

Osprey Approach: Using The Mobile Portal App

This help guide was last updated on
Apr 16th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=52644>

[Click here for a printer-friendly version](#)

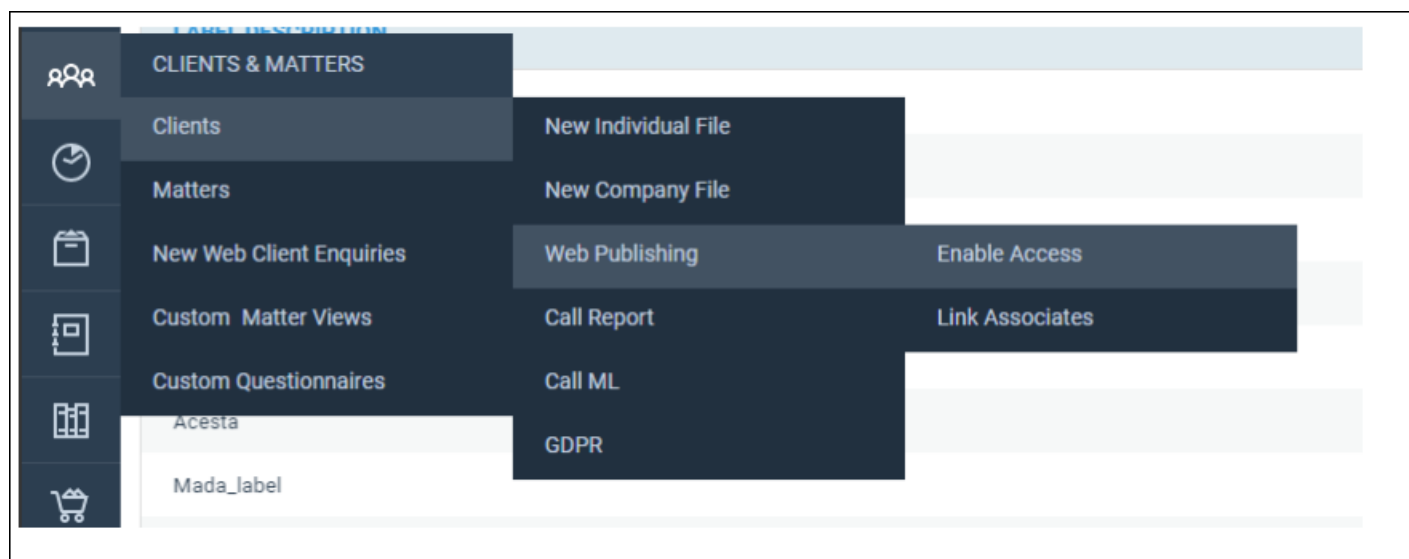



Getting the Mobile Portal App


The Mobile app is the mobile version of the web portal, to get the mobile app you would need to get in touch with the Support team


Making the Client Web enabled


To Create Credentials for the Client you then go into Client and matter area, web publishing, enable access, then click save. The client will then get an email attaching the log in details for the mobile portal.



 Save

 Cancel

 Delete

 This facility is to allow your clients to view their details via the internet.
A default password will be generated to allow your clients to log in.

Client No:

00004

Client Email:

adam@pracctice.net

Client Security Level:

Client

Generated Name:

Memorable Data:

