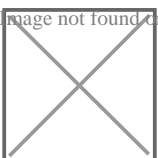


Osprey Approach: Add an item to the matter history

This help guide was last updated on
Jan 6th, 2022

The latest version is always online at
<https://support.pracctice.com/?p=35304>

Image not found or type unknown



Who is this guide for?

Any Users

Any documents you have stored locally, or on a network drive, can be uploaded to the matter history against your clients to enable a fully paperless office.

To add a new document, you can use either of the methods below.

Drag & Drop

Please note that Drag and Drop is only currently available when using Osprey Web via a Web Browser.

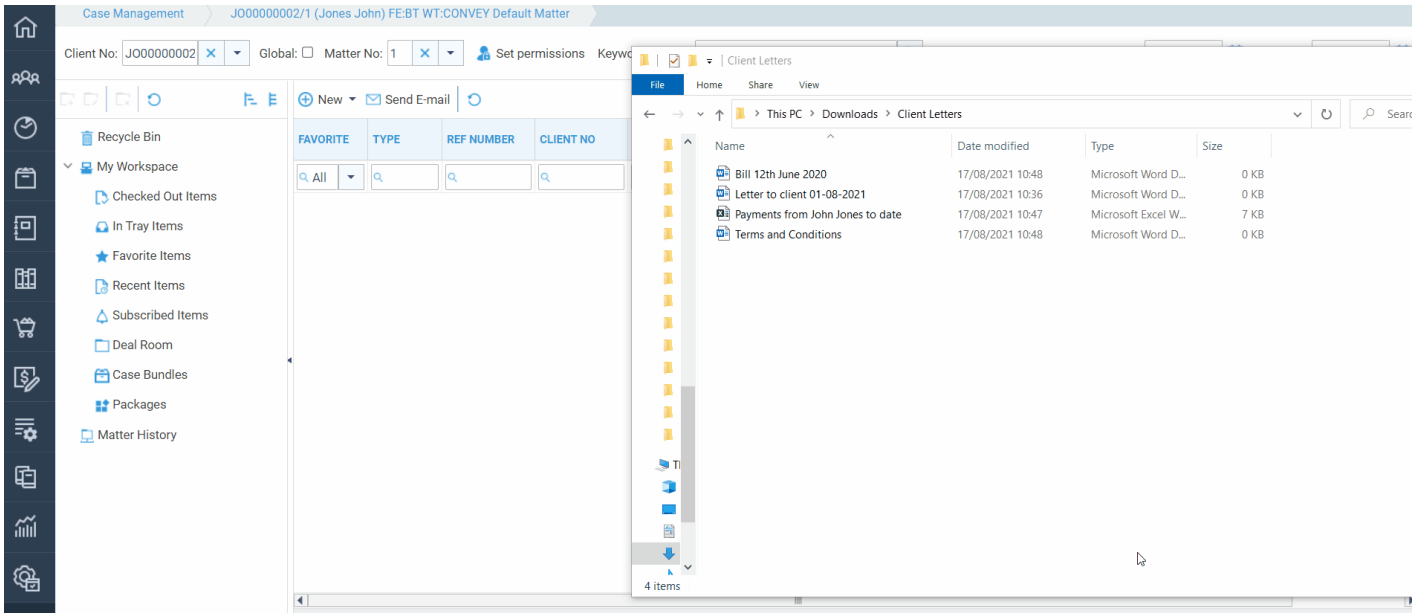
To add an item to the matter history using the drag and drop method, first select the client/matter to which you'd like to save the file, and ensure you are sitting in the Matter History. If you wish to upload to a Matter History folder ensure you have the correct folder selected.

Next, in file explorer, navigate to the folder in which your local/network/USB drive document is held, then simply drag it from the folder and into the matter history of the client/matter you wish to save it to.

FAVORITE	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	RETENTION PERIOD	DETAILS	CREATED DATE
*		374	JO00000002	Jones	1	Default Matter		Cheque Requisition Slip - Bill	30/06/2021 10:00

You can upload multiple documents at the same time in this way:

Name	Date modified	Type	Size
Bill 12th June 2020	17/08/2021 10:48	Microsoft Word Document	0 KB
Letter to client 01-08-2021	17/08/2021 10:36	Microsoft Word Document	0 KB
Payments from John Jones to date	17/08/2021 10:47	Microsoft Excel Worksheet	7 KB
Terms and Conditions	17/08/2021 10:48	Microsoft Word Document	0 KB



Manually add a document

You can also use the New option to add a document, or a note to the matter history.

