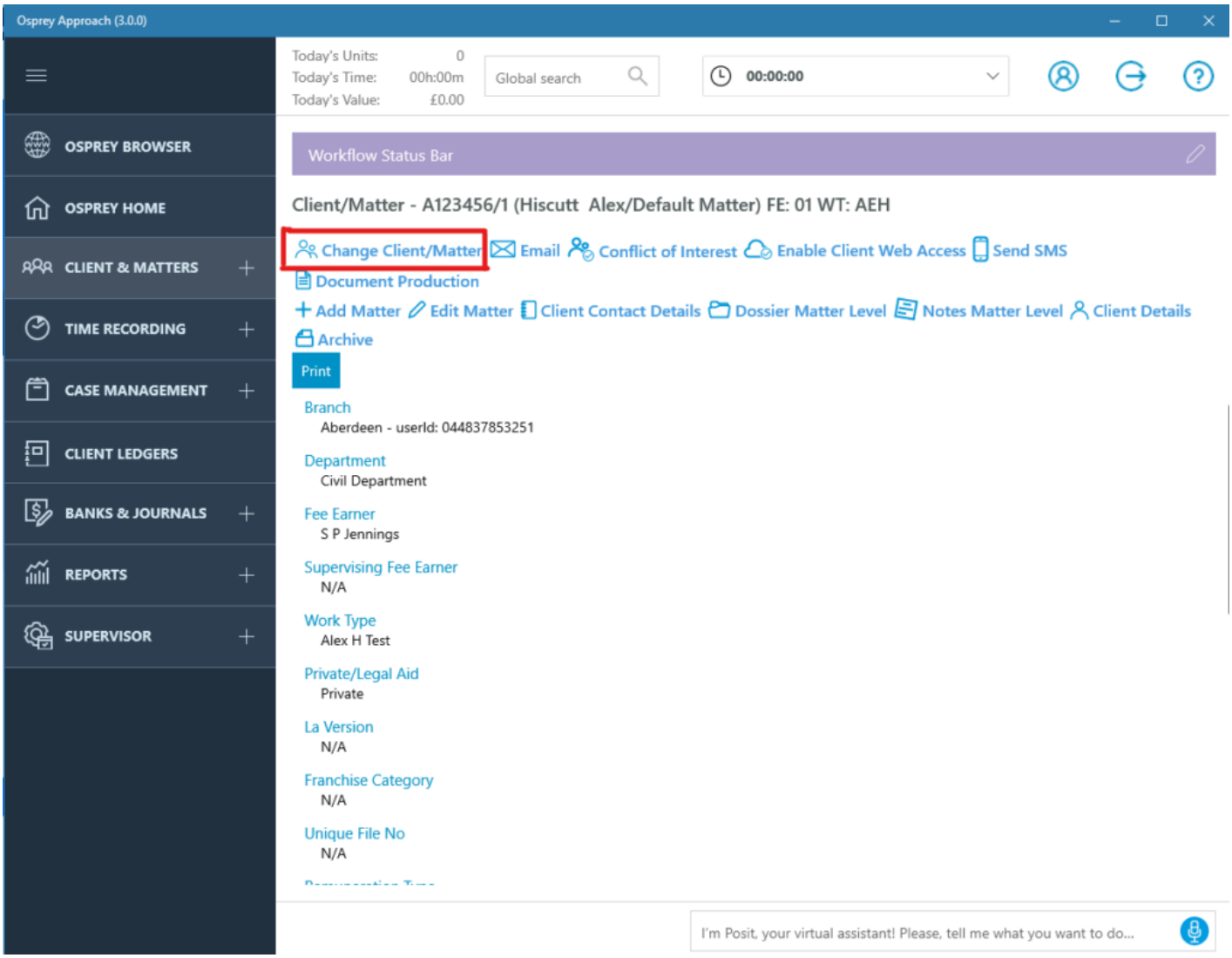
Osprey Approach: Searching for Clients (App)

