Osprey Approach: Using The Mobile Portal App

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Apr 16th, 2024

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

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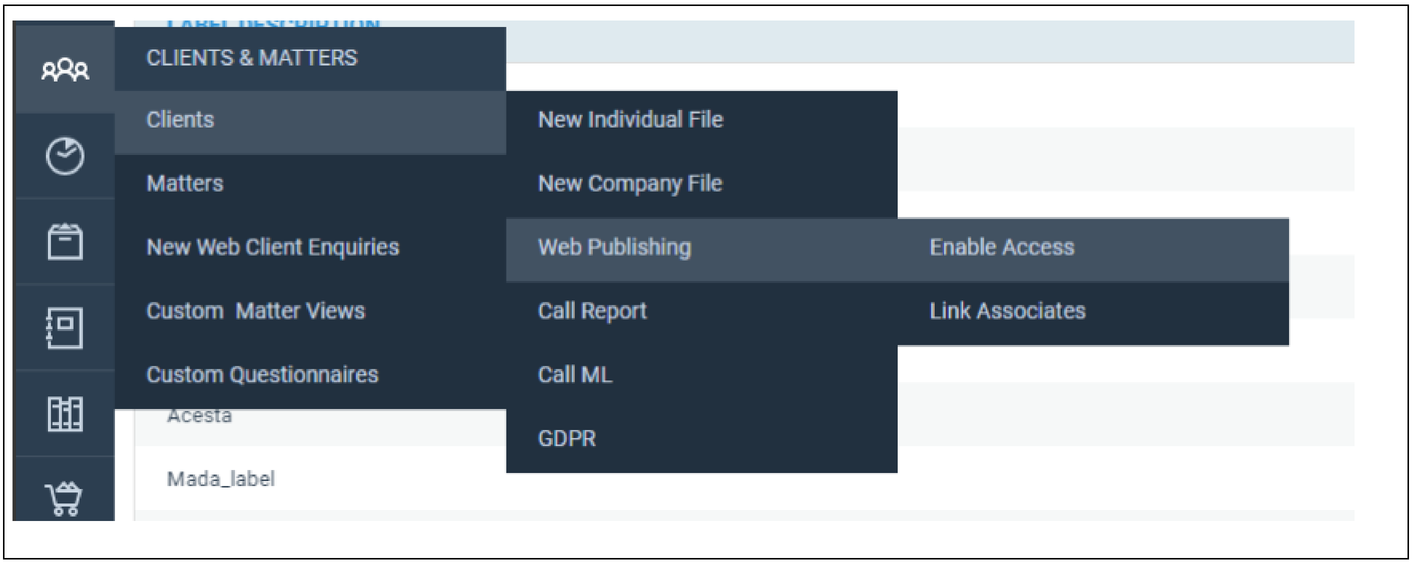
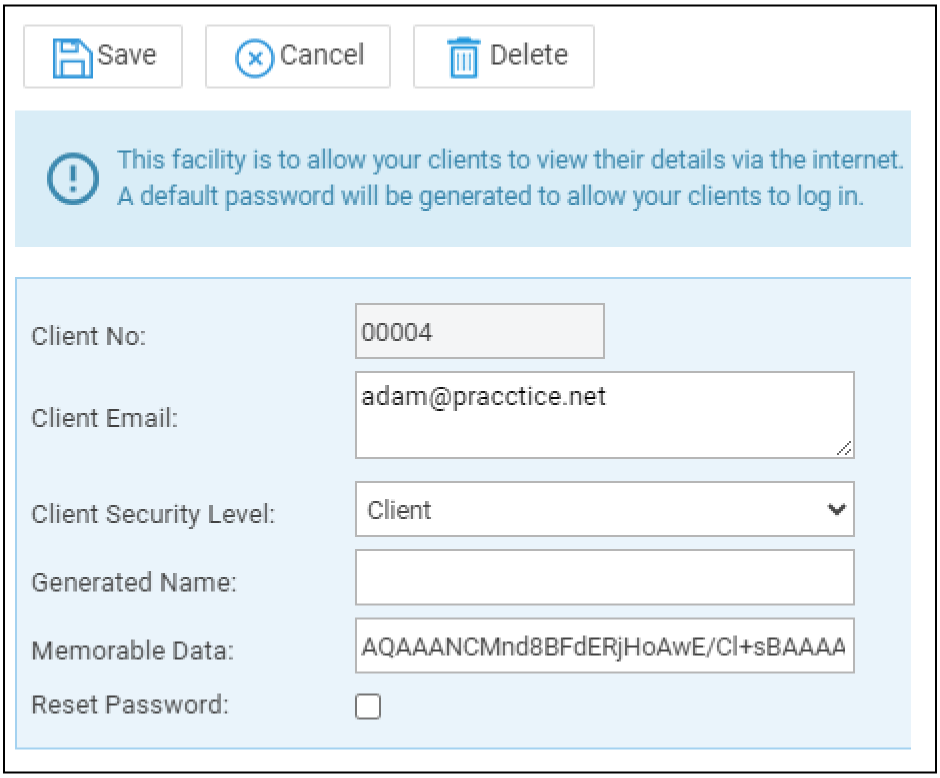
Getting the Mobile Portal App

