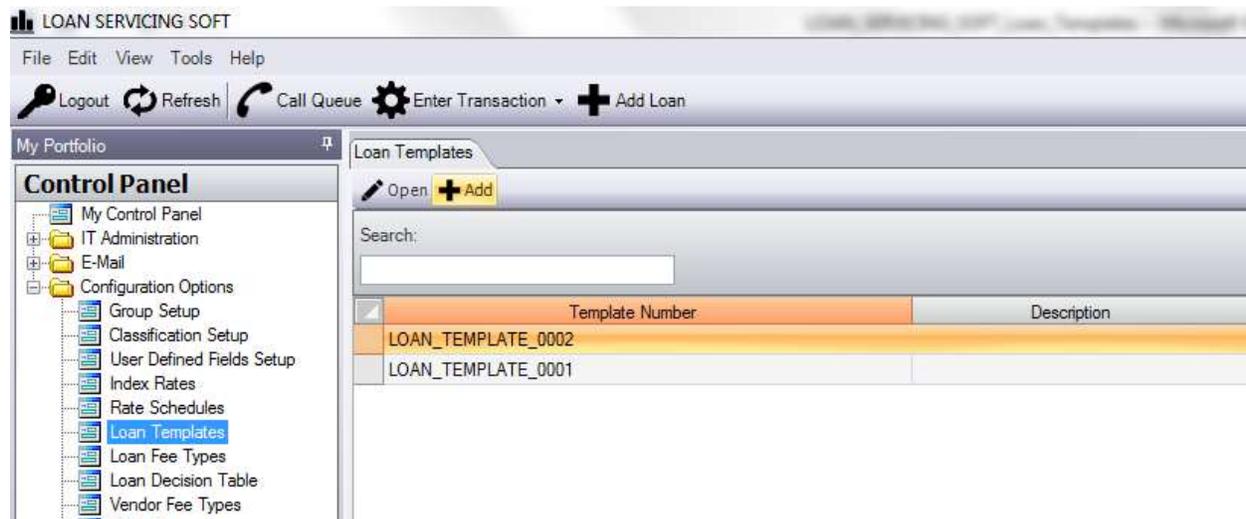# LOAN SERVICING SOFT Loan Templates

This document will guide you through the process of setting up and using loan templates with LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

If you have loans that have similar characteristics you can set up loan templates to save your default settings upon entering new loans. LOAN SERVICING SOFT supports an unlimited number of loan templates and all loan settings can be changed once the configuration process has begun regardless of whether you are using a loan template or not. For example, you choose to use a loan template because it has several default settings that match a new loan you are entering into the system, however the interest rate needs to be changed. This is fine because loan templates are only a starting set of defaults and again, all loan settings can be changed.

To create a loan template go to the Configuration Options area in the Control Panel, select Loan Templates and then click the Add button.

Once you do this you will be presented with a blank loan screen. From here you just need to configure your default settings and click OK in the bottom right corner of the screen to save your template. Leave the Loan Status as Entered. If you would like to label or name your loan template you may do so at the bottom of the Loan Data tab in the Memo/Notes field.

Once Loan Templates are configured they will be available for use from the Add Loan screen. First click the Add Loan button.

Then select the Use Loan Template option.

And then you will be presented with the Loan Template list. Notice the Description column where you can name and organize your different templates.