

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>



OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

+

TIME RECORDING

+

CASE MANAGEMENT

+

CLIENT LEDGERS

BANKS & JOURNALS

+

REPORTS

+

SUPERVISOR

+

Today's Time: 00
Today's Value:

Workflow Status

Home - C00041/

MATTERS FOR REV

CLIENT	MATTER
D00058	11
L00004	1

Save

Package Type:

ZIP

PDF


Expire Date:

No expire date


Expire by

select a date

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:

Name	Date modified	Type	Size
▼ Today (1)			
 4d9704f9-07f4-48f1-878f-d334f2c56fb3	11/08/2020 10:29	Adobe Acrobat D...	588 KB

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.

Name	Date modified	Type	Size
▼ Today (1)			
 028711c0-c48a-4ecd-81ce-56ec7bf2d32c	11/08/2020 10:28	Compressed (zipp...	1,566 KB

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









←
Save

Package Type:
☒ ZIP
☐ PDF


Expire Date:
☒ No expire date
☐ Expire by select a date

TYPE	REF NUMBER	DETAILS	CREATED DATE	EMAIL FROM
	61550	Cheque Requisition Slip - Fee Earner Bill	17/09/2020	
	61528	Bill 2 for Aging	16/09/2020	
	61527	Bill for Aging 1	16/09/2020	
	61141	Outlook imported e-mail	02/09/2020	Neil Braithwaite<neil@pracctice.net>
	60861	Client B00002 data csv	01/09/2020	
	60092	New Document	13/08/2020	

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	
	53428	Does this save 3	11/05/2020	
	53427	Completion Statement	11/05/2020	
	53426	Completion Statement	11/05/2020	
	53425	does this save	11/05/2020	
	49393	Cheque Requisition Slip - Fee Earner Bill	14/04/2020	
	49392	Cheque Requisition Slip - Fee Earner Bill	14/04/2020	
	48411	Cheque Requisition Slip - Client Payment Received	23/03/2020	
	48406	Testing Doc Production with Lucy.docx	18/03/2020	
	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.


Save

Package Type:
☒ ZIP
☐ PDF

Expire Date:
☐ No expire date
☒ Expire by

TYPE	REF NUMBER	DETAILS	CREATED DATE	EMAIL FROM
	53429	Does this save 3	11/05/2020	
	53428	Does this save 3	11/05/2020	
	53427	Completion Statement	11/05/2020	
	53426	Completion Statement	11/05/2020	
	53425	does this save	11/05/2020	
	49393	Cheque Requisition Slip - Fee Earner Bill	14/04/2020	

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