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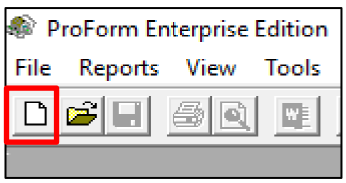
CREATING AND EDITING TEMPLATES

A template is a file that contains preset information that is common to all orders of a specific type. Templates can save you typing time by being predefined with frequently used information. You can create as many templates as you like, each containing different preset information. For instance, you can create a template for a lender that contains all of the information that is repetitively typed in for each order. When you create a new file for an order with that lender, you would copy the template you created to the new file. You can copy one or more templates to each new file you start.

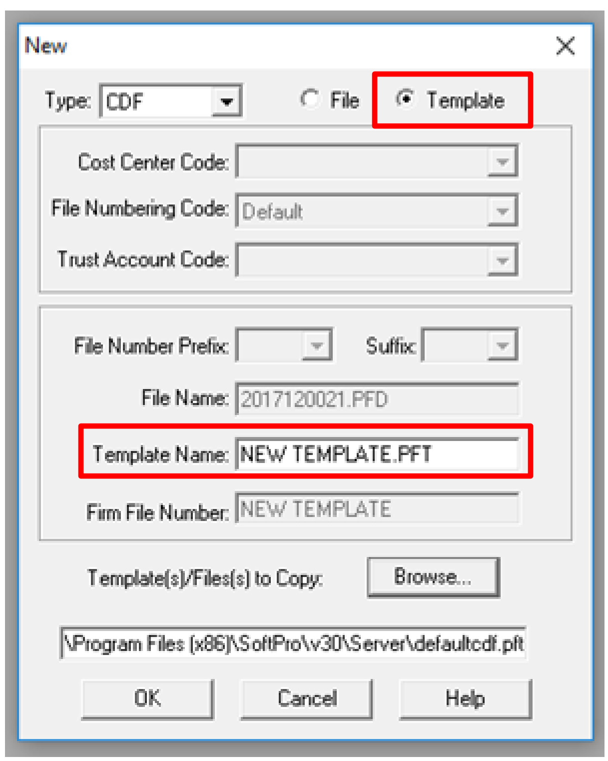
Creating a New Template:

1. From the menu bar, select **File > New** or click the **New** icon on the toolbar.



2. In the new file dialog box, click **Template**.

3. Enter the name of the template in the Template Name field. Be sure to enter the file extension .PFT.



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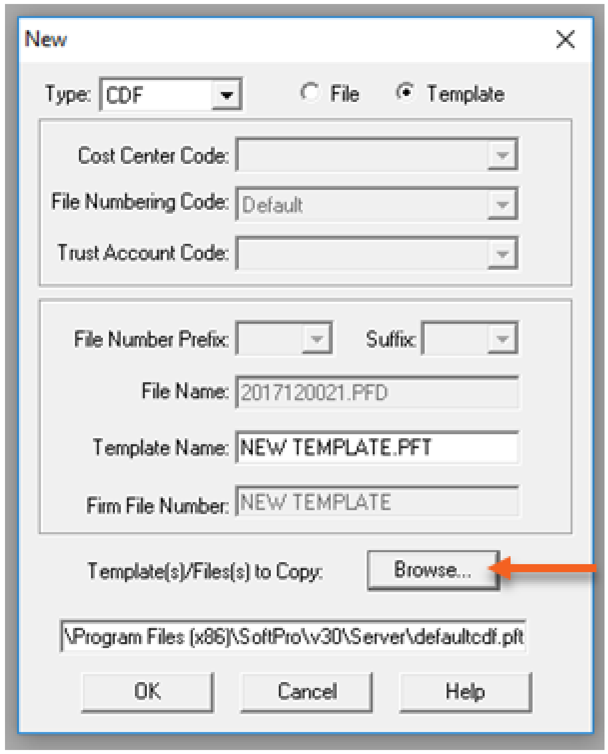
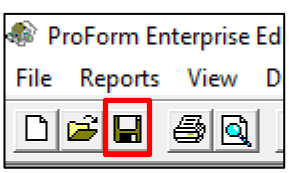
4. If desired, choose another template or data file to copy in the **Template(s)/File(s) to Copy** field. You can search for a template or file to copy by clicking **Browse**.



