Osprey Approach: Adding & Amending Organisations (App)

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

The latest version is always online at
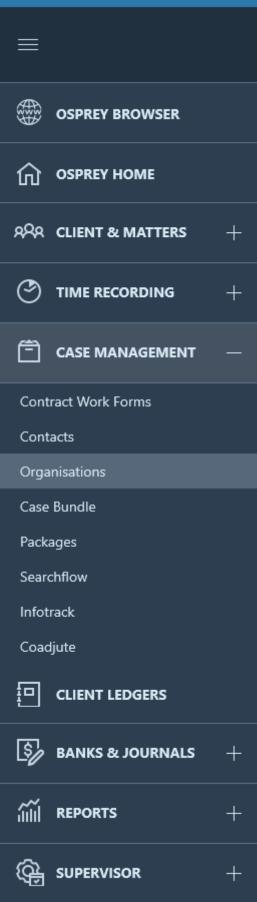https://support.ospreyapproach.com/?p=23575

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

Open the Osprey Approach app, Expand Case Management and click Organisations.

Osprey Approach (3.0.1)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

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 +

Completed File Opening

Home - 100003/1 (Wils

MATTERS FOR REVIEW

CLIENT	MATTER
HEA00007	2
100003	44
WEL00002	2
00002	3
00002	4
00002	6
PRO00005	2
100003	56

YOUR KEY DATES

CLIENT	MATTER
100003	1
100003	1
COW00002	2

Click the 'Add' button.

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.

Amending an Organisation

To edit an organisation, navigate to Case Management > Organisations.
Left-click the Organisation that you wish to edit.

Remember if you make any changes, to click 'Save'.

Adding & Amending Contacts

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

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