

# Conveyancing And Trust Account System

## GENERATING LETTERS & DOCUMENTS

(For instructions on creating templates, see *Appendix A – Creating Document Templates*)

### The Documents & Letters Screen

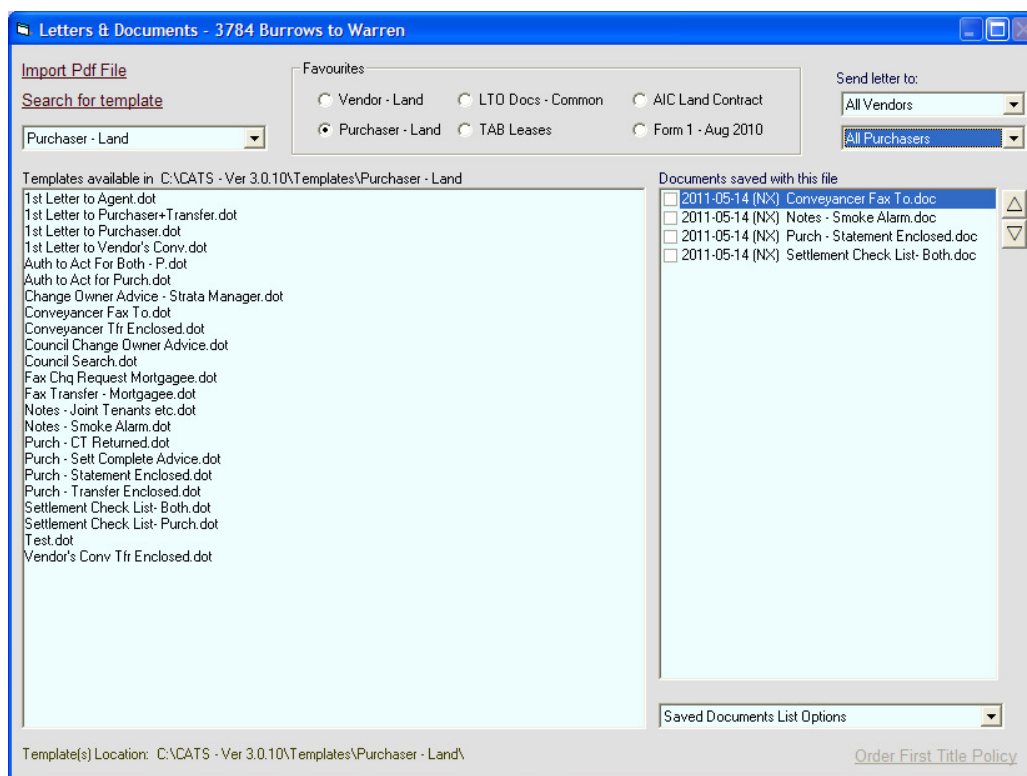
This screen provides access to categorised lists of templates from which the letter or document is to be created.

However, a template can be anywhere on the hard drive or network drive and can be accessed by clicking the *Select any template* link at the top left of the screen.

All letters and documents once created can be opened for editing and printing in Microsoft Word, from within CATS or without. The documents can be formatted using all of Word's features.

### Opening the Letters Screen

Open the client file and select *Letters & Docs* from the side menu



The default list of templates displayed will be the list of standard letters used for vendor or purchaser, depending on the party acting for. If acting for both, the vendor's standard letter template list is displayed by default.

To change the displayed template list, select the group of required templates from the options in the 'Favourites' group, from the drop down list called *Select Template Group* at top left of the above screen (in this example, it displays *Purchaser – Land*), or the *Select any template* link.

