

Osprey Approach: Transferring Time (Browser)

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The latest version is always online at
<https://support.ospreyapproach.com/?p=29945>

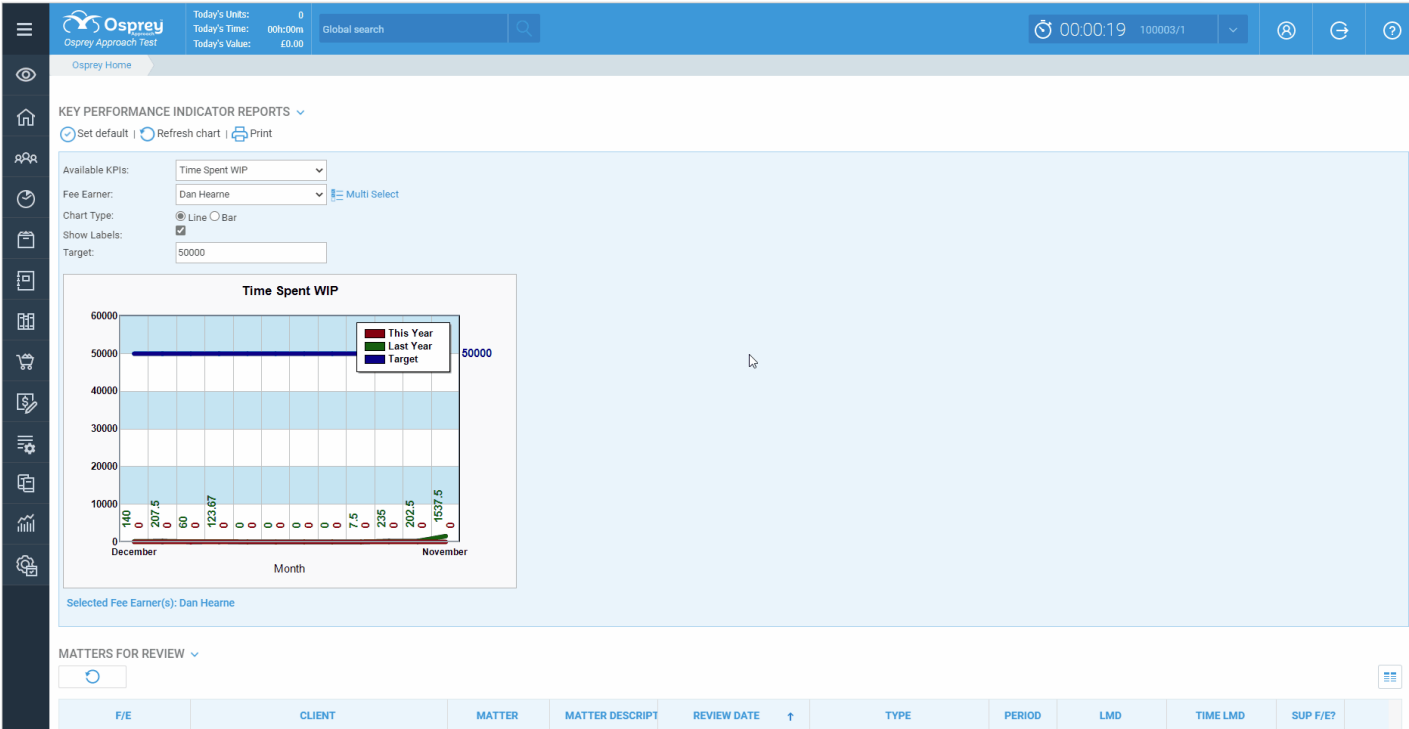
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Should have a client with multiple matters and time has been posted to the incorrect matter it is possible to transfer time to the correct matter.

Transferred Time Ledger

To view time postings that has been transferred to or from a client, navigate to Time Recording > Transfer Time > Transferred Time.



Transferring Time

To do so, select Transfer Time from the Time Recording Menu.

SELECT CLIENT & MATTER TO TRANSFER TIME TO

Show Client Search ^

Client / Matter No:

/

Should you need, to click Show Client Search to search for the matter to select. With the client and matter numbers filled in click Transfer Time.

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Are you sure you want to transfer the selected time postings?

OK

Cancel

Click OK to confirm

You will also be asked to confirm you wish to move the Matter History entries also, please ensure you click OK, choosing Cancel will leave the Matter History entries on the original matter.

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Do you want to transfer the attached matter history attendance notes as well?

OK

Cancel