Osprey Approach: Adding & Amending Contacts (Browser)

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

The latest version is always online at
https://support.ospreyapproach.com/?p=30195

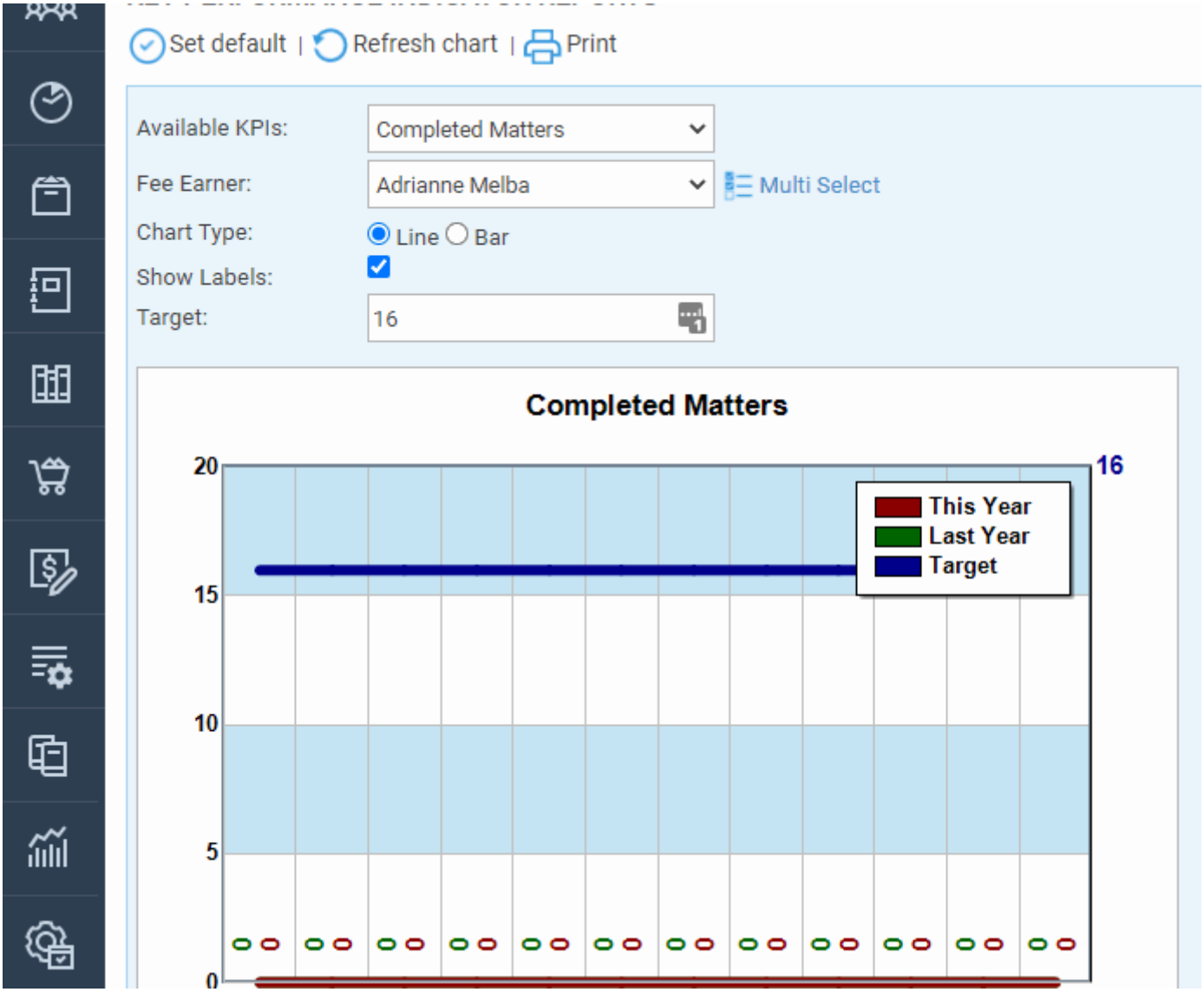
Click here for a printer-friendly version

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.

