

CALYX POINTERS...

Managing PointCentral or Point with the
Various tools available....

PointCentral vs. Point “Classic”

All users of Calyx Point or PointCentral will see the Point client software we call “Point”, and all will use templates, reports, and data folders. In plain English, the Point client is the program we all lovingly call “Point” and that we do our originating and processing within.

PointCentral adds on a back end server providing additional security, and the ability to use Business Rules. It is not immediately visible to the user that they are in PointCentral vs Point “Classic.”

When logged in to the system, the easiest way to tell is to look at the data folder list on the left hand side of your screen. If a folder name says something like “Active Origination (PDS)” then you are in PointCentral. If it doesn’t have the (PDS) at the end, then you are in Point “Classic” (not the official name but commonly used to describe Point without the backend Point Data Server that is a part of PointCentral).

(The Business Rules are the feature that distinguish PointCentral and provide a layer of security, and Compliance, not possible with Point “Classic.” Business rules are the defining feature of PointCentral, and are of incalculable value to any mortgage software user, regardless of company size...)

PointCentral uses all four of the following tools for managing your system. Point “Classic” only uses the first three tools.

The First Two Tools are Windows Programs.....

1. Point Client Software

Almost the entire mortgage related setup in Point or PointCentral is actually done inside of the program itself. The Templates, Reports, and Company Defaults are all generated from inside of Point or PointCentral and replicated back to a server for distribution to the other users on the network. This is true even of Point “Classic” if it is correctly networked in an office environment.

2. Point Administrator

The program called “Point Administrator” is installed in the same program group as Point itself. If it is not present, then your IT department elected not to give you access to this tool. It is essential for all administration of security and date folder structure with Point “Classic,” and is useful for troubleshooting and system setup for client machines operating under PointCentral. Every Administrative level user of Point or PointCentral needs access to this tool, occasionally.

The Other Two Tools are Websites.....

Then there are two totally unrelated websites that you use for the downloading of the software and for license control, and for the management of PointCentral security and business rules.

3. The Website AKA <https://www.mycalyx.com>

Every Point or PointCentral user must download their software from this website, which also controls licensing and version control. There is no other way to obtain the software, at least not for most users.

Does This Integrate With PointCentral??

Sorry but NO. You must build a list of recipients by email address for downloading the Point software, and also build a list of users in the PointCentral admin site. You may copy and paste if you want. You can also copy and paste from the user list in PointCentral to the dropdown list of Originators and Processors in the Utilities menu, when setting up the program, but you must do it one entry at a time.

Any Specific Tips??

Make it easy and use a web email account so you can reach your machine(s) easily when you download the client software.

What about the Server Software?

The IT admin must download the PDS (Point Data Server) install file from this same website. It may be moved freely from the download location to the server for installation.

4. The Website AKA <https://yourcompanyname.calyxpds.com/admin>

Actually, the address may be quite a bit different than the above, but it will be some site that will end in /admin, indicating that this is where you can administer PointCentral. Variations of the domain name include focuspds.net, myabt.net, and

perhaps your own company domain name, on occasion. This website is either installed on a server within your office environment, or is remotely located at a hosting company such as FocusIT or ABT, both officially recommended by Calyx Software.

Within this website, the IT person and mortgage department administrator may set up the security for data folders, template sets, and the cardex databases. The primary purpose of this site is for the setup of the security surrounding the program. A strong secondary reason is the setup and modification of the business rules that form such an important part of PointCentral.

In an ideal world, these business rules would be managed within the Point software itself, and not form a part of the other functions of the PointCentral admin site. Unfortunately, this is the tool that has been set up for PointCentral administrators. The important issue here is that there only exists one account for logging in to PointCentral Administration, and this must be shared by whomever needs to use it.

Remember, this last tool, the admin website, is not required if you do not have PointCentral.

The account should be limited to access by a very small group of people. But it **MUST** be available to the mortgage department if they want to be able to troubleshoot and modify business rules.

This note is provided by Stephen Breden, DBA Texafirma LLC
stephen.breden@gmail.com

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