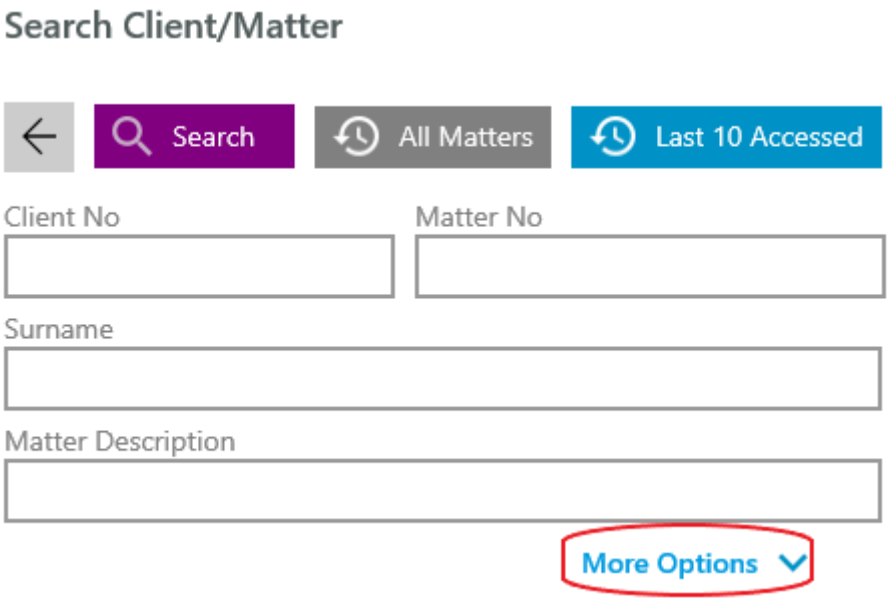
This help guide was last updated on
Feb 1st, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=34223

Full Client & Matter Search



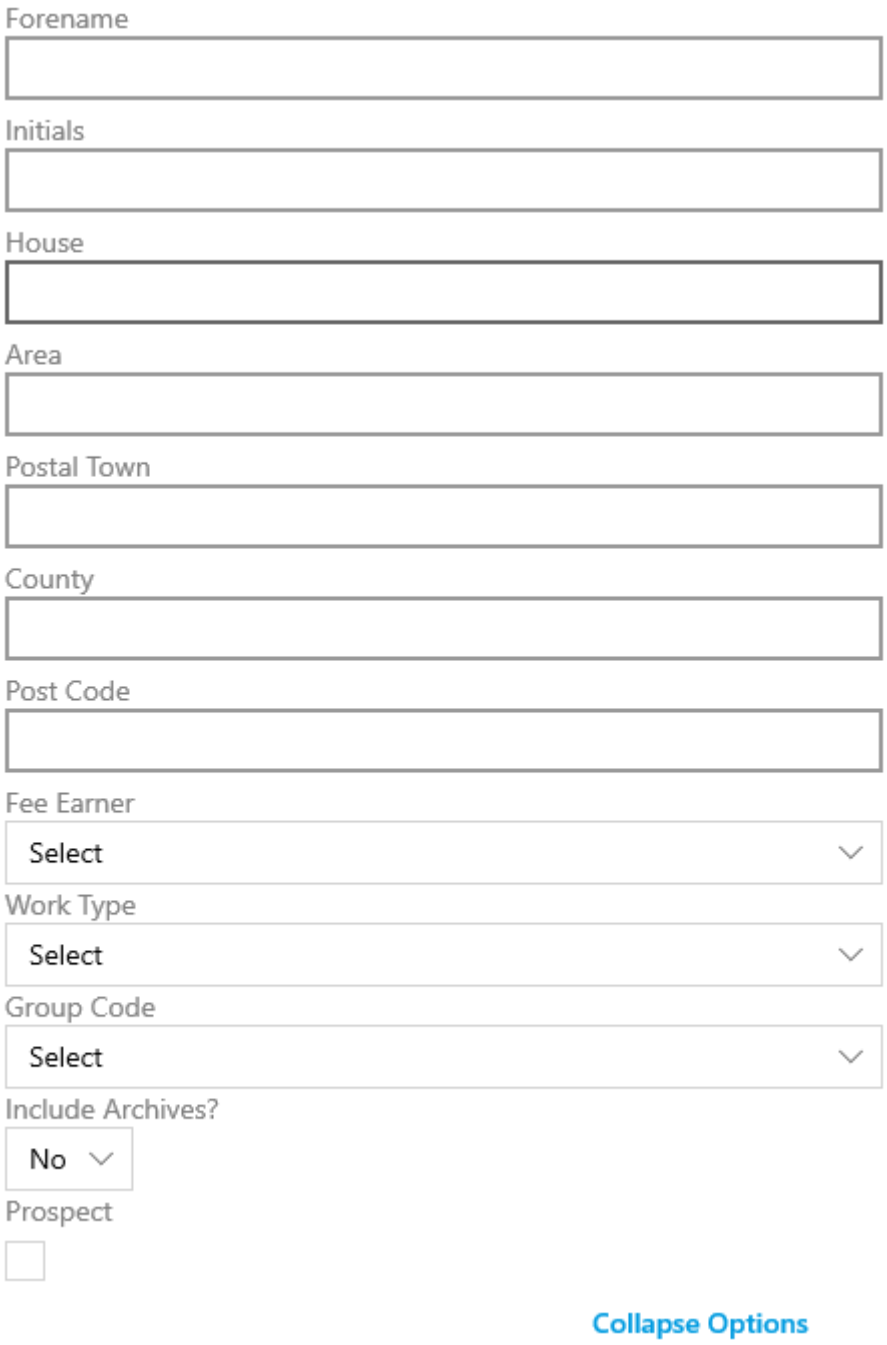
Tap Change Client/Matter, which is available from Clients & Matters, Case Management, or Client Ledgers



