

# Osprey Approach: Editing Matter History Details (App)

This help guide was last updated on  
Dec 27th, 2023

The latest version is always online at  
<https://support.ospreyapproach.com/?p=34848>

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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.

## Accessing the Edit Details Screen

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Right click the item and click Edit.

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## The Details Screen

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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 or add a retention period.

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

## Edit Matter History Metadata - B00002/1 (Braithwaite I



Save

### Client

B00002



### Matter

1



Load Client

### Folder

☐ 1 Folder

☐ IHT500

☐ IHT420

☐ ChrisF

### Custom Type

Please select...



### Description

Bill Template

### Processed Date

25/05/2021



### Retention Period

Please select...

