



Osprey Approach: Managing your Practice Details

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The latest version is always online at
<https://support.ospreyapproach.com/?p=60636>

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This guide will show you how to amend your own practice details in Osprey

Osprey can populate correspondence with your firms' details. These details can be added, amended, and removed when needed.

Viewing your Practice Details

To view your firm's current details stored within Osprey, go to Supervisor > System Setup > System Settings and select Practice Details.

The screenshot shows the Osprey system settings interface. On the left is a dark sidebar with various icons and menu items. The main area displays a form for 'Practice Details' with the following fields:

- Practice Id: DEFAULT
- Practice Name: Osprey Approach Test
- Falstaff House
- Branches
- Departments
- Labels Setup
- Matter Archive Details
- System Settings
- Practice Details (highlighted)
- Communication Settings
- Third Party Data
- Users
- Ledger View
- Configuration Settings
- Security Groups
- Email Setup

The 'System Settings' menu is open, showing the following options:

- SUPERVISOR
- Code Setup
- System Setup
- Financial Setup
- Case Management Setup
- User Design
- Report Setup
- Tools & Utilities
- Financial Periods
- CRM Auto Posting Defaults
- Reprint CRM611 Spreadsheet
- Include Documents
- Portal Setup

You should see one entry, with the ID of DEFAULT.

Editing the Practice Details


To View and Amend your practice details, right click on the DEFAULT entry, and select Edit.


PRACTICE ID	PRACTICE NAME	TELEPHONE	WEB ADDRESS
DEFAULT	Osprey Approach Test	0330604940	www.pracctice.net


 Edit

On the edit screen, you can update any of your practice's details, and then click Save.

Supervisor
System Setup
Practice Details
Edit

 Save

 Delete

 Cancel

Practice Id:

Practice Name:

House:

Area:

Postal Town:

County:

Postcode:

DX Number:

Telephone:

Fax number:

Email Address:

Web Address: