User Guide

Company Admission Tool (CaT)

CaT Release 2.270.0 – Multiple Segregation Change Request

This document version is valid in
Simulation from: 07 Jan 2022
Production from: 17 Jan 2022

Version 1
Date 14 Jan 2022
1. Choose **Change Request** from the menu bar.

2. Open **Change Requests – Models**.

3. Click on **New Request**.

4. Choose new functionality **Limited scope of clients** and a **Clearing Model**.
5. Select scope of clients (Selection of clients, which are part of the setup – already onboarded) and click on **apply changes & save**.
6. Switch to **Position Account** tab and find the selected clients. Start with the amendments for the clients as usual.

7. For example, add an account, edit an account, or delete an account.
8. Find the changes reflected on the new **Changes** tab

<table>
<thead>
<tr>
<th>Entity Name</th>
<th>Entity Identification</th>
<th>Applying State</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool</td>
<td>Name: NEW Client MemberID or LEB:</td>
<td>Successfully applied</td>
<td></td>
</tr>
<tr>
<td>Position Account</td>
<td>Name:</td>
<td>Successfully applied</td>
<td></td>
</tr>
</tbody>
</table>
Multiple Segregation Change Request

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