Osprey Approach: Send an SMS Text Message

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The latest version is always online at
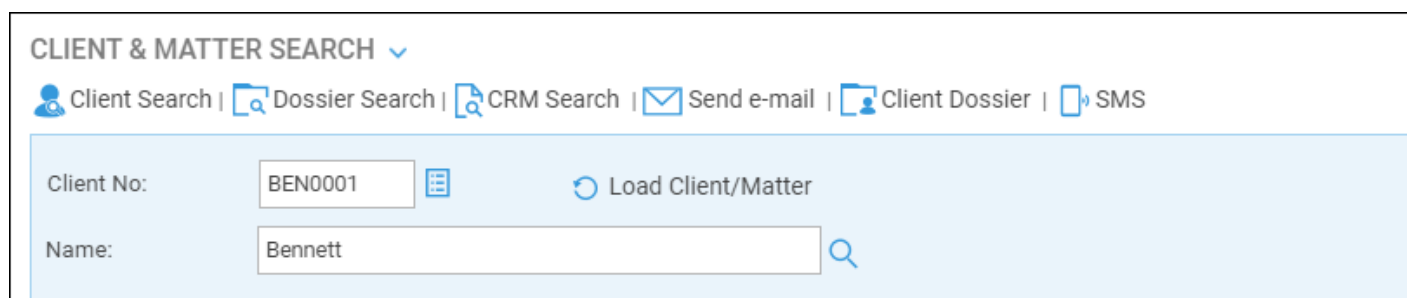https://support.ospreyapproach.com/?p=52840

Osprey
Approach™

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 form Osprey
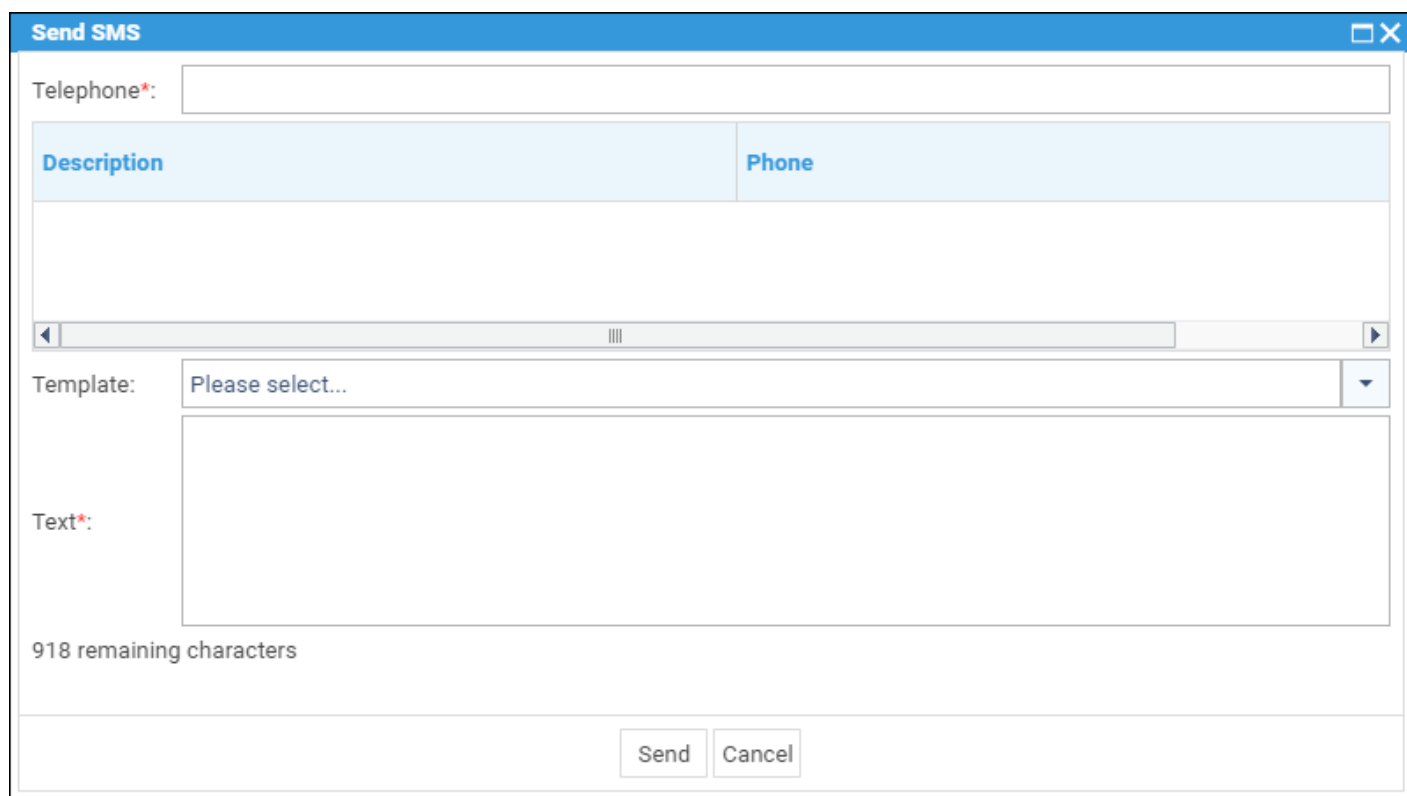
How to send a SMS text message

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

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'.