Osprey Approach: Adding & Amending Organisations (Browser)

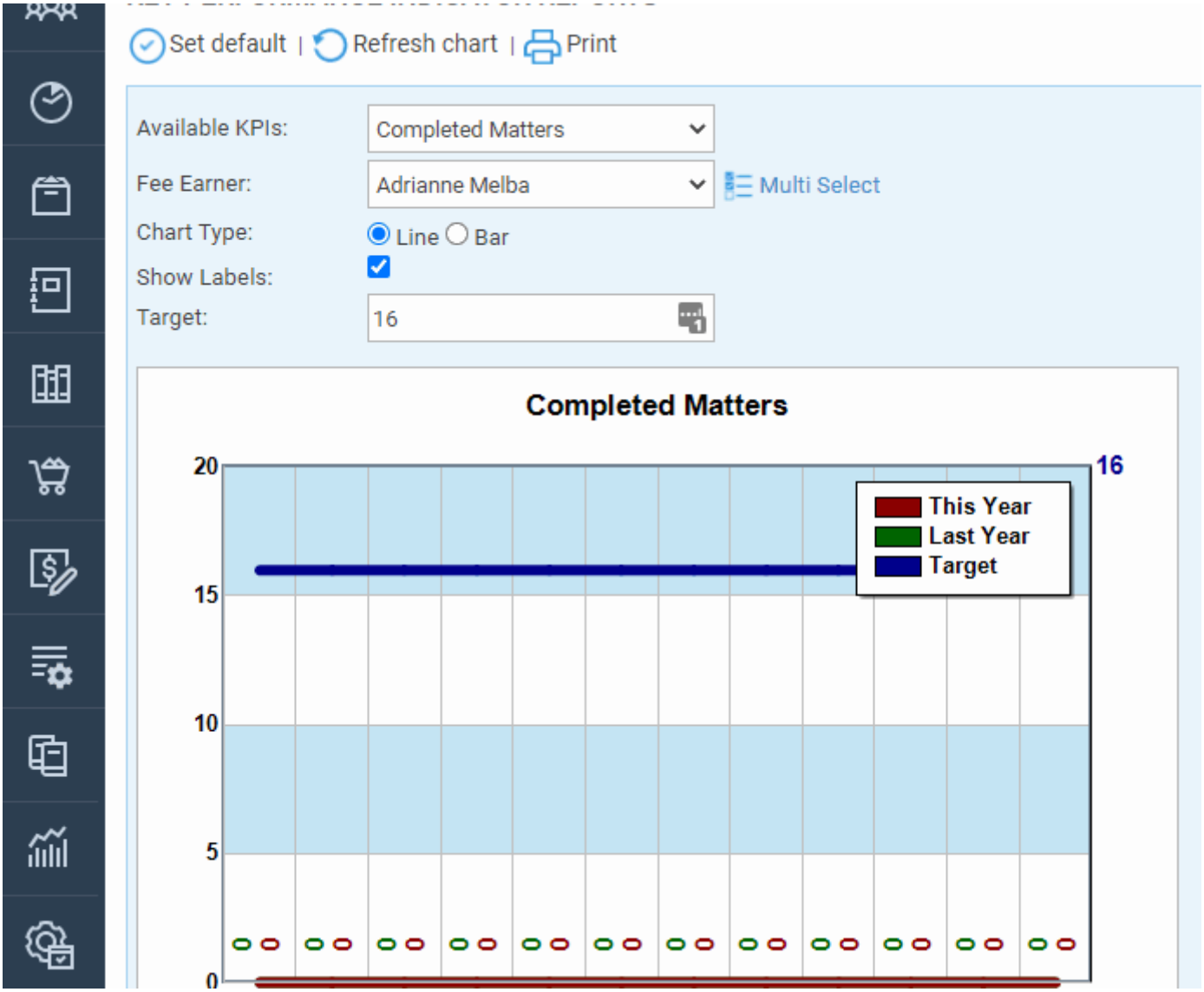
This help guide was last updated on
Dec 27th, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=30275

