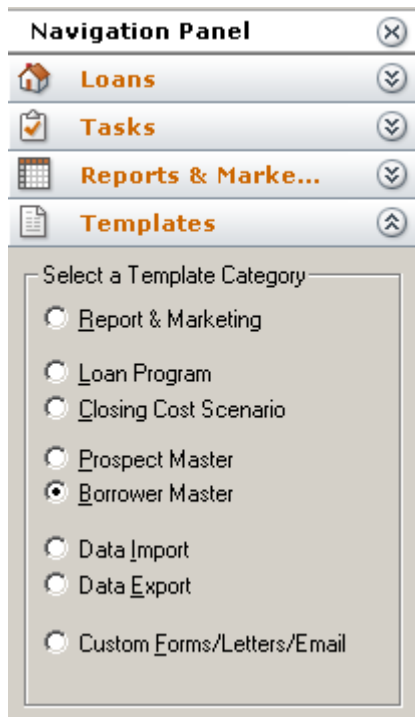


A Master File Template eliminates the need to re-enter information that may be the same on every loan file. You can set up as many Master Files as you would like to accommodate the various loan programs you may offer.

**How to Create a Master File:**

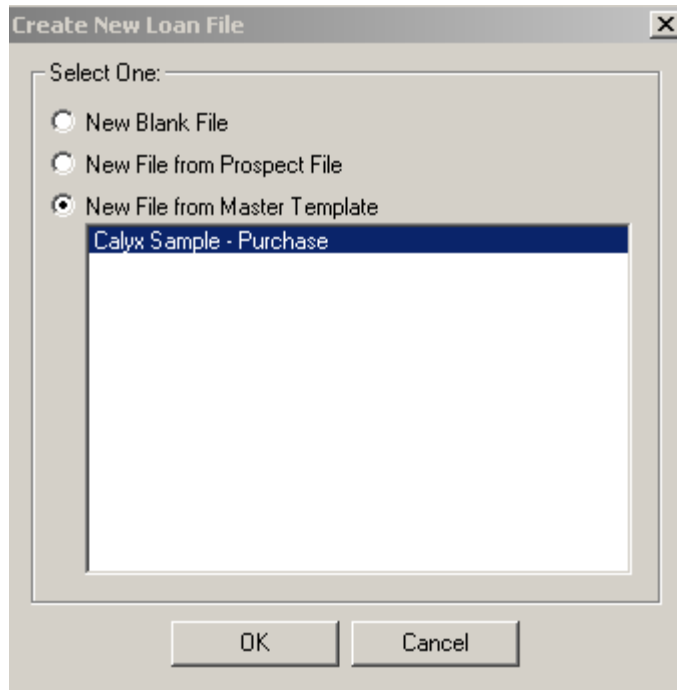
1. On the left Navigation Panel, click the Templates tab. Then click either Prospect Master or Borrower Master, depending on whether you want the template to apply to Prospect or Borrower files. Click the New button. A blank Master Template will open. The template is identical to a blank Borrower or Prospect file.



2. From the menu bar, navigate to any screens in the program that you would like to default information into and fill in the fields with data.
3. Once you're done, in the menu bar click File > Save. Type in a filename and click Save.

**How to import the master file into a new file:**

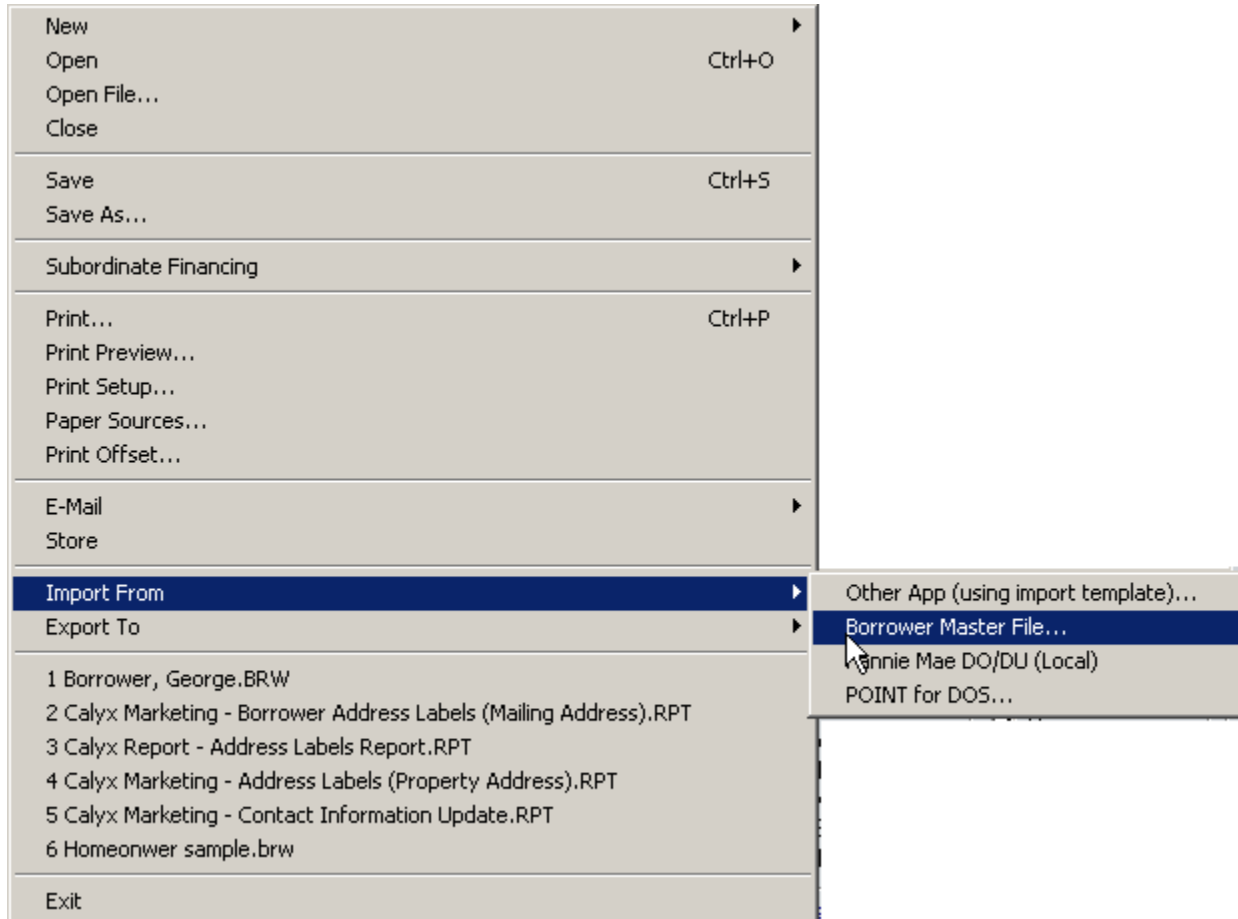
1. On the left Navigation Panel, click the Loans tab. Select the Prospect or Borrower radio button. Click the New button.
2. The Create New Loan File window opens.



