



Osprey Approach: Using the Web Portal

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The latest version is always online at
<https://support.ospreyapproach.com/?p=29284>



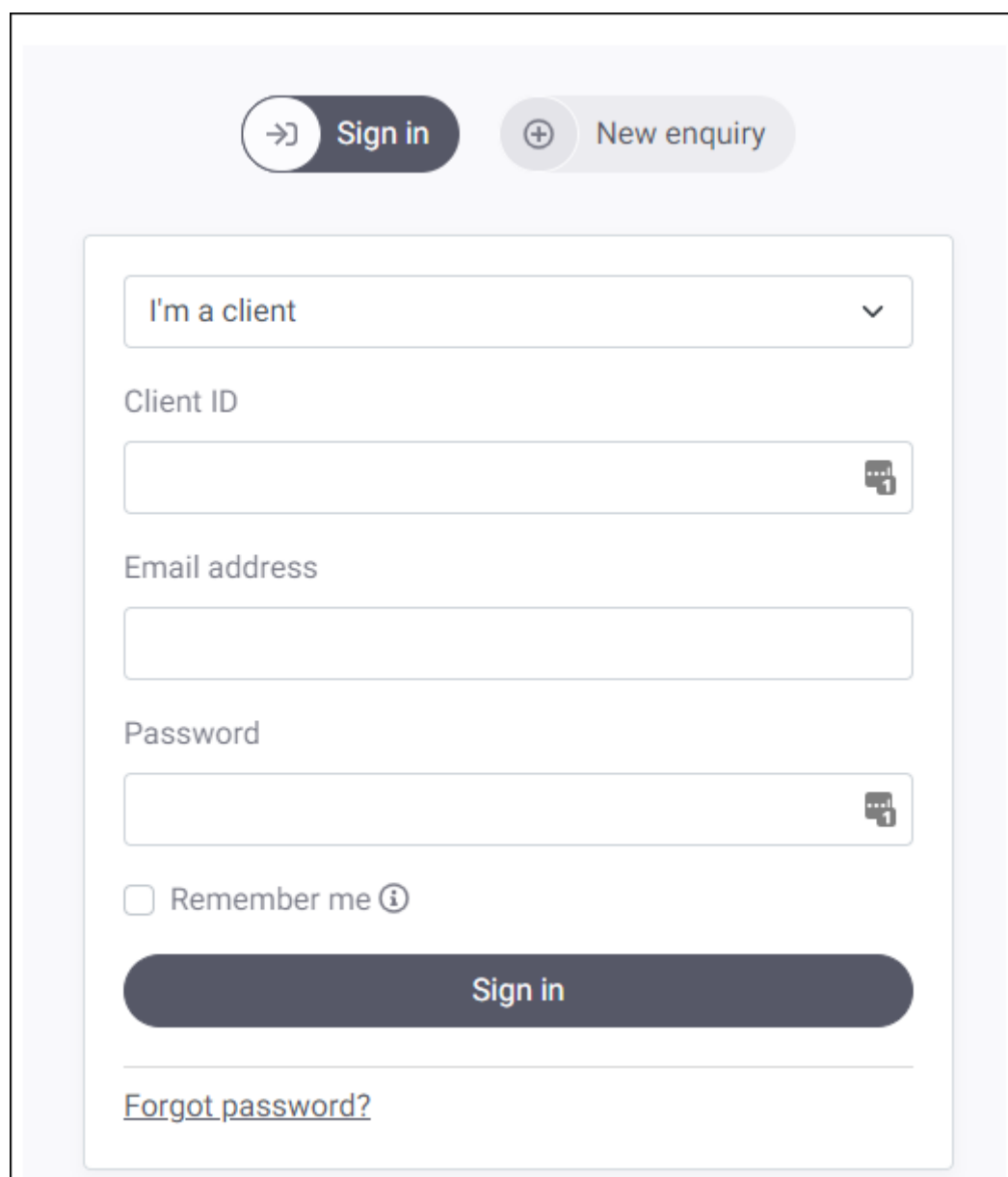
This guide will take you through using our web portal to allow clients and associates to track their cases

Newly enabled Clients and Associates will receive an automated email which includes their username and a temporary password, also a hyperlink to access the Client Portal.

