Conveyancing **A**nd **T**rust Account **S**ystem

OPEN AN EXISTING FILE

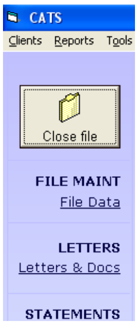
Opening an Existing Client File For Editing

This can be done in several ways

- Double click on the required row in the opening screen grid, or
- Single click on the row, then click the *Open file* button.
- Single click the row and press *Enter* on the keyboard.
- Enter the file number (excluding the file prefix) in the box headed File Number then click the *Open file* button
- 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.