

# 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>



# 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.

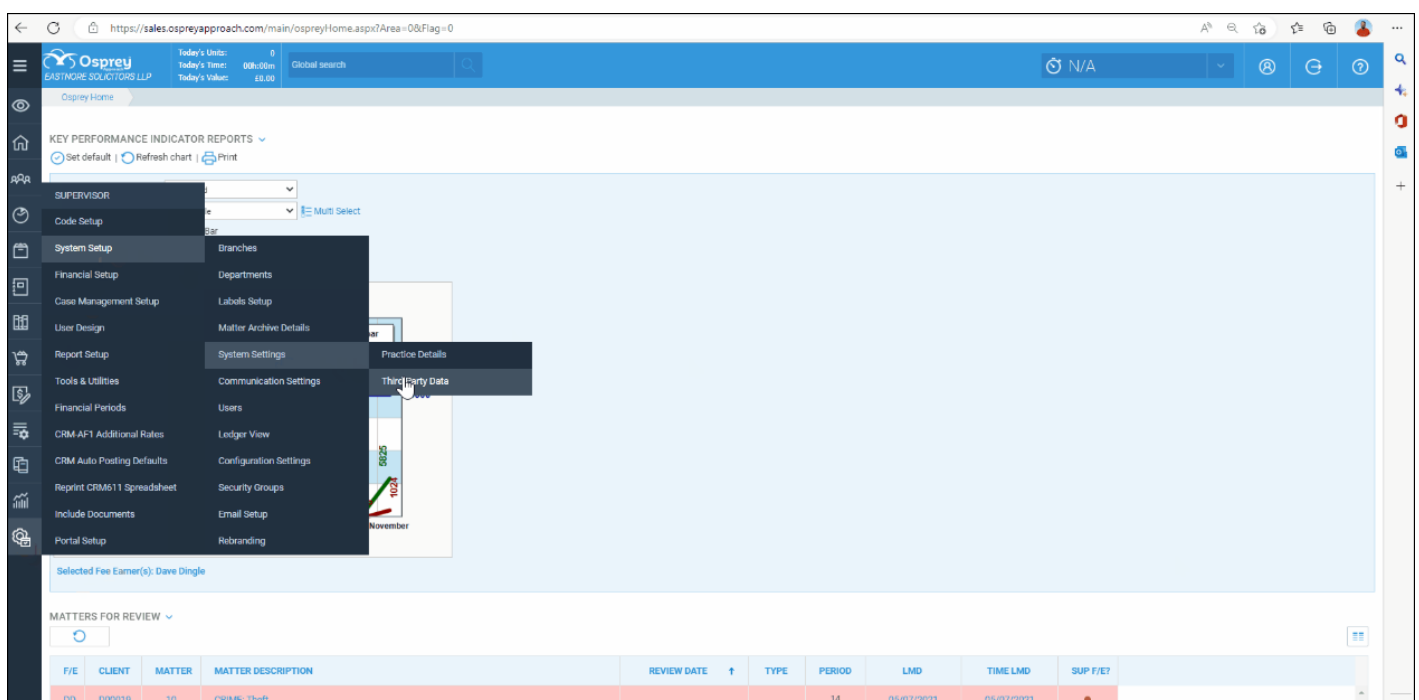
With the new account created, send an email to [customer@textanywhere.com](mailto:customer@textanywhere.com), asking to transfer your credits from your old account to your new account.

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 navigation menu on the left with the following items: SUPERVISOR, Code Setup, System Setup, Financial Setup, Case Management Setup, User Design, Report Setup, Tools & Utilities, Financial Periods, CRM AFT Additional Rates, CRM Auto Posting Defaults, Reprint CRM511 Spreadsheet, Include Documents, Portal Setup, Branches, Departments, Labels Setup, Matter Archive Details, System Settings, Communication Settings, Users, Ledger View, Configuration Settings, Security Groups, Email Setup, and Rebranding. The 'System Settings' menu item is highlighted, and a sub-menu is open showing 'Practice Details' and 'Third Party Data'. The 'Third Party Data' menu item is also highlighted. Below the navigation menu, there is a section for 'Selected Fee Eamer(s): Dave Dingle' and a 'MATTERS FOR REVIEW' section with a table. The table has columns for F/E, CLIENT, MATTER, MATTER DESCRIPTION, REVIEW DATE, TYPE, PERIOD, LMD, TIME LMD, and SUP F/E7. The first row of the table is highlighted in red and contains the following data: DD, D00019, 10, CRIME: Theft, REVIEW DATE, TYPE, PERIOD, LMD, TIME LMD, SUP F/E7.

F/E	CLIENT	MATTER	MATTER DESCRIPTION	REVIEW DATE	TYPE	PERIOD	LMD	TIME LMD	SUP F/E7
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 page in the Osprey CRM. The page title is 'Standard Text Description' and the breadcrumb is 'Supervisor > Code Setup > Standard Text Description > Link Merge Fields'. The 'Field Type' is set to 'Client/Master/CCDS/Doosler/Formula' and the 'Table' is 'LINKNAME'. A table lists various fields with checkboxes in the 'LINKED?' column. The 'FORENAME\_1' field is checked.

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"/>