

Osprey Approach: Adding & Amending Organisations (App)

This help guide was last updated on
Jul 26th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=23575>











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You can store the phone and address details for professional firms. This guide will go through adding and subsequently editing organisations on Osprey

Adding an Organisation

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

- 
-  **OSPREY BROWSER**
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Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Completed File Opening

Home - 100003/1 (Wils

MATTERS FOR REVIEW

CLIENT	MATTER
HEA00007	2
100003	44
WEL00002	2
00002	3
00002	4
00002	6
PRO00005	2
100003	56

YOUR KEY DATES

CLIENT	MATTER
100003	1
100003	1
COW00002	2

Click the 'Add' button.

The screenshot shows the 'Organisations' section of the Osprey Approach software. At the top, there is a 'Workflow Status Bar' and a search bar with the text 'Global search'. Below this, a table lists various organisations with their names and unique IDs. The table has two columns: 'NAME' and 'ORGANISATION ID'. The data is as follows:

NAME	ORGANISATION ID
Building Society 1	b_soc
Barclays	BARCLAYS
Best Estate Agents	BestEstateAgents
British Gas	BGAS
Charity Beneficiary	CHARBEN
Canterbury Social Services	CLASS
Court of Protection	COP
DWP	DWP
East Kent Hospitals University NHS Foundation Trust	EKHUFT
Electricity Provider	ELECPRO
Expert 1	Expert1
Funeral Director	FUNDIR
Gas Provider	GASPRO
GP Surgery	GP
HMRC	HMRC
Home Office	HOMEOFFICE
HSBC	HSBC
ISA Provider	ISAPROV
Land Registry	LANDREGISTRY
Legal Ombudsman	LEGOMB
Life Insurer 1	LIFEINS

At the bottom right of the interface, there is a chatbot icon and the text: 'I'm Posit, your virtual assistant! Please, tell me what you want to do...'

Fill as many details as possible, the Organisation ID should be unique and be a short description (no spaces) of the Organisation Name.

The ID cannot be changed once created.

The screenshot shows the 'Add Organisation' form in the Osprey Approach software. The form is titled 'Add Organisation' and includes a 'Save' button. The fields are as follows:

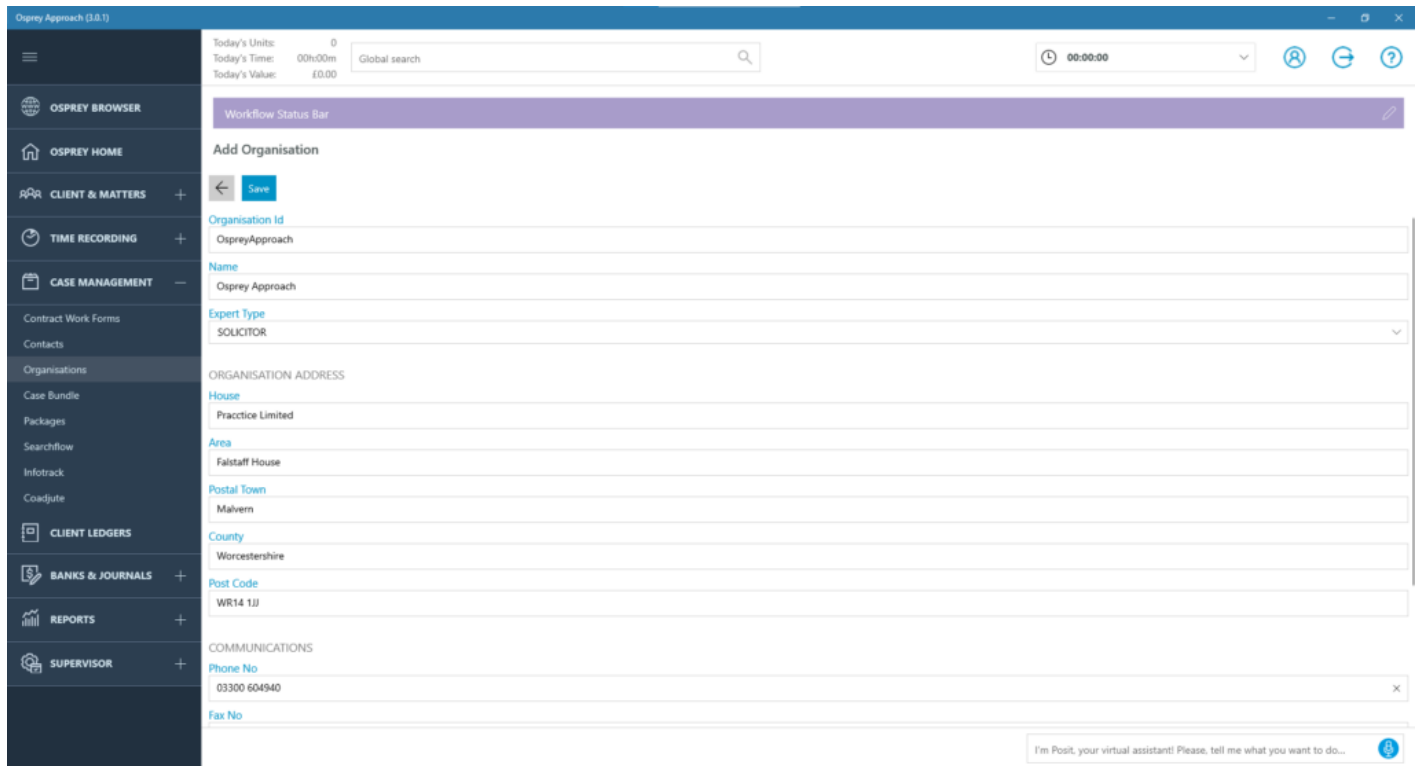
- Organisation Id:** OspreyApproach
- Name:** Osprey Approach
- Expert Type:** EXPERT
- ORGANISATION ADDRESS:**
 - House:** Pracctice Ltd
 - Area:** Sandy Lane
 - Postal Town:** Malvern
 - County:** Worcestershire
 - Post Code:** WR14 1JJ
- COMMUNICATIONS:**
 - Phone No:** 03300 604940
 - Fax No:**

At the bottom right of the interface, there is a chatbot icon and the text: 'I'm Posit, your virtual assistant! Please, tell me what you want to do...'

Click Save.

Amending an Organisation

To edit an organisation, navigate to Case Management > Organisations. Left-click the Organisation that you wish to edit.



The screenshot displays the 'Add Organisation' form within the Osprey Approach application. The interface includes a top navigation bar with a 'Workflow Status Bar' and a 'Save' button. The form is divided into several sections: 'Organisation Id' (OspreyApproach), 'Name' (Osprey Approach), 'Expert Type' (SOLICITOR), 'ORGANISATION ADDRESS' (House: Practice Limited, Area: Falstaff House, Postal Town: Malvern, County: Worcestershire), 'Post Code' (WR14 1J), and 'COMMUNICATIONS' (Phone No: 03300 604940, Fax No:). A search bar and a timer are visible in the top right corner. A chatbot icon is located in the bottom right corner.

Remember if you make any changes, to click 'Save'.

Adding & Amending Contacts

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

<https://support.ospreyapproach.com/guides/add-edit-a-contact-app/>