

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

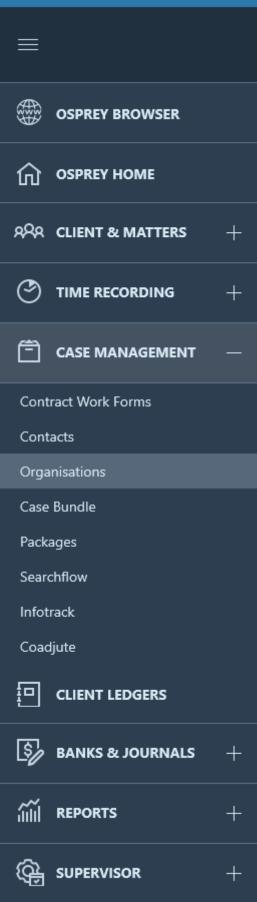


You can store the phone and address details for the professional firms. This guide will go through adding and subsequently editing organisations on Osprey.

Adding an Organisation

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





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Completed File Opening

Home - 100003/1 (Wils

MATTERS FOR REVIEW

CLIENT		MATTER
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	100003	44
	WEL00002	2
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	PRO00005	2
	100003	56

YOUR KEY DATES

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Click the 'Add' button.

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Organisations		Canterbury Social Services				CLASS				
Case Bundle		Court of Protection				COP				_
Packages		DWP				DWP				
Searchflow		East Kent Hospitals University NHS Foundation Trust				EKHUFT				_
Infotrack		Electricity Provider				ELECPRO				
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		Life Insurer 1				LIFFINS				
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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.

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Coadjute	Postal Town				
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iiii reports +	WR14 1JJ				
	COMMUNICATIONS				
(a)	Phone No				
	03300 604940				×
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Click Save.

Amending an Organisation

To edit an organisation, navigate to Case Management > Organisations.

Left-click the Organisation that you wish to edit.

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О OSPREY HOME	Add Organisation				
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	County Worcestershire				_
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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/