



# Osprey Approach: Editing Matter History Item Details

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



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

## Updating and editing information within the matter history

### Navigate to the 'Edit Details' screen

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

E	REF NUMBER	CLIENT NO	CLIENT SURNA...	MATTER NO	MATTER DESCRIP...
	<input type="text"/>				
	120062	100003	O'Wilson	1	Purchase 6 Anfi...
	120050	100003	O'Wilson		
	120049	100003	O'Wilson		
	120030	100003	O'Wilson		
	119943	100003	O'Wilson		
	119942	100003	O'Wilson		
	119941	100003	O'Wilson		
	119927	100003	O'Wilson		
	119926	100003	O'Wilson		
	119925	100003	O'Wilson		

-  New
-  Send E-mail
-  Edit Details
-  Clone
-  Check Out
-  Preview
-  Download
-  View Details
-  View Revision History
-  Subscribe to Notifications
-  Unsubscribe All Notifications
-  Add Retention Policy
-  Refresh

### 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.

### Edit Matter History Item

Client No\*\*: 100003

Global:  Matter No\*\*: 1

Custom Type: Standard letter

Folder: Matter History/Standard Letter

Processed date: 27/12/2023

Retention Period: 2 years

Retention Date: Calculate retention date on archive date

Description

Letter to Client

Web Enabled

Web Enabled:

Save Cancel