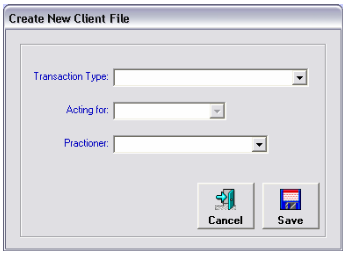
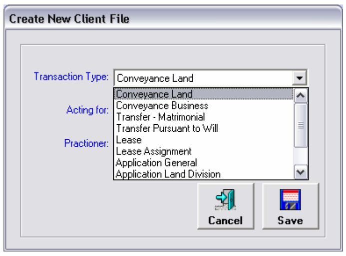
Conveyancing And Trust Account System

CREATING A NEW FILE

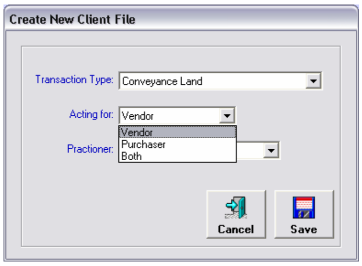
From the main menu, select Clients / New Client File or press F2 on the keyboard to display the *Create New Client* dialogue.



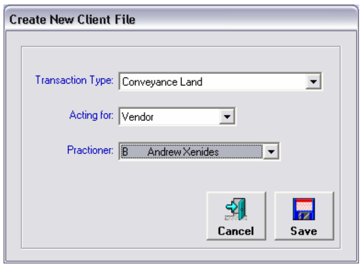
Select the required transaction type from the drop down list



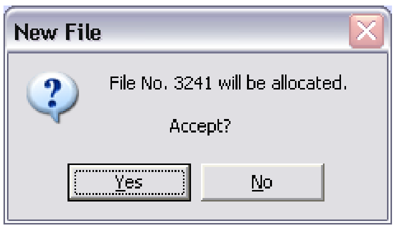
Select the party acting for.



Select the practitioner responsible for the file.
Click *Save* to create the new file



To accept the next auto generated file reference, click *Yes*.



If you chose to enter an alternative file number, you will be asked to enter the number of your choice. That number will be checked for validity and availability.

After a new file number has been accepted, a blank data entry screen will be displayed ready for input.

To abandon the entry of a new file, click *Cancel*.