

# Favorite Keyboard Shortcuts in Calyx Point®

## Key Action

Alt + underscored letter or number activates that menu item w/o using the mouse

\*Alt+F+1 Most recent file

Alt+F+2 Second most recent file

Alt+ {menu item} Toggles on top menu item, such as Forms or Marketing

## Activating Keys

Enter Activates highlighted command

Escape Closes open dialog boxes; cancels commands

Spacebar Chooses highlighted button; check or uncheck box

## Hot Keys Use to replace use of mouse

Ctrl + D Insert current date

\*Ctrl + L Conversation Log

Ctrl + U Launch Calculator

\*Ctrl + R Bring up Cardex

Ctrl + T Bring up ratio calculator anywhere in Point

Ctrl + W Display Tasks

Ctrl + N Create new file in Point

Ctrl + O Open Point file

Ctrl + S Save file (field or screen you are in; Auto Save also available under utilities.

Ctrl + P Open print menu

Ctrl + Z Undo last action

Ctrl + X Cut highlighted data to clipboard

Ctrl + C Copy highlighted data to clipboard

Ctrl + V Paste data from clipboard to cursor location

## Movement Keys

Tab Move cursor forward one field

Shift + Tab Move cursor back one field

Alt + right arrow Moves cursor forward one section

Alt + left arrow Moves cursor back one section

## Scrolling Keys

Ctrl + Pagedown Moves page view down one screen view

Ctrl + Pageup Moves page view up one screen view

Ctrl + Home Moves page view to top of current page

Ctrl + End Moves page view to bottom of current page

**And don't forget – a complete PDF copy of the user manual is available inside of Point® when you click help.**

# Three Major Functional Tools Within Calyx Point® and Calyx PointCentral®

---

1. The Conversation Log, which can be invoked from the icon at the top of the screen that looks like an old fashion telephone in front of a notepad. This is the place to keep all of your notes and conversations between you and the client, as well as between the members of the mortgage company team.
2. The Cardex Utility, which functions like a Rolodex®, allows you to memorize commonly used addresses for key third parties to the transaction, including Banks and Employers. It is basically unlimited (ignore the message about “500 entries” as that simply means you can only see 500 at a time...). You may invoke it from the familiar icon at the top of the screen that looks like a desktop style Rolodex®.
3. Document Management allows you to save your fees worksheets, applications, Loan Estimates, for permanent storage in the system, before you actually send them to the client. It is reached from the icon at the top that looks like a File Cabinet. It is absolutely staggering the number of Point users who do not know this feature is here until it is pointed out.

## Other Key Enhancements Within Calyx PointCentral®

---

1. Almost everyone creates too many data folders; consider a slimmed down structure of only two folders if you are a small office (Active Origination and Annual Loan Archive). A user that needs additional security for the file when it goes into Processing can gain this by adding an Active Processing folder. You really don't need all of those other folders for Underwriting, Closing, etc.
2. Business Rules allow the manager to customize the workflow by adding hard stops and soft warnings. The most important rule, in my opinion, is a hard stop to make the user change Status to Application when the six pieces of information make it a Disclosable File. The canned Calyx Business Rules only provide a guideline of the capabilities of the Rules, and should be modified as needed for your specific mortgage operation.
3. Refined Borrower Master Templates allow the Business Rules to efficiently work within the more streamlined workflow available in PointCentral, and are a basic requirement before the Rules are written.
4. The Calyx Mobile App easily allows a user to add to the Conversation Log while outside the office, and is an underrated tool for the active Originator.