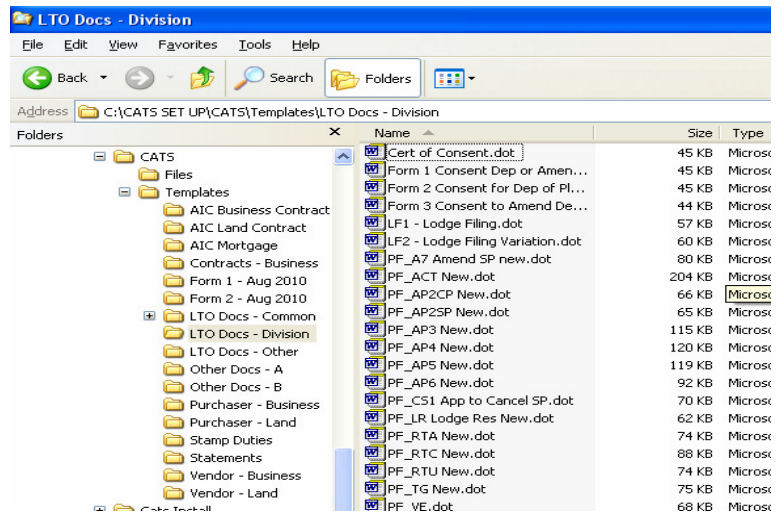
# Conveyancing And Trust Account System

## GENERATING LETTERS & DOCUMENTS (Cont)

### How CATS Stores Template Groups and Templates

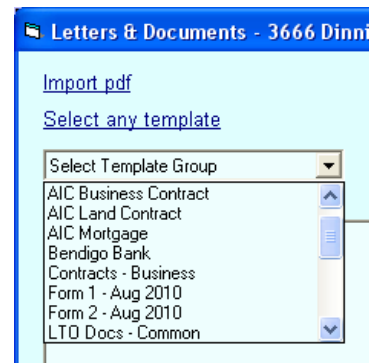
The CATS program resides on the computer hard drive or network in a folder called CATS. Within the CATS folder is a sub folder called Templates.

Within the Templates folder are the sub folders which make up the template groups and within each of these folders are the individual templates.

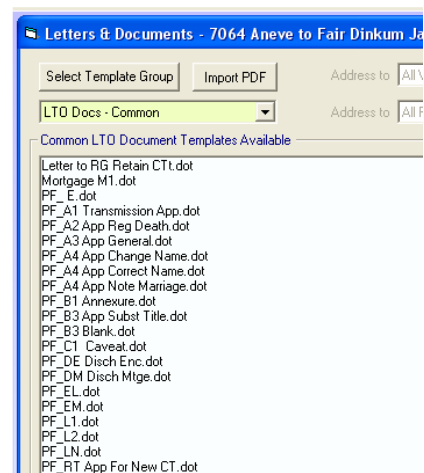


### The Select Template Group List

When the *Select Templates Group* in the Letters screen is displayed, you can see that the list of folders which can be seen above in Windows Explorer screen are the same as in the Select Template Group screen at right.



So if for example you want to prepare an LTO document, click on the template group called *LTO Docs – Common* in the list and the individual templates which make up that group will be displayed.



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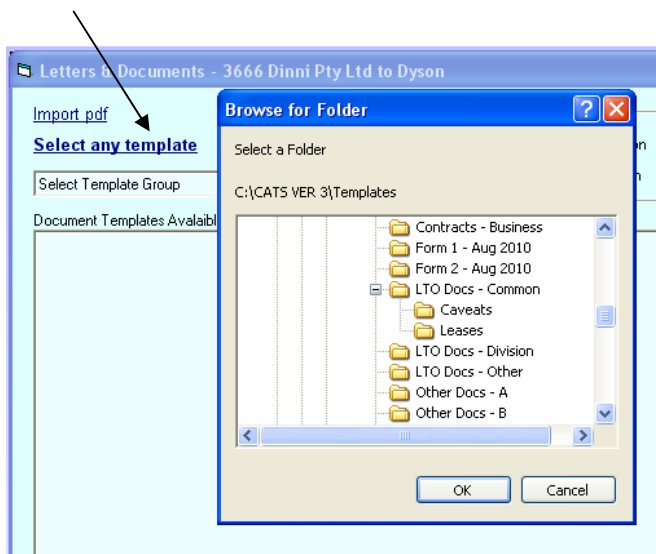
### The Select Any Template Link

This is similar to the *Select Templates Group* list but allows templates to be stored in and retrieved from nested folders as well.

