Osprey Approach: Managing your Branches

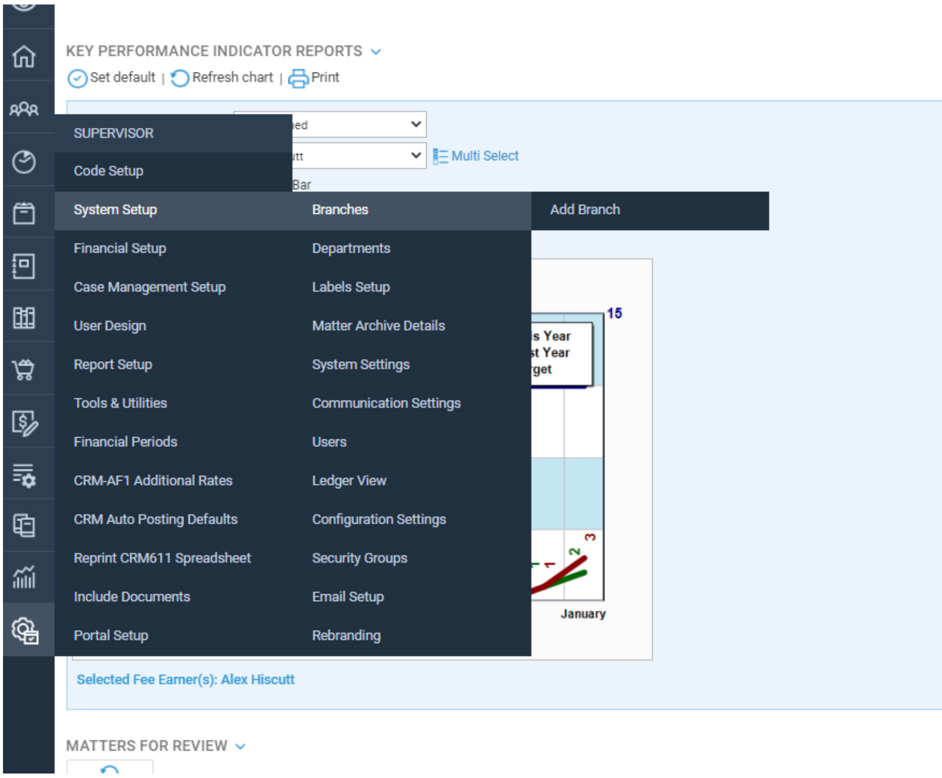
This help guide was last updated on
Dec 20th, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=54675

This Guide will cover how to add and update 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.

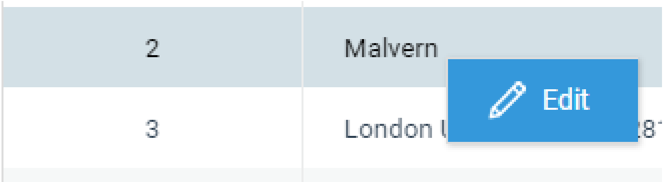


- Branch Description - *The name of the branch*
- Branch Weighting - *All branches need to add up to 100%, however this does not affect any current feature of Osprey*
- Location - *London or not London (Location determines whether the London or National rates are used for time recording on legal aid 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.

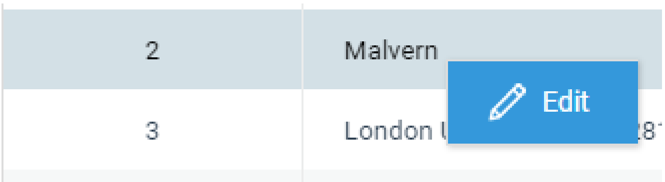


Once the changes have been completed, click Save.

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.



Untick the In Use box and click Save.