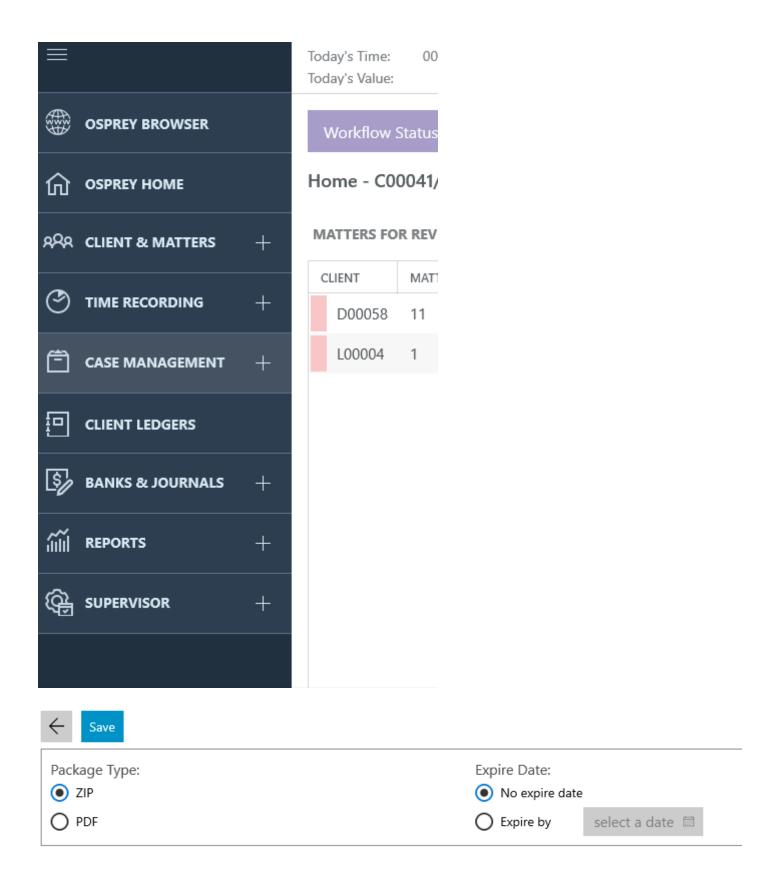
Osprey Approach: Create a Package of files (App)

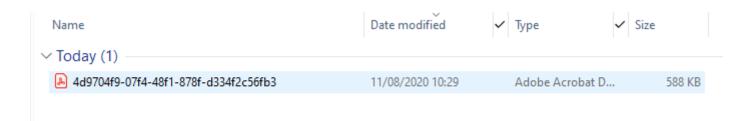
This help guide was last updated on Dec 27th, 2023

The latest version is always online at https://support.ospreyapproach.com/?p=23821

