

**Conveyancing And Trust Account System**  
**APPENDIX A**  
**CREATING & MAINTAINING DOCUMENT TEMPLATES**

**Overview**

A library of templates can be created and maintained by the user, into which CATS can insert data to create a finished document.

All available fields for inclusion in these templates are listed in Appendix "B" of this manual.

In most cases, standard letters or documents created from these templates require minimal further word processing. Finished documents are viewed and edited in Microsoft Word © format, so all of Word's printing and formatting features are available.

**Creating a Template**

Templates are created directly in Microsoft Word © not from within CATS.

- Open a blank document in Word.
- Type the document and insert the applicable template fields in the spot where the actual data drawn from the database is required to be shown.
- The illustration at right is a sample of a letter template showing the text and fields.
- When finished, click Save as.
- Select Word Template (.dot)
- Browse to the folder where you want to save it.
- Save the finished template.

Our ref: {FilePrefix} {FileRef}

26 April, 2011

{ToClientAddressee}  
{ToClientStrAddr1}  
{ToClientStrAddr2}  
{ToClientSuburb} {ToClientState} {ToClientPostcode}

Dear {ToClientSalutation}

**Purchase of {ContAddress1} {ContAddress2}  
{ContSuburb}**

I am now pleased to enclose your original Certificate of Title Volume {TitlesVolume} Folio {TitlesFolio}.

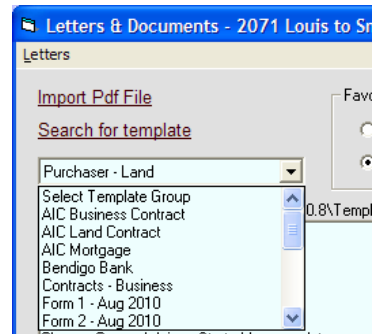
Yours sincerely  
{UserCoyName}

Templates must be saved in a sub folder of the folder called *Templates* which itself is a sub folder of the *CATS* folder.

A new subfolder of the *Templates* folder can be created and the new template saved to it. Any number of sub folders can be opened in the *Templates* folder and each can be given any descriptive name.

The names of all subfolders of the *Templates* folder will then be visible in the drop down list in the *Letters & Documents Screen*, and clicking the name of the subfolder in that list will make available all of the templates saved within it.

(See chapter - *Generating Letters & Documents*)



**Conveyancing And Trust Account System**  
**APPENDIX A**  
**CREATING & MAINTAINING DOCUMENT TEMPLATES**

**Editing existing templates**

- Find the Templates folder in Windows Explorer and double click it.

*TIP*

*To facilitate finding the Templates folder, put a shortcut to it on the 'desktop' of the computer.*

\*\*\*\*

- Double click the sub folder which contains the template to be edited.
- Right click on the template to be edited, then select Open from the context menu which appears. **Important** – do not try to open the template by double clicking on it. This will open a document based on the template rather than open the template itself.
- Make the required changes.
- Save the document.

**Create a new template from existing templates**

Follow the procedure above, but select *Save As* instead of *Save*. It is better to do this as soon as you have opened the template so that you don't forget, otherwise the original template will be overwritten.

*IMPORTANT NOTE*

*The Templates folder must not be deleted or moved otherwise the CATS word processing facility will not work*

\*\*\*\*\*

**Conveyancing And Trust Account System**  
**APPENDIX A**  
**CREATING & MAINTAINING DOCUMENT TEMPLATES**

**UNDERSTANDING FIELDS**

The auto-insert feature of CATS relies on 'fields' appearing in the letter or document.

When CATS processes that letter for a selected client, it checks the database for corresponding field names and automatically inserts the data contained in those fields into the document.

In the above example, the fields are identified by enclosing them in brackets '{}'.

**Complex Fields**

On many occasions, there will be more than one vendor and more than one purchaser in a single client file.

Therefore there will be times when you will want the names of all vendors and/or all purchasers to be printed, for example in a Memorandum of Transfer.

Some tables have complex fields attached to them for that purpose. An example is in the *Clients* table. This table contains two complex fields, {VendNamesFull} and {PurchNamesFull}.

CATS will automatically replace these fields with the full names of all vendors and purchasers respectively – See Appendix B

**Special Fields**

Some special fields are included to be used in appropriate circumstances.

For example if the field {ContAmtInWords} or {ContDepAmtInWords} appears in a template, the purchase price and amount of deposit will appear in words in the processed document. (These same fields substitute for annual and monthly rent if the transaction type is a lease.)