



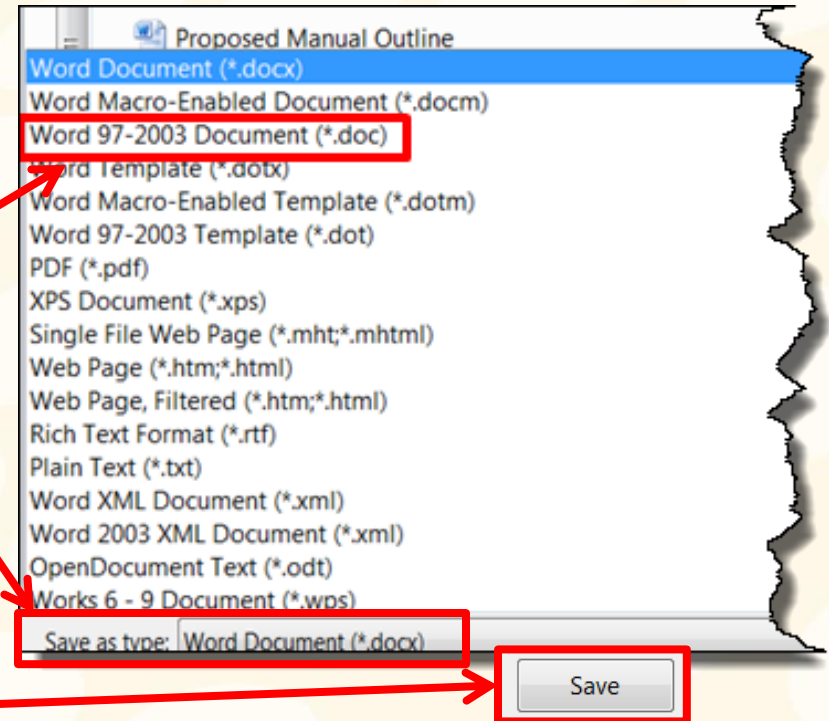
# **Importing and Editing Custom Forms in Calyx**

## Importing and Editing Custom Forms in Calyx



When attempting to import a custom form into Calyx using an existing Word Document file, the file's format must be in Word 97-2003 or earlier. If your copy of the file is in Word format later than 97 – 2003, you can easily save it in the required earlier format by following these steps:

1. Open the file you wish to import.
2. Use the “**Save as**” command and under “**Save as type**” at the bottom of that window, select the **Word 97-2003 Document (\*.doc)**
3. Give the document a new name or just add -2003 to the name so that you know it is the file you want to import.
4. Choose **Save** and your document should now be in the proper format for importing.





**If your copy of the form that you wish to import and edit in Calyx is not in Word format, (Example: PDF) you can use a tool like the one below to convert it into a word document.**

**<http://www.onlineocr.net/default.aspx>**

**You can then just clean the form up, which is much easier than typing it again from scratch.**

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## To begin...

1. Open up **Point**
2. Click on **Templates(PDS)** located on the left-hand side menu bar
3. Click the **Radio Button** next to **Custom Forms/Letters/Email**
4. Click on the **Import Button** located on the menu bar at the top of the screen

A screenshot of the Calyx software interface. On the left is a "Navigation Panel" with a tree view containing "Loans", "Tasks", "Reports & Marketing", and "Templates [PDS]". The "Templates [PDS]" item is circled in red. Below it is a "Select a Template Category" section with several radio buttons. The "Custom Forms/Letters/Email" option is selected and circled in red. A red arrow points from this option to the "Import..." button in the top menu bar of the main window. The main window title is "Templates | List of Custom Forms" and contains a table of templates. The "Import..." button is also circled in red.

File Name
Calyx Marketing - Custom Letter - Contact Information Update Request
Calyx Marketing - Custom Letter - Current Market Information Letter
Calyx Marketing - Custom Letter - Post Close Congratulations
Calyx Marketing - Custom Letter - Referral Request
Calyx Marketing - Custom Letter - Refi Letter
Sample Form - Loan Approval Notification
Sample Form - Lock-In Confirmation
Sample Form - Mortgage Loan Origination Agreement
Sample Form - Privacy Disclosure
Sample Form - Registration and Rate Lock