For example, you may have decided to keep the *LTO Docs – Common* folder less cluttered by putting caveats and lease panel forms in a sub folder of the *LTO Docs – Common* folder.

Clicking the *Select any Template* link gives a different view of the template group folders.

In the example at right, you can see that you now have access to the nested Caveats and Leases subfolders.



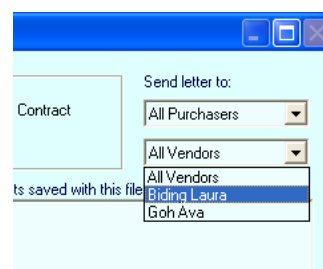
Click OK to display the templates contained in any folder or sub folder.

### Selecting a Specific Addressee

There are occasions when it is necessary to address a letter to one of multiple vendors or purchasers, for example, where partners have separated or divorced.

When in the Templates group for letters to vendor or purchaser, the *Address To* list boxes become active as appropriate.

In the example at right, you can see that the list for vendor clients contains two names. The name of the client to whom the letter to be addressed is selected from this list.



Clicking *All Vendors* or *All Purchasers* in the list has the same effect as selecting the first listed vendor or purchaser.

### Generating a Letter/Document

Double click the required template in the list on the left headed "...*Templates Available...*".

This creates the required letter or document by importing existing data into the template, and converting it to a MS Word document. This document is then displayed in the list at the right of the screen, highlighted for easy recognition, ready for editing and or printing. The saved document is in Microsoft Word format.

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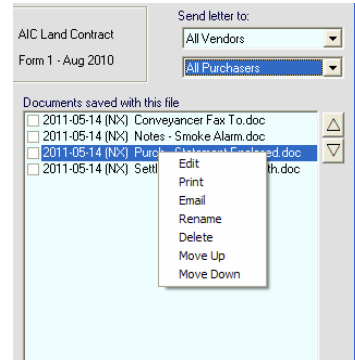
## GENERATING LETTERS & DOCUMENTS (Cont)

### Document Handling Options

#### CONTEXT MENU

Right clicking on a document in the *Saved Letters List* will display a pop up menu with options as below.

- Edit Opens a document for editing.
- Print Prints the document without first opening it in MS Word.
- Email Launches MS Outlook and attaches it to an email
- Rename Rename the selected document.
- Delete Deletes the document
- Move Up Moves the document up by one row in the list.
- Move Down Moves the document down by one row in the list.

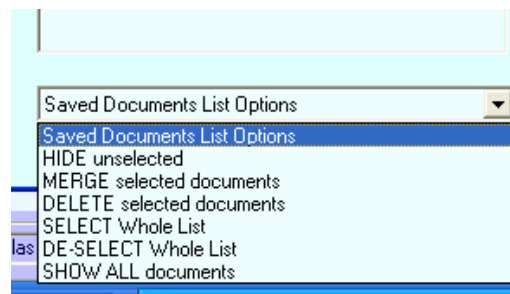


(You can also move an item up or down by selecting it and clicking the arrow keys at the top right of the saved documents list)

#### SAVED DOCUMENT LIST OPTIONS

This drop down list appears at the bottom of the *Saved Letters List*. An explanation of the options appears below.

NB: In the context of this action, 'unselected' means those items which do not have a tick in the box at the left of the document name and conversely 'selected' means those which are ticked.



#### HIDE Unselected

Selecting this option will temporarily hide any selected items.

#### MERGE Selected Documents

All items which are selected will be merged into one document. See below for detailed instructions.

#### DELETE Selected Documents

All selected documents will be deleted.

#### SELECT Whole List

All items appearing in the list will be ticked (marked as selected).

#### DE-SELECT Whole List

All items appearing in the list will be un-ticked (marked as unselected).

