

Osprey Approach: Adding & Amending Contacts (App)

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The latest version is always online at https://support.ospreyapproach.com/?p=23475

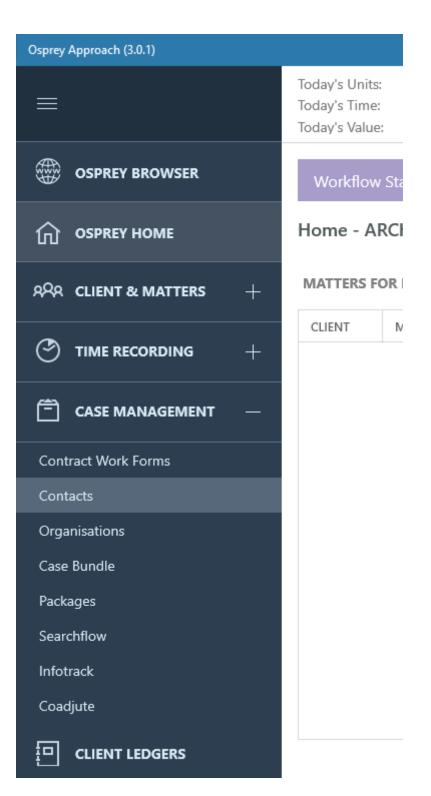
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You can store the phone and address details for the professional individuals. This guide will go through adding and subsequently editing contacts on Osprey

Adding a Contact

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



Click the 'Add' button.

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Fill in the details on this page and click save. At the bottom you can link the contact to an organisation if necessary.

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Click Save to save your new Contact.

Amending a Contact

To amend or update a contact, go Case Management > Contact Manager. Left-click the contact you wish to Edit

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

Adding & Amending Organisations

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

https://support.ospreyapproach.com/guides/add-edit-an-organisation-app/