Osprey Approach: Editing Matter History Item Details

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The latest version is always online at https://support.ospreyapproach.com/?p=53142

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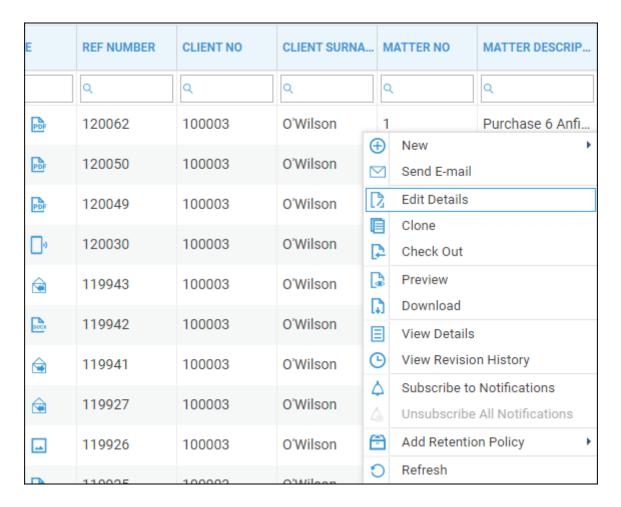
This guide will go through updating and editing information for matter history items

It may be necessary to update the details of any items within the matter history of a client, such as changing the description of an email, or adding a processed date to a scanned document.

This guide will provide you with the steps of how to edit and update items within the matter history

Navigate to the 'Edit Details' screen

Within the Matter History, right click the relevant item and click 'Edit Details'.



Edit matter history item

You may:

- Change the client or matter the file is saved under
- Assign to a matter history folder

- Set a custom type
- Change the description
- Set a processed date
- Add a retention period for GDPR purposes
- Web enable the document to allow clients to log on through the Client Web Portal.

If you are typing dates in Osprey please use the format dd/mm/yyyy.

