



Osprey Approach: Edit an Existing Client

This help guide was last updated on
Apr 15th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=17685>



Once a client has been added, you can edit any of the details held other than the client and matter numbers.

Please note that if you are using alphanumeric client numbers, changing the client's surname which the number is based upon will NOT change the client number. e.g. if your client's name is Jones, number JON001 and they have changed their surname, the client number will remain the same.

Edit name and address details

Navigate to Clients & Matters > Clients, and search for the client you want to edit.

Click the Edit button, make the required changes to the client's details, and click Save.

Osprey Home

CLIENTS & MATTERS

REPORTS

CLIENTS

New Individual File

New Company File

Web Publishing

New Conveyancing File

Call Report

Call ML

GDPR

MATTERS

New Web Client Enquiries

Custom Matter Views

Custom Questionnaires

YOUR KEY DATES

F/E	CLIENT	MATTER	CLIENT NAME	KEY DATE	TYPE	SUP F/E?
No data to display						

KEY DATES ADDED BY YOU

Filter by Keydate Type: All

F/E	CLIENT	MATTER	KEY DATE	TYPE	
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Clients & Matters

Clients

D0001/T (Dubh A P Alex) FE:MB WT:CONV_R Purchase of The Maltings, Ledbury Road, Hereford HR2

WORKFLOW STATUS BAR

Key Dates:

Date:

Description:

More Key Dates

CLIENT & MATTER SEARCH

Client Search

Dossier Search

CRM Search

Send e-mail

Client Dossier

SMS

Client No:

D0001

Load Client/Matter

Name:

Dubh

MAIN CLIENT NAME

Edit

SURNAME	FORENAME	INITIALS	TITLE	EMAIL
Dubh	Alex	A P	Mr	a.b@c.com

ACCOUNT ADDRESS

House:

Area:

Postal Town:

Edit phone numbers

Click the Add button. All phone numbers are displayed here, so you can either select and add a new phone number, or right click one of the existing numbers and select Edit.

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Clients & Matters

Clients

D0001/1 (Dubh A P Alex) FEMB WT:CONV_R Purchase of The Maltings, Ledbury Road, Hereford HR2

BILLING ADDRESS

Bill Street:

Bill Area:

Bill Postal Town:

Bill County:

Bill Postcode:

Bill Addressee:

ACCOUNT CONTROL DETAILS

Debtor Limit: 0.00

Disbursements Limit: 0.00

Wip Limit: 0.00

Group Code:

TELEPHONE NUMBERS AND OTHER DETAILS

Add

PHONE TYPE	DESCRIPTION
MOBILE	Mobile Phone Number - Alex

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Clients

Edit Communications Details

Save

Cancel

Client No: D0001

Phone Type: PHONE

Description: Phone Number - Home

Info: 01432 384938

Main No: ☐

Export

Refresh

PHONE TYPE	DESCRIPTION
MOBILE	Mobile Phone Number - Alex
MOBILE	Mobile Phone Number - Amanda

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