



# Osprey Approach: Top Client – New Matters Report

This help guide was last updated on  
Mar 1st, 2021

The latest version is always online at  
<https://support.ospreyapproach.com/?p=33212>



This report shows you your firm's top 10 clients. The top 10 are decided according to the number of matters they have open.

### **Filter Options**

**Fee Earner** – Tick this box to select only certain fee earners, or leave unticked for all fee earners.

**Work Type** – Tick this box to select only certain work types, or leave unticked for all work types

**Franchise** – Tick this box to select only certain franchise categories, or leave unticked for all franchises.

**Branch** – Choose the branch that you wish to print or leave on All for all branches

**Private or LA** – Leave set to All for all clients, or to see only Private or Legal Aid clients, select the relevant option.

**Date Filters** – Enter the date range for the bills you wish to see

### **Grouping Options**

**No Grouping** – This leaves the report sorted in order of the client with the highest number of matters.

**Fee Earner** – This leaves the report sorted in order of the client with the highest number of matters, grouped by fee earner.

**Work Type** – This leaves the report sorted in order of the client with the highest number of matters, grouped by work type.

**Franchise Category** - This leaves the report sorted in order of the client with the highest number of matters, grouped by Franchise Category.

**Private or LA** - This leaves the report sorted in order of the client with the highest number of matters, grouped into Private clients and Legal Aid clients.

**Branch** - This leaves the report sorted in order of the client with the highest number of matters, grouped by branch.

### **List of columns produced**

Client Number

Matter Number

Client Name

Matter Count (number of matters they have open)

Matter Description

Fee Earner Code

Work Type Code

Branch Code

Department Code

Date Opened

Date Archived