#### SHOW ALL documents

All items that were hidden by the *HIDE Selected* option will be re-instated in the list

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### GENERATING LETTERS & DOCUMENTS (Cont)

#### Opening a Created Document for Editing or Printing

In the *Saved Letters* list, either

- Double click on the document name, or
- Right click on the document name and select the *Edit* option from the pop-up menu
- Click on the document name to highlight it then select *Edit* from the drop down list below the *Saved Letters List*

*A letter can be printed without opening it. Right click on it in the Saved Letters list and select Print from the pop-up menu*

#### Inserting Signing Clauses into Documents

A shortcut exists to insertion of a signing clause into a document such as an LTO document.

Click where you want the signing clause to appear.

If you want to insert say, the signing clause for a transferor in a Memorandum of Transfer, type the word Transferor then press the F3 button on the keyboard. The normal signing clause with provision for one signature will appear.

For a signing clause with provision for two signatures, type Transferors instead of Transferor.

For a company execution clause type TransferorCS instead.

Of course, the same applies for a transferee or transferees.

What is typed as the autotext name depends on the type of document. For a Lease, type Lessor or Lessee etc, for an Application, type Applicant or Applicants etc, and press the F3 key.

#### Merging Separate Documents into One

This feature is used to merge several templates into one document. It is used in situations such as preparing a Contract or Form 1, or even a lease by combining the various components which comprise it.

- Start by displaying the template group containing the templates for the document to be merged.
- If there are other items in the *Saved Letters List*, select the option *HIDE Unselected* from the drop down list beneath it called *Saved Documents List Options* as described above. (This step is not compulsory but by hiding all items in the list gives a clearer picture of the documents you are merging).
- From the appropriate template list, create those templates to be merged in the same way as you would any other letter or document. They will be displayed as normal in the *Saved Letters List* where they can be individually edited.
- To change the order of the documents to be merged, either
  - right click on the one to be moved then select *Move Up* or *Move Down* from the pop up menu or
  - select the item to be moved then repeatedly click the up or down arrow at right of the list until it is in the required position.

*The order of documents in that list is determined by the order they appear in the Files folder in Windows Explorer. That is why when the documents screen is refreshed, documents revert to that order.*

*Components of a contract can be renamed in the templates folder so that each is in the order you would want them in the final merged document e.g A\_Schedule1 B\_Schedule2 etc. This will assist to keep them in a logical group in the saved documents list.*

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### GENERATING LETTERS & DOCUMENTS (Cont)

- When the required components have been correctly edited and in the required order, select *MERGE Selected documents* from the *Saved Documents List Options* drop down list.

They will be combined into one document called *TempDoc* which will be displayed with all the components which created it. These individual components remain intact so the merge process can be repeated if these are subsequently edited.

*If the final document is accepted as correct, rename it immediately otherwise any subsequent merge will overwrite it.*

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### GENERATING LETTERS & DOCUMENTS (Cont)

#### Canceling a Merge

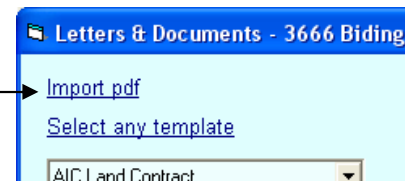
Delete the merged. Because the original component documents remain intact, it is a simple matter to re-create the merged document.

#### Importing an Existing PDF File

PDF files can be imported into and saved with the documents and letters for a client file. This is handy because more and more documents are sent as pdf files attached to an email, e.g. PIR reports from Land Services Group. You may wish to save these pdf's with other documents and letters created for a particular file rather than create hard copies of the document for filing.

To do so;

- Click the *Import PDF* link .
- Browse to where the pdf file is located, then double click it. It will be saved in the *Saved Letters* list along with anything other documents created.



The pdf can also be opened for reading by double clicking on it in the Saved Letters List.

#### To Email a Document using Microsoft Outlook

Right click on the document in the *Saved Letters* list to be emailed and select the *Email* option.

This will open Microsoft Outlook with the document already attached, ready for the recipients email address to be entered.

#### IMPORTANT NOTE

*If a settlement statement or cheque request has been generated and saved, it will also appear in the Saved Letters list and can be opened/edited/reprinted/emailed etc just like any other Word document there.*

*CARE - Changes made to any of the figures in the settlement statement here will not be reflected in the actual data. Changes to financial details must be made in the Statements screen.*

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