



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 Approach (3.0.1)

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.

Osprey Approach (1.0.1)

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.

Osprey Approach (1.0.1)

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
Practice 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 'Add Organisation' form in the Osprey Approach (1.0.1) application. The interface includes a dark sidebar with navigation options: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT (selected), CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The main content area is titled 'Add Organisation' and features a 'Workflow Status Bar' at the top. Below this, there are several input fields for organisation details: '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 1JJ), and 'COMMUNICATIONS' (Phone No: 03300 604940, Fax No:). A 'Save' button is located at the top left of the form. At the bottom right, there is a chatbot icon and a message: '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/>