



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.

The screenshot shows the Osprey Approach (3.0.1) app interface. On the left is a dark blue sidebar menu with the following items: 'OSPREY BROWSER', 'OSPREY HOME', 'CLIENT & MATTERS' (with a plus icon), 'TIME RECORDING' (with a plus icon), 'CASE MANAGEMENT' (with a minus icon), 'Contract Work Forms', 'Contacts' (highlighted in a lighter blue), 'Organisations', 'Case Bundle', 'Packages', 'Searchflow', 'Infotrack', 'Coadjute', and 'CLIENT LEDGERS'. The main content area on the right shows 'Today's Units:', 'Today's Time:', 'Today's Value:', a purple 'Workflow Sta' button, 'Home - ARCI', 'MATTERS FOR I', and a table with columns 'CLIENT' and 'M'.

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/>