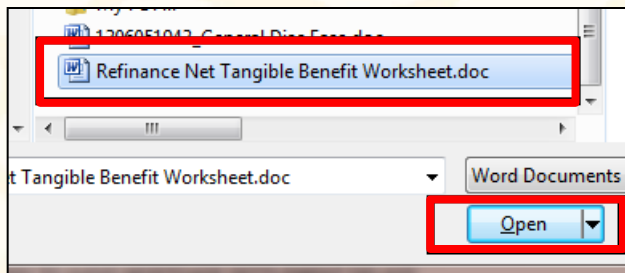
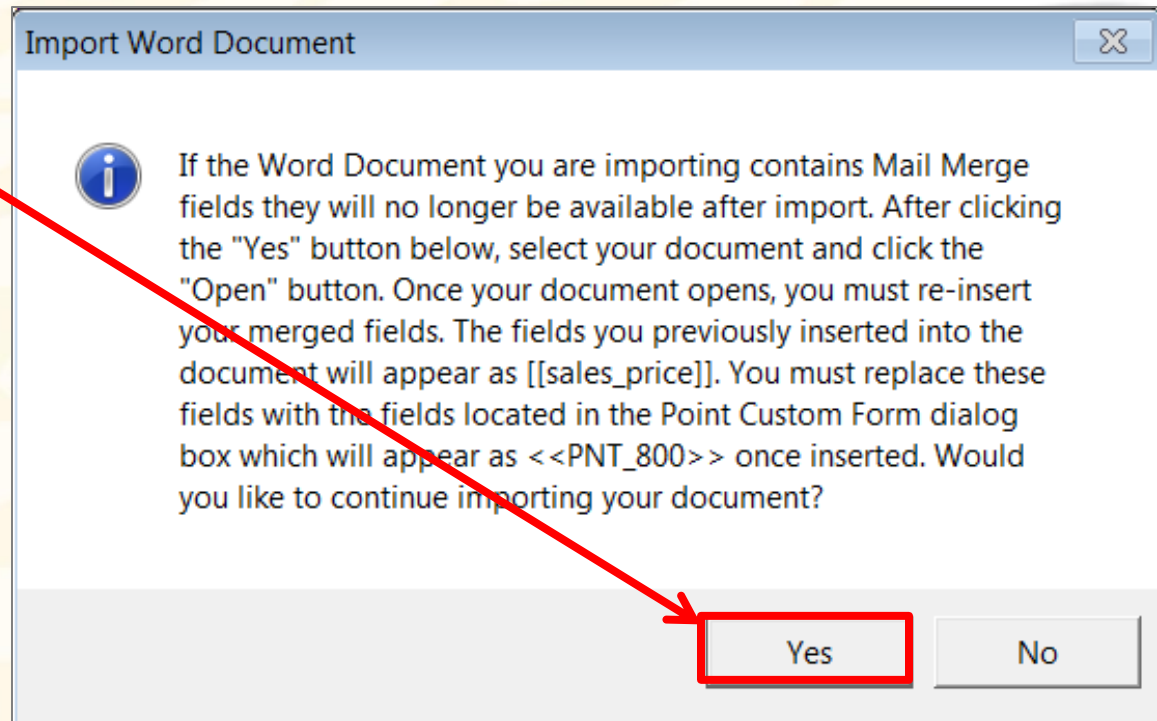
System questions or issues, please email : [support@focusitinc.com](mailto:support@focusitinc.com)  
or call 480-346-1299 Option 1 (Hours of Operation are 7 days a week from 5:00 AM to 10:00 PM PST)



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5. Click **Yes** on this message screen.



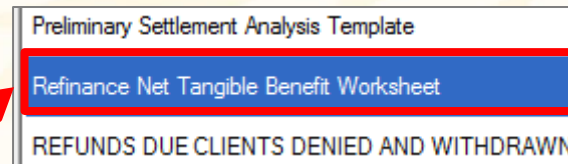
6. Browse to the file that you want to import and left single click **Open**.



