

Copying Template Files to Create New Orders

Overview

If your company uses template (or base) files, you can reduce keystrokes and data entry by copying a template file to create and open a new order.

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 Create New Orders

You can create new orders by copying the data from a template file using Quick Data Entry (QDE) or Copy Files.


Using QDE is the preferred method. You have more control over what data is copied from your template file and you can input additional file data directly into the QDE screen, eliminating the need to complete data entry after creating your new file.

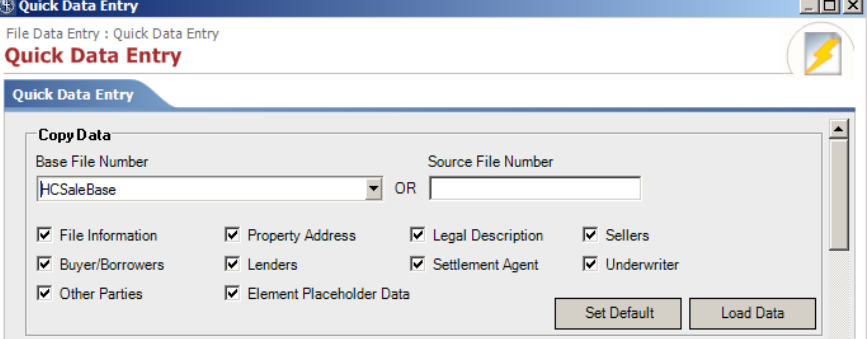
Use Copy Files when you need to create multiple copies of the same file.

Creating New Orders with Quick Data Entry

Tip: If using Quick Data Entry, designate a template file as a 'base file' for quick access within the QDE screen. To do this, open the template file, click the blue *File Information* tab, then select *Base File* in the **Order Type** drop down field.

Steps

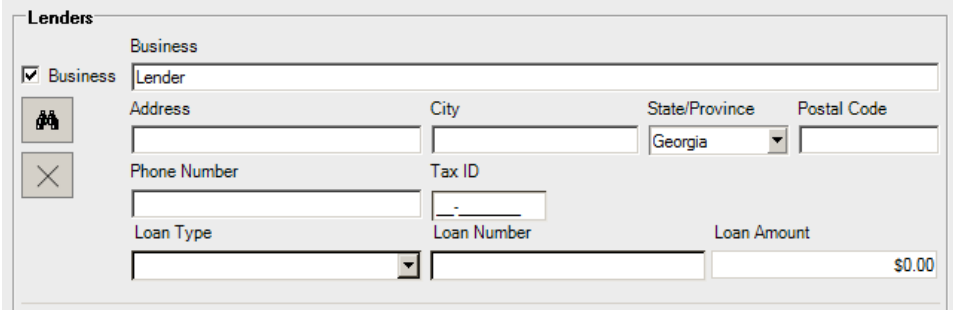
1. From the **File** menu, select **Quick Data Entry** or click the *Quick Data Entry* icon on the toolbar .
2. Select the template you want to use to create a new order from the **Base File Number** drop down field. (If you want to use a file that has not been setup as a base file, simply type that file's number in the **Source File Number** field instead.)
3. In the *Copy Data* section of the screen, check the items to be copied from the base (source) file and uncheck any items that should not be copied. Then click the **Load Data** button.



4. The data from your base file will populate into the lower fields of the QDE screen. You can modify any information as needed and add any missing data, such as the Closing Date or Sales Price.
5. Leave the **File Number** field blank if you want AIM+ to assign the next sequential file number or manually input the desired file number.


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- The loan information can be input under the Lenders party section.



Lenders

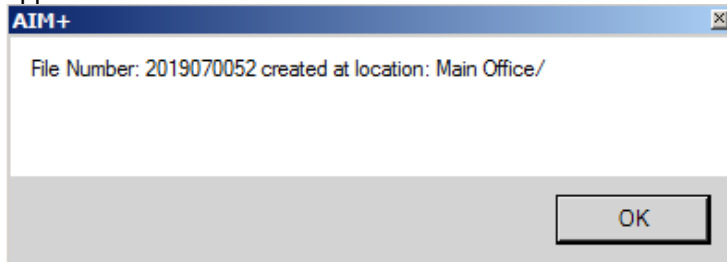
Business

 Address City State/Province Postal Code

 Phone Number Tax ID

Loan Type Loan Number Loan Amount

- Additional parties can be added in each section on the fly or by using the binoculars icon to insert parties from Party Setup.
- Click the **Create Order** button at the bottom of the screen when ready to save the new order. A message box will appear with the new file number and its location.



Creating New Orders with Copy Files

Steps

- Select the template from which you want to create and open a new order.
- From the **Module** menu, select **Copy Files**. The *Copy Files* screen displays.

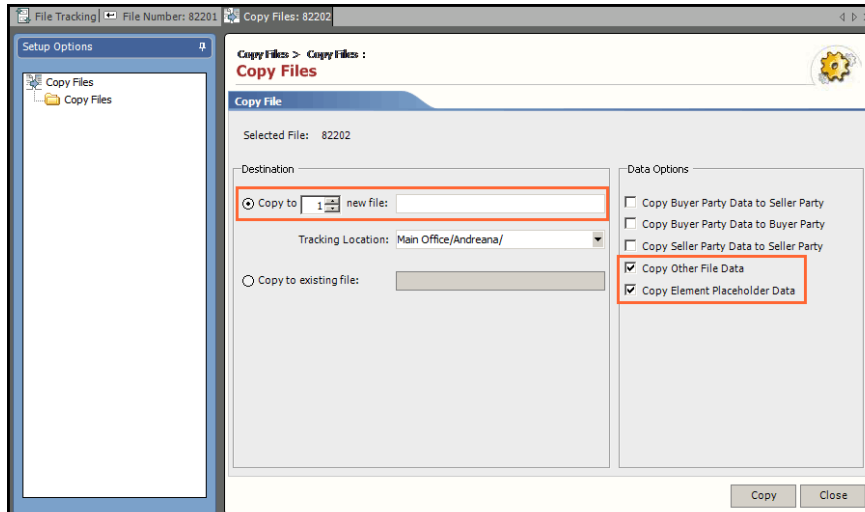
Tip: You can right-click the file you want to copy from the *File Tracking* screen. On the floating menu, point to **Open** and select **Copy**.

- Under the **Destination** section, select the **Copy to To** option. If creating multiple copies of the same file, increase the number of copies from 1 to the desired amount.

Tip: If you are copying to only one new file and do not want AIM+ to assign the next sequential file number, type the number in the **new file** field.

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- Under the *Data Options* section, select the **Copy Other File Data** and **Copy Element Placeholder Data** options.



- Click **Copy**.

Tip: Write down the new file number within the yellow message bar that displays on the screen.

- Click **Close**. Make the necessary changes to the new order(s).