



# Osprey Approach: Adding & Amending Contacts (Browser)

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

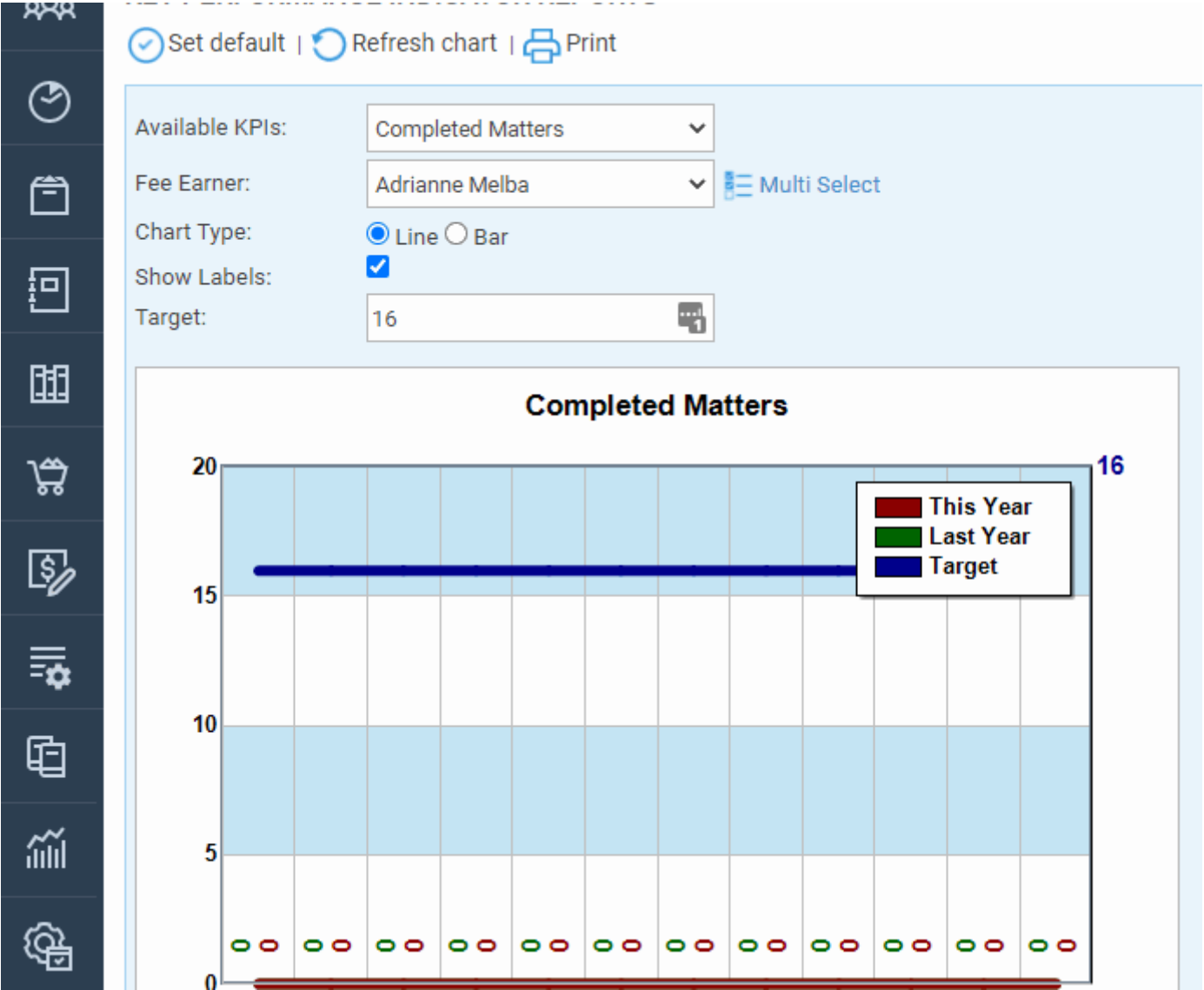
The latest version is always online at  
<https://support.ospreyapproach.com/?p=30195>



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.