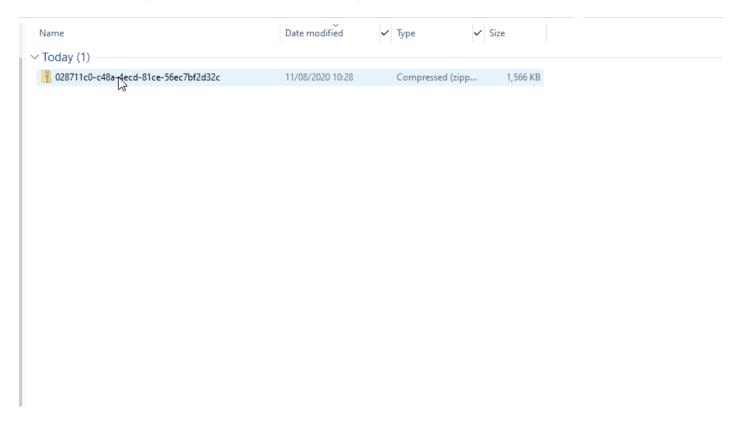




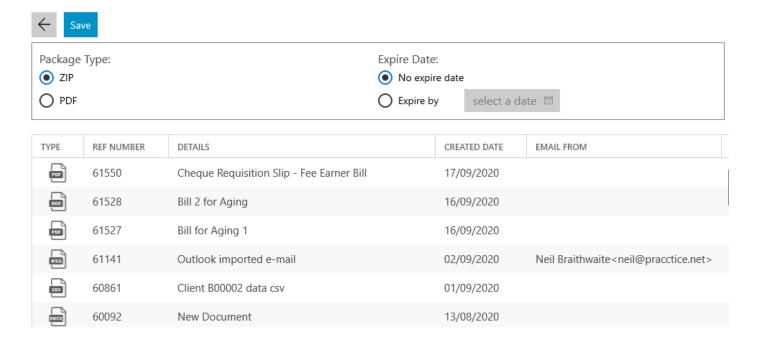
You may choose to generate either a zip file or a pdf. If a PDF is chosen, all of the files chosen are saved to one PDF:



If a ZIP file is chosen, all of the files are zipped up into a zip file which will extract to give the files in the same format as they are stored in the matter history.



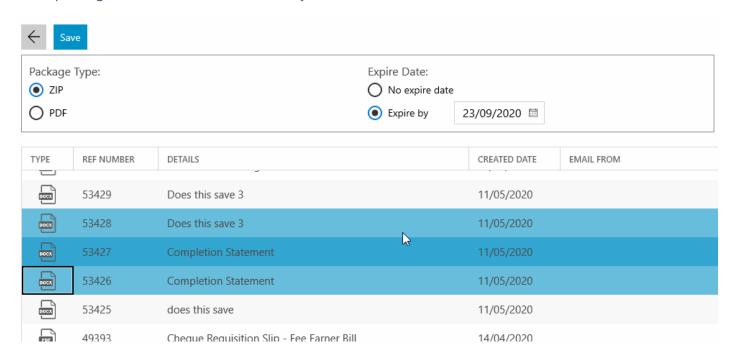
You can also choose whether the package will expire to prevent your clients from opening them after a certain date has passed.



To choose the files you want to include in the package, select them by holding down the CTRL key on your keyboard, and clicking the small square box on the left hand side of the screen:

TYPE	REF NUMBER	DETAILS	CREATED DATE	EMAIL FROM
	53429	Does this save 3	11/05/2020	
DOCX	53428	Does this save 3	11/05/2020	
DOOR	53427	Completion Statement	11/05/2020	
POCK	53426	Completion Statement	11/05/2020	
POOR	53425	does this save	11/05/2020	
PDF	49393	Cheque Requisition Slip - Fee Earner Bill	14/04/2020	
POF	49392	Cheque Requisition Slip - Fee Earner Bill	14/04/2020	
POF	48411	Cheque Requisition Slip - Client Payment Received	23/03/2020	
10000	48406	Testing Doc Production with Lucy.docx	18/03/2020	
DOCK	48403	Testing Doc Production with Lucy	18/03/2020	

Click Save when you are ready to create your package. To email the package link to someone, right click it in the packages section in the matter history.



From here, you can choose View Details to show the the link for the package to copy to send as an email from Outlook.



General Info

Client No B00002 (Braithwaite Neil)
Matter No 1 (Default Matter)

Access Link https://test.ospreyapproach.com/main/DownloadMatterHistoryPackage.ashx?pkid=3cbdd444-b826-48d3-9ea2-f91ade

Expire Date 23/09/2020

Record Info

Created By neil

Created Date 22/09/2020 18:08:03

Last Modified By neil

Last Modified Date 22/09/2020 18:08:03

Package Content

Email refno 61141.msg Size: 6:7 B bytes	Version 1
info.csv Size: 0:5.67 B bytes	Version 1
Care_Letter_Purchase.docx Size: 16:1.39 B bytes	Version 1
Does this save 3.docx Size: 1:5.27 B bytes	Version 1
Completion Statement.docx Size: 1:4.07 B bytes	Version 1
Completion Statement.docx Size: 1:4.07 B bytes	Version 1