



Osprey Approach: Editing an Existing Client

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Apr 26th, 2024

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



This guide will show you how to edit the details and contact information of an existing client in Osprey

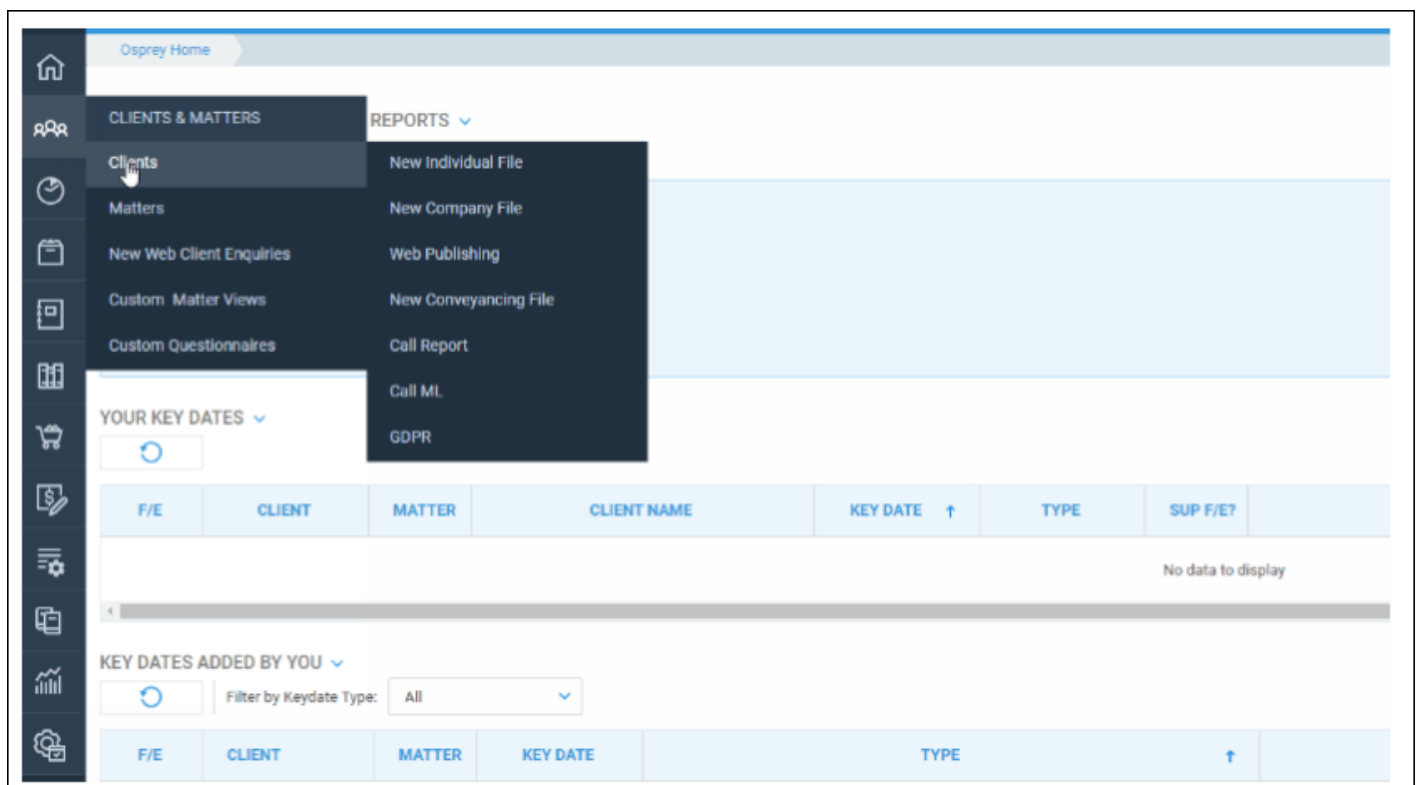
Once a client has been added, you can edit any of the details held other than client and matter numbers.

Please note that if you use alphanumeric client numbers, changing the surname which the number is based upon will NOT change the client number. For example, 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.



The screenshot displays the Osprey Home interface. On the left, a dark navigation sidebar contains icons for Home, Clients & Matters, Reports, and various other functions. The 'Clients & Matters' menu is expanded, showing options like 'Clients', 'Matters', and 'New Web Client Enquiries'. The 'Reports' menu is also expanded, listing options such as 'New Individual File', 'New Company File', 'Web Publishing', 'New Conveyancing File', 'Call Report', 'Call ML', and 'GDPR'. Below the navigation, a table with columns 'F/E', 'CLIENT', 'MATTER', 'CLIENT NAME', 'KEY DATE', 'TYPE', and 'SUP F/E?' is shown. The table is currently empty, with the text 'No data to display' centered below it. At the bottom, there is a section for 'KEY DATES ADDED BY YOU' with a filter dropdown set to 'All'.

Clients & Matters > Clients > D0001/1 (Dubh A P Alex) FE:MB WT:CONV_R Purchase of The Maltings, Ledbury Road, Hereford HR2

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: D0001 Load Client/Matter

Name: Dubh

MAIN CLIENT NAME ▾

Edit

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

ACCOUNT ADDRESS ▾

House:

Area:

Postal Town:

Clients & Matters > Clients > Edit Individual

Save Cancel Phone Details

Client No: JON0001 Type: Individual ▾

Title: Mr Initials: P

Forename: Peter

Surname: Swinson

E-mail: pjones@u.net

Prospect:

High Risk:

ADDITIONAL NAMED CLIENTS ^

ACCOUNT ADDRESS ▾

House: 75 The Street

Area: Greenlands

Postal Town: Worcester

County: Worcestershire

Postcode: WR1 1KK

Copy to Billing Address

Editing 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. You can either select and add a new phone number, or right click an existing one and select Edit.

Clients & Matters > Clients > D0001/1 (Dubh A P Alex) FE:MB WT:CONV_R Purchase of The Maltings, Ledbury Road, Hereford HR2

BILLING ADDRESS ▾

Bill Street:
Bill Area:
Bill Postal Town:
Bill County:
Bill Postcode:
Bill Addressee:

ACCOUNT CONTROL DETAILS ▾

Debtor Limit: Disbursements Limit:
Wip Limit: Group Code:

TELEPHONE NUMBERS AND OTHER DETAILS ▾

PHONE TYPE	DESCRIPTION
MOBILE	Mobile Phone Number - Alex

Clients > Edit Communications Details

Client No:
Phone Type:
Description:
Info:
Main No:

PHONE TYPE	DESCRIPTION
MOBILE	Mobile Phone Number - Alex
MOBILE	Mobile Phone Number - Amanda

Page 1 of 1 (2 items) << < 1 > >>

Save Cancel

Client No

Phone Type

Description

Info

Main No

Export Refresh

PHONE TYPE	DESCRIPTION
MOBILE	Mobile Phone Number - Alex
MOBILE	Mobile Phone Number - Amanda
PHONE	Phone Number - Home

Page 1 of 1 (3 Items) << < 1 > >>