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

Adding an Organisation

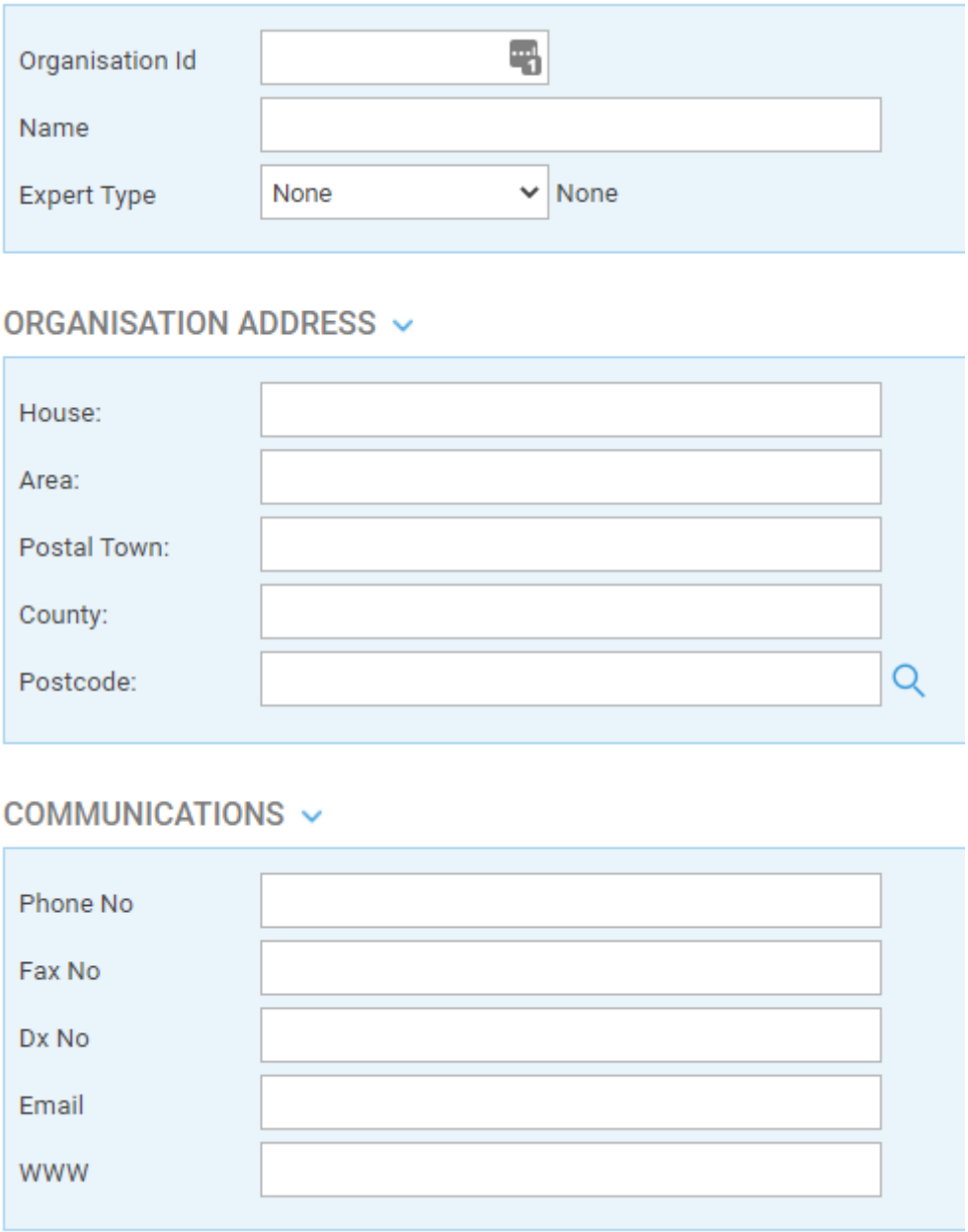
To add a new Organisation, open Case Management > Contacts & Organisations > Organisation Manager > Add Organisation.



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

Fill as many details as possible, the Organisation ID should be unique and be a short description (no spaces) of the Organisation Name.

