Osprey Approach: Setting up InfoTrack Integration

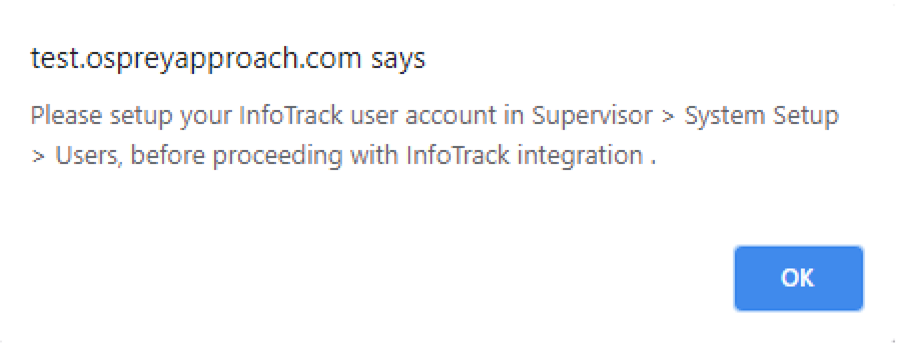
This help guide was last updated on
Dec 20th, 2023

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

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.

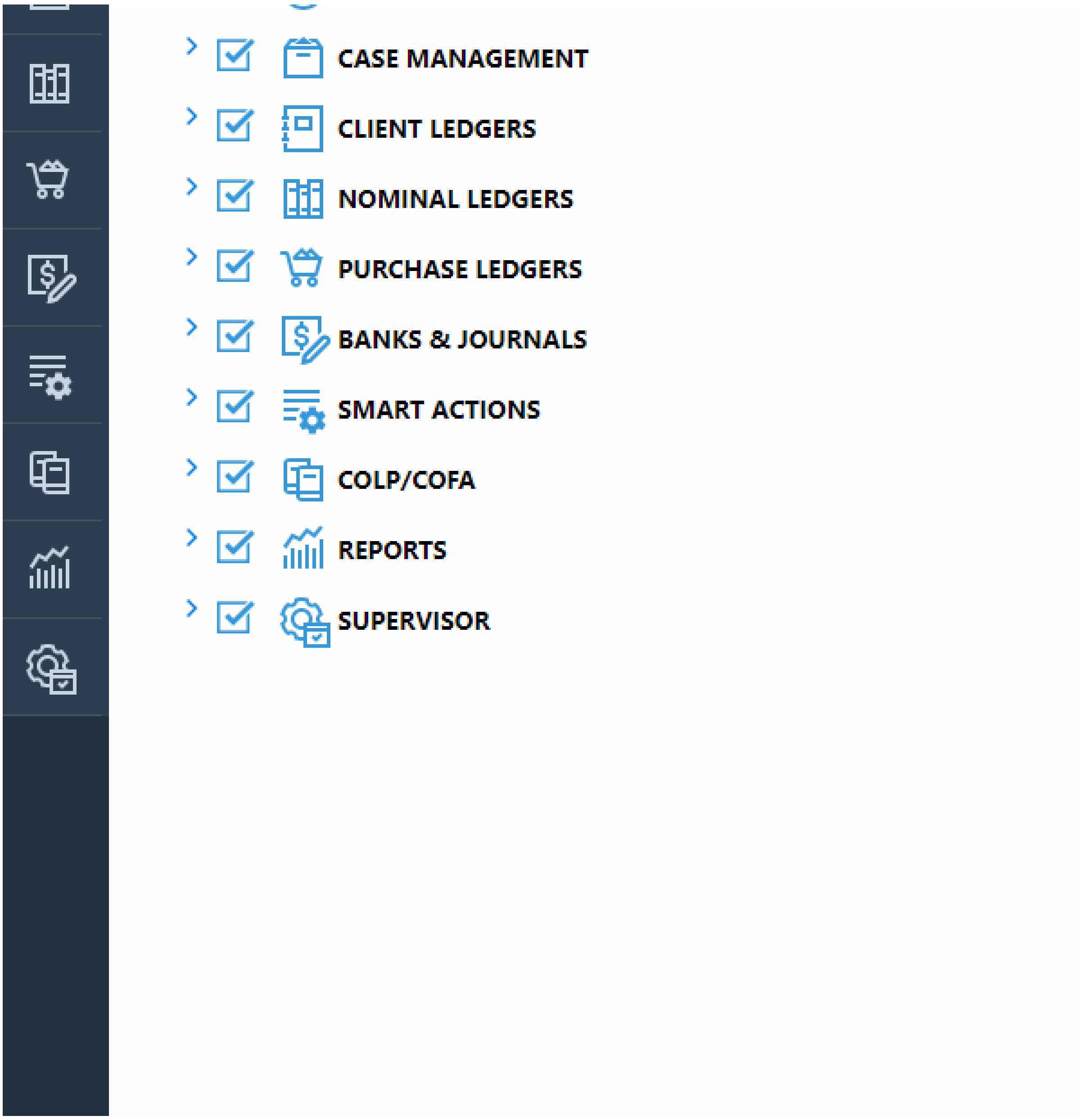


The credentials can be set by going to Supervisor > System Setup > Users, right click the user in question and click Edit.

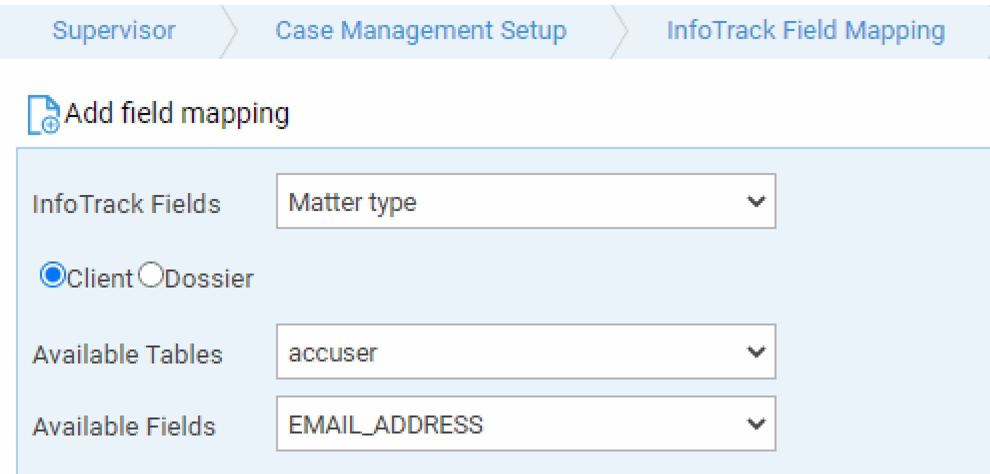
