## Osprey Approach: Editing Matter History Details (App)

This help guide was last updated on Dec 27th, 2023

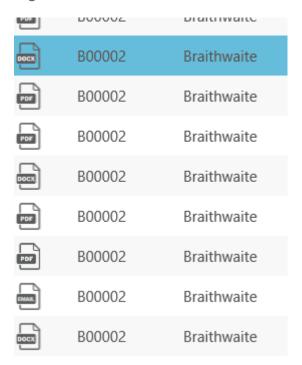
The latest version is always online at https://support.ospreyapproach.com/?p=34848



It may be necessary to update the details of any items within the matter history of a client, such as changing the description of an email, or adding a processed date to a scanned document.

## Accessing the Edit Details Screen

Right click the item and click Edit.



## The Details Screen

You may change the client or matter the file is saved under, assign to a matter history folder, set a custom type, change the description, set a processed date or add a retention period.

If you are typing dates in Osprey please use the format dd/mm/yyyy.

## Edit Matter History Metadata - B00002/1 (Braithwaite 1