Please note that you can edit the automated email that is sent to clients, to do this, please see the related guide 'Customising Osprey Automated Emails'.

When logging in for the first time, you will be prompted to change your password to a more memorable one.

If logging in as an Associate, you must change the **'I'm a Client'** option to **'I'm an Associate'**

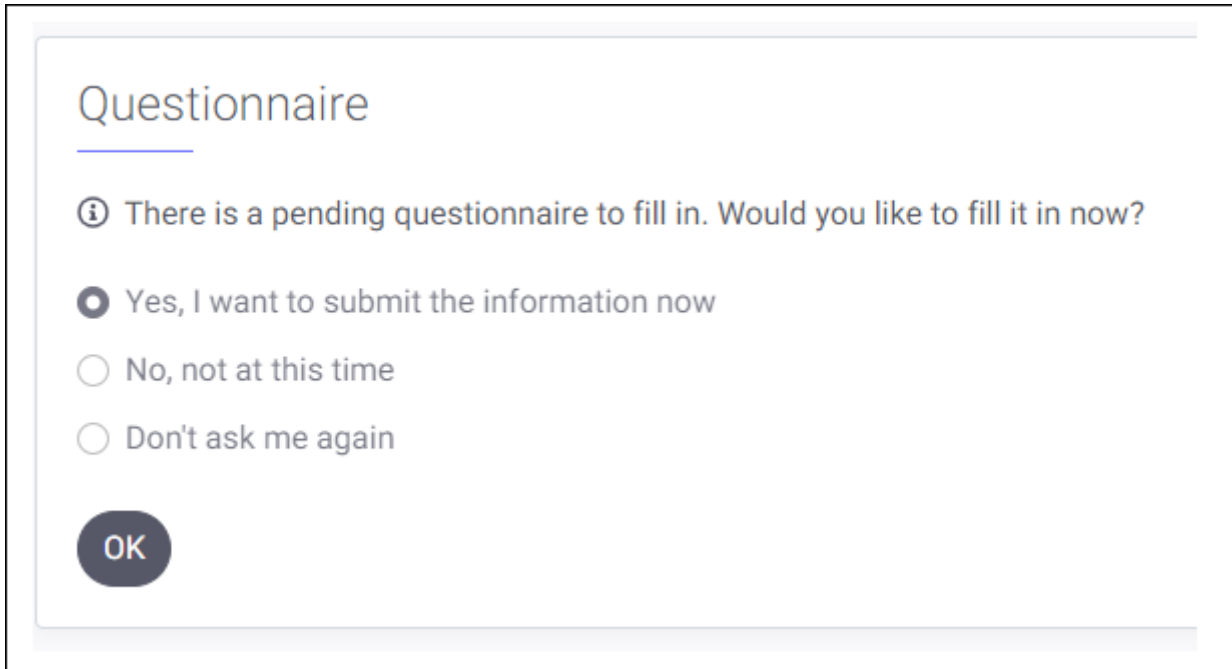


The screenshot shows a login interface with a light gray background. At the top, there are two buttons: a dark blue 'Sign in' button with a right-pointing arrow icon, and a light gray 'New enquiry' button with a plus icon. Below these is a white login box with a rounded border. Inside the box, the first element is a dropdown menu with the text 'I'm a client' and a downward arrow. Below the dropdown are three input fields: 'Client ID', 'Email address', and 'Password'. The 'Client ID' and 'Password' fields have a small icon on the right side of the input box. Below the 'Password' field is a checkbox labeled 'Remember me' followed by an information icon. At the bottom of the login box is a large, dark blue 'Sign in' button. Below the login box, there is a link that says 'Forgot password?'.