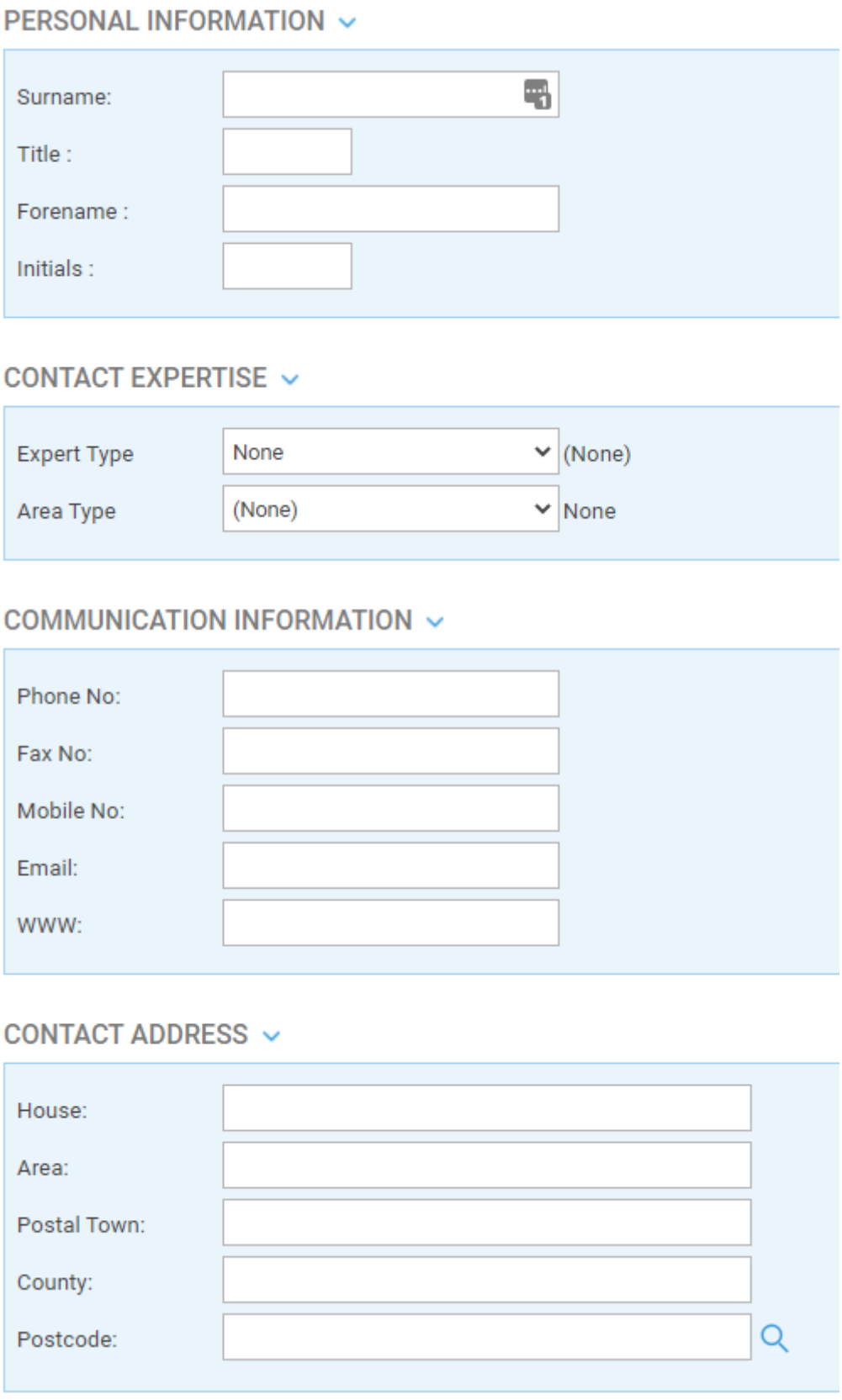
Adding a Contact

To add a new Contact, open Case Management > Contacts & Organisations > Contact Manager > Add Contact.

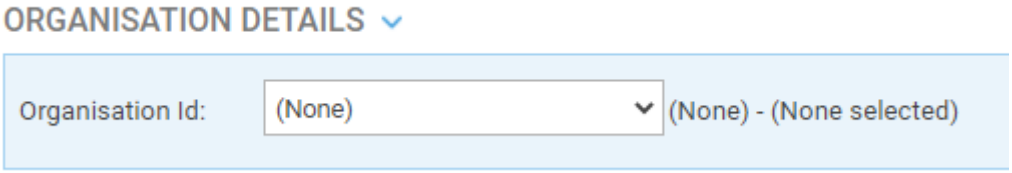


Select Case Management > Contacts & Organisations > Contact Manager > Add Contact

Fill out as many details as possible.



