Osprey Approach: Adding & Amending Contacts (App)

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Osprey
Approach

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.

Osprey Approach (3.0.1)

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Click the 'Add' button.

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

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

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/