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

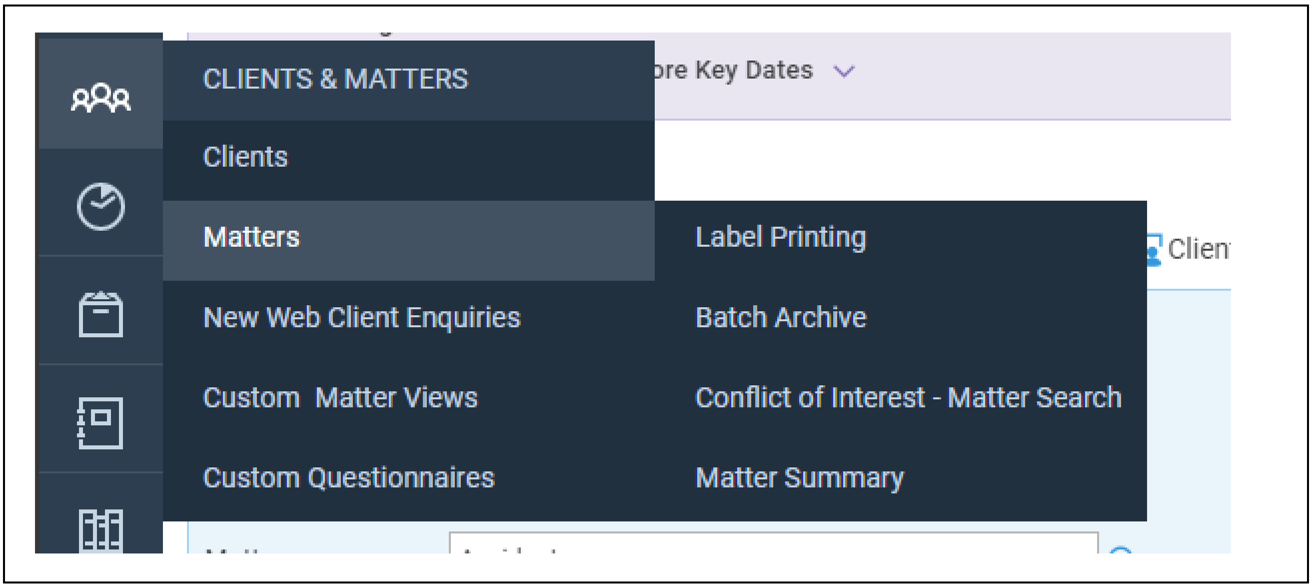
To Create Credentials for the Client you then go into Client and matter area, web publishing, enable access, then click save. The client will then get an email attaching the log in details for the mobile portal.

