

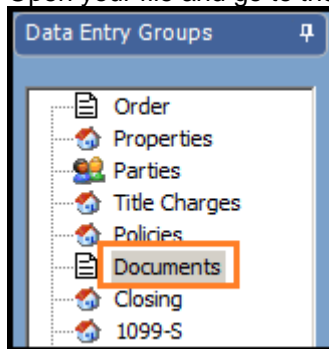
Using BP (BoilerPlate) Forms

Did you know that you can access forms in Documents that will allow you more flexibility in editing? These are called Boilerplate forms and their form names end with BP. This document explains how to locate and use these forms.

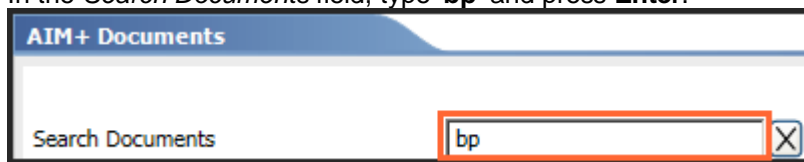
Locating BP Forms

Steps

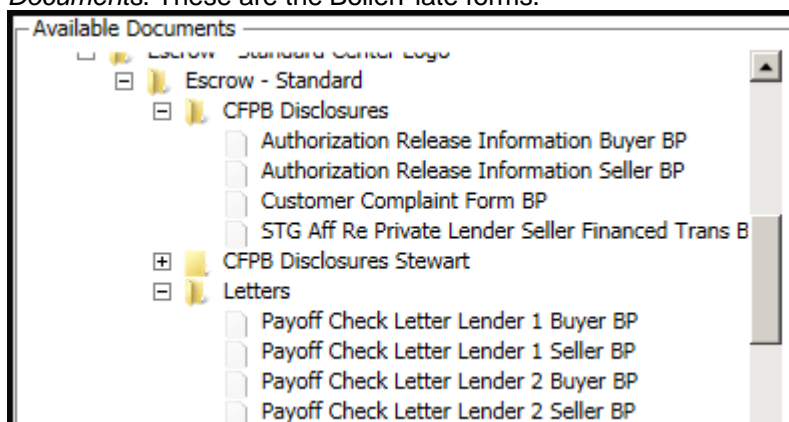
1. Open your file and go to the **Documents** data entry group.



2. In the *Search Documents* field, type **'bp'** and press **Enter**.



3. All documents that contain **BP** in the form name (usually at the end of the form name) will appear under *Available Documents*. These are the BoilerPlate forms.

