Osprey Approach: Adding & Amending Contacts (App)

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

The latest version is always online at
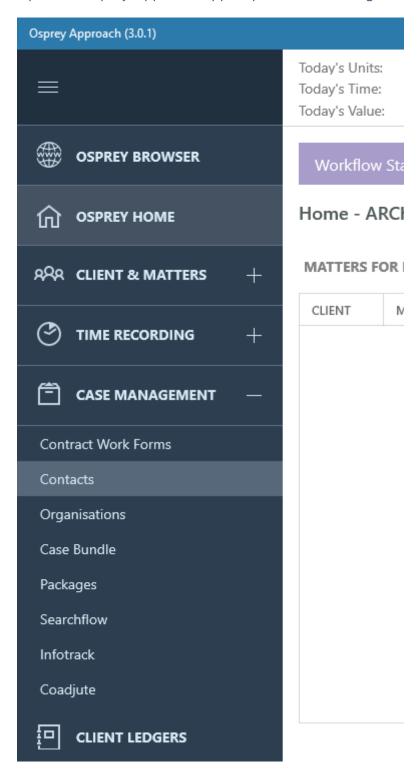https://support.ospreyapproach.com/?p=23475
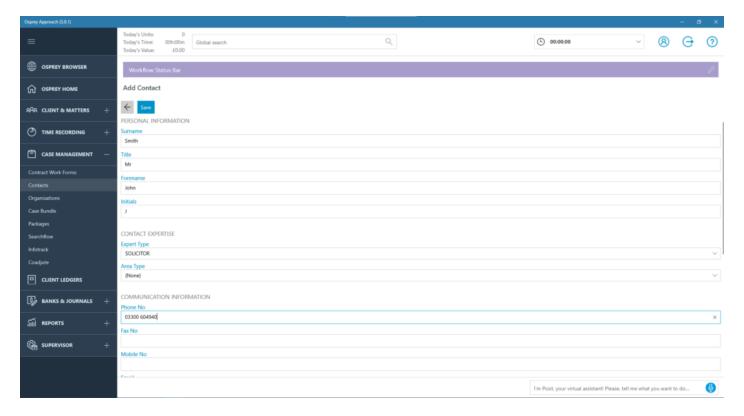
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You can store the phone and address details for the professional individuals. This guide will go through adding and subsequently editing contacts on Osprey.
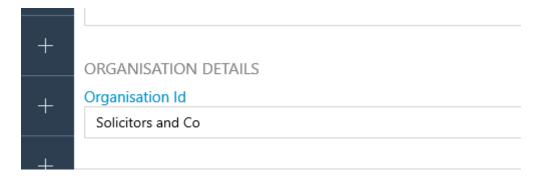
Adding a Contact

Open the Osprey Approach app, Expand Case Management and click Contacts.
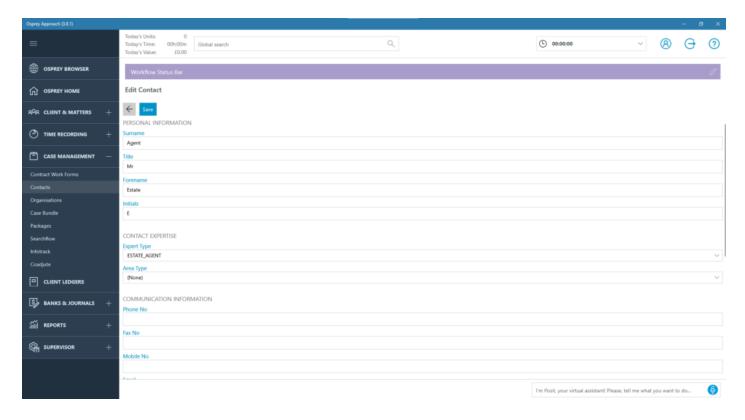

Click the 'Add' button.

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

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/