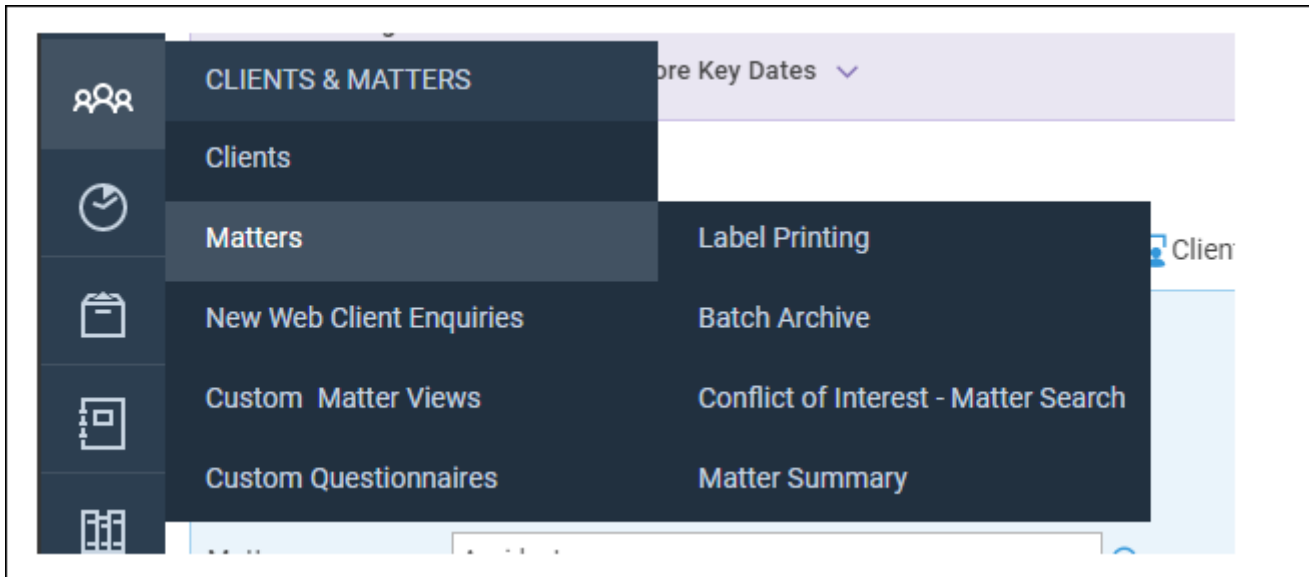
AQAAAANCMnd8BFdERjHoAwE/CI+sBAAAA

Reset Password:

☐

Making the Matter Web Enabled

To make the matter web enabled you will go to client/matter area, matter and then click the Publish tick box.


A screenshot of a 'Matter' form in a software application. The form contains various fields for client and matter information. A yellow circle highlights the 'Publish' checkbox, which is currently unchecked. A mouse cursor is pointing at the checkbox. The form fields include:
Client No: P00052
Matter No: 1
Matter Description: Default Matter
Prospect matter: ☐
Branch: 1: Malvern
Dept: 1: General
Fee Earner: Alex Hiscutt
Supervising F/E: (None)
Work Type: Clinical Negligence - FW
Private Or La: Private
Remuneration Type: Standard Rate (£180)
Debtor Limit: 0.00
Disbursements Limit: 0.00
WIP Limit: 0.00
Date Opened: 20/12/2022
Date Completed:
Date Archived:
Review Date:
Review Type: (None)
Review Period: 0
Publish: ☐
Email:
☒ Load Default Workflow
☒ Create Label?

Using the Mobile App


The Client will have the Log in details so will log in using the details provided.


you can also log in as an associate.

18+



Log in as ☐ Client ☒ Associate





Login

☐ Remember me

By logging in you accept our [terms & conditions](#)



