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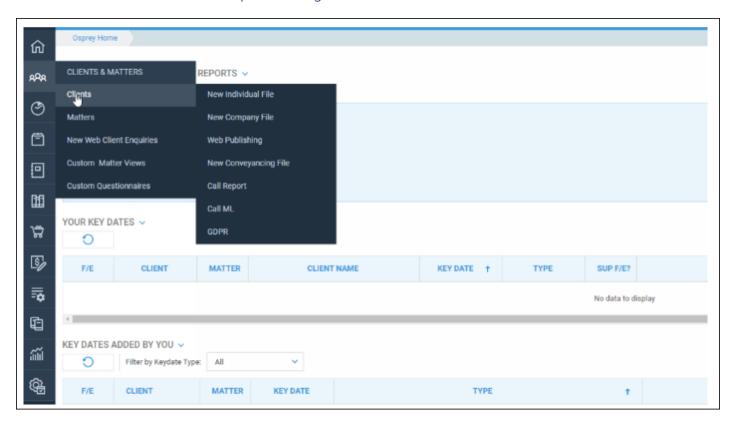
Once a client has been added, you can edit any of the details held other than the client and matter numbers.

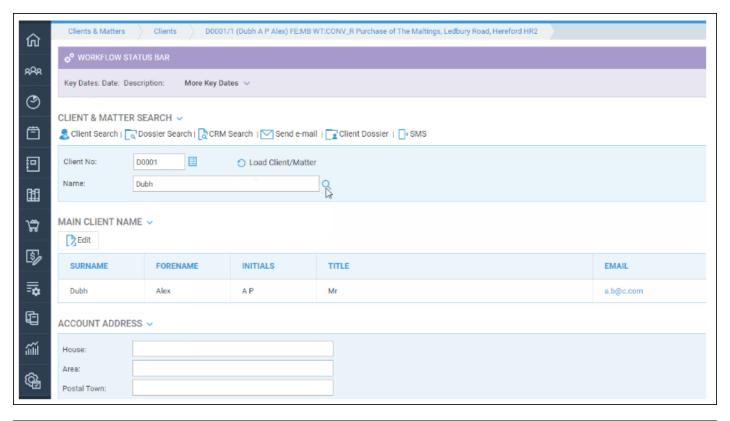
Please note that if you are using alphanumeric client numbers, changing the client's surname which the number is based upon will NOT change the client number. e.g. if your client's name is Jones, number JON001 and they have changed their surname, the client number will remain the same.

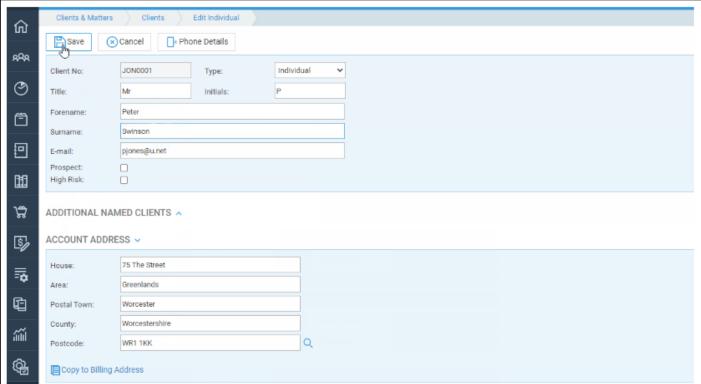
Edit name and address details

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.







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.