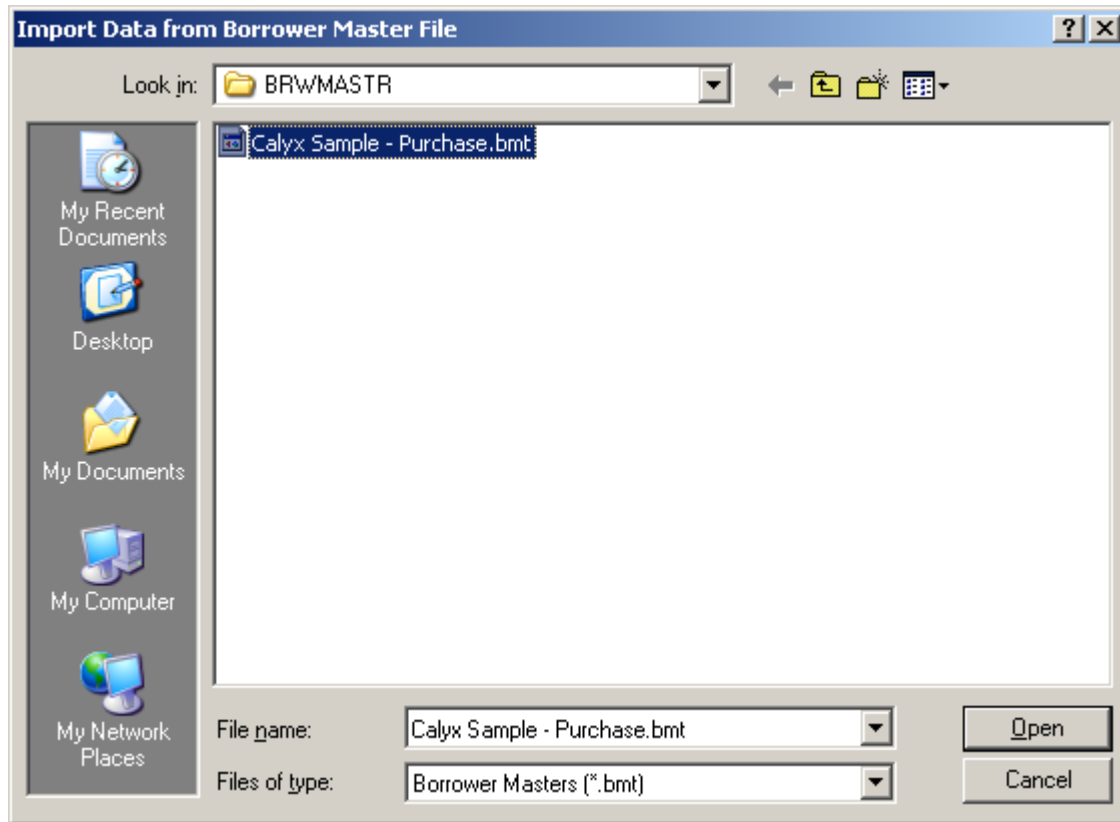
3. Select the radio button titled New File from Master Template. The list that appears will include.
4. Select the Master Template you want to use and click OK. The Master File data will populate into the new file.

**How to import the master file into an existing file:**

1. Open an existing Prospect or Borrower file.
2. From the Menu bar, select File > Import From > Prospect Master File or Borrower Master File.



3. Select the Master Template you want to use and click Open. The Master File data will populate into the new file.



(Note: A Master File Template will only add data to your existing Point<sup>®</sup> file.  
It will not overwrite fields with existing data.)