

# Osprey Approach: Send an SMS Text Message

This help guide was last updated on  
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The latest version is always online at  
<https://support.ospreyapproach.com/?p=52840>

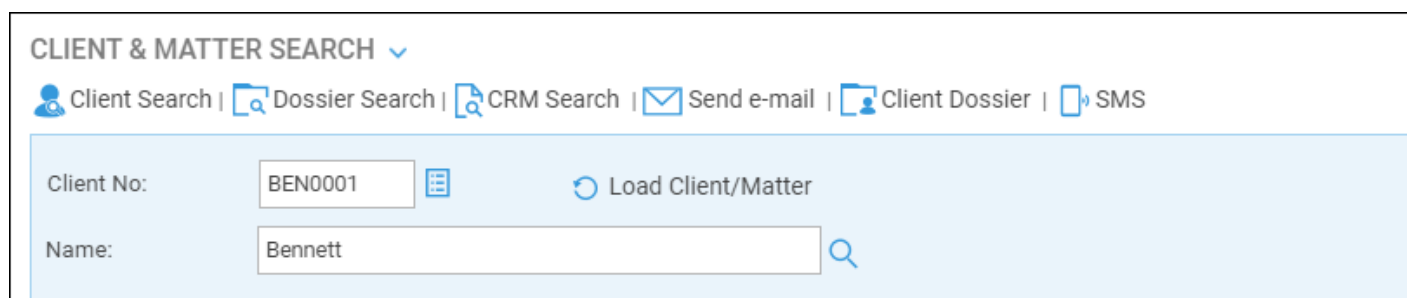


Within Osprey, there is the ability to send SMS text messages straight to clients. Follow the steps in this guide in order to send texts to your clients.

## Step-by-step guide on how to send an SMS text message to your client from Osprey

### How to send a SMS text message

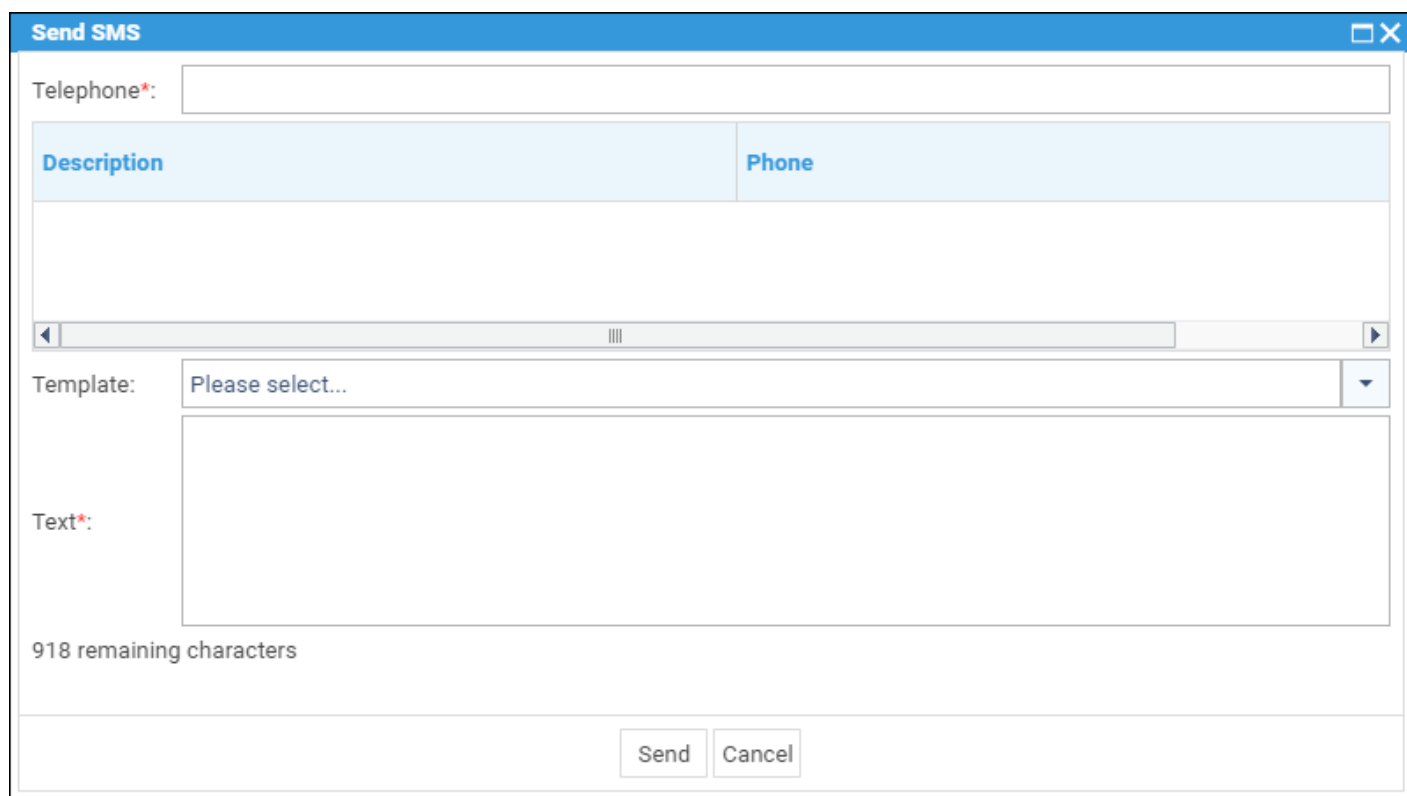
Navigate to Clients & Matters > Clients. At the top of the screen there is an 'SMS' button



The screenshot shows the 'CLIENT & MATTER SEARCH' section of the Osprey interface. At the top, there is a navigation bar with icons and labels for 'Client Search', 'Dossier Search', 'CRM Search', 'Send e-mail', 'Client Dossier', and 'SMS'. Below this, there are two search fields: 'Client No:' with the value 'BEN0001' and a 'Load Client/Matter' button, and 'Name:' with the value 'Bennett' and a search icon. The interface is light blue with white text and icons.

Once you have selected the 'SMS' button, a pop up box will appear where the number may be automatically generated from the information stored within the client details. If the number is not automatically generated, you can manually enter the number into the box.

You can then select a template from the drop-down menu. Once you are happy with the message, click 'Send'.



The screenshot shows the 'Send SMS' pop-up box. It has a blue header with the title 'Send SMS' and a close button. Below the header, there is a 'Telephone\*' field. Underneath, there is a table with two columns: 'Description' and 'Phone'. Below the table, there is a 'Template:' dropdown menu with the text 'Please select...'. Below the dropdown, there is a 'Text\*' field. At the bottom left, it says '918 remaining characters'. At the bottom right, there are 'Send' and 'Cancel' buttons. The interface is light blue with white text and icons.