

Osprey Approach: Amend the VAT Number on your Branches

This help guide was last updated on Apr 24th, 2024

The latest version is always online at https://support.ospreyapproach.com/?p=225



This guide will go through the process of adding and amending a VAT number

Each of your branches will need a VAT number assigned to it.

Please note that only Supervisor level users will be able to amend the VAT number on your branches.

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888	KEY PERFORMANCE INDICATOR REPORTS 🗸		
	SUPERVISOR	Print	
G	Code Setup	ters 🗸	
Ê	System Setup	Branches	
٤D	Financial Setup	Departments	
	Case Management Setup	Labels Setup	
	User Design	Matter Archive Details	
\	Report Setup	System Settings	
5/	Tools & Utilities	Communication Settings	
	Financial Periods	Users	
-\$	CRM-AF1 Additional Rates	Ledger View	
Ē	CRM Auto Posting Defaults	Configuration Settings	
~~	Reprint CRM611 Spreadsheet	Security Groups	
11111	Include Documents	Email Setup	
(Ĉļ	Portal Setup	Rebranding	

The screen will now display a list of your available branches.

BRANCH NO	BRANCH DESCRIPTION	BRANCH WEIGHTING	LOCATION	IN USE
1	Malvern	100.00	Non-London	•
2	Manchester	0.00	London	•
3	London	0.00	London	•
4	Property Search	0.00	London	•

Right-click the mouse on the branch you wish to change the VAT number for and then click on the Edit button which appears.

BRANCH NO	BRANCH DESCRIPTION
1	Bucharest - UserID 525587168795
2	Malvern
3	London Usena.o+ro17720125

The VAT Number field is available around halfway down this page. You can now amend it and select the Save button at the top of the screen to keep your changes.

Save Scancel			
Branch Description:	Malvern		
Branch Weighting (%):	100.00		
Location:	Non-London 🗸		
TM User Id:			
LAA Supplier No:	6679008		
CRM Contract No:	xx/xxxxx/x		
CRM Schedule No:	CDS/1ABCD2/3		
CLS Schedule No:	CDS/1ABCD2/10		
VAT No:	1234567890		
House:	Suite 1, Falstaff House		
Area:	Sandy Road		
Postal Town:	Malvern		

Now, when you submit your tax returns through Osprey Approach, the newly amended VAT number will be available in the VAT Period Input drop-down list.

VAT PERIOD INPUT	
VAT Number: 1234567890	
From:	
То:	
VAT OBLIGATIONS 🗸	
Obligation status: All 🔽 List Obligations	