



Osprey Approach: Making a Prospect File Live

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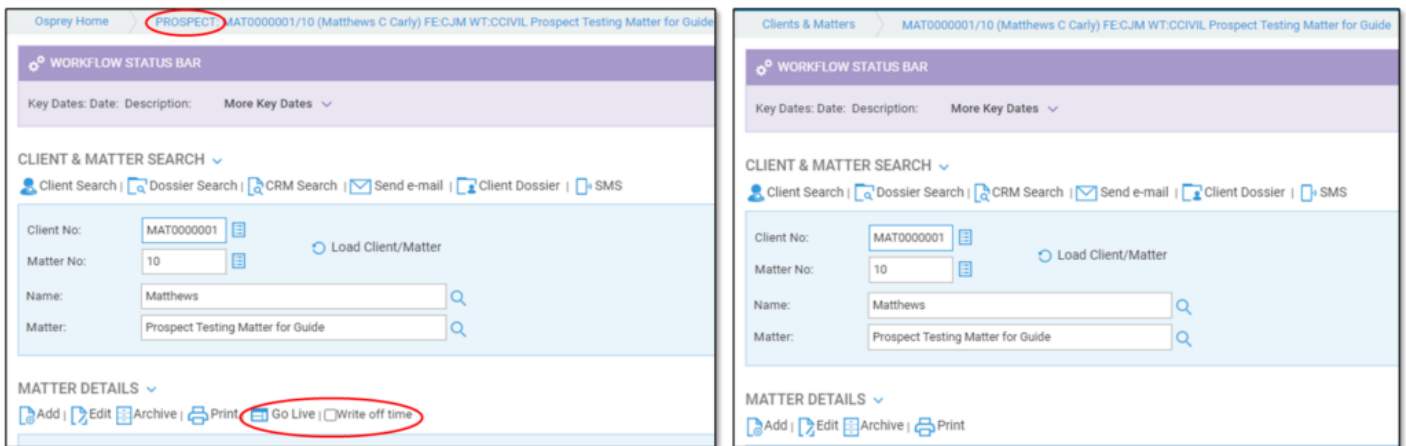
The latest version is always online at
<https://support.ospreyapproach.com/?p=62280>



This guide will demonstrate how to change a prospect file to a live file

Prospect File Vs Live File

Options on a Prospect File Vs a Live File



You will see the prospect file has the wording on the top ribbon and also at the matter details you have the option to "go live" and write off time.

Converting from Prospect to Live File

In order to make the prospect file live, you simply need to decide if you are going to write off any time associated with the file or bring it through to the live file.

If you wish to write off any time that has been recorded so far on your prospect file and wish the live file to start at zero, tick the Write off Time box. If you wish to retain the time when the file is made live, leave the box unticked.

You can now select Go Live. You will then be asked to confirm both the activation of the file and the time write off.

When a prospect file has been converted, a new entry will appear in the file's matter history to show this.