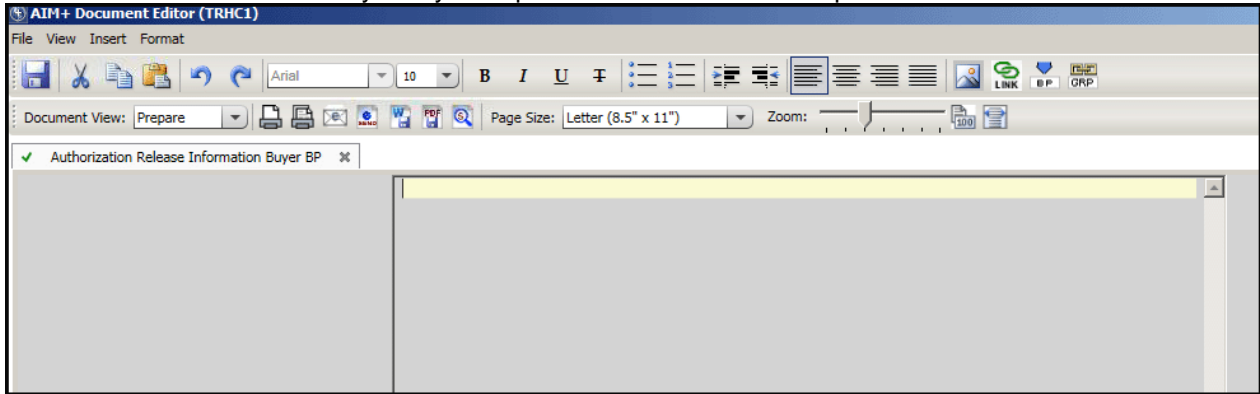


Using BP (BoilerPlate) Forms

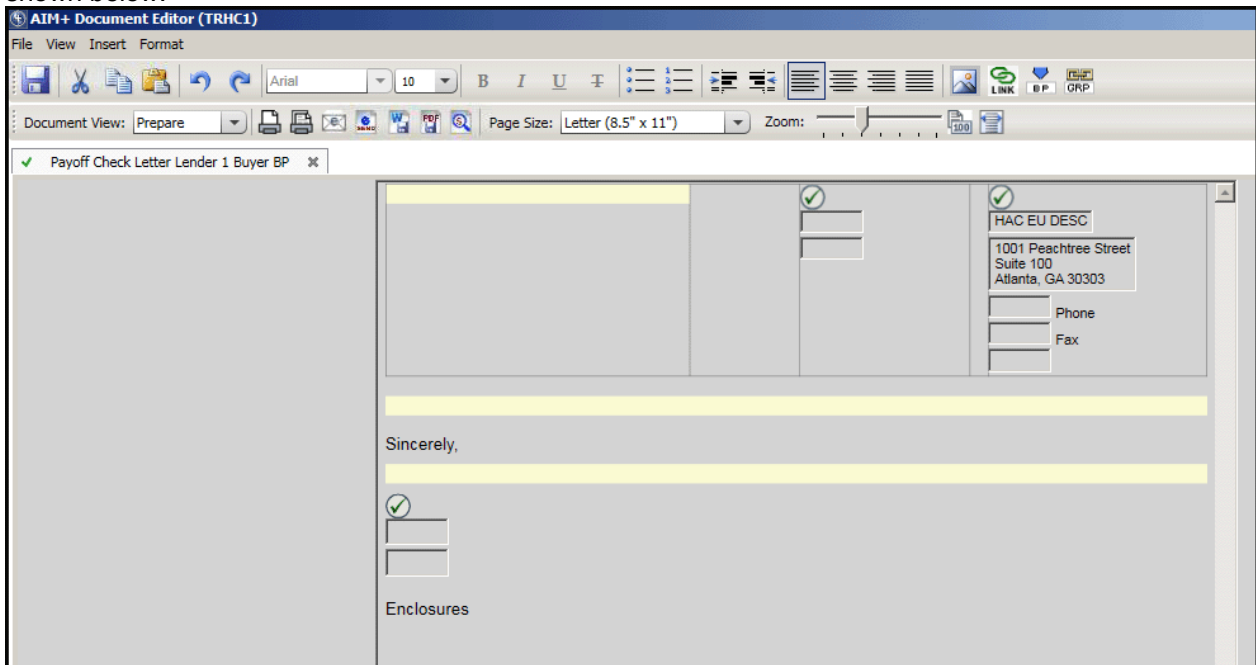
Using BP Forms

Steps

1. Select a BP form from *Available Documents* by left-clicking on the form name, then drag it to **Selected Documents**.
2. Open the document by double-clicking the form name under **Selected Documents**.
3. Most BP forms will contain only one yellow placeholder as in the example below:

