

## Osprey Approach: Performing an InfoTrack Search (App)

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

The latest version is always online at https://support.ospreyapproach.com/?p=29980

Click here for a printer-friendly version



Osprey Approach offers integration with InfoTrack, allowing you to run InfoTrack searches and have results automatically uploaded back into the Matter History.

Osprey can automatically populate the InfoTrack screen with data already captured.

## Accessing the InfoTrack Screen

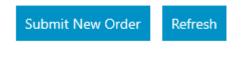
Navigate to Case Management > InfoTrack.

If configured, Osprey will populate any relevant fields. These fields can also be completed manually and edited if required.

	,	oday's Time: 00h:00m Global search 🔍							) 00:17:47	10
	Workflow Status	Bar								
	InfoTrack									
ନ୍ୟର CLIENT & MATTERS +		PPED MATTER DETAILS								
🕙 TIME RECORDING +	Matter Type Pu	irchase								
CASE MANAGEMENT —	✓ PROPERTY DE	TAILS								
	Title Number	AB123		Property Cour	cil Malvern					
Contract Work Forms										
Contacts	Address Building Name			Street Numbe		Street Nam	Constate Docad			
Organisations	building Name	Suite 1 Falstaff House		Sueet Number		Street Nam	e Sandy's Road			
Case Bundle	Town	Malvern		County	Worcestershire	Post Code	WR14 1JJ			
Packages	Street Address Suite 1 Falstaff House, Sandy's Road, Malvern, Worcestershire, WR14 1JJ									
Searchflow										
Infotrack	Purchase Price			Deposit Price		balance Pri	<i>x</i>			
Coadjute	Exchange Date	select a date	613	Exchange	date confirmed?					
CLIENT LEDGERS	Settlement Date select a date 📾 🖸 Settlement date confirmed?									
_	✓ PURCHASER/T	RANSFEREE/PARTIES TO REMOR	TGAGE DETAI	LS						
S BANKS & JOURNALS +	Title	Mr	Forename		Jack	Surname	Jones			
iiiii reports +	Second Name		National Insurance Numb			Date Of Birth	select a date			
G SUPERVISOR +	Phone		Email		support@pracctice.net					
	Company Name									

## Submitting an Order

At the bottom of the screen, you will see a Submit New Order. When clicking this, you will be taken to the InfoTrack website, pulling through any information through, ready to perform any searches.



## **Order History**

At the bottom of the page, you will find the orders that have been submitted and the status of them.

ORDER ID	DESCRIPTION	REFERENCE	STATUS	DATE OPENED	DATE COMPLETED	ORDERED BY	ORDER DETAILS
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No InfoTrack Orders

Once an order has been completed, an automated email will arrive from InfoTrack, advising the searches to have been completed. Osprey will also provide an automated email, letting you know that the search results have been returned, and uploaded to the client's matter history.