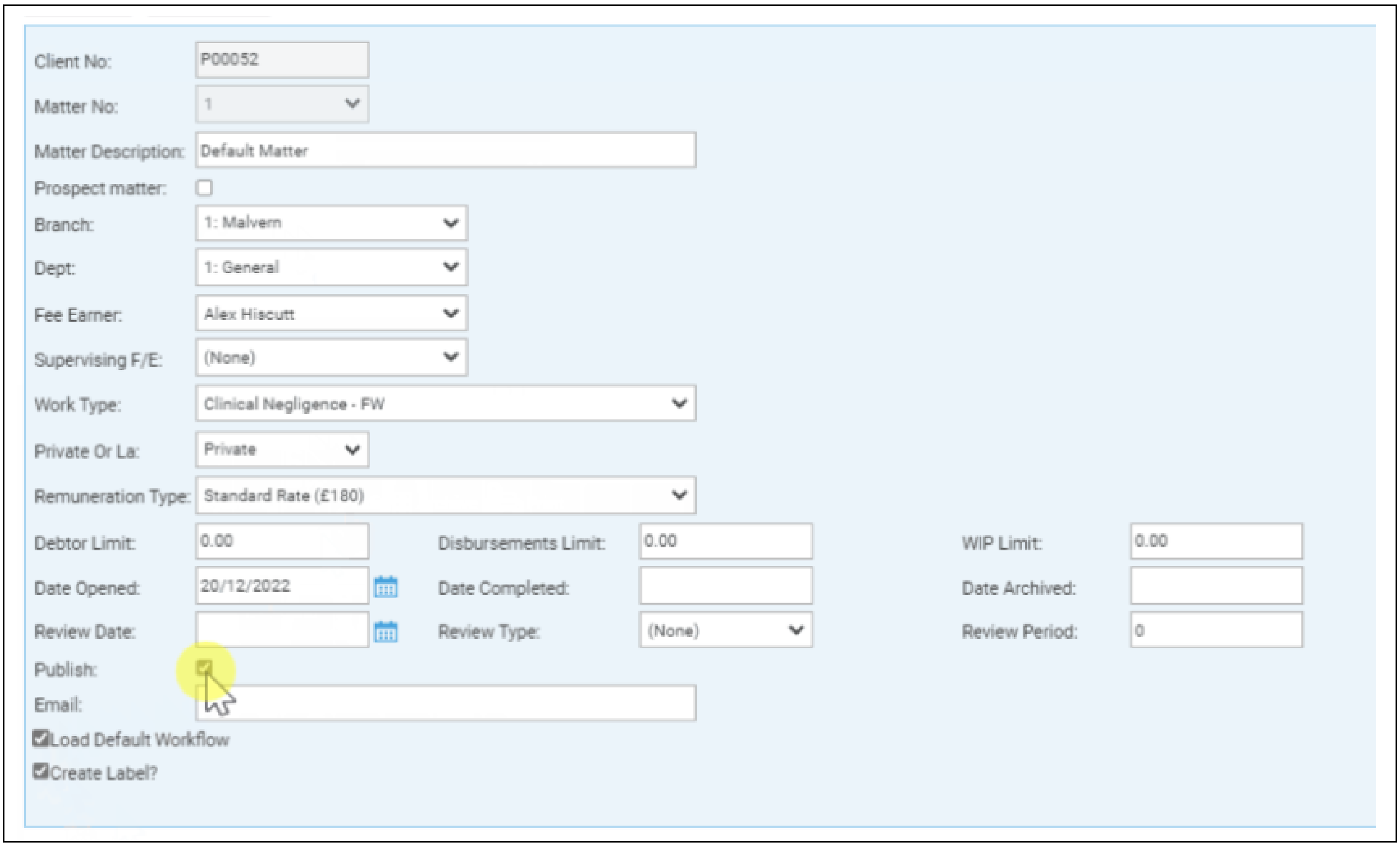




Making the Matter Web Enabled

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

