



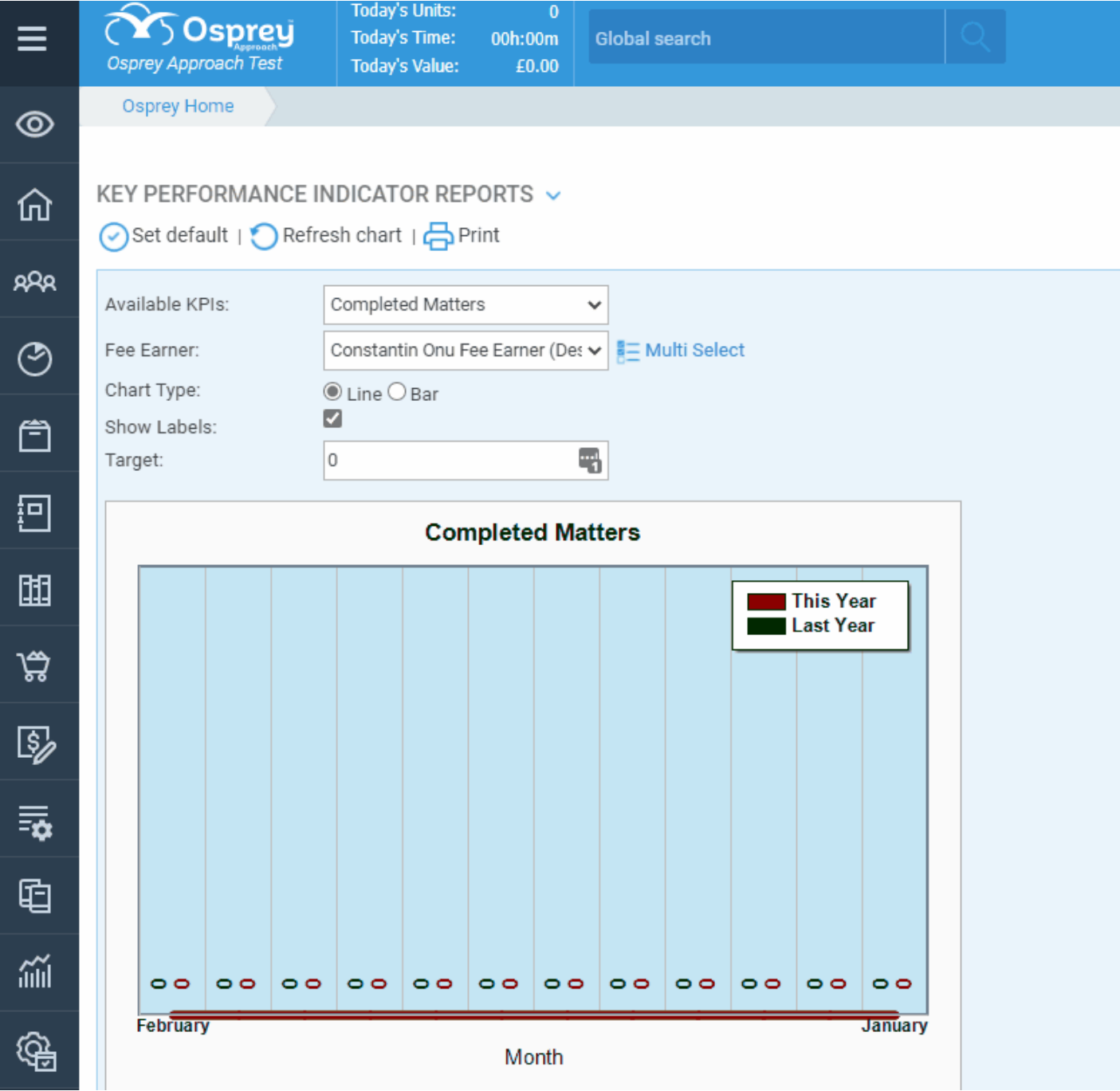
Osprey Approach: Batch Key Date ticking

This help guide was last updated on
Apr 11th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=685>



If your fee earners have multiple key dates in progress, you will be able to mark them all as met in one go. This guide will demonstrate this process.



Navigate to the Supervisor > Case Management Setup > Key Date Types > Batch Key Date Ticking.

Save

Export

Key Date Type:

All

Fee Earner:

All

From:

30/07/2018

To:

17/07/2019

Search...

	CLIENT	MATTER	SURNAME	MATTER DESCRIPTION	KEY DATE	KEY DATE TYPE
	A00001	1	Adams	Purchase of Rose Cottage	02/08/2018	CHASESOL
	A00001	1	Adams	Purchase of Rose Cottage	02/08/2018	CHSE_ESTAG
	A00001	1	Adams	Purchase of Rose Cottage	26/09/2018	10WEEK
	A00001	1	Adams	Purchase of Rose Cottage	27/09/2018	10WEEK
	A00001	2	Adams	Theft	25/02/2019	CHASECLI
	A00001	2	Adams	Theft	28/02/2019	HEARINGDAT
	A00001	2	Adams	Theft	05/03/2019	CHASECLI
	A00001	2	Adams	Theft	05/03/2019	CHASECLI
	A00001	2	Adams	Theft	18/03/2019	COURTDATE
	A00004	1	Andrews	Potential Client - Chamber of Commerce contact	02/08/2018	10WEEK

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You can filter by Type, Fee Earner and Date as appropriate. You can also search for any key dates if required.

Tick the key dates you wish to mark as met using the tick box on the left hand side.

Now click the Save button and confirm by clicking OK.