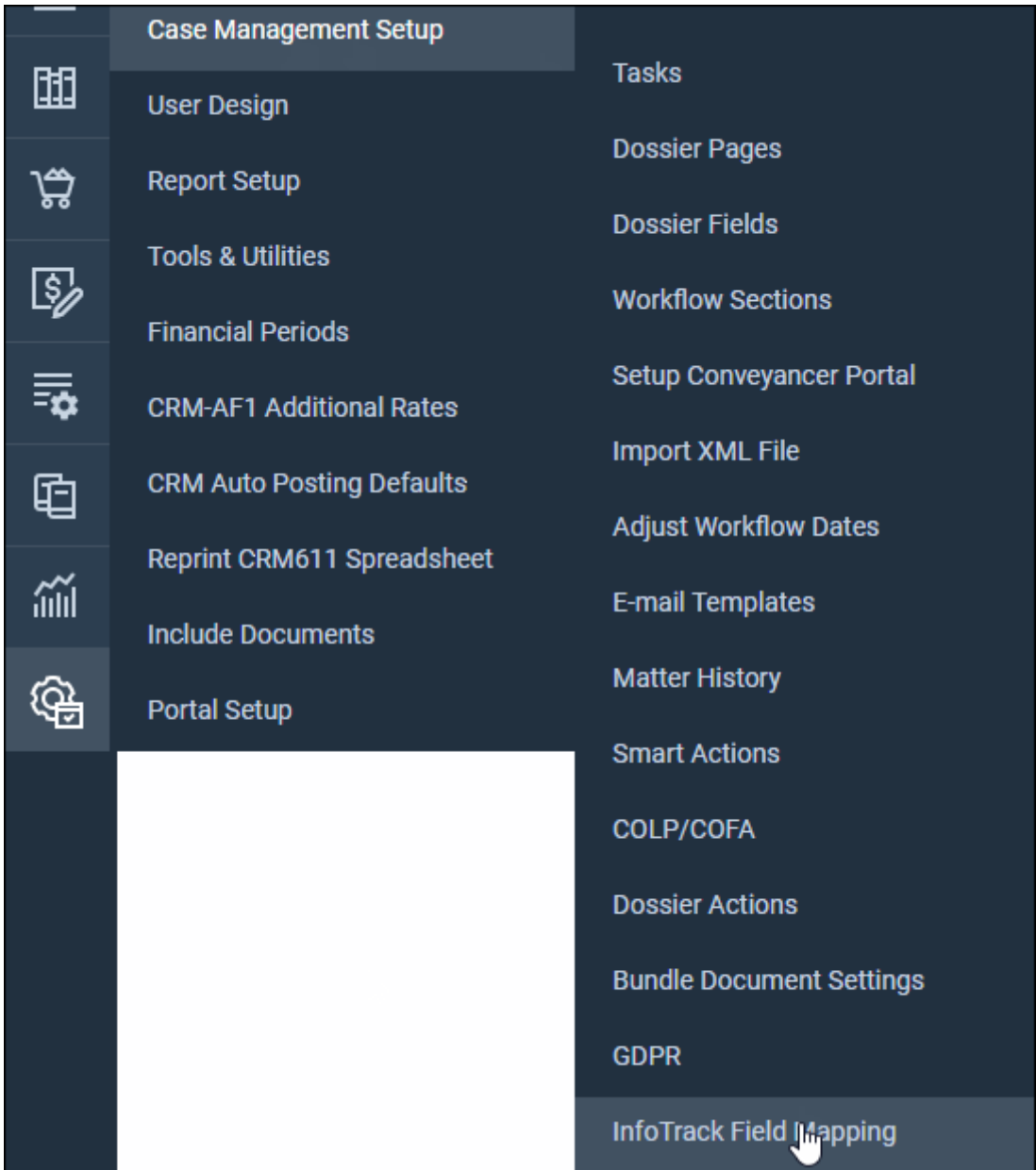
The credentials can be set by going to Supervisor > System Setup > Users, right click the user in question and click Edit.

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

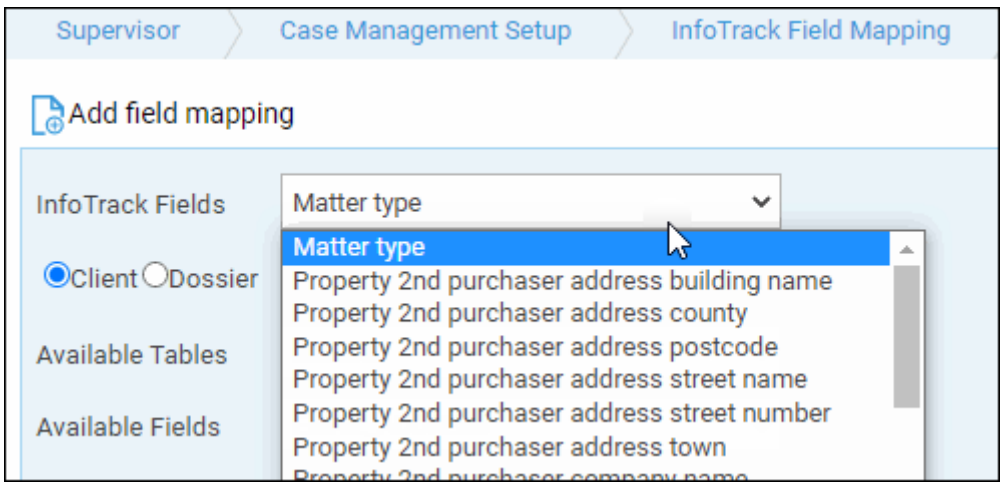
A screenshot of a form titled "InfoTrack Account". It contains two input fields: "Username:" and "Password:". Each field has a small icon of a speech bubble with a question mark to its right, indicating a tooltip or help text is available. The form is enclosed in a thin black border.

InfoTrack mapping

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



Select the InfoTrack Field.



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

Add field mapping

InfoTrack Fields: Matter type

Client Dossier

Available Tables: 00001

Available Fields: Provisional Client and Matter Go Live

1 2 3 4 5 6

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			