Osprey Approach: Editing Matter History Details (App)

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

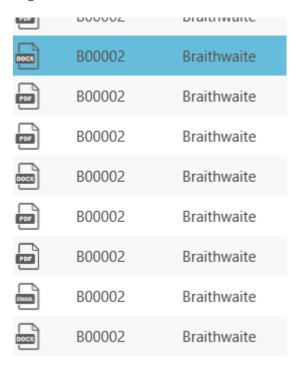
The latest version is always online at https://support.ospreyapproach.com/?p=34848



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

Right click the item and click Edit.



The Details Screen

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 1