5. Click **OK**.

6. Enter data in the new template for any information you require to be in all transactions of this type.

7. Choose **File > Save** or click the **Save** icon on the toolbar to save the template.



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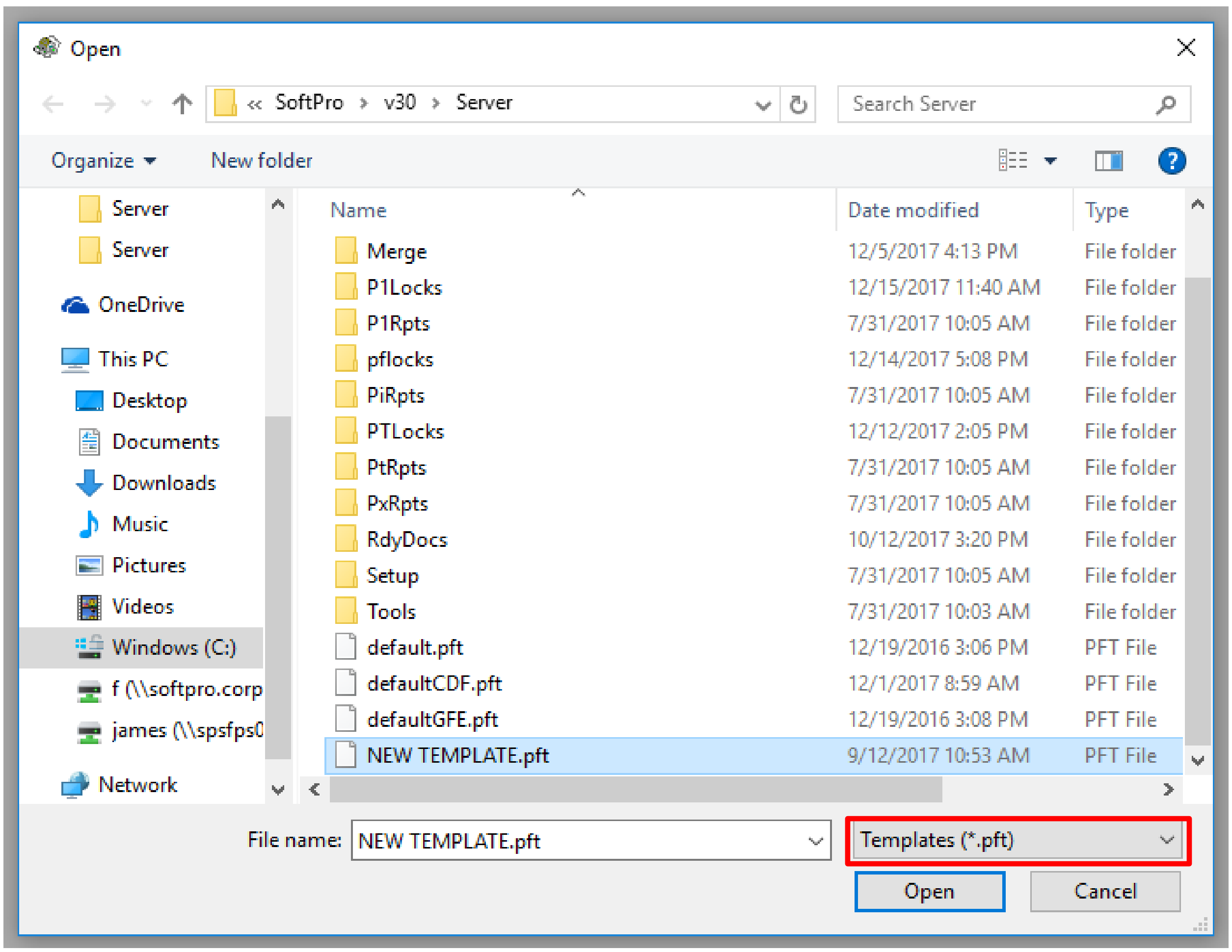
Editing an Existing Template:

1. From the menu bar, select **File > Open** or click the **Open** icon on the toolbar.

2. Set the file type to Templates (*.pft). Select the template you wish to edit from your database. Click **Open.**



3. Edit the information in the template as desired.

4. Choose **File > Save** or click the **Save** icon on the toolbar to save the template.