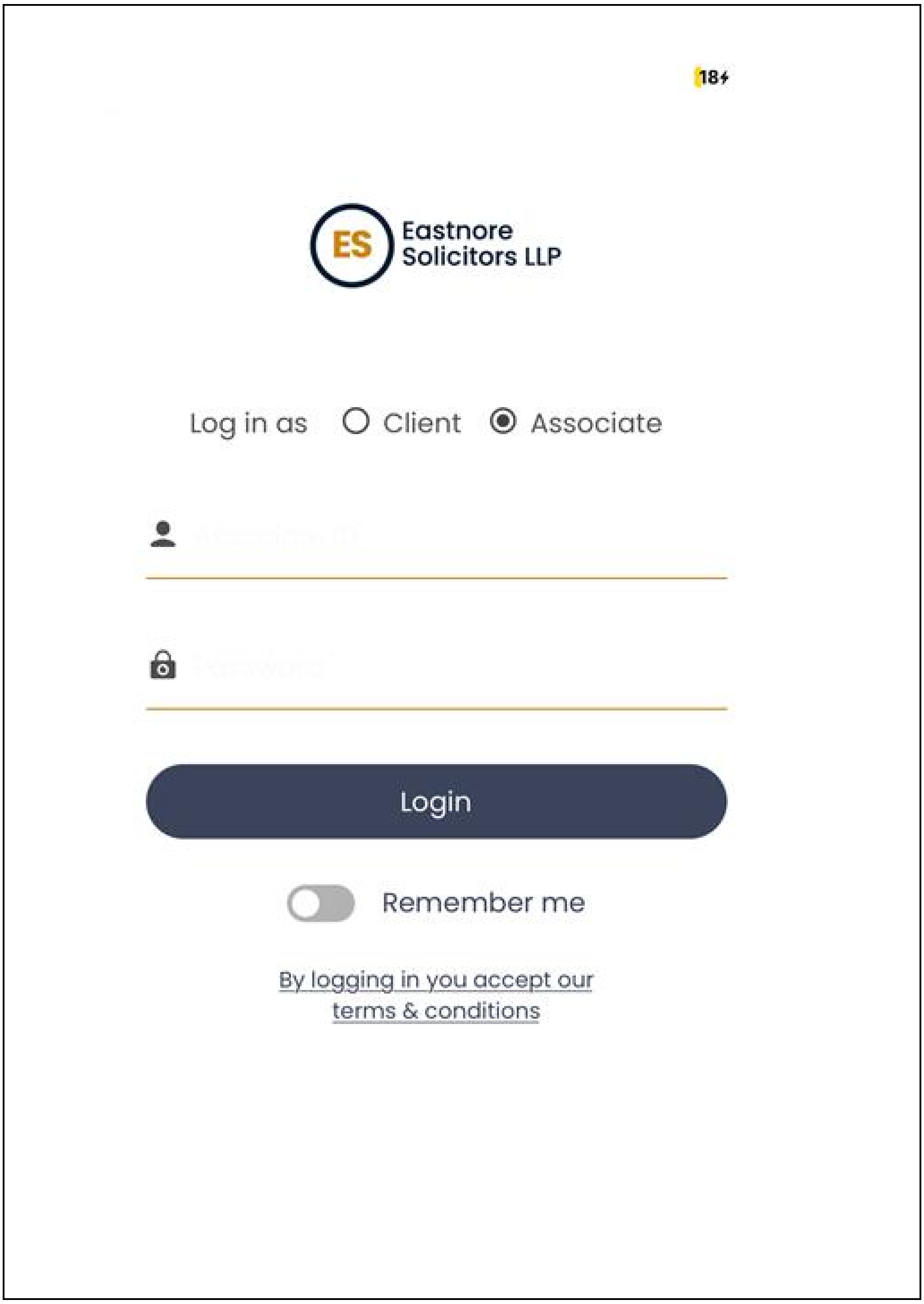


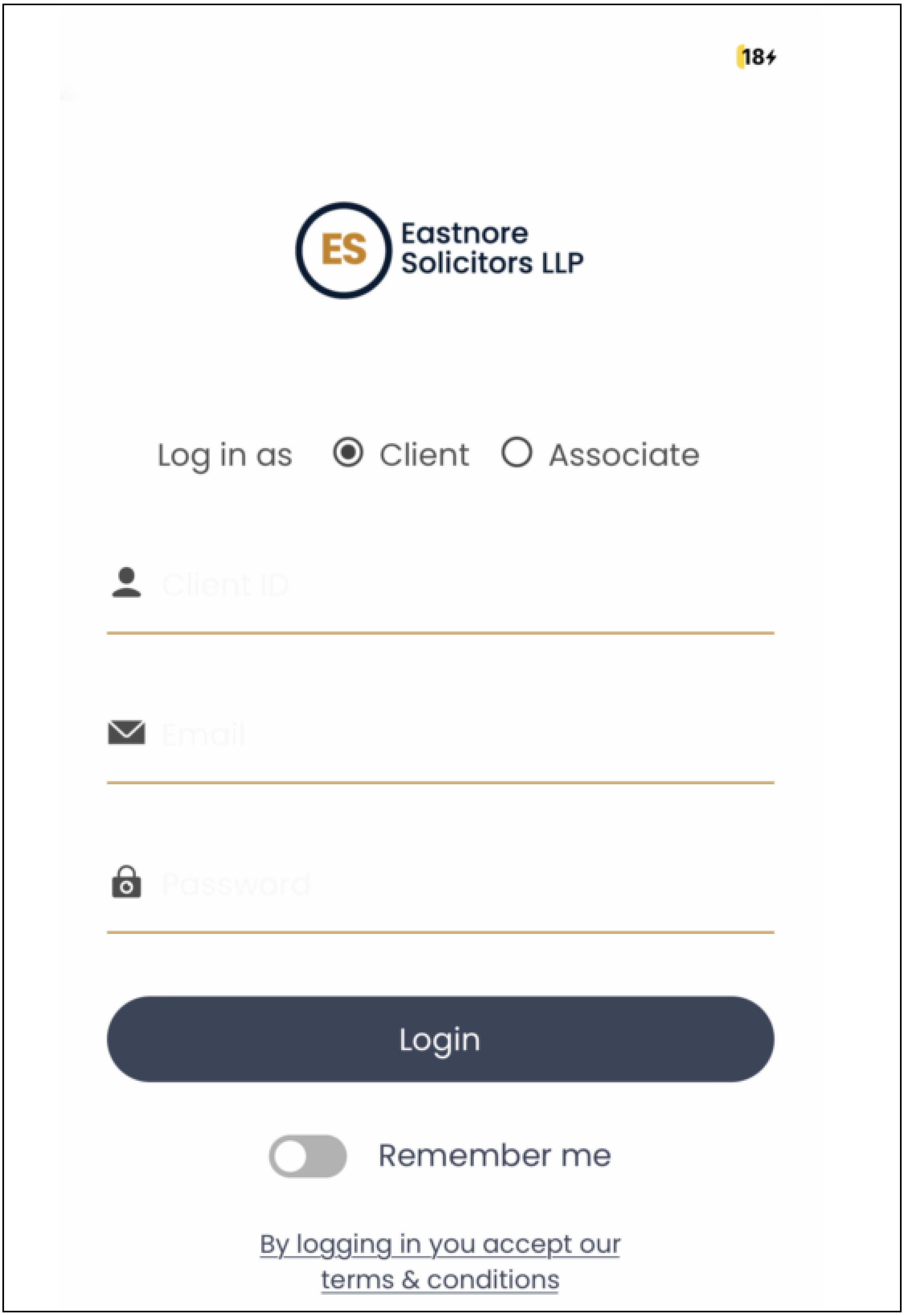


