



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>



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)


☰


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.

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

Add Contact

Save

PERSONAL INFORMATION

Surname: Smith

Title: Mr

Forename: John

Initials: J

CONTACT EXPERTISE

Expert Type: SOLICITOR

Area Type: (None)

COMMUNICATION INFORMATION

Phone No: 03300 60494d

Fax No:

Mobile No:

I'm Posit, your virtual assistant! Please, tell me what you want to 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

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/>