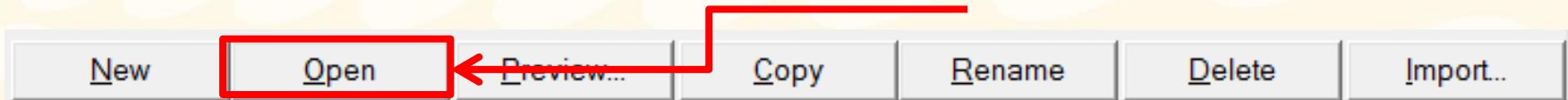
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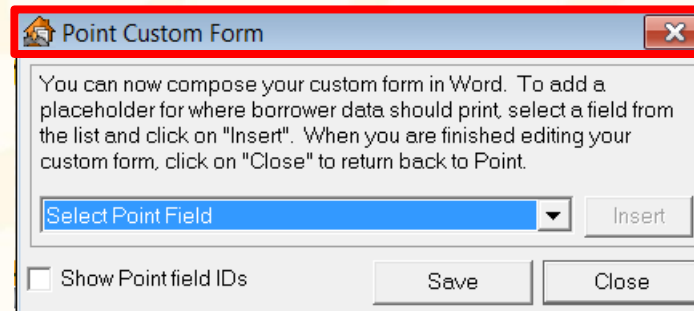
7. Next locate your imported form in the list of forms.



8. Click the file to select it and then click on **Open**.



9. Now you will see that the form has opened in Word with an extra box for inserting the data fields.



10. Review the form after importing to make any adjustments needed

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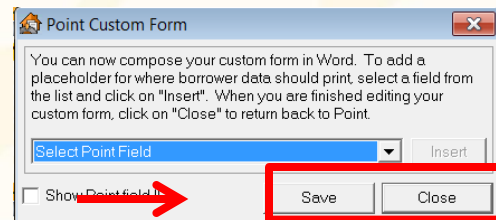
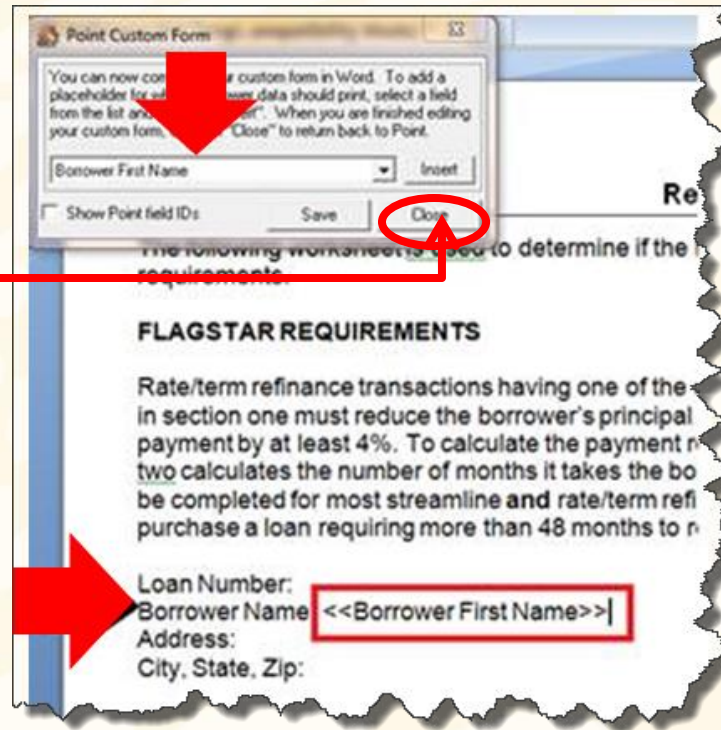
11. Next place the **Cursor** where you want the **Data Field (Borrower Name)** to be inserted in your document.

12. From the **Point Custom Form** box select the data field you want “**Borrower First Name**” and click on **Insert**.

**Note:** You can also select the option “**Other Point Fields not Listed Above...**” and enter the field ID number.

13. Repeat steps 11 and 12 until you have all your data fields inserted.

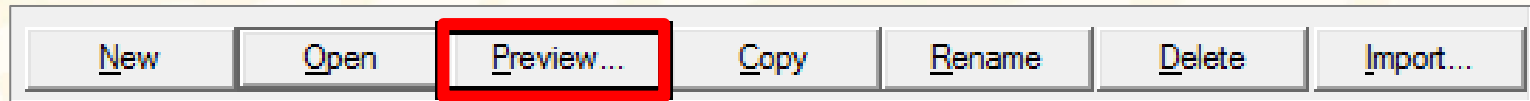
14. Then click on **Save and Close**



## Importing and Editing Custom Forms in Calyx



15. To test and review your form, you can click on the **Preview** button on the top menu bar.



16. Once the form is complete then you are ready to add it to a document set.

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

[Importing Forms in Calyx...](#)



