



Introducing the Template Field Trigger Tool

Loan templates are a powerful way to update field values, closing costs, and document placeholders with one click. However, when loan terms or programs change, users must manually select and apply the correct template from a list—which can lead to errors or missed steps. The Template Field Trigger PowerTool™ automates this process, helping ensure accuracy and efficiency.



TEMPLATE FIELD TRIGGER KEY BENEFITS:

Auto Apply

The correct loan template is applied automatically when specific loan fields change, eliminating the need for manual selection.

Custom Rules

Field Trigger logic can be customized and filtered to ensure templates are applied only when the conditions are right.

Error Reduction

This tool reduces the chance of user error by removing the need to remember or manually choose the correct template.