



# Osprey Approach: Adding & Amending Contacts (Browser)

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

The latest version is always online at  
<https://support.ospreyapproach.com/?p=30195>

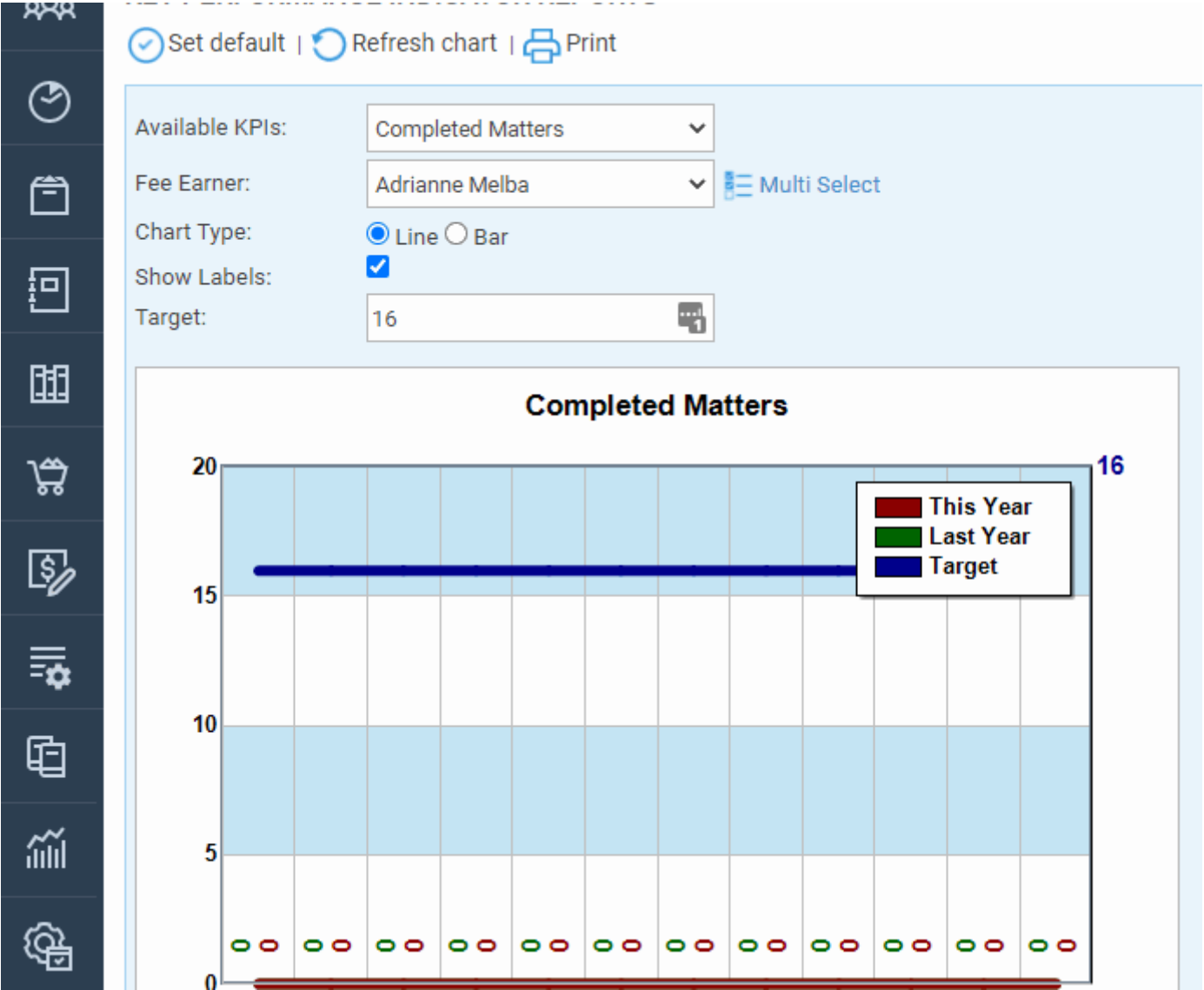
[Click here for a printer-friendly version](#)



You can store the phone and address details for the professional individuals. This guide will go through adding and subsequently editing contacts on Osprey.

## Adding a Contact

To add a new Contact, open Case Management > Contacts & Organisations > Contact Manager > Add Contact.





Select Case Management > Contacts & Organisations > Contact Manager > Add Contact

Fill out as many details as possible.

## PERSONAL INFORMATION

Surname:	<input type="text"/>
Title :	<input type="text"/>
Forename :	<input type="text"/>
Initials :	<input type="text"/>

## CONTACT EXPERTISE


Expert Type	<input type="text" value="None"/>	 (None)
Area Type	<input type="text" value="(None)"/>	 None

## COMMUNICATION INFORMATION

Phone No:	<input type="text"/>
Fax No:	<input type="text"/>
Mobile No:	<input type="text"/>
Email:	<input type="text"/>
WWW:	<input type="text"/>

## CONTACT ADDRESS

House:	<input type="text"/>
Area:	<input type="text"/>
Postal Town:	<input type="text"/>
County:	<input type="text"/>
Postcode:	<input type="text"/>



At the bottom you can link the contact to an exiting organisation.