Using the Mobile App

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

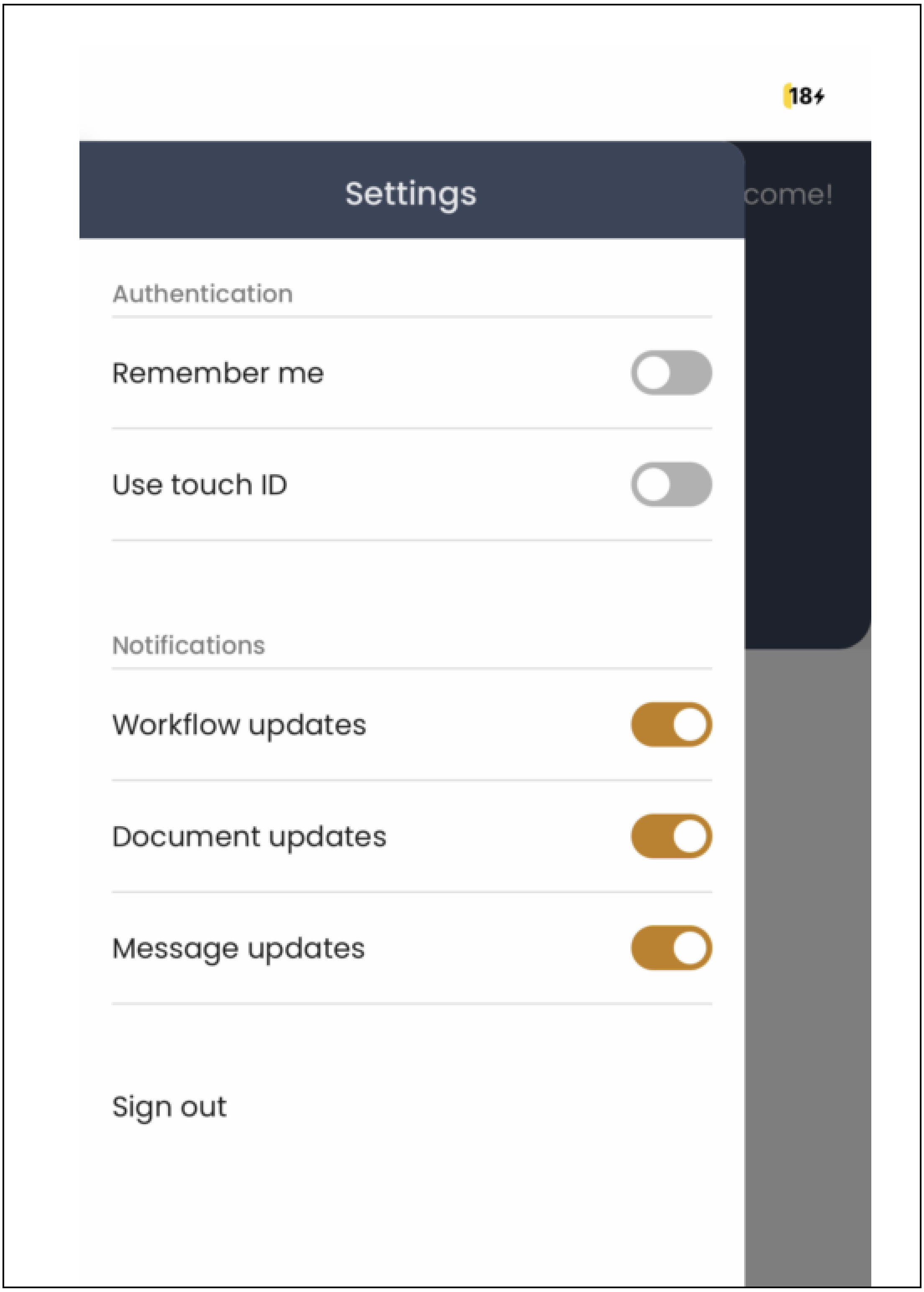
you can also log in as an associate.





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.

