

Osprey Approach: Adding & Amending Organisations (Browser)

This help guide was last updated on
Dec 22nd, 2022

The latest version is always online at
<https://support.ospreyapproach.com/?p=30275>

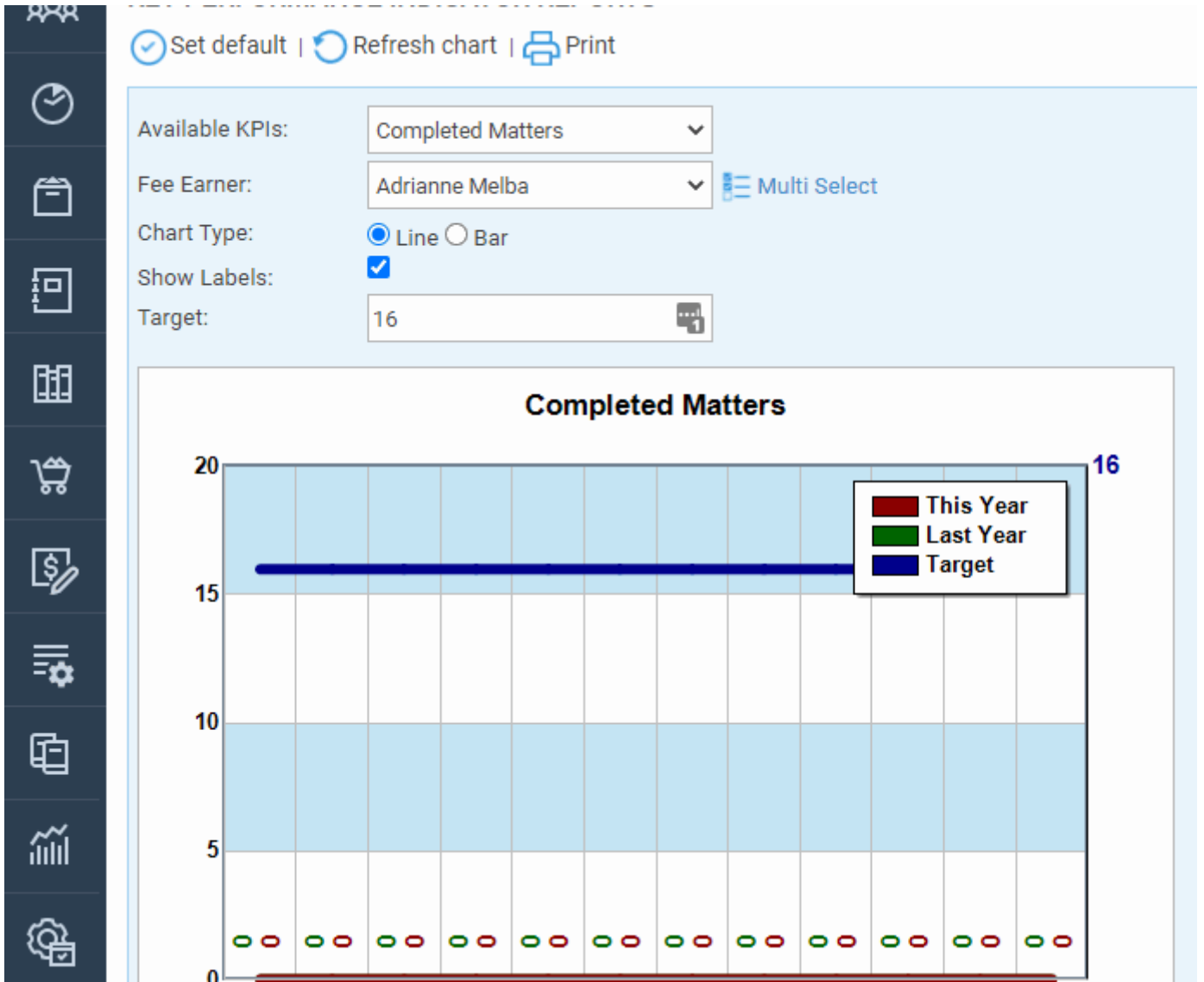
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You can store the phone and address details for the professional firms. This guide will go through adding and subsequently editing organisations on Osprey.

Adding an Organisation


To add a new Organisation, open Case Management > Contacts & Organisations > Organisation Manager > Add Organisation.




