



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.

OSPREY BROWSER

OSPREY HOME

+

CLIENT & MATTERS

+

TIME RECORDING

+

CASE MANAGEMENT

—

Contract Work Forms

Contacts

Organisations

Case Bundle

Packages

Searchflow

Infotrack

Coadjute

CLIENT LEDGERS

BANKS & JOURNALS

+

REPORTS

+

SUPERVISOR

+

Today's Units: 0

Today's Time: 00h00m

Today's Value: £0.00

Global search

00:17:47

10

Workflow Status Bar

InfoTrack

▼

INFOTRACK MAPPED MATTER DETAILS

Matter Type

Purchase

▼

PROPERTY DETAILS

Title Number

AB123

Property Council

Malvern

Address

Building Name

Suite 1 Falstaff House

Street Number

Street Name

Sandy's Road

Town

Malvern

County

Worcestershire

Post Code

WR14 1JJ

Street Address

Suite 1 Falstaff House, Sandy's Road, Malvern, Worcestershire, WR14 1JJ

Purchase Price

Deposit Price

Balance Price

Exchange Date

select a date

Exchange date confirmed?

Settlement Date

select a date

Settlement date confirmed?

▼

PURCHASER/TRANSFEREE/PARTIES TO REMORTGAGE DETAILS

Title

Mr

Forename

Jack

Surname

Jones

Second Name

National Insurance Numt

Date Of Birth

select a date

Phone

Email

support@practice.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.

Submit New Order

Refresh

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.