



# 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

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

Osprey Approach (3.0.1)

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:00h:00m

Today's Value:£0.00

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.

Osprey Approach (1.0.1)

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00

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

Workflow Status Bar

Organisations

+ Add

ALL

Search by organisation name...

NAME	ORGANISATION ID
Building Society 1	b_soc
Barclays	BARCLAYS
Best Estate Agents	BestEstateAgents
British Gas	BGAS
Charity Beneficiary	CHARBEN
Canterbury Social Services	CLASS
Court of Protection	COP
DWP	DWP
East Kent Hospitals University NHS Foundation Trust	EKHUFT
Electricity Provider	ELECPRO
Expert 1	Expert1
Funeral Director	FUNDIR
Gas Provider	GASPRO
GP Surgery	GP
HMRC	HMRC
Home Office	HOMEOFFICE
HSBC	HSBC
ISA Provider	ISAPROV
Land Registry	LANDREGISTRY
Legal Ombudsman	LEGOMB
Life Insurer 1	LIFEINS

I'm Posit, your virtual assistant! Please, tell me what you want to do...

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.

Osprey Approach (1.0.1)

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

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Infotrack

Coadjute

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

Workflow Status Bar

Add Organisation

← Save

Organisation Id

OspreyApproach

Name

Osprey Approach

Expert Type

EXPERT

ORGANISATION ADDRESS

House

Practice Ltd

Area

Sandy Lane

Postal Town

Malvern

County

Worcestershire

Post Code

WR14 1JJ

COMMUNICATIONS

Phone No

03300 604940

Fax No

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Click Save.

# Amending an Organisation

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

The screenshot displays the Osprey Approach (1.0.1) web application. The left sidebar contains a navigation menu with categories: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT (expanded), CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The 'CASE MANAGEMENT' section is active, showing a list of options: Contract Work Forms, Contacts, Organisations (selected), Case Bundle, Packages, Searchflow, Infotrack, and Coadjute. The main content area is titled 'Add Organisation' and features a 'Workflow Status Bar' at the top. Below this, there is a 'Save' button and a form with the following fields: 'Organisation Id' (OspreyApproach), 'Name' (Osprey Approach), 'Expert Type' (SOLICITOR), 'ORGANISATION ADDRESS' (House: Falstaff Limited, Area: Falstaff House, Postal Town: Malvern, County: Worcestershire, Post Code: WR14 1JJ), and 'COMMUNICATIONS' (Phone No: 03300 604940, Fax No: ). A chatbot icon is visible in the bottom right corner.

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/>