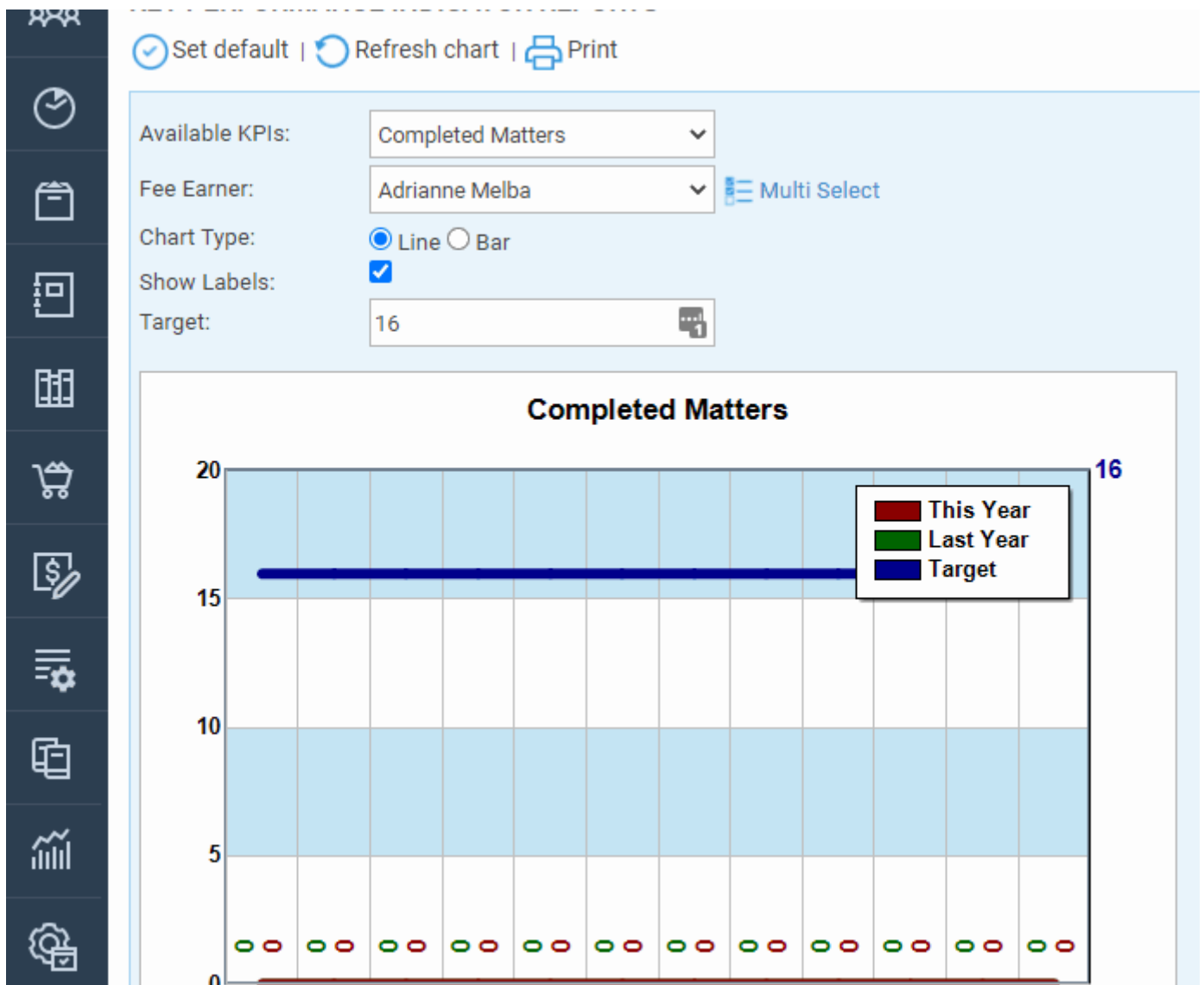
## ORGANISATION DETAILS

Organisation Id: (None) ▼ (None) - (None selected)

Click Save at the top of the screen.








## Amending a Contact

To amend or update a contact, go Case Management > Contact Manager.



Select Case Management > Contacts & Organisations > Contact Manager

Locate the required client, and click the Pencil Edit icon.

ORG BASED?	EDIT
	
	
	
	

You may make any changes and click Save at the top, you may even delete the contact if it no longer needed.

# Adding & Amending Organisations

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Use the below guide for further details on adding and amending Organisations.

<https://support.ospreyapproach.com/guides/add-edit-an-organisation-using-a-browser/>