

Osprey Approach: Setting up TextAnywhere Integration

This help guide was last updated on
Jul 1st, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=52690>

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This guide will show you how to use TextAnywhere through Osprey via our integration

Creating a TextAnywhere account

To create an TextAnywhere account, please follow the link: <https://www.textanywhere.com/action/free-trial/>

Existing customers

If you have created an account before December 2022, you will also need to create a new account with the link above.

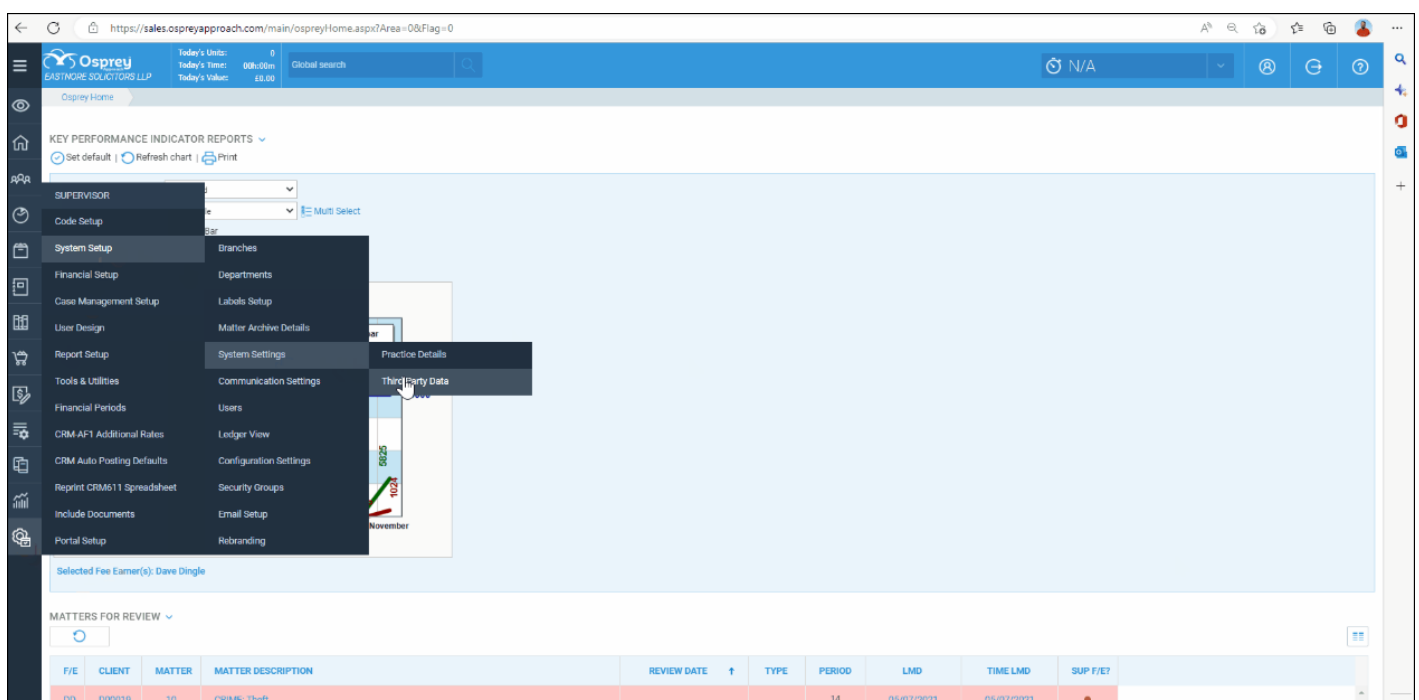
With the new account created, send an email to customer@textanywhere.com, asking to transfer your credits from your old account to your new account.

You will need to provide them your old account reference number, and the email address of your new account, and request that Trial Mode is switched off in your new account.

Entering the credentials

To enter your TextAnywhere credentials, you will need to go to Supervisor > System Setup > System Settings > Third Party Data.

Locate TextAnywhere, click Edit and enter your Textanywhere Username (Email address) and Password.



The screenshot shows the Osprey software interface. The top navigation bar includes the Osprey logo, user information (Today's Units: 0, Today's Items: 00h:00m, Today's Value: £9.00), and a search bar. The main content area displays a 'KEY PERFORMANCE INDICATOR REPORTS' section with a chart and a 'MATTERS FOR REVIEW' table. A navigation menu is open, showing the path: Supervisor > System Setup > System Settings > Third Party Data. The 'Third Party Data' option is highlighted, and a mouse cursor is pointing at it. The 'MATTERS FOR REVIEW' table at the bottom has the following data:

F/E	CLIENT	MATTER	MATTER DESCRIPTION	REVIEW DATE	TYPE	PERIOD	LMD	TIME LMD	SUP F/E?
DD	D00019	10	CRIME: Theft			14	05/07/2021	05/07/2021	

Setting up text templates

Not only can you send ad-hoc SMS messages, users can also benefit from Text Templates.

To create, go to Supervisor > Code Setup > Standard Text Description and then Add Standard Text Description.

Select Standard Text Message from the Context Area dropdown, and enter any text in the bottom box. Click Save.

Once saved, you will have an option to link mergefields, allowing you to pull client-relevant information.

The screenshot shows the 'Link Merge Fields' configuration screen in the Osprey CRM. The page title is 'Standard Text Description' and the table is 'LINKNAME'. The 'Field Type' is 'Client/Master/CCDS/Doosler/Formula'. The table has two columns: 'DESCRIPTION' and 'LINKED?'. The 'LINKED?' column contains checkboxes for each row. The 'FORENAME_1' row has a checked checkbox.

DESCRIPTION	LINKED?
ADDRESS_5	<input type="checkbox"/>
AREA_2	<input type="checkbox"/>
AREA_3	<input type="checkbox"/>
AREA_4	<input type="checkbox"/>
AREA_5	<input type="checkbox"/>
COUNTRY_2	<input type="checkbox"/>
COUNTRY_3	<input type="checkbox"/>
COUNTRY_4	<input type="checkbox"/>
COUNTRY_5	<input type="checkbox"/>
EMAIL_ADDRESS_1	<input type="checkbox"/>
EMAIL_ADDRESS_2	<input type="checkbox"/>
EMAIL_ADDRESS_3	<input type="checkbox"/>
EMAIL_ADDRESS_4	<input type="checkbox"/>
EMAIL_ADDRESS_5	<input type="checkbox"/>
FORENAME_1	<input checked="" type="checkbox"/>