

Conveyancing And Trust Account System

CHANGING FILE PREFIX

Purpose of File Prefix

When creating a practitioner entry in the *Practitioners* table, it is necessary to allocate a unique file prefix consisting of up to three alpha characters.

The appropriate file prefix is then automatically allocated to a file/matter at the time of creating it, as soon as the practitioner responsible for that file is added.

The same prefix can not be used for more than one practitioner.

However, the same practitioner can be entered any number of times in the *Practitioners* data table and allocated a different prefix each time. The different prefixes for the practitioner can be used by statistical management reports to (for example) identify the source of referrals.

Changing a File Prefix

If a prefix was wrongly allocated when a new file was opened, its file prefix can be changed by clicking *File Prefix* in the side menu.

This will display the *Change File Prefix* window.

Select the required prefix from the drop down list and click the *Change* button.

