

Osprey Approach: Add and Edit Matters

This help guide was last updated on
Apr 15th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=17674>

[Click here for a printer-friendly version](#)



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.

Matters on Criminal Cases

Please note that for Criminal files, you will need to ensure that each stage of your proceedings is created as an individual matter.

The reason to add matters for each stage is due to the way disbursements work in Osprey. There is no mechanism for the disbursements to be attached to a particular stage, so they would all be included within the investigations bill. You could therefore have a court related disbursement included on a bill for investigations.

The majority of our clients operate criminal cases using separate matters for each stage. Therefore, we would recommend you use separate matters for all criminal cases. If you choose to conduct cases on one matter, it is your responsibility to ensure that the disbursements are billed correctly. We will not be able to assist in rectifying any billing issues which arise from cases being concluded on one matter.

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:

Osprey Home > D0001/1 (Dubh A P Alex) FE:MB WT:CONV_R Purchase of The Maltings, Ledbury Road, Hereford

WORKFLOW STATUS BAR

Key Dates: Date: Description: [More Key Dates](#) ▾

CLIENT & MATTER SEARCH ▾

[Client Search](#) | [Dossier Search](#) | [CRM Search](#) | [Send e-mail](#) | [Client Dossier](#) | [SMS](#)

Client No:
 Matter No: [Load Client/Matter](#)
 Name:
 Matter:

MATTER DETAILS ▾

[Add](#) | [Add Conveyancing File](#) | [Edit](#) | [Archive](#) | [Print](#)

Branch:
 Dept:
 Fee Earner:

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.



MATTER DETAILS

 Add |  Edit |  Archive |  Print

Branch:	<input type="text" value="16: Dan Branch"/>				
Dept:	<input type="text" value="1: Civil Department"/>				
Fee Earner:	<input type="text" value="Dan Hearne"/>				
Supervising Fee Earner:	<input type="text"/>				
Work Type:	<input type="text" value="DAN BTL Purchase"/>				
Private Or Legal Aid:	<input type="text" value="Private"/>				
Remuneration Type:	<input type="text" value="Standard Remuneration"/>				
Debtor Limit:	<input type="text" value="0.00"/>	Disbursements Limit:	<input type="text" value="0.00"/>	WIP Limit:	<input type="text" value="100.00"/>
Date Opened:	<input type="text" value="13/12/2018"/>	Date Completed:	<input type="text" value="05/12/2023"/>	Date Archived:	<input type="text"/>
Review Date:	<input type="text"/>	Review Type:	<input type="text" value="None"/>	Review Period:	<input type="text" value="0"/>
Email:	<input type="text" value="team@learn.mail.monday.com"/>				Publishable: <input checked="" type="checkbox"/>

[Clients & Matters](#)
[Matters](#)
[Edit Matter](#)

 Save |  Cancel

Client No:	<input type="text" value="D0001"/>				
Matter No:	<input type="text" value="1"/>				
Matter Description:	<input type="text" value="Purchase of The Maltings, Ledbury Road, Hereford HR2"/>				
Prospect matter:	<input type="checkbox"/>				
Branch:	<input type="text" value="1: Malvern"/>				
Dept:	<input type="text" value="1: Department 1"/>				
Fee Earner:	<input type="text" value="Mitzi Broom"/>				
Supervising F/E:	<input type="text" value="(None)"/>				
Work Type:	<input type="text" value="Residential Conveyancing Purchase"/>				
Private Or La:	<input type="text" value="Private"/>				
Remuneration Type:	<input type="text" value="Standard Remuneration"/>				
Debtor Limit:	<input type="text" value="0.00"/>	Disbursements Limit:	<input type="text" value="0.00"/>	WIP Limit:	<input type="text" value="0.00"/>
Date Opened:	<input type="text" value="10/07/2020"/>	Date Completed:	<input type="text"/>	Date Archived:	<input type="text"/>
Review Date:	<input type="text"/>	Review Type:	<input type="text" value="(None)"/>	Review Period:	<input type="text" value="0"/>