Osprey Approach: Adding & Amending Organisations (App)

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

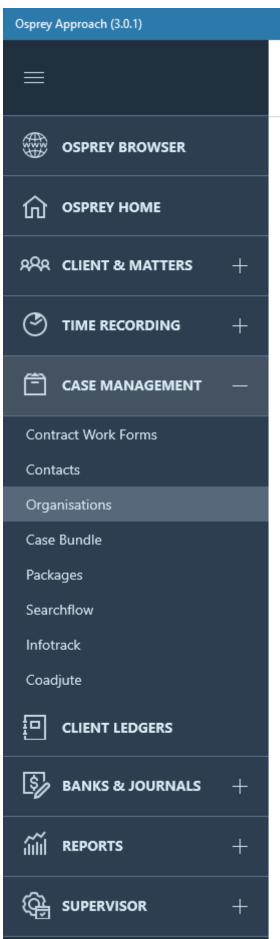
The latest version is always online at https://support.ospreyapproach.com/?p=23575



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.



Completed File Opening

0

00h:00m

£0.00

Today's Units:

Today's Value:

Today's Time:

Home - 100003/1 (Wils

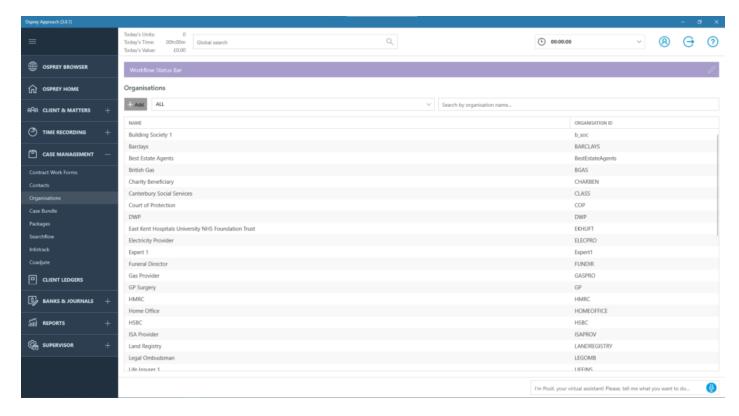
MATTERS FOR REVIEW

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

YOUR KEY DATES

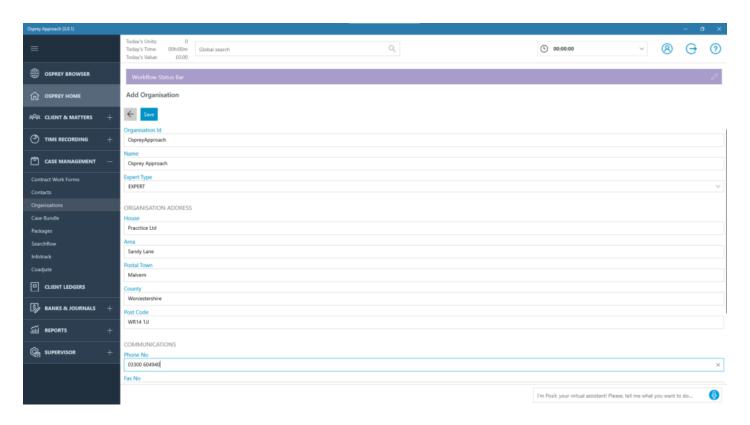
CLIENT	MATTER
100003	1
100003	1
COW00002	2

Click the 'Add' button.



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

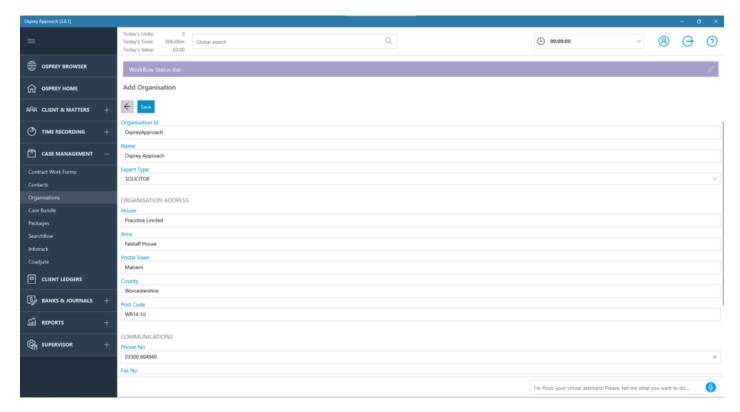
The ID cannot be changed once created.



Click Save.

Amending an Organisation

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



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/