

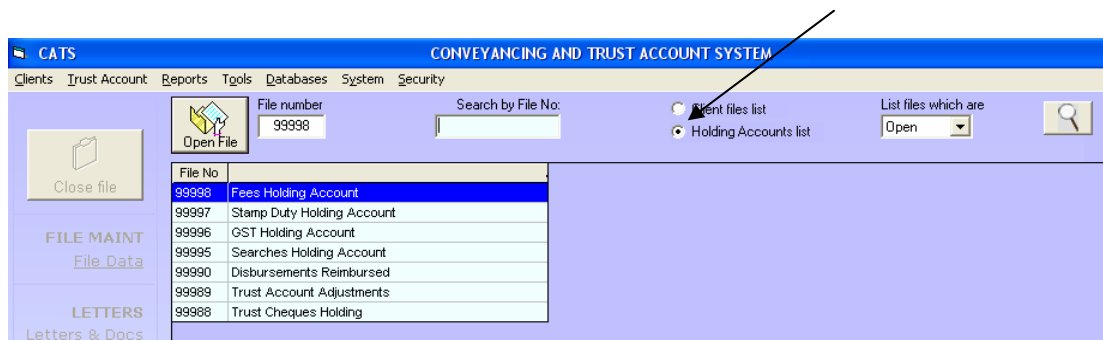
# Conveyancing And Trust Account System

## OPENING SCREEN

The opening screen (home page) is the screen the user first sees when CATS is run.



The list of Holding Accounts can be displayed by selecting the Holding Accounts List option. By default, when a holding account is opened, it will display the View Ledger screen rather than the File Data screen.



### Main Menu

All items in the main menu (which are placed horizontally above the screen) are for use when there is no file is open for editing.

These menu items are for general data maintenance and do not relate to a specific client file.

### Files List

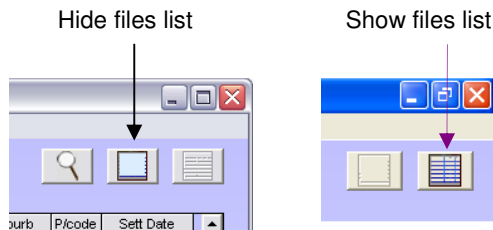
The Files List contains a list of files (matters) and holding accounts which have been created in CATS. By default, files are listed in descending order of file reference. Where there are multiple vendors and purchasers, they are shown separately. The reason all vendors and purchasers show in this list, whether or not acting for them, is to enable accurate searching for a file when the file reference is not known.

# Conveyancing And Trust Account System

## OPENING SCREEN – (Cont)

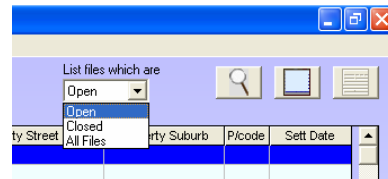
### Hiding the Files List

Use the buttons shown below to toggle between hiding and showing the Files list.



### Filtering the Files List

The Files List can show just open files, closed files or all files. Select preference from list at top right marked "List files which are " ... The default is a list of open files.



### Sorting Columns in the Files List

A single mouse click on the heading of each column sorts the list according to the contents of that column, e.g. clicking the heading *Property Suburb* sorts the list into alphabetical order of the suburb of the property dealt with. Another mouse click on the same column header will sort the list in reverse order.

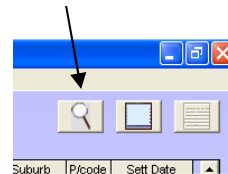
### Searching the File List

Once a column has been sorted, a search can be conducted based on the contents of that column. To search by property suburb, type the first few characters of the suburb name into the "Search by " box at the top of the list. The default is descending order of the file reference.

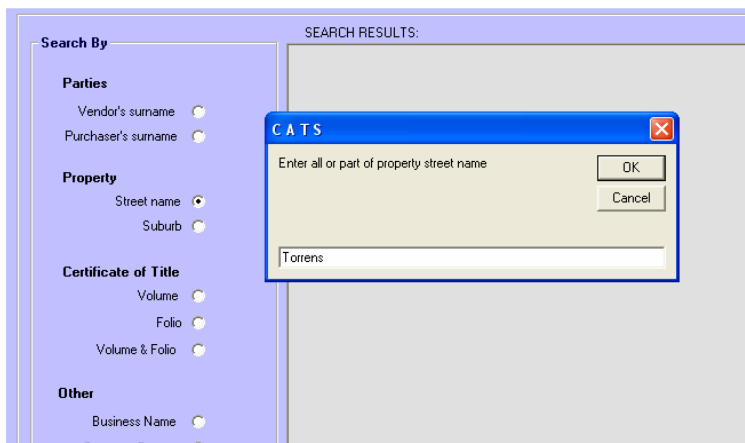
### Advanced Search

The advanced search is handy if you don't know the full or name/address etc to be searched. For example, Johnstone or Johnston. The advanced search will take any portion of a name and will list all matches that have that string of characters in it. For example if searching a surname and 'bert' is entered as the key, the search results will include names like *Lambert*, *Albertson*, *Bertram* etc. You can also search by Certificate of Title reference, business name etc.

*Display advanced search window*



To access the advanced search screen, click the button with the magnifying glass icon.



# Conveyancing And Trust Account System

## OPENING SCREEN – (Cont)

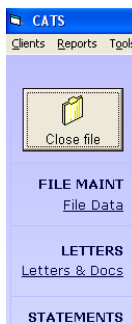
### Opening an Existing Client File

This can be done in four ways

- Double click on the required row, or
- Single click on the row, then click the *Open file* button.
- Single click the row and press *Enter* on the keyboard.
- To open a file from the advanced search screen, double click the required row in the results list. This will put the file reference in the *File No* box. Then click the *Open File* button

**TIP** - You can bypass the *Files List* by entering the required file reference number directly into the box called *File No*, which is immediately to the right of the *Open File* button. This will open any file in the system, whether or not it appears anywhere in the list.

### File Maintenance



The horizontal menu at the far left of the opening screen, contains the various functions for maintaining a file including word processing, settlement statements and trust accounting.

All of these menus relate to the maintenance of the currently open file and are de-activated when the file is closed.

To close a file, click the Close File button at the top of the File Maintenance menu.