

Osprey Approach: Add and Edit Matters (App)

This help guide was last updated on
Feb 1st, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=52120>



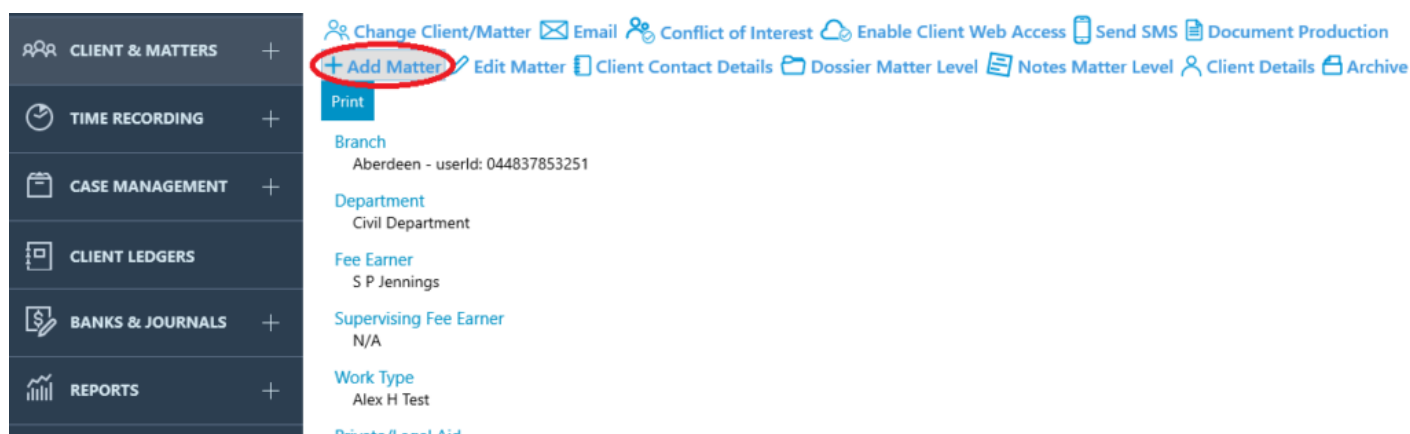
If you have an existing client who has instructed you upon a new matter, you can simply add a new matter to the existing client's record - this avoids having to duplicate any information you have already saved against the client.

If you need to edit an existing matter, everything other than the client and matter numbers (and branch/department, if there are financial postings on the matter) can be edited.

Add a new matter to an existing client

Navigate to the Clients & Matters menu, and search for the client you want to add the new matter to. See our search guides here for details on how to search for a client.

From the Clients & Matters > Matters page of the existing client, select the Add option:



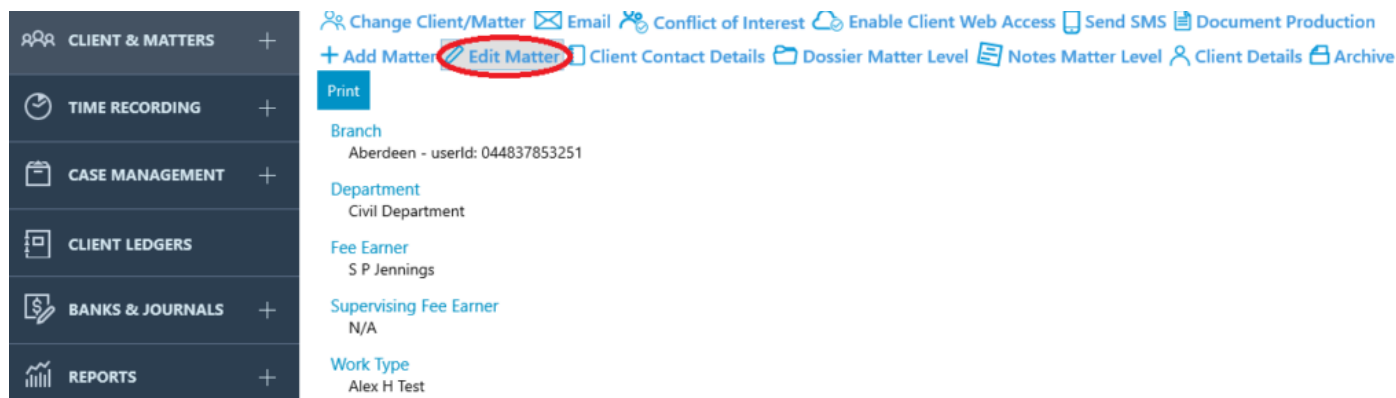
The screenshot shows the 'CLIENT & MATTERS' menu on the left with a plus sign. The main area displays various actions: Change Client/Matter, Email, Conflict of Interest, Enable Client Web Access, Send SMS, Document Production, Add Matter (highlighted with a red circle), Edit Matter, Client Contact Details, Dossier Matter Level, Notes Matter Level, Client Details, and Archive. Below these actions, the details for a client are shown: Branch (Aberdeen - userId: 044837853251), Department (Civil Department), Fee Earning (S P Jennings), Supervising Fee Earning (N/A), Work Type (Alex H Test), and Private/Personal Air.

Enter all the details for the new matter as explained here and click Save when you are done.

Edit an existing matter

Navigate to Clients & Matters > Matters, and enter or search for the matter you wish to edit. See our search guide here for advice on searching for a client/matter.

Click the Edit button in the Matter details section, make any amendments you need to and click Save when done.



The screenshot shows the 'CLIENT & MATTERS' menu on the left with a plus sign. The main area displays various actions: Change Client/Matter, Email, Conflict of Interest, Enable Client Web Access, Send SMS, Document Production, Add Matter, Edit Matter (highlighted with a red circle), Client Contact Details, Dossier Matter Level, Notes Matter Level, Client Details, and Archive. Below these actions, the details for a client are shown: Branch (Aberdeen - userId: 044837853251), Department (Civil Department), Fee Earning (S P Jennings), Supervising Fee Earning (N/A), Work Type (Alex H Test), and Private/Personal Air.