

## Osprey Approach: Adding & Amending Contacts (App)

This help guide was last updated on Jul 25th, 2024

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

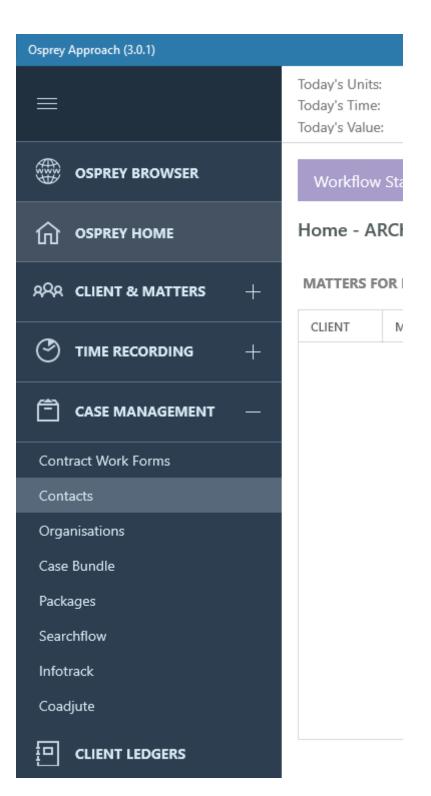
Click here for a printer-friendly version



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.

Osprey Approach (3.0.1)				- 0	×
	Today's Value: £0.00 Global search Q.	(b) 00:00:00 ~	8	θ	0
	Workflow Status Bar				0
G OSPREY HOME	Add Contact				
RPR CLIENT & MATTERS $+$	FERSONAL INFORMATION				
TIME RECORDING +	Surgame Single Control				
🖹 CASE MANAGEMENT —	Title Mr				
Contract Work Forms	Forename				_
	John				
Organisations	Initials				_
Case Bundle	J				
Packages					
Searchflow	CONTACT EXPERTISE				
Infotrack	Expert Type				~
Coadjute	SOUCITOR				
<b>—</b>	Area Type (None)				$\sim$
BANKS & JOURNALS +	COMMUNICATION INFORMATION				
	Phone No				
iiii reports +	03300 604940				×
	Fax No				
🕞 SUPERVISOR +					
	Mobile No				
	Faced				
		I'm Posit, your virtual assistant! Please, tell me w	hat you want to o	do	₿

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

+	
'	ORGANISATION DETAILS
+	Organisation Id
	Solicitors and Co
+	

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

				- 0	×
	Today's Units: 0 Today's Time: 00h:00m Today's Value: £0.00	C 00:00:00	~ 8	Θ	?
	Workflow Status Bar				0
☐ OSPREY HOME	Edit Contact				
	PERSONAL INFORMATION				
CASE MANAGEMENT -	Title Mr				
Contract Work Forms	Forename				_
	Estate				
Organisations	Initials				
Case Bundle	E				
Packages					
Searchflow	CONTACT EXPERTISE Expert Type				
Infotrack	ESTATE_AGENT				~
Coadjute	Area Type				
	(None)				$\sim$
BANKS & JOURNALS +	COMMUNICATION INFORMATION Phone No				
iiiii reports +	Fax No				
Gervisor +	Mobile No				
	L _PeetR				
		I'm Posit, your virtual assistant! Please, tell me	e what you want to	do	₿

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/