

# Osprey Approach: Managing your Branches

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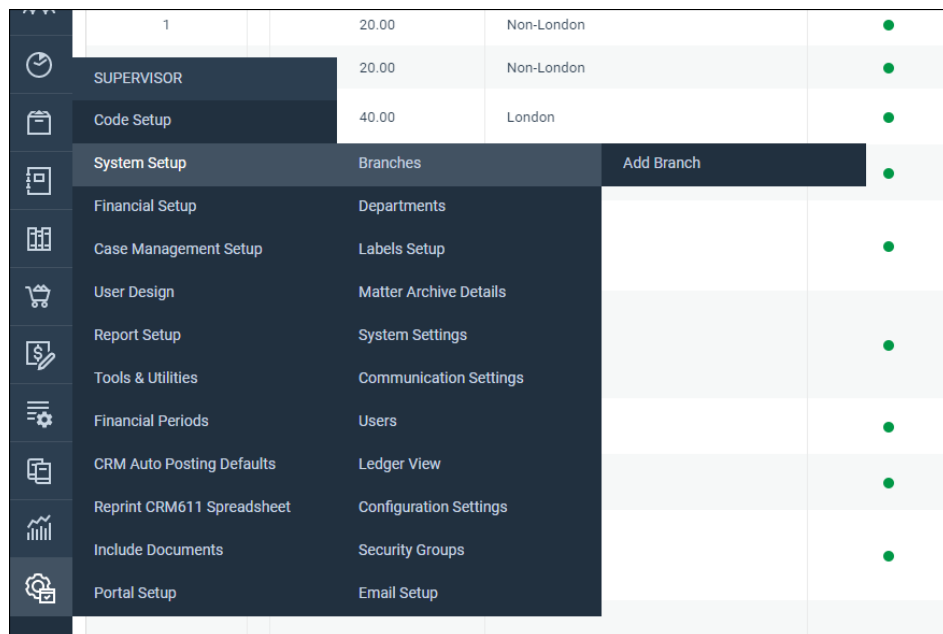
The latest version is always online at  
<https://support.ospreyapproach.com/?p=63736>



# This Guide will cover adding and updating your branches on Osprey Approach

## Adding a new branch

To add a new branch, go to Supervisor, System Setup, then select Branches. Left click Add Branch.



The screenshot shows the Supervisor System Setup menu. The 'System Setup' option is selected, and the 'Branches' sub-menu is open. The 'Add Branch' button is visible in the top right of the Branches sub-menu. The background shows a table with columns for Branch ID, Weighting, Location, and a status indicator (green dot).

Branch ID	Weighting	Location	Status
1	20.00	Non-London	●
SUPERVISOR	20.00	Non-London	●
Code Setup	40.00	London	●

- Branch Description - *The name of the branch*
- Branch Weighting - *All branches need to add up to 100%, however this does not affect any current feature of Osprey*
- Location - *London or not London (Location determines whether the London or National rates are used for time recording on legal aid matters)*
- TM User ID - *No longer needed*
- LAA Supplier Number - *needed for Legal Aid*
- CRM Contract Number - *needed for Legal Aid*
- CRM Schedule Number - *needed for Legal Aid*
- CLS Schedule Number - *needed for Legal Aid*
- VAT No - *for VAT submissions*
- Address and contact details - *Can be used with document, email and SMS templates.*
- Is Default - *Set this branch to be the default branch*
- In Use - *Marks the branch as In Use/Archived*
- Email Signature - *Set up a branch email signature*

## Editing a branch

To make amendments to an existing branch, such as updating address or contact details, go to Supervisor, System Setup, then select Branches.

Right-click and edit the required branch.

BRANCH NO		BRANCH WEIGHTING	LOCATION	 Edit
1		20.00	Non-London	
2		20.00	Non-London	

Once the changes have been completed, click Save.

# Removing a branch

You can only archive a branch if there are no live matters currently assigned to the branch. To archive a branch, go to Supervisor, System Setup, then select Branches.

Right-click and edit the required branch.

BRANCH NO		BRANCH WEIGHTING	LOCATION	 Edit
1		20.00	Non-London	
2		20.00	Non-London	

Untick the In Use box and click Save.

Is Default:

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In Use:

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