Osprey Approach: Customise Matter History Columns (Browser)

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The latest version is always online at https://support.ospreyapproach.com/?p=293



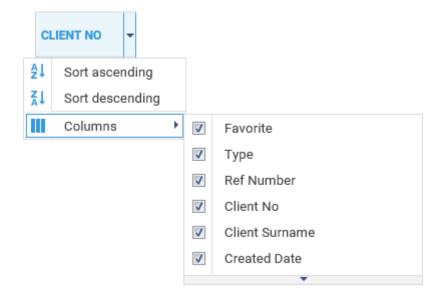
The Osprey Approach Matter History is entirely customisable and will allow you to rearrange, add and remove any columns.

Navigate to your Case Management tab to bring up the Matter History.

Hover over a column heading and a small [icon down] icon will appear on the right hand side, as highlighted below. Select this icon to open further column options.

MATTER DESCRIP	RETENTION PERIOD	DETAILS	CREATED DATE	CREATED BY
Q	Q	Q	Q	Q
Purchase of 10		A Client Letter - Blank	28/03/2019 13:33:50	dave
Purchase of 10	6 years	RCP Cli Completion Report TK_RCP	20/02/2019 14:30:47	rob
Purchase of 10		RCP Completion Statement TK_RCP	20/02/2019 14:30:28	rob
Purchase of 10		RCP Cli Enc Financial Stmnt TK_RCP	20/02/2019 14:29:38	rob
Purchase of 10		RCP Est Request Memo of Sale TK_RCP	14/02/2019 13:14:12	osprey

You can sort the selected column in ascending or descending order if you wish. Click the Columns option to open up a list of available columns to insert. Hover over the small drop-down arrow at the bottom of the list to scroll down to view further available columns.



Any columns which are ticked will appear in the Matter History. Tick any other columns you wish to show or untick them to hide them.

It is also possible to drag the columns around if you wish to reorder them. Simply hold down the left mouse button while hovering over a column heading and drag and drop the column to where you would like it to appear.

The following table shows all the columns available, if required, for your Matter History.

Favorite				
Туре				
Ref Number				
Client No				
Client Surname				
Matter No				
Matter Description				
Retention Period				
Details				
Created Date				
Processed Date				
Created By				
Custom Type				
Last Modified Date				
Last Modified By				
Size				
Web Enabled				
Checked Out Date				
Checked Out By				
Checked Out Comment				
Is Checked Out				
External Checked Out Date				
External Checked Out By				
External Checked Out Comment				
Is External Checked Out				
Email From				
Email To				
Email Cc				
Email Bcc				
Email Subject				
Email Body				
Email Date				
Is Email Attachment				
Journal Subject				
Journal Body				
Journal Entry Type				
Journal Company				
Journal Duration				
Is Journal Attachment				