

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.

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- 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.

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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.

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Untick the In Use box and click Save.

Is Default:	
In Use:	Y