



Osprey Approach: Adding & Amending Organisations (App)

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











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



You can store the phone and address details for the 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**
-  **OSPREY HOME**
-  **CLIENT & MATTERS** +
-  **TIME RECORDING** +
-  **CASE MANAGEMENT** —
- Contract Work Forms
- Contacts
- Organisations
- Case Bundle
- Packages
- Searchflow
- Infotrack
- Coadjute
-  **CLIENT LEDGERS**
-  **BANKS & JOURNALS** +
-  **REPORTS** +
-  **SUPERVISOR** +

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.

Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

Organisations

+ Add ALL Search by organisation name...

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

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.

Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

Add Organisation

← Save

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

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 'Osprey Approach (3.0.1)' application window. The top navigation bar includes a hamburger menu, user information (Today's Units: 0, Today's Time: 00h:00m, Today's Value: £0.00), a global search bar, and system icons (clock, user, refresh, help). The left sidebar lists various modules: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT (highlighted), CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The main content area is titled 'Add Organisation' and features a 'Save' button. The form fields are as follows:

- Organisation Id: OspreyApproach
- Name: Osprey Approach
- Expert Type: SOLICITOR (dropdown menu)
- ORGANISATION ADDRESS:
 - House: Practice Limited
 - Area: Falstaff House
 - Postal Town: Malvern
 - County: Worcestershire
 - Post Code: WR14 1JJ
- COMMUNICATIONS:
 - Phone No: 03300 604940
 - Fax No: (empty)

A chatbot prompt at the bottom right reads: "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 Contacts

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

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