

Osprey Approach: Install and use the Office 365 Outlook Add-in

This help guide was last updated on
Jul 27th, 2020

The latest version is always online at
<https://support.pracctice.com/?p=16581>

[Click here for a printer-friendly version](#)



Who is this guide for?

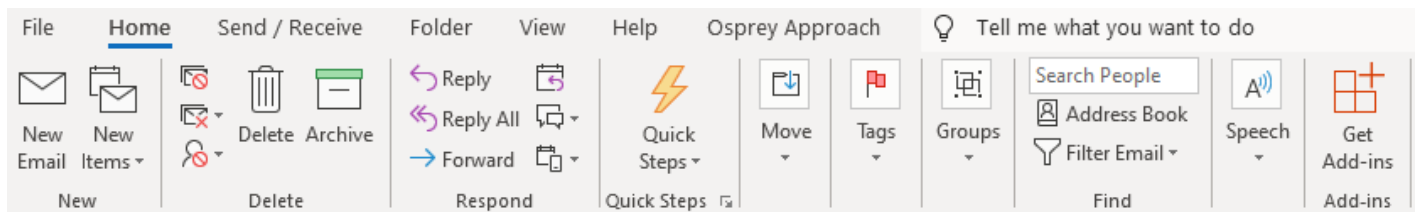
Any Users

The Osprey Approach Outlook Add-in can be installed either on your local copy of Outlook or through Outlook 365.

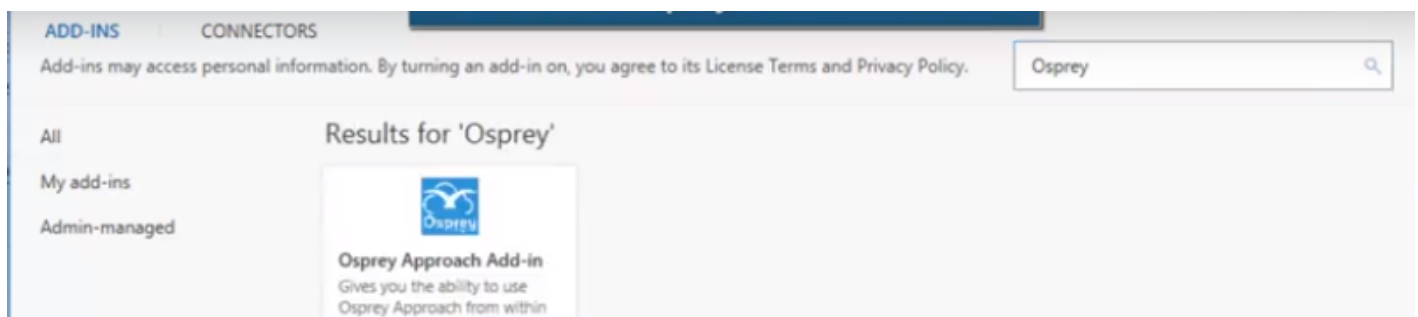
We have also produced a short video if you prefer to watch these steps.

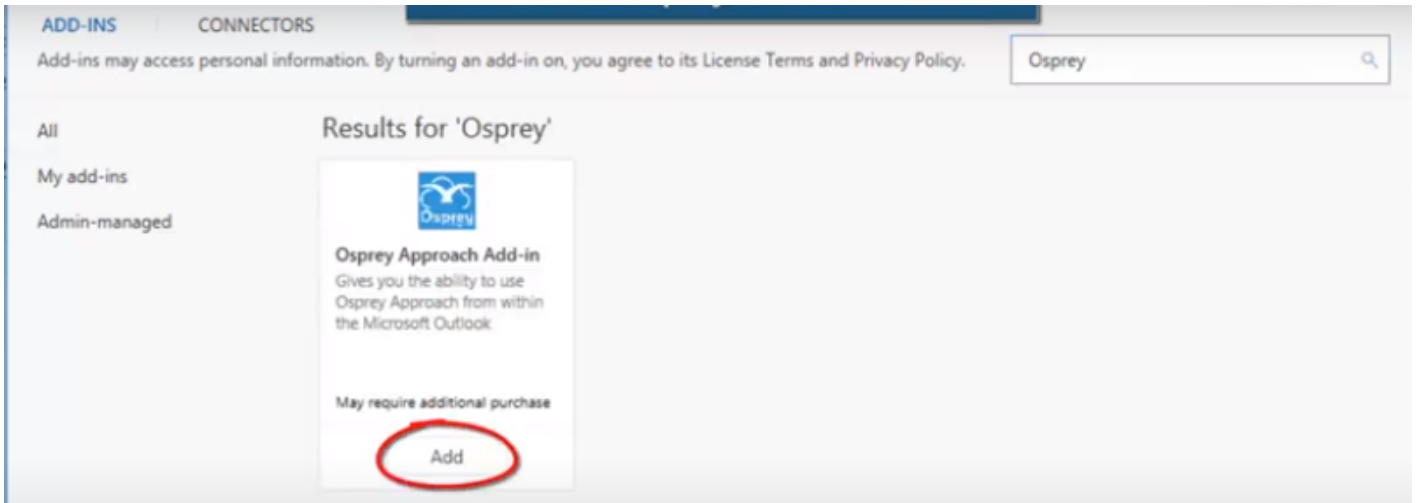
Step 1

First, let's install the add-in, within Outlook, navigate to the 'Home' tab and select the Get Add-ins.