If you have forgotten your password, there is a **'Forgot Password'** option. Clicking this will send an automated email containing a new password.

Client Web Portal Log in

If logging in as a client, it is possible that you may be prompted to fill in some additional information about your matters as shown below:



Questionnaire

ⓘ There is a pending questionnaire to fill in. Would you like to fill it in now?

☒ Yes, I want to submit the information now

☐ No, not at this time

☐ Don't ask me again

OK

Selecting '**Don't ask me again**' will discard this message and it will not appear again.

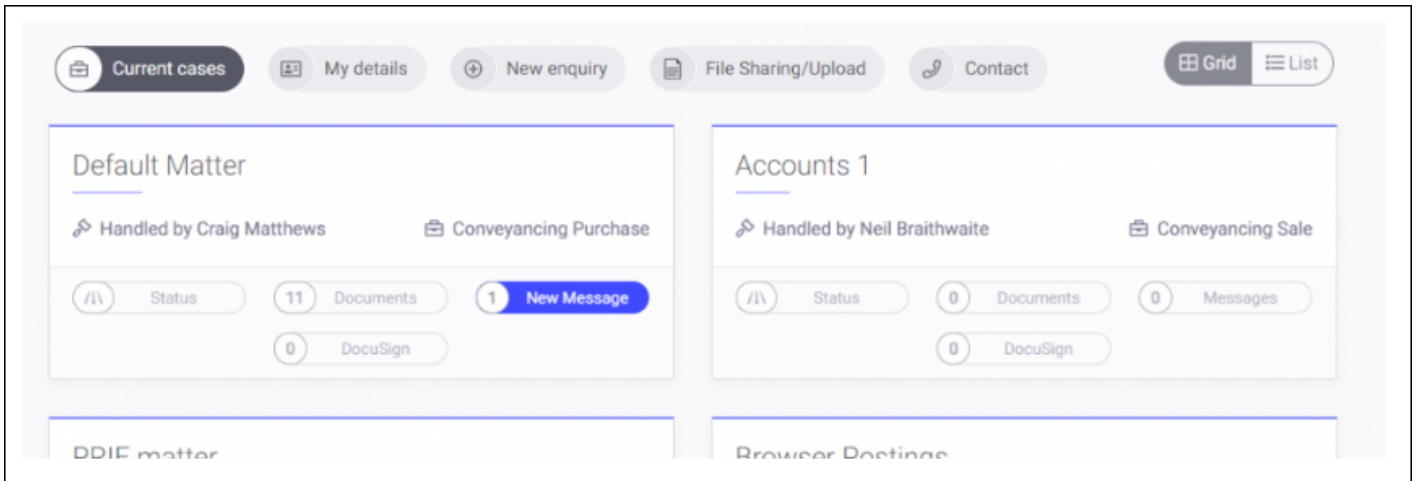
If you choose '**No, not at this time**' then this will discard the questionnaire at this time but it will re-appear on the next login.

Selecting '**Yes, I want to submit the information now**' enables you to fill in details relating to your case which upon submission will be sent to your solicitor.

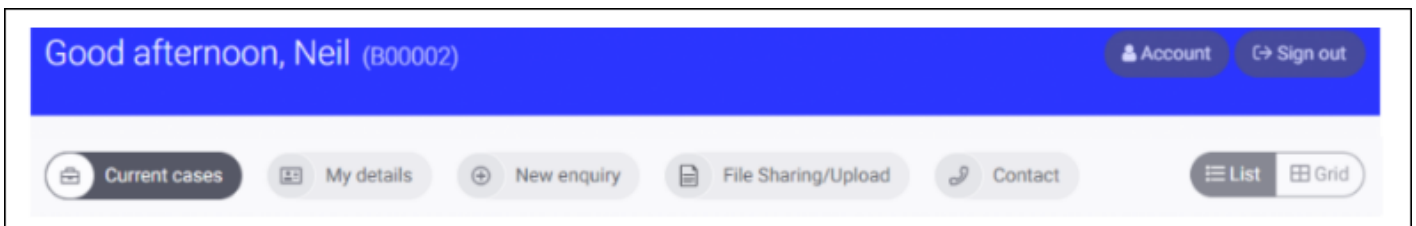
Options within the Web Portal – Client Login

Upon initial log in, you will need to enter the user name and password sent via the automated email.