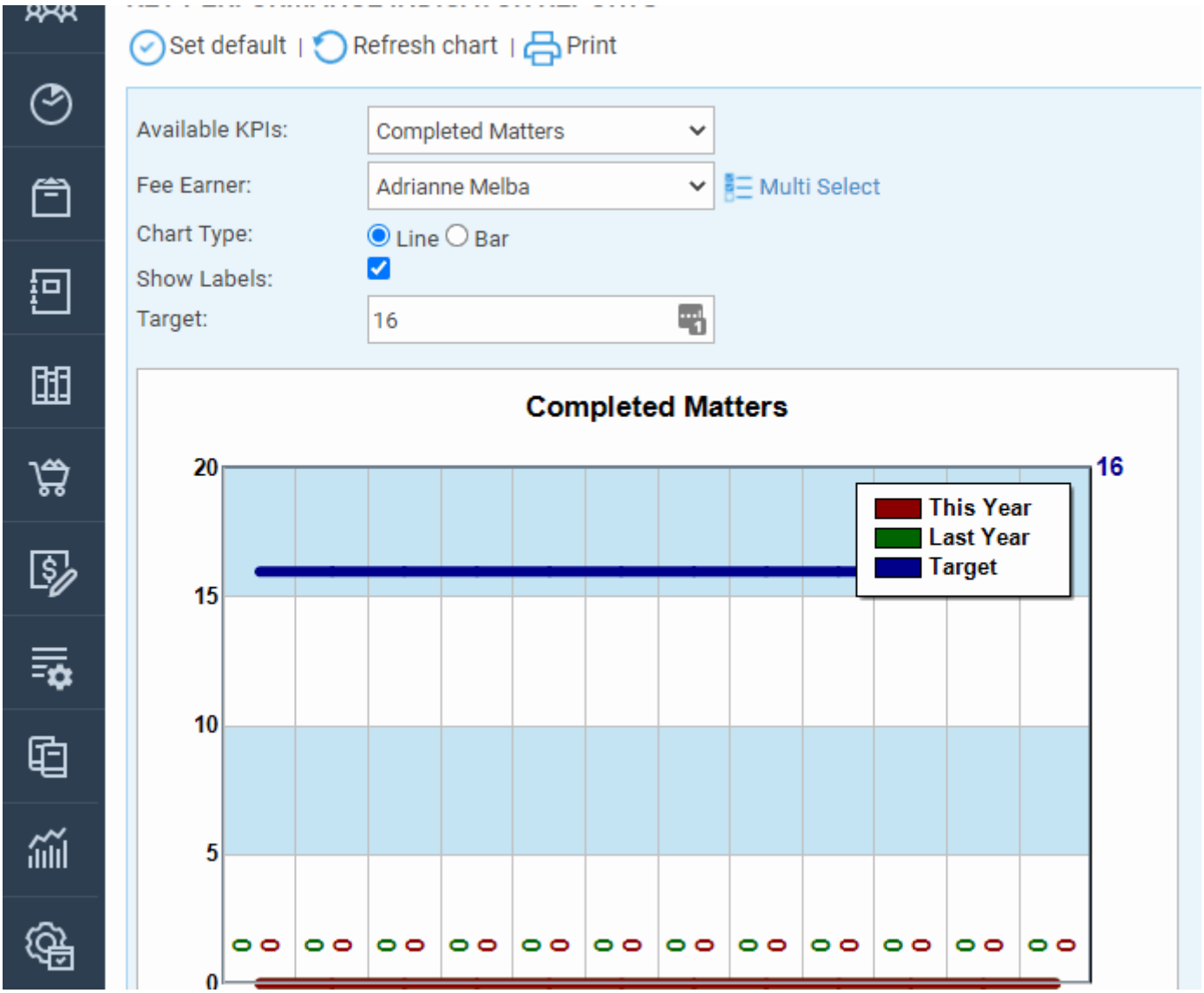
At the bottom you can link the contact to an exiting organisation.



Click Save at the top of the screen.

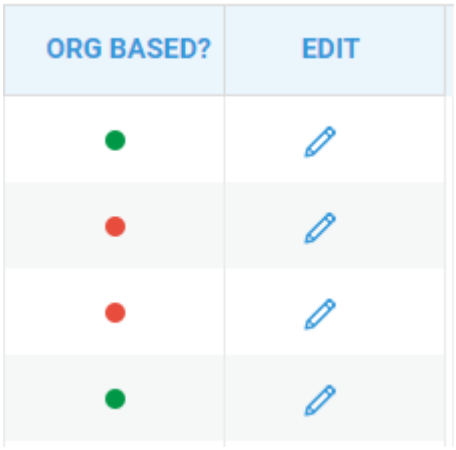
Amending a Contact

To amend or update a contact, go Case Management > Contact Manager.



Select Case Management > Contacts & Organisations > Contact Manager

Locate the required client, and click the Pencil Edit icon.



You may make any changes and click Save at the top, you may even delete the contact if it no longer needed.

Adding & Amending Organisations

Use the below guide for further details on adding and amending Organisations.

https://support.ospreyapproach.com/guides/add-edit-an-organisation-using-a-browser/