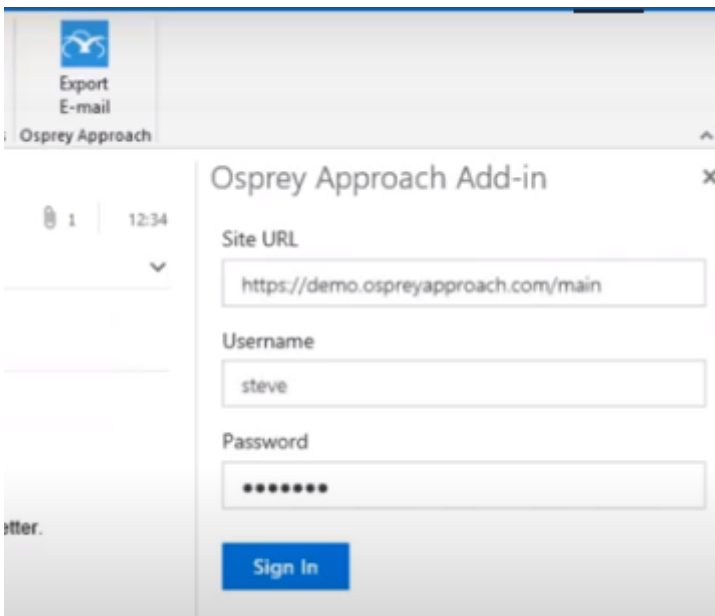
Search for 'Osprey' and select 'Add'.





Step 2

Select Export E-mail and enter your Osprey URL and credentials.



The progress bar will show you which stage of the export process is currently underway. If you know the client and matter you wish to export the email to, enter them, alternatively you may search for it.

Select Client/Matter Export

Client/Matter search

Client no

Matter no

Matter description

Surname

[Show advanced search](#)

Results

CLIENT NO	MATTER	DETAILS	FORE
F0006	1		Becky
F0007	1		Becky

Click Search

Then left-click on the client to select them.

Add a 'Detail' to be displayed in the Osprey Matter History. You can also set a custom type, a folder, and a retention period. To export the email only, tick the option. Ticking Time posting will display the time recording options. click Export.

Select Client/Matter Export

Client/Matter
 L00004/1

E-mail info

Sender
 jane.thomas4427@hotmail.com

Subject
 Client Care Letter

Detail

Custom type

Folder

Retention period

Export e-mail only

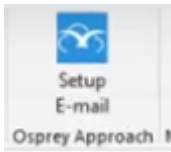
Time posting

Your email and, if selected, any attachments will now have been saved to the Matter History.

FAVORITE	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNA..	MATTER NO	MATTER DESCIP..	RETENTION PERIOD	DETAILS	CREATED DATE	CREATED BY
All		3009	L00004	Lancaster	1	Purchase of 123...		Client Care Letter.docx	02/08/2018 12:51:00	steve
		3008	L00004	Lancaster	1	Purchase of 123...		Client Care Letter	02/08/2018 12:50:59	steve

Step 3

When opening a new email, you can use the Add-in to send the email to contacts in Osprey, as well as the attaching Osprey documents and packages. Click Setup E-mail and sign in.



Osprey Approach Add-in

Site URL

Username

Password

Sign In

Export e-mails, setup e-mails with templates, recipients and attachments and time recording.

If you don't have already an Osprey Approach account, please visit our website <https://ospreyapproach.com> and make an enquiry to our sales team.

Now search for and select the appropriate matter

Osprey Approach Add-in

SETUP E-MAIL

Select Client/Matter Setup

Client/Matter search

Client no

Matter no

Matter description

Surname

Show advanced search

Search

Results

CLIENT NO.	MATTER	DETAILS	FORE
FO0006	1		Becky
FO0007	1		Becky

You can select an email template to import it into your new email.

Select Client/Matter Setup

Client/Matter
L00004/1

Email template
Please select... v

Client/Matter Contacts

EMAIL	CONTA
admin@blanquetteharper.co.uk	Blanqui Harper Solicito
mattdemo@practtice.net	Matthe Lancast

Select a recipient from the list of available contacts and choose To or Cc

Choose e-mail address destination:

To Cc

Scrolling down you can also choose an email address from your Contacts & Organisations.

Contacts/Organisations

Filter by
Please select... v

E-MAIL	CONTACT
ajames@abc ltd	Andrew James
info@atlantic.co.uk	Atlantic Gas & Electricity

Scrolling further you can also attach any document or package available in Osprey.

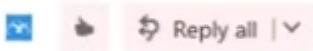
Attachments

Convert Word to PDF

REF NUMBER	DETAILS	TYPE	CREATED DATE
202	Client Care Guide	docx	15/04/2010 10:31:47
203	Letter to Estate Agents to request Memo of Sale	doc	15/04/2010 10:33:07
204	Initial letter to the Solicitor for the other side.	doc	15/04/2010 10:36:38
205	Letter Added via Microsoft Word Add In.	doc	15/04/2010 11:08:36
219	RCP CI blank letter	doc	26/04/2012 12:47:55

Step 4

When logging into your emails through Office 365, you will notice an Osprey Approach icon.



Sign in to enable the same functionality as found on your local copy of Outlook. The add-in will also be available on any new email sent from Outlook 365.