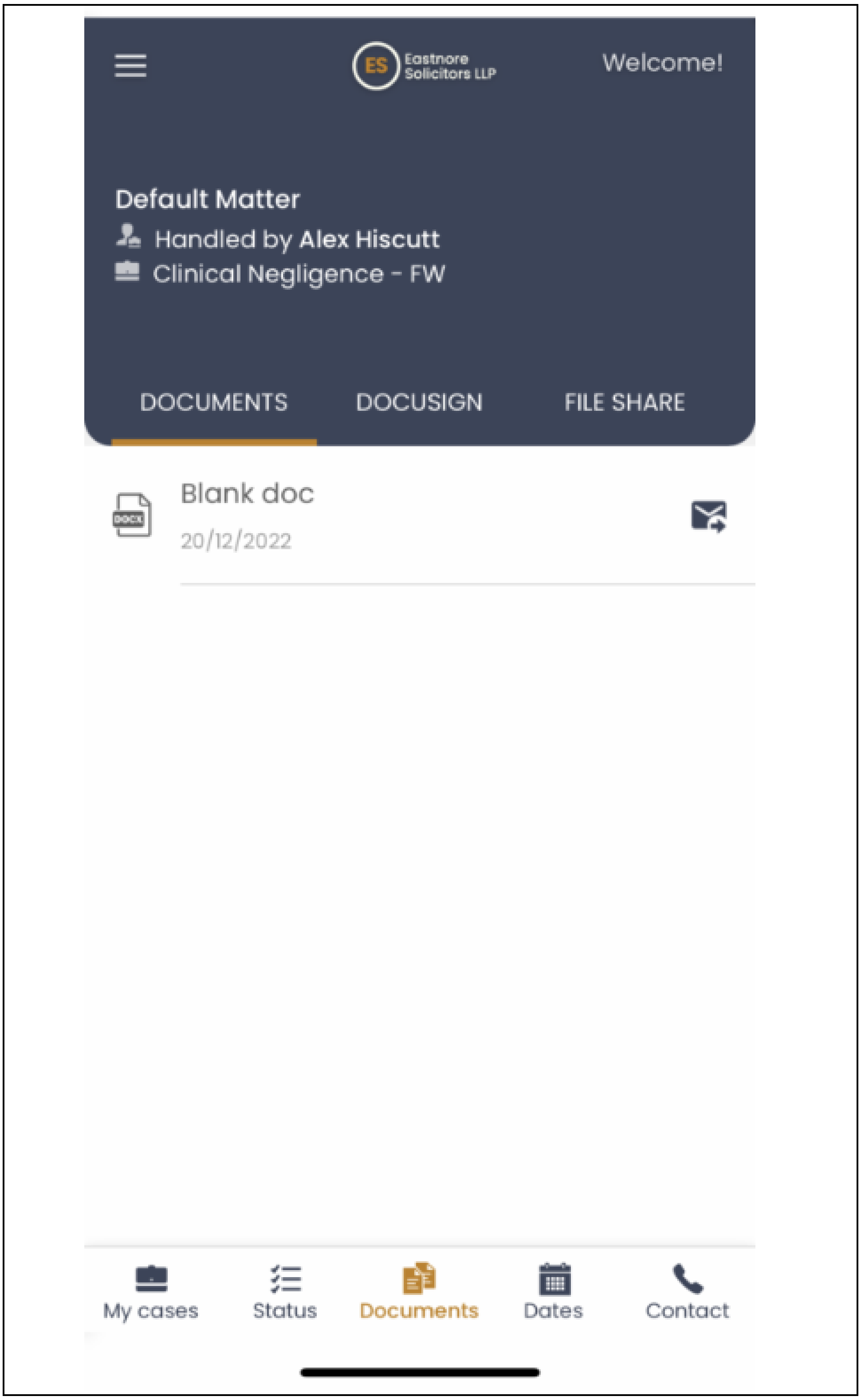


Status Bar

This option tracks the progress of workflows on the matter

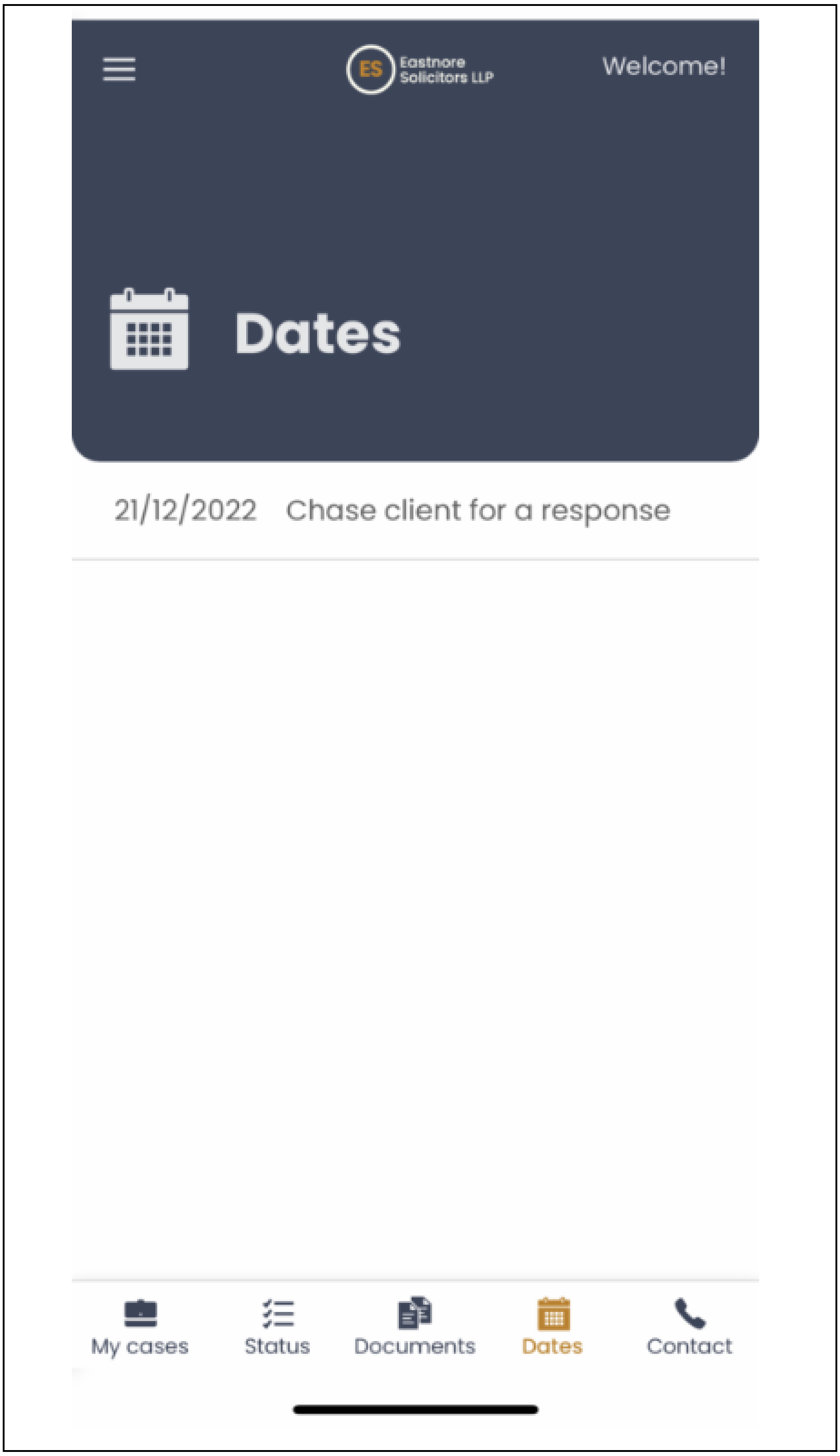
Documents

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


Eastnore Solicitors LLP
Welcome!
Dates
21/12/2022 Chase client for a response
My cases
Status
Documents
Dates
Contact