Select Case Management > Contacts & Organisations > Organisation Manager > Add Organisation

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.

| | | |
|-----------------|-----------------------------------|---|
| Organisation Id | <input type="text"/> |  |
| Name | <input type="text"/> | |
| Expert Type | <input type="text" value="None"/> | <input type="text" value="None"/> |

ORGANISATION ADDRESS

| | | |
|--------------|----------------------|---|
| House: | <input type="text"/> | |
| Area: | <input type="text"/> | |
| Postal Town: | <input type="text"/> | |
| County: | <input type="text"/> | |
| Postcode: | <input type="text"/> |  |

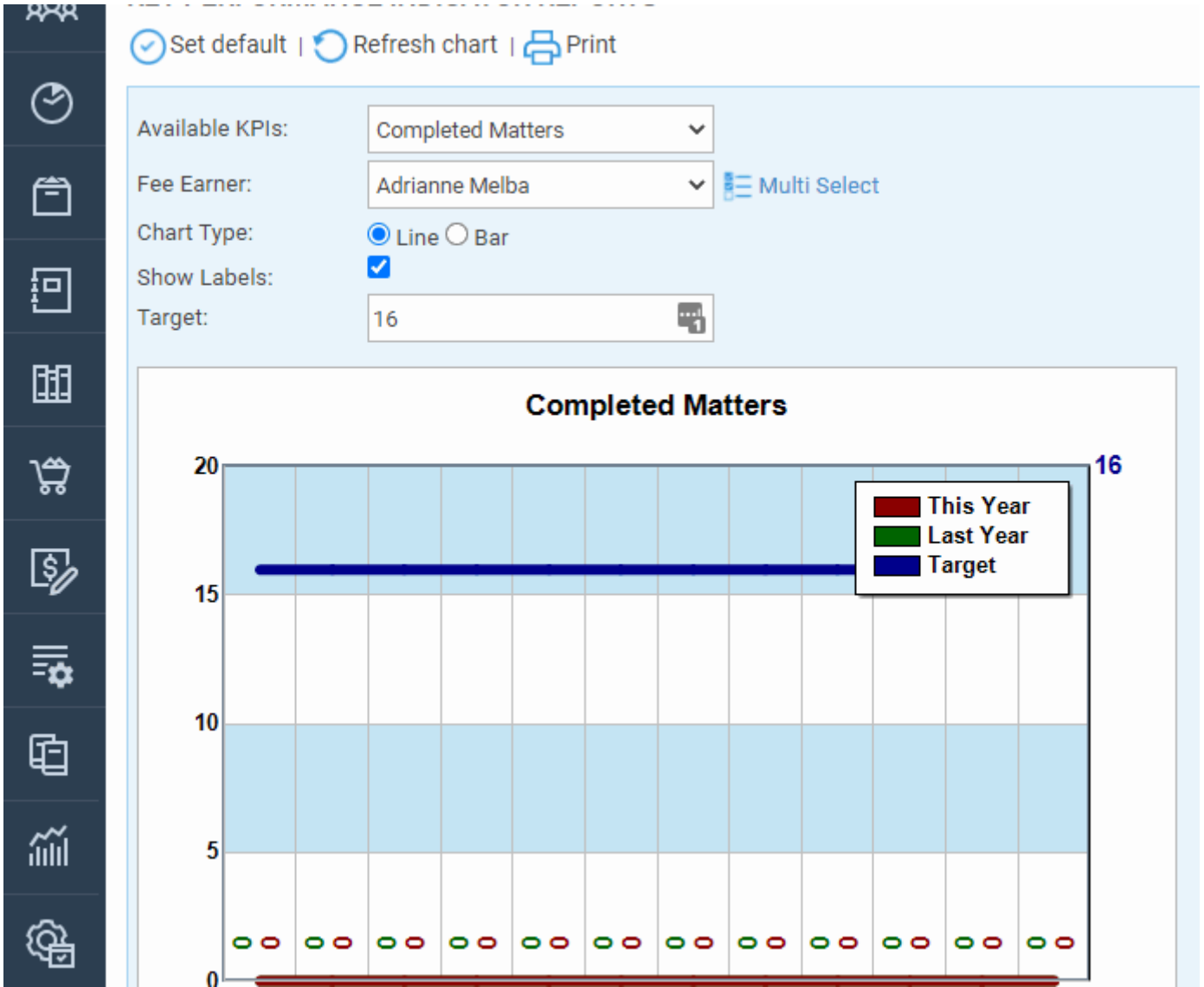
COMMUNICATIONS

| | |
|----------|----------------------|
| Phone No | <input type="text"/> |
| Fax No | <input type="text"/> |
| Dx No | <input type="text"/> |
| Email | <input type="text"/> |
| WWW | <input type="text"/> |

Click Save when finished.

Amending an Organisation

To edit an organisation, navigate to Case Management > Contacts & Organisations > Organisation Manager.



Select Case Management > Contacts & Organisations > Organisation Manager

This will open a table of all the existing Organisations. Click the Pencil edit icon to amend them.

| EDIT | LINKS |
|------|-------|
| | |
| | |
| | |

You may make any changes you need and click Save, or delete the Organisation if it is no longer required.

Adding & Amending Contacts

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

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