Scrolling to the bottom of the page you can fill in the InfoTrack credentials and then click Save at the top.

InfoTrack Mapping

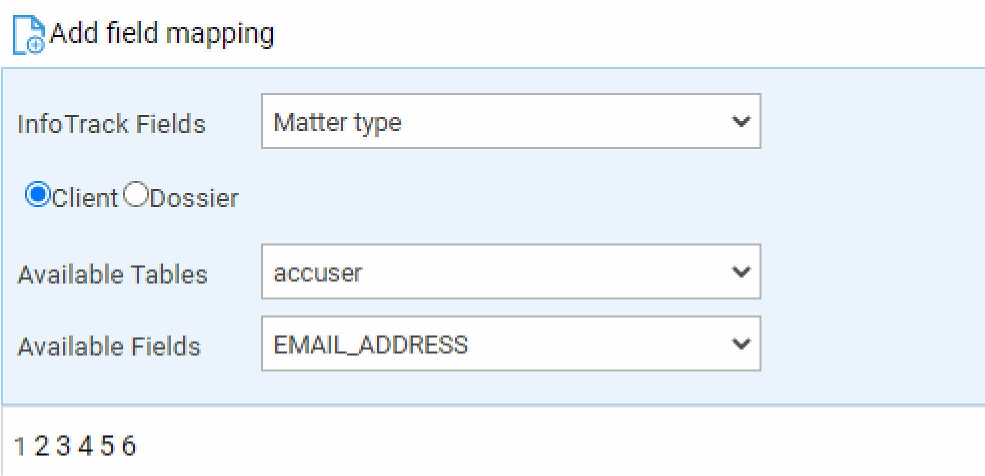
You can map the Osprey fields to the fields of InfoTrack, automatically populating the InfoTrack screen. Select Supervisor > Case Management Setup > InfoTrack Field Mapping



Select the InfoTrack Field.



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



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			⊗