



Osprey Approach: Edit an existing client

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The latest version is always online at
<https://support.ospreyapproach.com/?p=17685>

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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 > Clients, and search for the client you want to edit.

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

Osprey Home

KEY PERFORMANCE INDICATOR REPORTS ▾

☑ Set default | 📊 Show chart |

Available KPIs: ▾

Fee Earner: ▾

Chart Type: Line Bar

Show Labels:

Target:

YOUR KEY DATES ▾

| F/E | CLIENT | MATTER | CLIENT NAME | KEY DATE ↑ | TYPE | SUP F/E? |
|--------------------|--------|--------|-------------|------------|------|----------|
| No data to display | | | | | | |

KEY DATES ADDED BY YOU ▾

Filter by Keydate Type: ▾

| F/E | CLIENT | MATTER | KEY DATE | TYPE | ↑ |
|-----|--------|--------|----------|------|---|
|-----|--------|--------|----------|------|---|

Edit phone numbers

To edit the client's phone number details or add a new phone number, navigate to Clients & Matters > Clients and scroll down to the bottom of the page.

Click the Add button. All phone numbers are displayed here, so you can either select and add a new phone number, or right click one of the existing numbers and select Edit.

WORKFLOW STATUS BAR

Key Dates: Date: Description: More Key Dates ▾

CLIENT & MATTER SEARCH ▾

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No:

Name:

MAIN CLIENT NAME ▾

| SURNAME | FORENAME | INITIALS | TITLE | EMAIL |
|---------|----------|----------|-------|-----------|
| Dubh | Alex | A P | Mr | a.b@c.com |

ACCOUNT ADDRESS ▾

House:

Area:

Postal Town: