



# Osprey Approach: Adding and Editing Matters

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



# This guide will take you through adding new matters and editing existing ones in Osprey

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If an existing client has instructed you upon a new matter, simply add a new matter to the existing client. 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 disbursements are billed correctly. We will not be able to assist in rectifying 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:

The screenshot displays a software interface for managing legal matters. At the top, there is a breadcrumb trail: "Osprey Home" > "D0001/1 (Dubh A P Alex) FE:MB WT:CONV\_R Purchase of The Maltings, Ledbury Road, Hereford". Below this is a purple "WORKFLOW STATUS BAR" with a gear icon. A section for "Key Dates" includes columns for "Date:", "Description:", and a "More Key Dates" dropdown. The "CLIENT & MATTER SEARCH" section features a navigation bar with icons for "Client Search", "Dossier Search", "CRM Search", "Send e-mail", "Client Dossier", and "SMS". The search area contains four input fields: "Client No:" with the value "D0001", "Matter No:" with the value "1", "Name:" with the value "Dubh", and "Matter:" with the value "Purchase of The Maltings, Ledbury Road, Hereford". A "Load Client/Matter" button is positioned between the Client No and Matter No fields. Below the search section is the "MATTER DETAILS" section, which includes a row of action buttons: "Add", "Add Conveyancing File", "Edit", "Archive", and "Print". The details section contains three input fields: "Branch:" with the value "1: Malvern", "Dept:" with the value "1: Department 1", and "Fee Earner:" with the value "Mitzi Broom". A vertical sidebar on the left contains various navigation icons.

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

Clients & Matters > Matters > Edit Matter

 Save |  Cancel

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