Once logged in, a screen similar to the one below will appear displaying a variety of options.



The main headings are as below:



Current cases	This area lists all published matters, any messages sent to you will also be visible.
My Details	This area shows your Address, Billing address and contact details. They can be amended here which will automatically update the details your solicitor holds for you.
New Enquiry	If enabled, this area enables you to submit details in respect of an additional matter.
Deal Room	The Deal Room contains documents from your matter history which are published to the web portal.
Contact	Used to email your Solicitor.
Account	Displays your account details and the option to log out.

My Details

You are able to update your existing contact details held by your solicitor.

Click 'My Details'

This screen allows you to update your Contact Address, Billing address, email and contact numbers. *(It is not possible to amend any of the Name details)*

Make any changes as required and then select 'Save' from either top of bottom of the screen. The details are automatically updated within Osprey.

Current Cases

Once selected, this area will show all currently published matters. Each matter may have messages available for you to read, click the number of messages to be able to reveal them all and then read them. Messages can then be flagged as read to remove them.

You may choose to display in list or grid view - Select the preferred option in the top right.

Good afternoon, Neil (B00002)

AccountSign out

Current casesMy detailsNew enquiryFile Sharing/UploadContact

ListGrid

Default Matter

Handled by Craig MatthewsConveyancing Purchase

Status11 Documents1 New Message0 DocuSign

Accounts 1

Handled by Neil BraithwaiteConveyancing Sale

Status0 Documents0 Messages0 DocuSign

PRIE matter

Handled by Alina DarlowCrime

Browser Postings

Handled by Neil BraithwaiteResidential Conveyancing

Grid or

Good afternoon, Neil (B00002)

AccountSign out

Current casesMy detailsNew enquiryFile Sharing/UploadContact

ListGrid

Show 10 entriesSearch:

Case	Solicitor	Type	Created
Accounts 1	Neil Braithwaite	Conveyancing Sale	11/08/2019
Browser Postings	Neil Braithwaite	Residential Conveyancing Purchase	02/01/2021
Default Matter	Craig Matthews	Conveyancing Purchase	22/08/2018

