

# 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

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## Adding a Contact


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


Osprey Approach (3.0.1)


☰


Today's Units:  
Today's Time:  
Today's Value:

 **OSPREY BROWSER**

 **OSPREY HOME**

 **CLIENT & MATTERS** +

 **TIME RECORDING** +

 **CASE MANAGEMENT** —

Contract Work Forms

Contacts

Organisations


Case Bundle

Packages

Searchflow

Infotrack

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 **CLIENT LEDGERS**

Workflow Sta

### Home - ARCI

#### MATTERS FOR I

CLIENT	M
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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

Osprey Approach (3.0.1)

Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

### Edit Contact

← Save

PERSONAL INFORMATION

Surname  
Agent

Title  
Mr

Forename  
Estate

Initials  
E

CONTACT EXPERTISE

Expert Type  
ESTATE\_AGENT

Area Type  
(None)

COMMUNICATION INFORMATION

Phone No

Fax No

Mobile No

I'm Posit, your virtual assistant! Please, tell me 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/>