Osprey
Approach

Welcome to the new era of Osprey

The new era of Osprey is focused on building an intuitive, faster, and easy-to-use platform. We're taking the powerful functionality in Osprey and modernising the design and enhancing the user experience so you can access data quicker, navigate to features easier, and manage your workload effortlessly.

The benefits of Osprey v1.5

✔ **Modern, intuitive dashboard** – start the day with clear visibility of tasks, KPIs, and recent matters in one place.

✔ **Dedicated client and matter workspaces** – all financials, compliance documents, history, and workflows brought together in one screen.

✔ **Streamlined navigation** – simplified menus and improved layout for quicker access to essential tools.

✔ **Smarter data management** – sortable, filterable, and exportable tables that save time and improve accuracy.

✔ **Enhanced & new integrations** – Expanded partnerships with market-leading legal technology providers give your firm more flexibility, connectivity, and choice.

✔ **Performance improvements** – faster, more reliable system performance across day-to-day workflows.

✔ **Future-ready foundation** – ongoing updates and innovation will be delivered through 1.5, not 1.37.

Why the upgrade matters?

The new era of Osprey is focused on building an intuitive, faster, and easy-to-use platform. We're taking the powerful functionality in Osprey and modernising the design and enhancing the user experience so you can access data quicker, navigate to features easier, and manage your workload effortlessly.

Transitioning from 1.37 to 1.5 is fully supported. Our team provides guidance, training, and resources to ensure your firm can adopt the new features quickly and confidently.
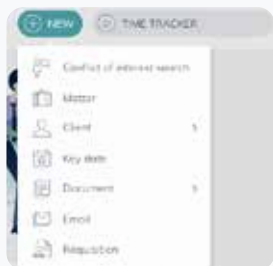
SWITCH NOW

What's next?

Version 1.5 of Osprey is available now, your system will be automatically updated and you'll recieve your go-live date and how to prepare.

What's changed/enhanced in Osprey v1.5?

We've made enhancements to existing features and functionality to make it easier to access the data and tools you need to effectively manage your clients and matters.

Streamlined navigation
Menus have been simplified and reorganised to focus on the core areas you use daily: Case Management, Accounts, Reporting, and Compliance. Less time searching, more time working.

Conflict of interest and new client & matter flows
Faster onboarding with smoother creation flows and clearer conflict checks to reduce risk and save time.

Enhanced InfoTrack integration
The Osprey and InfoTrack integration has been enhanced to enable automatic disbursement posting from all InfoTrack services bought. This means you can improve cashflow in less steps.

Enhanced time tracking
The new time tracker sidebar makes recording time quicker, easier, and more accurate, ensuring no billable minutes are missed.

Enhanced custom data pages
Custom fields and data pages are now more flexible and powerful, letting you capture additional information specific to your firm's workflows. Display, edit, and report on data in ways that suit your practice.

What's new in Osprey v1.5?

We've made enhancements to existing features and functionality to make it easier to access the data and tools you need to effectively manage your clients and matters.

Client & matter workspace
Provides a complete overview of client & matter activity, including lifetime and current-year spend, WIP, disbursements, invoices, compliance documents, and portal data.

Client and matter tables
Lists are now sortable, filterable, and exportable, so you can quickly find and act on the information you need. Batch actions like recording time or opening a workspace can be done directly from the table.

Client and matter notes
Capture important information directly within the client or matter workspace. Notes are fully searchable, helping teams stay aligned and maintain a clear record of communications and updates.

Katchr integration
Exclusive to 1.5, Katchr dashboards provide advanced reporting and insights into firm performance. Customisable views allow partners and managers to make informed decisions quickly.

Minerva integration
The Minerva integration enables law firms to automate key parts of their onboarding process. From secure identity checks to online forms, all client information collected in Minerva is synced directly into Osprey.

Perfect Portal integration
Seamlessly connect with Perfect Portal to improve client communications, onboarding, and quote management without leaving Osprey.