



Osprey Approach: Edit an Existing Client (App)

This help guide was last updated on
Feb 1st, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=52129>



Once a client has been added, you can edit any of the details held other than the client and matter numbers.

Please note that if you are using alphanumeric client numbers, changing the client's surname which the number is based upon will NOT change the client number. e.g. if your client's name is Jones, number JON001 and they have changed their surname, the client number will remain the same.

Edit name and address details

Navigate to Clients & Matters and search for the client you wish to edit.

Click the Client Details button and then Edit Client button, make the required changes to the client's details, and click Save.

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS +

TIME RECORDING +

CASE MANAGEMENT +

CLIENT LEDGERS

BANKS & JOURNALS +

REPORTS +

SUPERVISOR +

Today's Value: £0.00

Workflow Status Bar

Client/Matter - A123456/1 (Hiscutt Alex/Default Matter) FE: 01 WT: AEH

Change Client/Matter

Email

Conflict of Interest

Enable Client Web Access

Send SMS

Document Production

Add Matter

Edit Matter

Client Contact Details

Dossier Matter Level

Notes Matter Level

Client Details

Archive

Print

Branch

Aberdeen - userId: 044837853251

Department

Civil Department

Fee Earner

S P Jennings

Supervising Fee Earner

N/A

Work Type

Alex H Test

Private/Legal Aid

Private

La Version

N/A

Franchise Category

N/A

Unique File No

N/A

Remuneration Type

Standard Remuneration


Debtor Limit


N/A


Edit phone numbers

To edit the client's phone number details or add a new phone number, navigate to Clients & Matters and select Client Contact Details


All phone numbers are displayed here, so you can either add a new phone number, edit or delete.

 OSPREY BROWSER


 OSPREY HOME




 CLIENT & MATTERS +




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 SUPERVISOR +

Client/Matter - A123456/1 (Hiscutt Alex/Default Matter) FE: 01 WT: AEH

-  Change Client/Matter  Email  Conflict of Interest  Enable Client Web Access  Send SMS  Document Production
-  Add Matter  Edit Matter  Client Contact Details  Dossier Matter Level  Notes Matter Level  Client Details  Archive

Print

Branch
Aberdeen - userId: 044837853251

Department
Civil Department

Fee Earner
S P Jennings

Supervising Fee Earner
N/A

Work Type
Alex H Test

Private/Legal Aid
Private

La Version
N/A

Franchise Category
N/A

Unique File No
N/A

Remuneration Type
Standard Remuneration

Debtor Limit
N/A

Disbursement Limit