



# Osprey Approach: Add and Edit Matters (Browser)

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



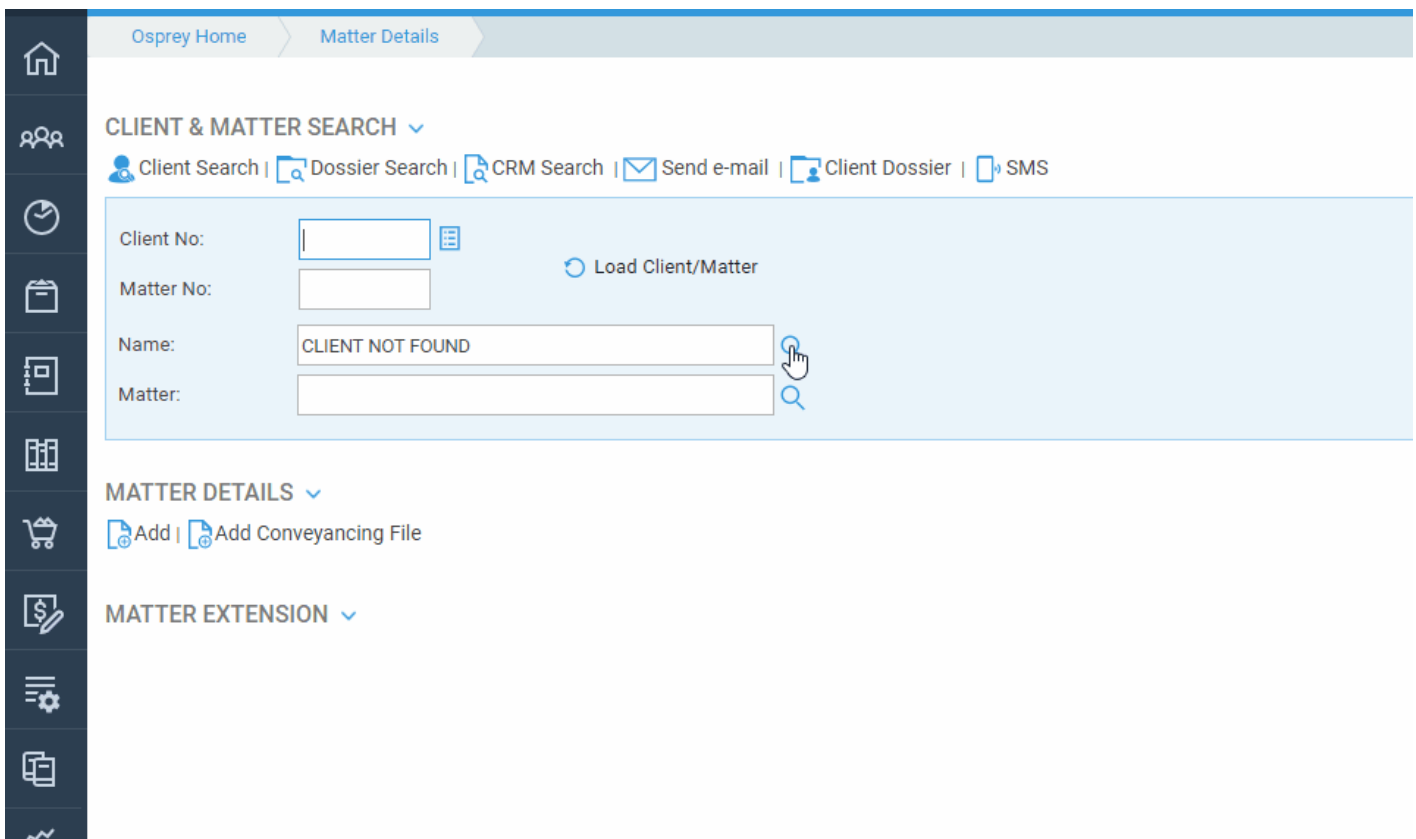
If you have an existing client who has instructed you upon a new matter, you can simply add a new matter to the existing client's record - this avoids having to duplicate any information you have already saved against the client.

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 Osprey Home interface. The top navigation bar includes 'Osprey Home' and 'Matter Details'. A sidebar on the left contains various icons for navigation. The main content area is titled 'CLIENT & MATTER SEARCH' and includes a dropdown menu. Below this, there are several search options: 'Client Search', 'Dossier Search', 'CRM Search', 'Send e-mail', 'Client Dossier', and 'SMS'. The search form contains the following fields and elements:

- Client No:** A text input field with a dropdown arrow icon.
- Matter No:** A text input field.
- Name:** A text input field containing the text 'CLIENT NOT FOUND' and a magnifying glass icon.
- Matter:** A text input field with a magnifying glass icon.
- Load Client/Matter:** A button with a circular arrow icon.

Below the search section, there are two more sections: 'MATTER DETAILS' with options 'Add' and 'Add Conveyancing File', and 'MATTER EXTENSION'.

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.



### CLIENT & MATTER SEARCH ▼

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No:

Matter No:

Name:

Matter:

Load Client/Matter

### MATTER DETAILS ▼

Add | Add Conveyancing File

### MATTER EXTENSION ▼