# Copying Template Files to Existing Orders

## Overview

When an order is created in AIM+ there are times that the file will need to be updated to reflect the appropriate documents/process templates. The steps below indicate the process of applying the template to an existing order in AIM+.

What is a template file? A template file is set up with defaults and options based on the type of closing transaction. For example, your company may have refinance and resale templates set up for residential closing transactions.

## Locating Template Files

Depending on how the tracking locations are set up for your company or site, you may find templates in the top level tracking location or in a template folder set up for each branch.

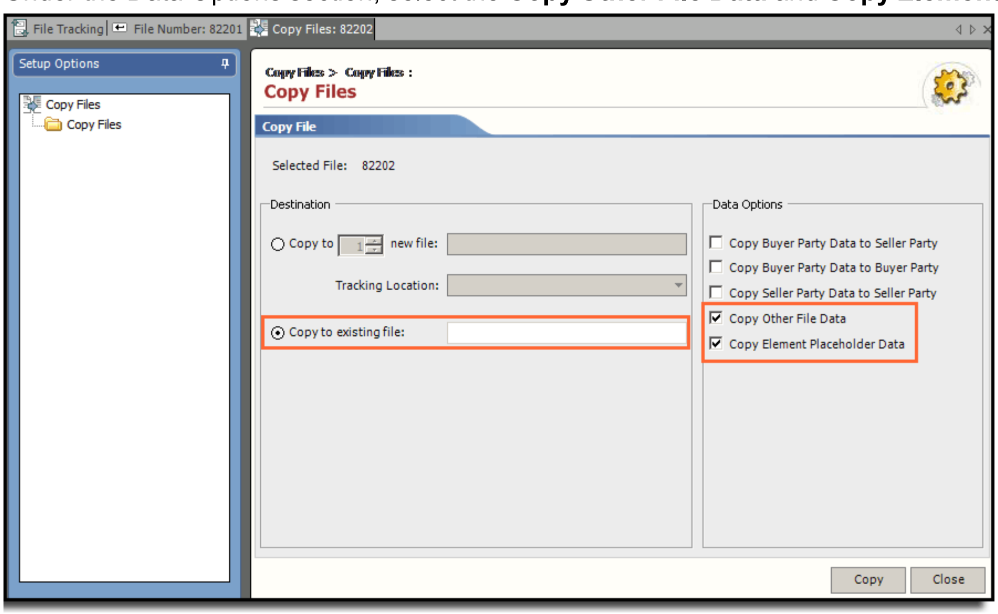
## Copying Files to Existing Orders

### *Steps*

1. Select the template from which you want to apply to your existing order.
2. From the **Module** menu, select **Copy** Files. The Copy Files screen displays.

**Tip:** You can right-click the file you want to copy from the *File Tracking* screen. On the floating menu, point to **Open** and select **Copy**.

3. Under the **Destination** section, select the **Copy to Existing File** option.
4. Enter the existing file number.
5. Under the Data Options section, select the **Copy Other File Data** and **Copy Element Placeholder Data** options.




6. Click **Copy**.
7. Click **Close**.