Log in as ☒ Client ☐ Associate



Client ID



Email



Password

Login



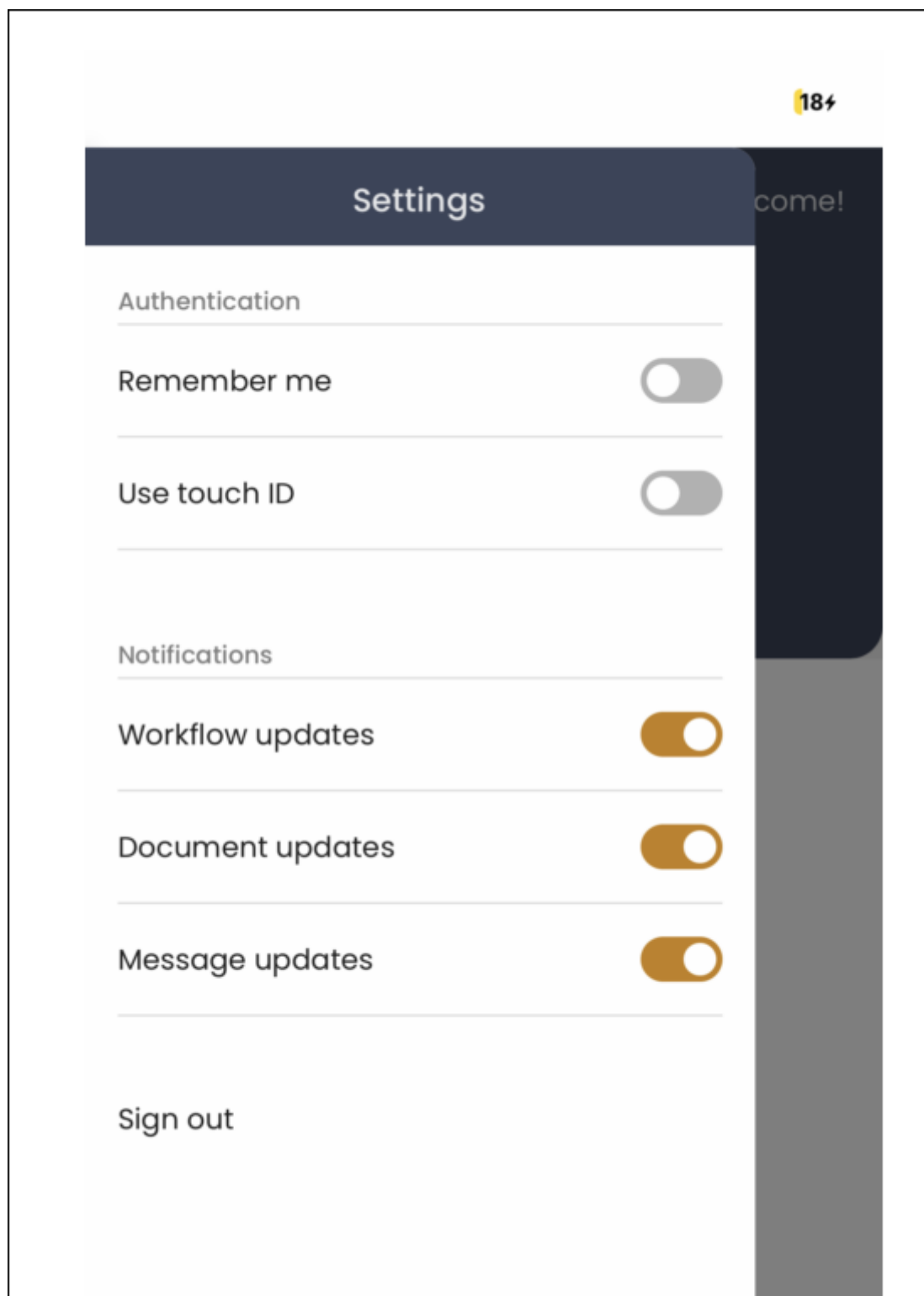
Remember me

By logging in you accept our
[terms & conditions](#)

Notifications within the app

The client can receive Notifications within the app, this can be Workflow updates, Document Updates and Message Updates. These are managed by hamburger menu icon on the top left corner of the screen. In that screen you can enable Remember me and also Touch ID which works for Touch and Face ID when

logging in.