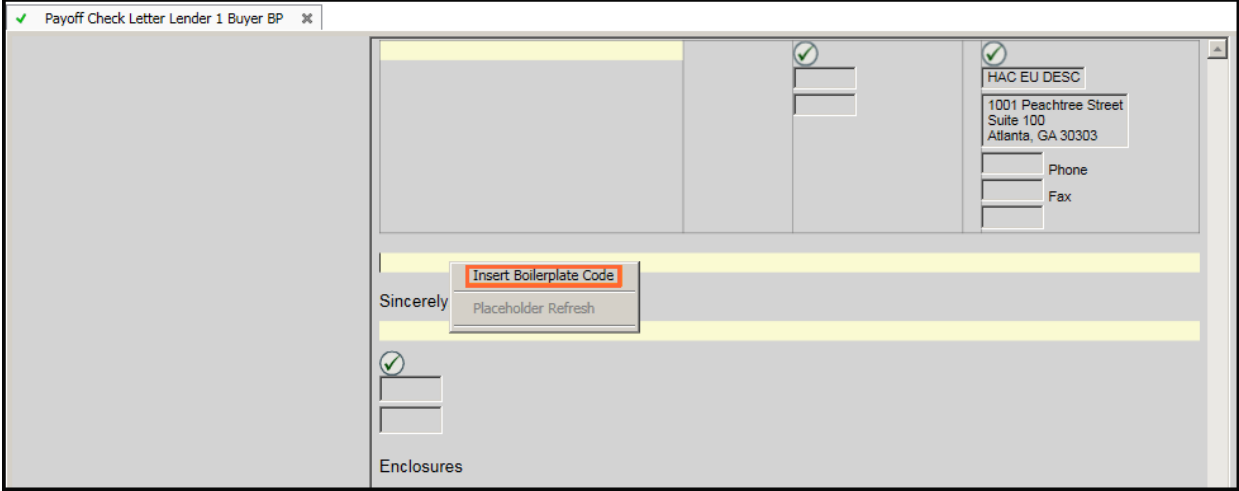


Some BP forms, such as letters, may contain other placeholders for such items as the logo or signatures, as shown below:

