

Osprey Approach: Adding & Amending Organisations (Browser)

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

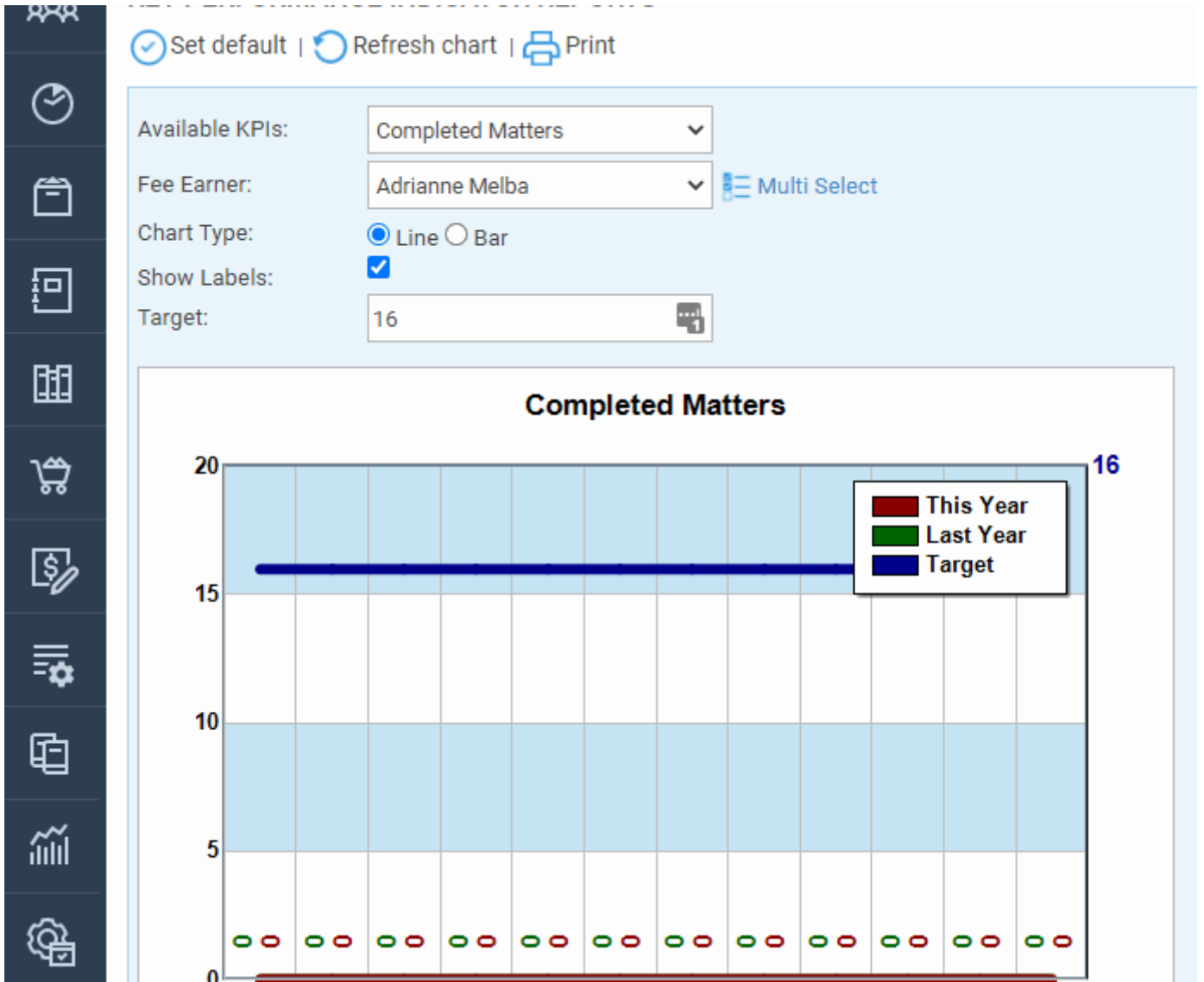
The latest version is always online at
<https://support.ospreyapproach.com/?p=30275>