## PERSONAL INFORMATION

Surname:	<input type="text"/>
Title :	<input type="text"/>
Forename :	<input type="text"/>
Initials :	<input type="text"/>

## CONTACT EXPERTISE


Expert Type	<input type="text" value="None"/>	 (None)
Area Type	<input type="text" value="(None)"/>	 None

## COMMUNICATION INFORMATION

Phone No:	<input type="text"/>
Fax No:	<input type="text"/>
Mobile No:	<input type="text"/>
Email:	<input type="text"/>
WWW:	<input type="text"/>

## CONTACT ADDRESS

House:	<input type="text"/>
Area:	<input type="text"/>
Postal Town:	<input type="text"/>
County:	<input type="text"/>
Postcode:	<input type="text"/>



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

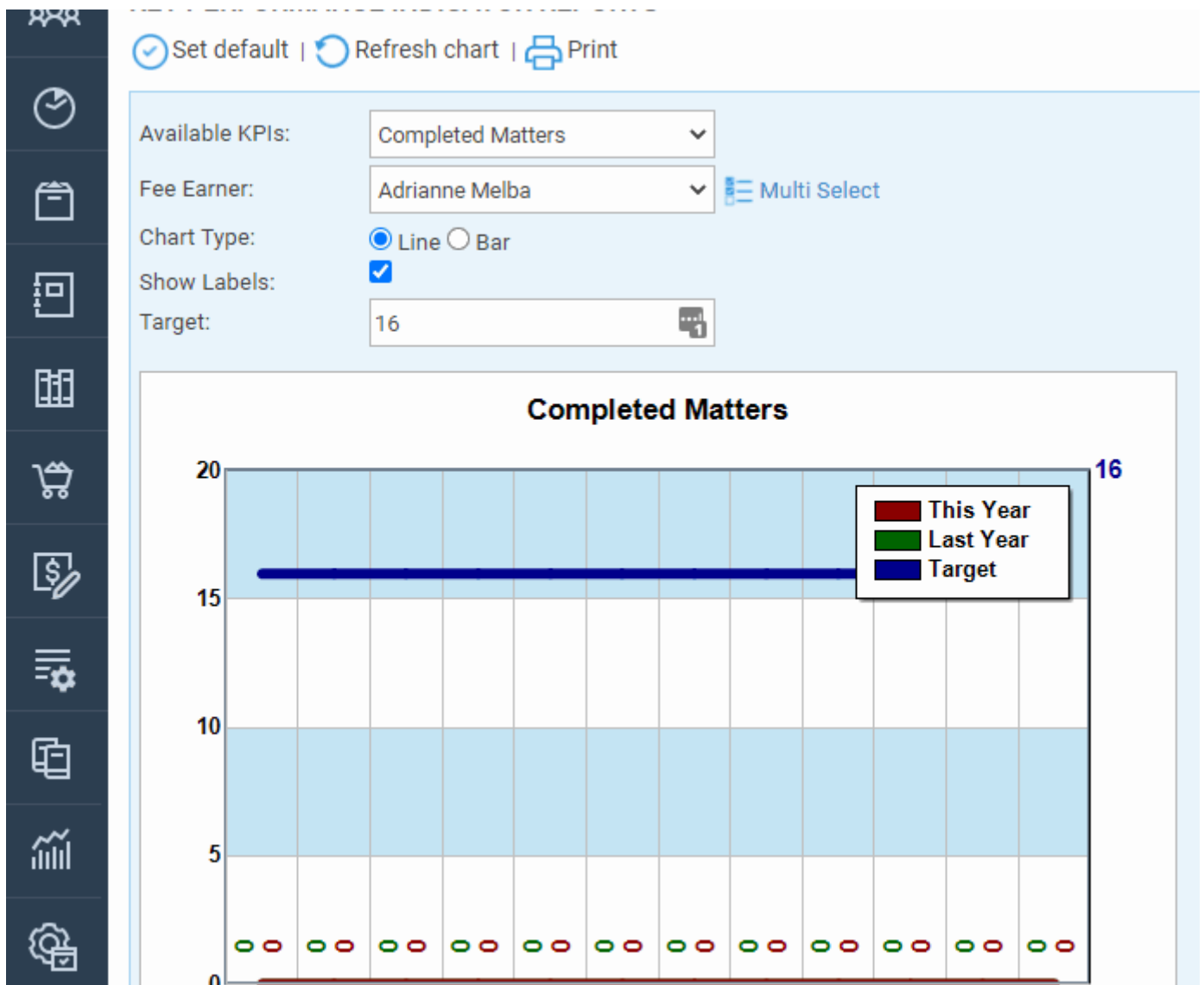
## ORGANISATION DETAILS

Organisation Id: (None) ▼ (None) - (None selected)

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.

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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

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

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