Use any of the basic search fields or tap More Options, from here you can perform a full search using the purple search button, View all Matters for the currently selected file using the grey all matters button and

finally you can view the last 10 accessed by using the blue button.

More Options shows:



You may search for the clients full name, and/or address. It's also possible to filter for a specific fee earner, or work type.

Should wish to search archives, set Include Archives? to Yes

To search through Prospect Matters, tick Prospect.

Search Results:

Search Again

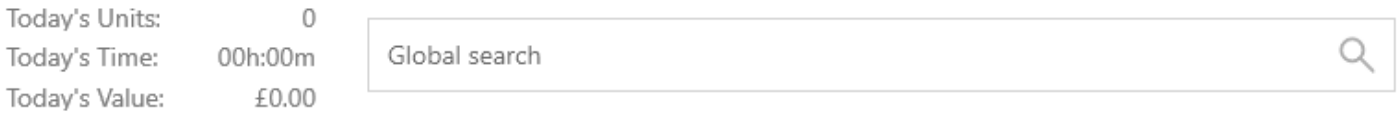
CLIENT/MATTER	MATTER DESCRIPTION	FEE EARNER	CLIENT NAME	ARCHIVED	WORK TYPE
MAT00008/1	Default Matter	S P Jennings	Matthews	No	GLOBAL
A00001/7	Default matter	AdamB	Matthews	No	ADO
A00001/8	K123456	Marcel	Matthews	No	FAMILY

Scroll through results and left click to load it.

You can use the Conflict of Interest to search for duplicate clients

Global Search

The Global search searches all areas of Osprey with no requirement for a wildcard to be entered and returns all matches. For best results, you should enter as much information as you can.



Once you have entered your search details in the Global search box and clicked the magnifying glass icon to perform your search

Step 2

Search Again

CLIENT/MATTER	MATTER DESCRIPTION	FEE EARNER	CLIENT NAME	ARCHIVED	WORK TYPE
MAT00008/1	Default Matter	S P Jennings	Matthews	No	GLOBAL
A00001/7	Default matter	AdamB	Matthews	No	ADO
A00001/8	K123456	Marcel	Matthews	No	FAMILY

Scroll through results and left click to load it.