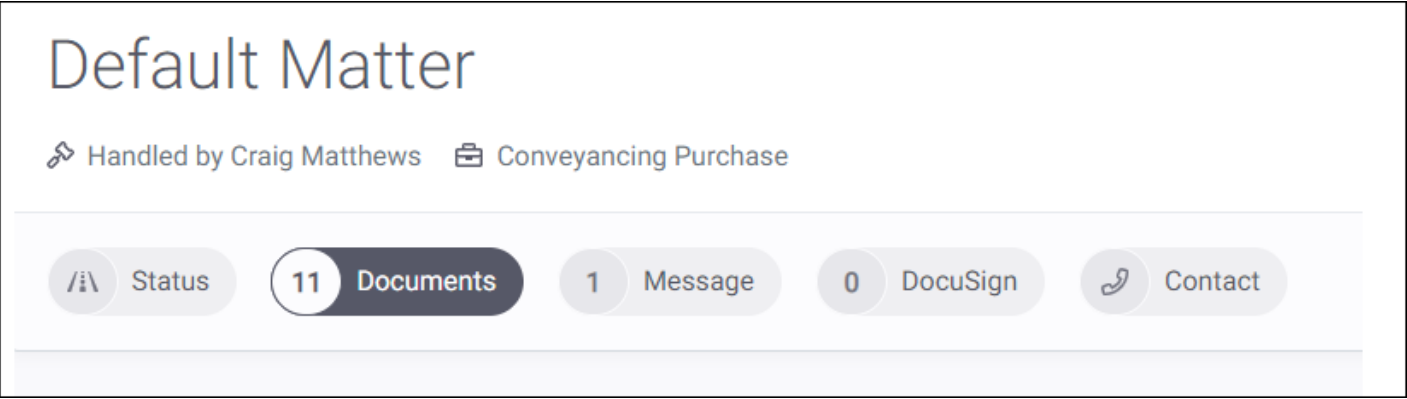
List

Click on a case description to view details.

Documents

The first area will show any published documents.

To the right hand side of any published document is an actions area.



Selecting this icon opens a Contact Us screen, from within which a message relating to the document can be sent directly to your Solicitor’s main email.



Select the second icon to enable you to save or open a copy of the item.



Selecting the third icon shows a preview of the document.



Select the fourth icon to show the version history of the document and also offers the ability to preview or download previous version.



You can change the view of items per page or you can use the arrows at the bottom of the Documents area to navigate to additional pages.


Status menu

This area will show any published workflow tasks including the actions within them. **Ticked** indicates the task has been run and the **date column** shows the date the task was run. There is also an **action** icon, selecting this opens a Contact Us screen and a message box appears relating to the matter and workflow

task. Once sent, the message goes directly to your Solicitor's main email.

Default Matter


 Handled by Craig Matthews  Conveyancing Purchase

 Status

11 Documents

1 Message

0 DocuSign

 Contact



Current Stage

Key dates

Click on the arrow to the left of the task description to expand.

Current StageKey dates

Conveyancing Purchase

Hover over a stage to learn more

Selecting the arrows at the bottom of the task allows you to flick through any additional actions, items per page can also be changed to show either 5, 10 or 20 per page. These options are also available when viewing tasks.

Key Dates

This area displays any published outstanding key dates and against each key date is the ability to message the Solicitor in relation to the matter and key date.

Current StageKey dates

Show 10 entriesSearch:

Date	Type	Notes	Actions
No data available in table			

DocuSign

The Signature request area displays any request for signatures to be completed through the use of DocuSign.

Status11 Documents1 Message0 DocuSignContact

Show 10 entries

Status	Documents	Actions
No data available in table		

New Enquiry

Dependant on set-up, you are able to submit a new enquiry relating to a particular area of law.

Select 'New Enquiry' to show all available enquiry forms.

Good afternoon, Neil (B00002)

AccountSign out

Current cases

My details

New enquiry

File Sharing/Upload

Contact

New enquiry

Adelini 04

CP New Client Enquiry

New matter enquiry quest

CP New Client Enquiry - Cloned

QUESTIONNAIRE 3

Sale Enquiry

Select the appropriate enquiry

Fill in details accordingly and keep clicking next until you come to the end of the form. Click Submit to send the New Enquiry.

You will receive an automated email thanking you for your enquiry and you will also be provided with credentials for logging into the Web Portal.

Contact

To contact your firm, you can select the 'Contact' option.

The following will pop up on the existing screen.

A screenshot of a web form titled "General contact" with a close button (X) in the top right corner. The form contains two input fields: "Subject" and "Message". At the bottom right, there are two buttons: "Cancel" and "Send".

Account/Sign out

A screenshot of a user account page. The top blue header bar displays "Good afternoon, Neil (B00002)" and contains "Account" and "Sign out" buttons. Below the header is a row of navigation tabs: "Current cases", "My details", "New enquiry", "File Sharing/Upload", and "Contact". The "My details" tab is active. Under this tab, the "Two steps authentication" section shows an "Enabled" checkbox, with "Email" selected as the method. A "Save" button is located at the bottom of this section.

Click Account to enable Two steps authentication, by email or using Google Authenticator

Click 'Sign out' to log out of the Web Portal and be taken back to the main log in screen.

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