

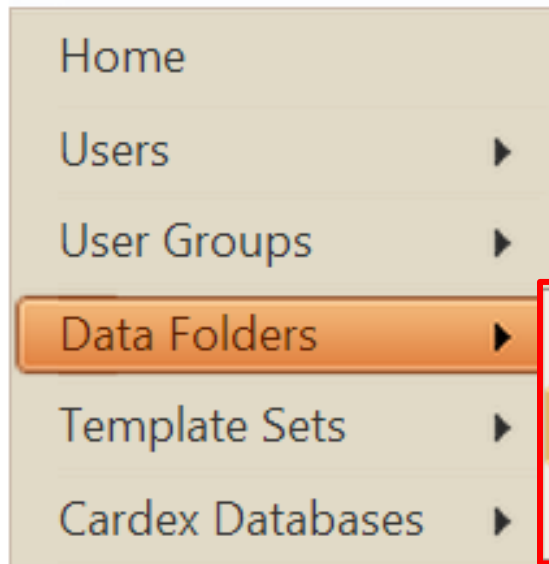


Enabling Auto File Naming

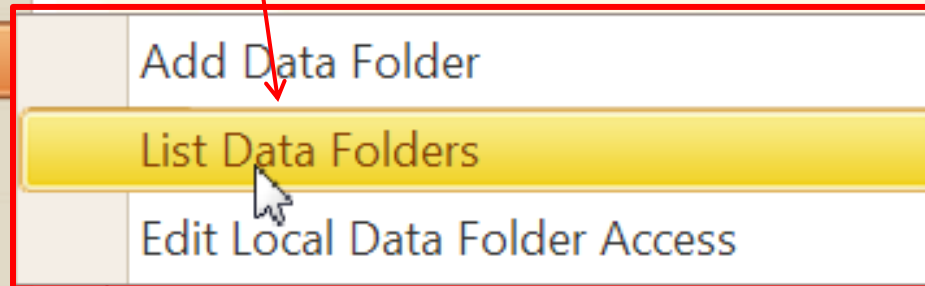
Enabling Auto File Naming



1. Log into your PointCentral Administration site.



2. From the left Navigation Menu, go to **Data Folders**, then **List Data Folders**.



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3. Click **Edit** next to the folder to which you want to enable auto file naming.

PointCentral List Data Folders

PointCentral Data Folders
To sort the list of PointCentral Data Folders, click the column title. To edit data folder information or access rights, click **Edit**. Add on the [Add Data Folder](#) page.

1 2

Order		Edit	Data Folder Name	Path
5	▲ ▼	Edit	Atlanta Archived	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Atlanta-Arch
6	▲ ▼	Edit	Atlanta Processing	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Atlanta-Pro
7	▲ ▼	Edit	Atlanta Prospect	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Atlanta-Pro
8	▲ ▼	Edit	Dallas Archived	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Dallas-Arch
9	▲ ▼	Edit	Dallas Processing	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Dallas-Pro
10	▲ ▼	Edit	Dallas Prospect	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Dallas-Pro
11	▲ ▼	Edit	Houston Archived	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Houston-A
12	▲ ▼	Edit	Houston Processing	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Houston-Processing\

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4. Enter the appropriate parameters for your naming scheme and then click **Update**.

NOTE: You can add a Prefix to either the naming convention for the Borrower or Prospect, but keep in mind, if your going to be creating a MERs MIN number, it must contain only numbers not letters.

Also, if you enable both Prospect and Borrower, you must make sure their naming convention is not identical, otherwise you will have loans in the system with the same file name, which will cause the loss of loans when moving files from one folder to the other.

Also, make sure you only turn on Auto File Naming on the folder where all new loans will be created. It's recommended that you only have loans originated under one folder per Branch setup to prevent duplications.

Data Folder Information

To update the Data Folder information, make the desired changes and then click the **Update** button. Required fields are in **bold**. Scroll to copy Data Folder Settings or access rights.

Edit Data Folder	
Data Folder Name	Atlanta Processing
Order	6 Order in which Data folders appear in Point clients
Path	D:\Program Files\Calyx Software\PointCentral\filesync\DataFolders\Atlanta-Processing\
Notes	
Auto File Naming	<input type="checkbox"/> Enable Prospect Auto File Naming Prefix: <input type="text"/> Use Year: 4 digits Use Month: 2 digits Use Day: 2 digits Use Counter: 3 digits <input type="checkbox"/> Enable Borrower Auto File Naming Prefix: <input type="text"/> Use Year: 4 digits Use Month: 2 digits Use Day: 2 digits Use Counter: 3 digits
<input type="button" value="Update"/>	

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Final Note:

The user will need to close and open Point and then next time they save a loan file, it will save as all numbers.

To reference the Calyx Knowledge Base for this topic, use the link below.

[Auto File Naming](#)