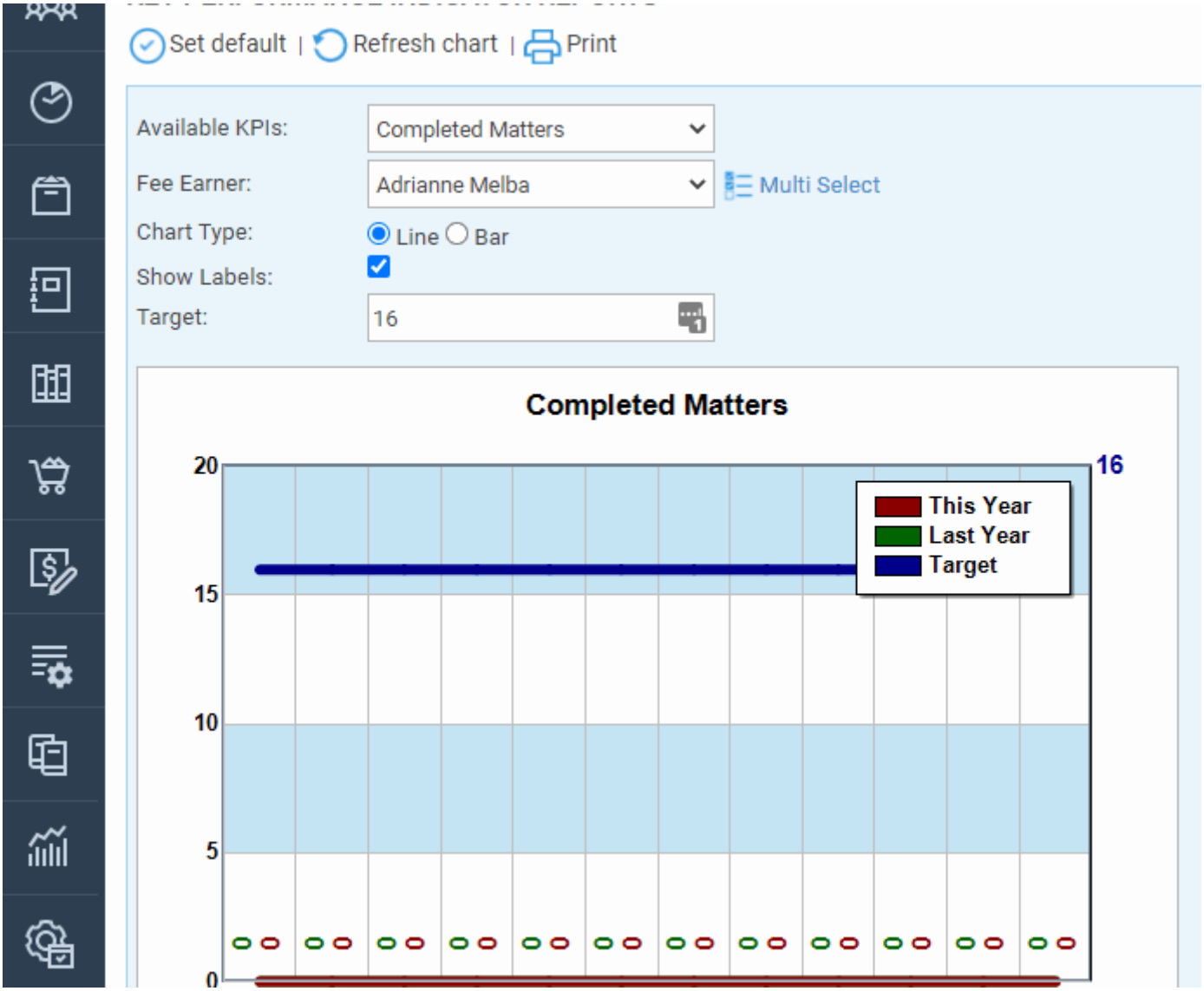
The ID cannot be changed once created.



Click Save when finished.

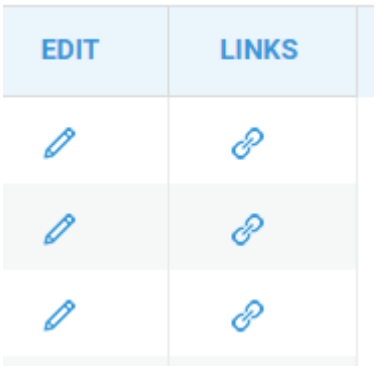
Amending an Organisation

To edit an organisation, navigate to Case Management > Contacts & Organisations > Organisation Manager.



Select Case Management > Contacts & Organisations > Organisation Manager

This will open a table of all the exisiting Organisations. Click the Pencil edit icon to amend them.



You may make any changes you need and click Save, or delete the Organisation if it is no longer required.

Adding & Amending Contacts

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

https://support.ospreyapproach.com/guides/add-edit-a-contact-using-a-browser/