



Osprey Approach: Editing Matter History Item Details

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Jun 24th, 2024

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













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'.

E	REF NUMBER	CLIENT NO	CLIENT SURNA...	MATTER NO	MATTER DESCRIP...
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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