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"/>	None

ORGANISATION ADDRESS

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

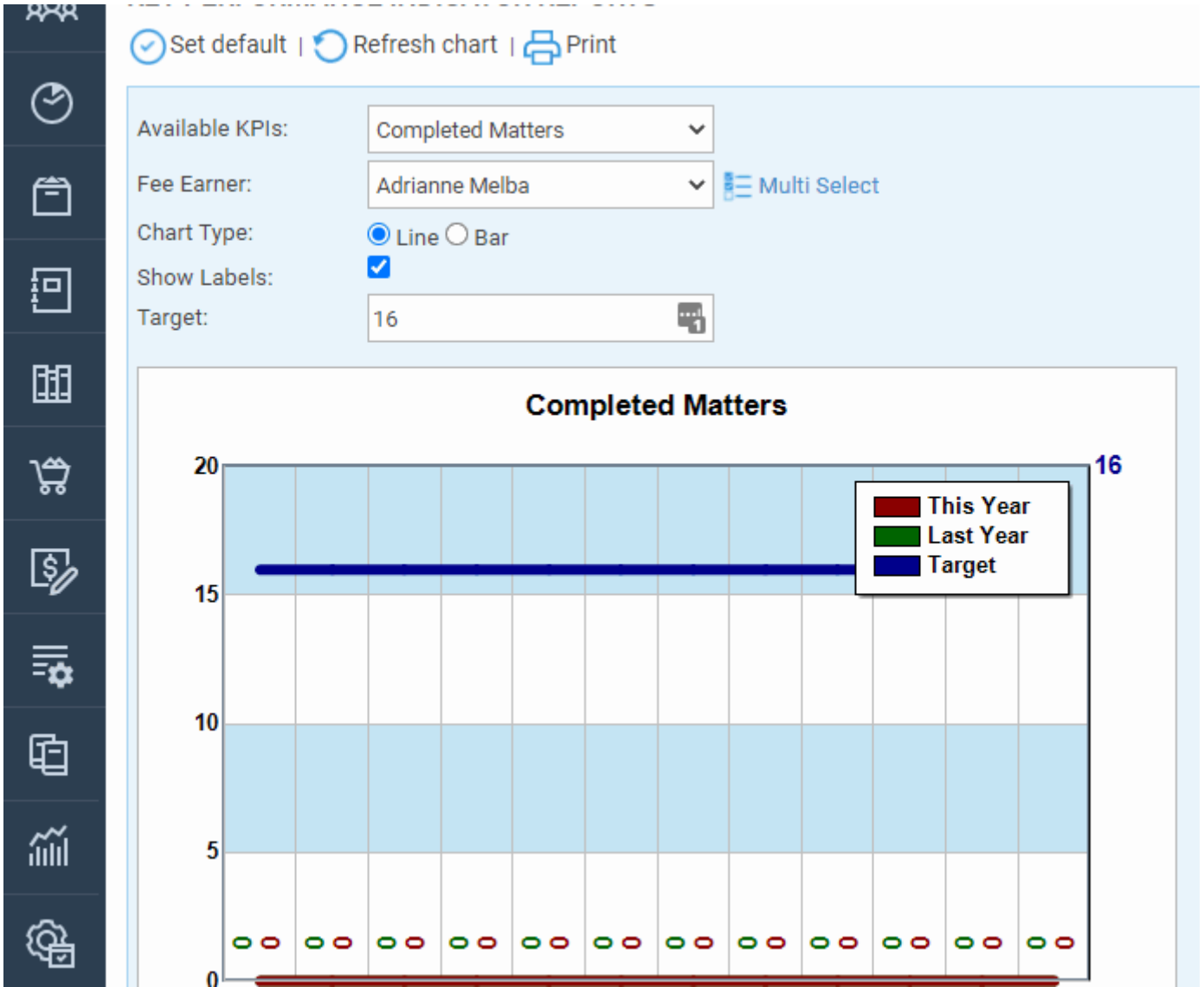
COMMUNICATIONS

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/>