

# 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

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

test.ospreyapproach.com says

Please setup your InfoTrack user account in Supervisor > System Setup > Users, before proceeding with InfoTrack integration .

OK

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 Account

Username:



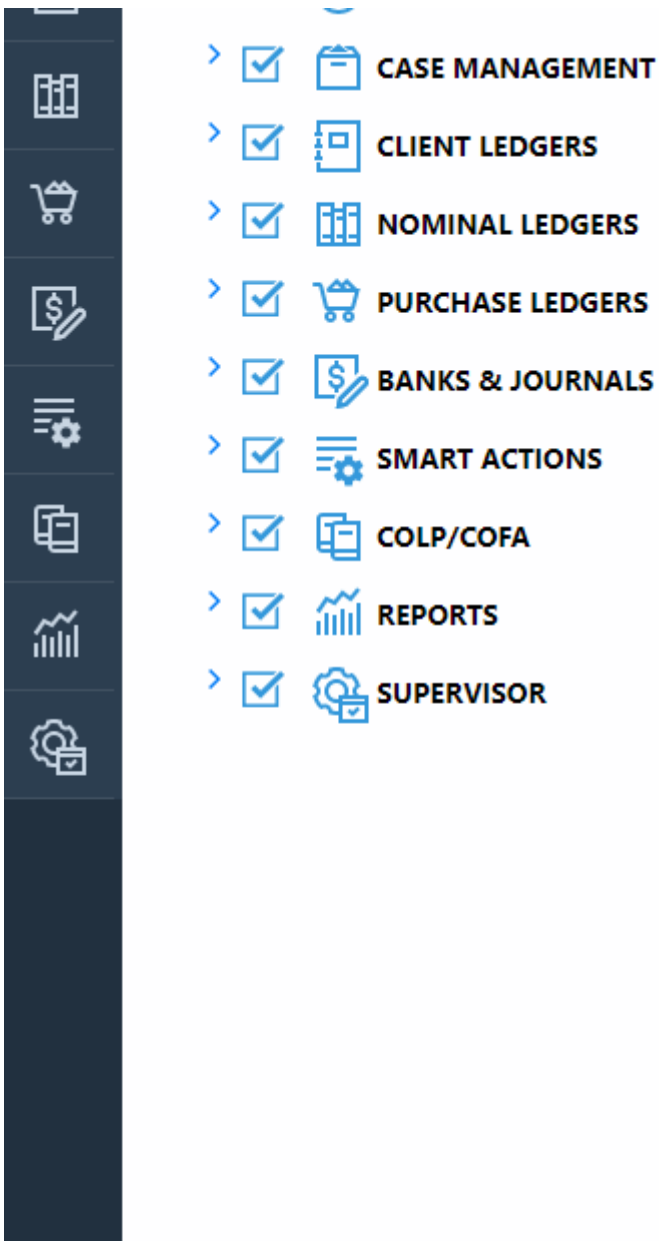
Password:



## InfoTrack Mapping

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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.

Supervisor > Case Management Setup > InfoTrack Field Mapping

Add field mapping

InfoTrack Fields	Matter type	▼
<input checked="" type="radio"/> Client <input type="radio"/> Dossier		
Available Tables	accuser	▼
Available Fields	EMAIL_ADDRESS	▼

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

## Add field mapping

InfoTrack Fields

Client  Dossier

Available Tables

Available Fields

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			