



Osprey Approach: Adding & Amending Contacts (App)

This help guide was last updated on
Dec 27th, 2023

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)

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TIME RECORDING +

CASE MANAGEMENT —

Contract Work Forms

Contacts

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Case Bundle

Packages

Searchflow

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Click the 'Add' button.

Osprey Approach (1.0.1)

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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 604940

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

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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/>