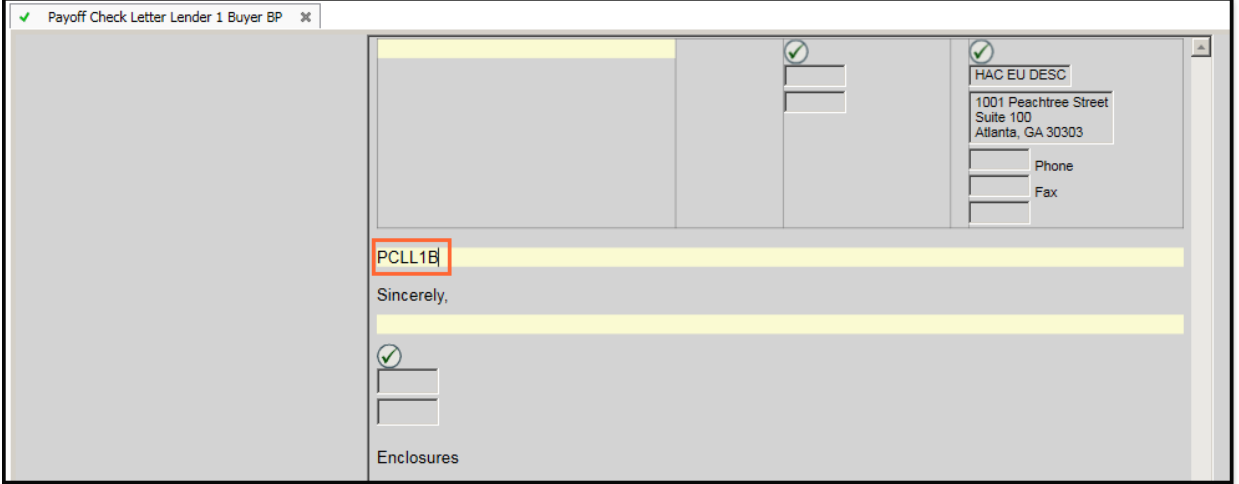


Using BP (BoilerPlate) Forms

4. Place your cursor in the appropriate empty placeholder, right-click, then select **Insert Boilerplate Code**.

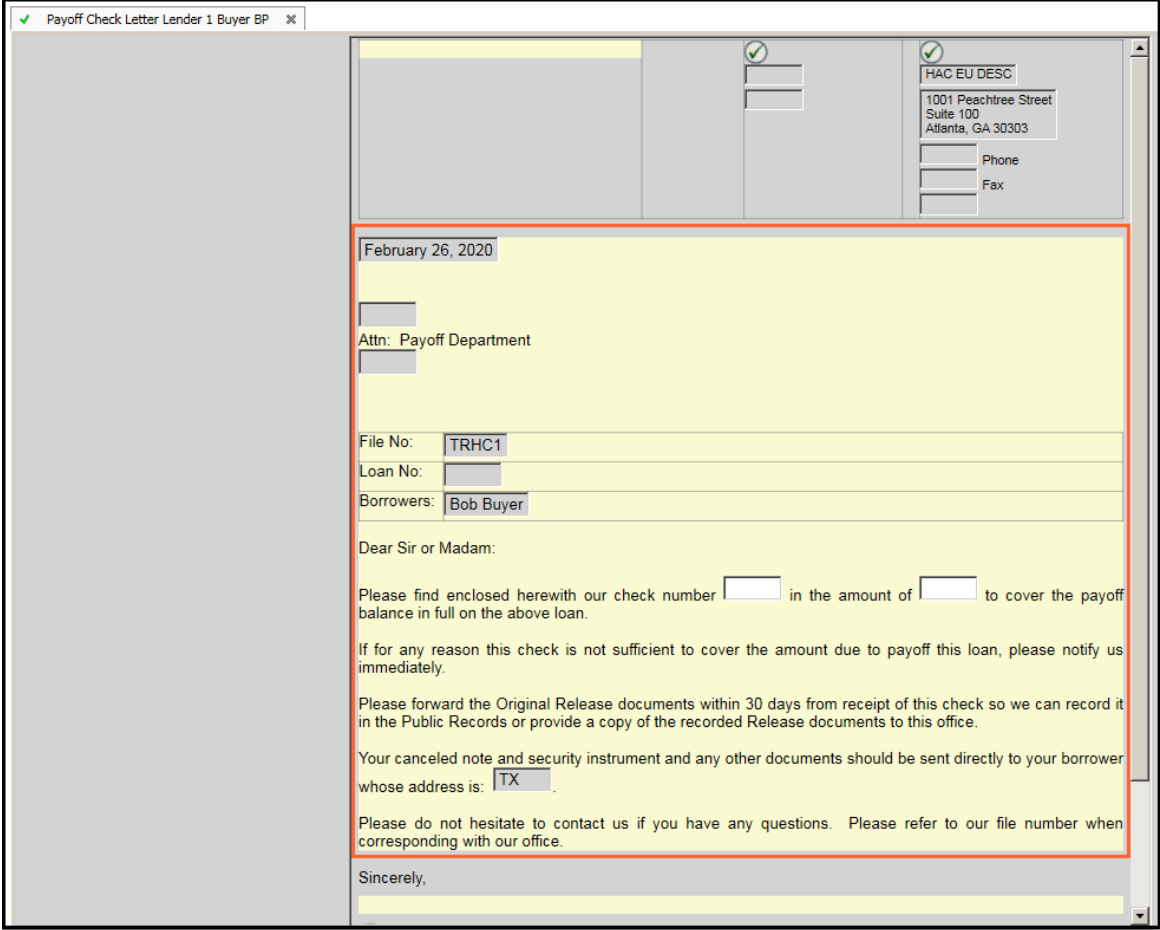


5. The boilerplate code for this form populates.



Using BP (BoilerPlate) Forms

6. Press **F3** on your keyboard. The body of the form displays.



Payoff Check Letter Lender 1 Buyer BP

HAC EU DESC
1001 Peachtree Street
Suite 100
Atlanta, GA 30303
Phone
Fax

February 26, 2020

Attn: Payoff Department

File No: TRHC1
Loan No:
Borrowers: Bob Buyer

Dear Sir or Madam:

Please find enclosed herewith our check number [] in the amount of [] to cover the payoff balance in full on the above loan.

If for any reason this check is not sufficient to cover the amount due to payoff this loan, please notify us immediately.

Please forward the Original Release documents within 30 days from receipt of this check so we can record it in the Public Records or provide a copy of the recorded Release documents to this office.

Your canceled note and security instrument and any other documents should be sent directly to your borrower whose address is: TX .

Please do not hesitate to contact us if you have any questions. Please refer to our file number when corresponding with our office.

Sincerely,

7. All text within the yellow placeholder can be edited as desired.