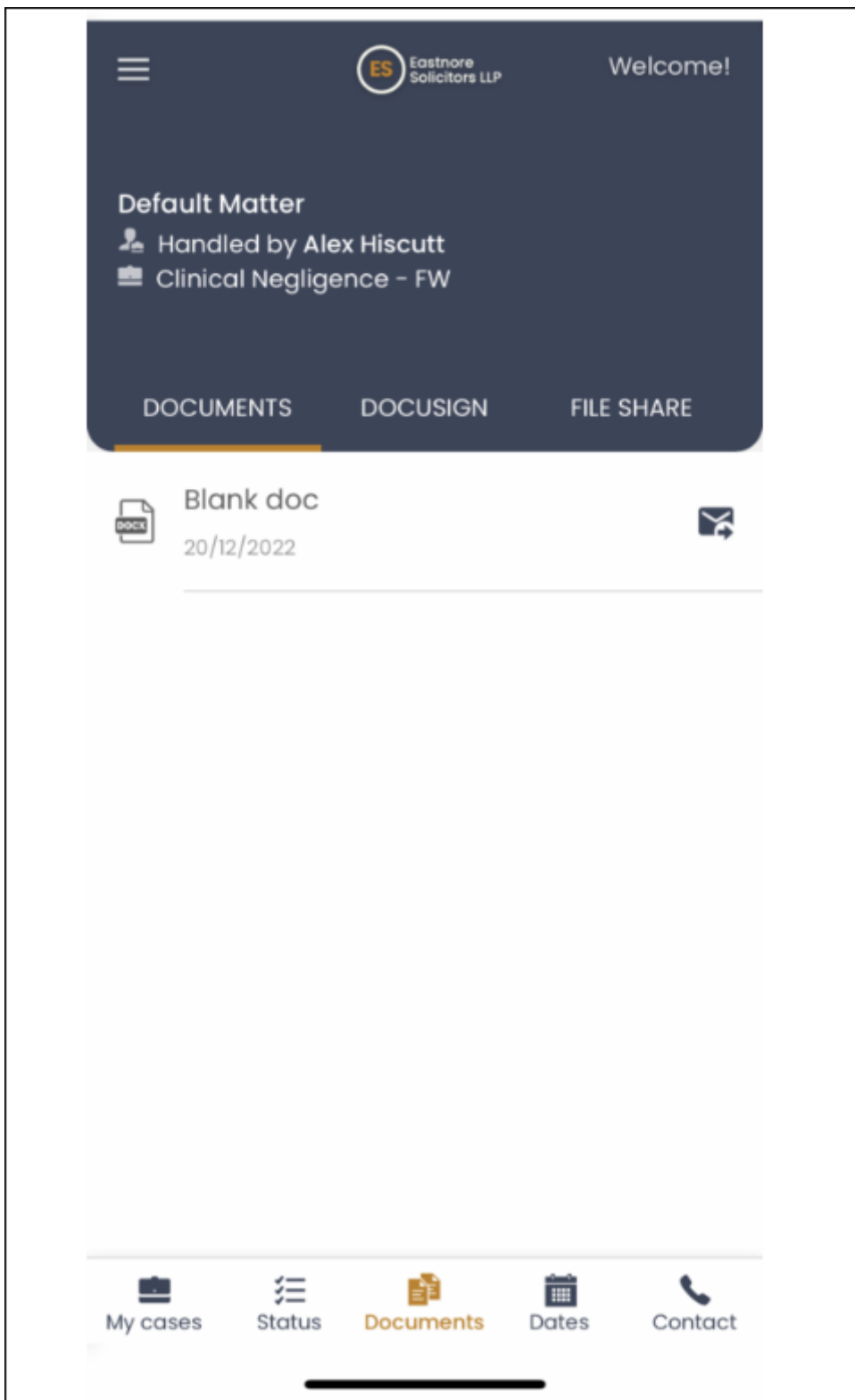
Status Bar

This option tracks the progress of workflows on the matter

Documents



Here is where documents that are web enable are found, also DocuSign requests can be found here as well file share documents.



Key dates Screen

This is where the Clients can see the Published key dates



Welcome!



Dates

21/12/2022 Chase client for a response



My cases



Status



Documents



Dates



Contact