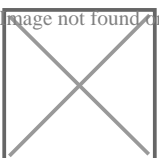


Osprey Approach: Create a Package of files using the Case Management App

This help guide was last updated on
Sep 22nd, 2020

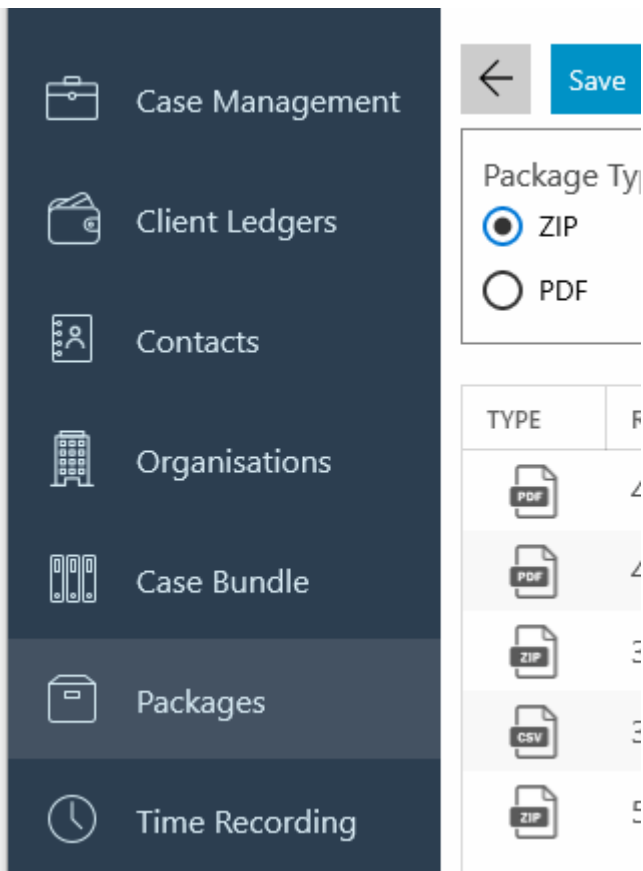
The latest version is always online at
<https://support.pracctice.com/?p=23821>

Image not found or type unknown



Who is this guide for?


Any Users




Tap Packages and then Add



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 | |

| 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



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 | |