GenX2009Lite Tips

Navigation - Files can be added, duplicated, or deleted by utilizing options on the "File" menu.

It's always a good idea to enter the property's state when you first open a file.

You must always have a sales price, even if that price is $0.00.

Cash Deals and Refinances must be indicated as such in Loan Information.

Always delete unused Buyers and Sellers using the "Garbage Can" icon.

You can navigate the data entry tabs by utilizing Control / Tab.

You can personalize most of the dropdown lists in the program by going to Utility Files and adding your items there. If you make a change (in a Maintenance Screen) to an item selected from a dropdown list, you must reselect that item from the dropdown list (in the file) to affect those changes.

Exceptions, Requirements, etc.: You have to click on Title Insurance (the Certificate icon) and select either the Commitment or the Schedule B's. When entering text, such as Exceptions, into a file, you can save it if you'd like. After you are done typing, click on File, Save As, choose a folder where you want to save the text, and save it as an appropriately named rtf file. The next time you wish to use that text, click on the Open Folder" icon and the folder containing your rtf files will open. Then, just double-click on the file you want to insert.

PDF Factory: You will notice a new print option (PDF Factory) has been added to your computer. With PDF Factory you can see a quick, accurate preview (up to a 400% zoom) of a document and save it to any location as a PDF file. Or just choose to print it to paper. You can also send PDF files through your default email program with one click of the mouse. As an added bonus, you will find that PDF Factory works with just about any Windows application.

Export Data: From time to time you may find that you would like to retrieve and manipulate some information from GenX2009Lite. We have a module that allows you to export data from the program quite easily. To access this module click on Inner Office and then Export Data. This will bring up a screen that will facilitate this data extraction, either to an Excel or Text File.

In the HUD: To email a HUD, simply print the HUD to PDF Factory and click "Send" when you are at the print preview screen. This will attach the document to your default email application. To change the name of the document you are attaching, go to the Doc Info tab in PDF Factory and type in the desired name. To save the document as a PDF file, simply click on the "Save" button.

HUD Descriptions: To add items to the descriptive dropdowns on the HUD (and HUD 1A) go to Utility Files, and select HUD Description Maintenance. Follow the instructions and guidelines on that screen to add any descriptive text that you commonly use.

Please be aware that you need a description if you enter an amount on lines 1008 and 1009. These lines work in conjunction with aspects of the Aggregate Accounting Function.

Title Rates on the HUD: Remember that you must click on the HUD icon in Title Insurance to insert Title Rates onto the HUD. This icon can be found at the bottom of the Insurance Premiums and Endorsements tab.

Initial Aggregate Accounting: To access the Initial Aggregate Escrow Accounting Module in GenX2009Lite, click on the calculator icon.

Disbursement Printout: This is a printout of all the amounts that are reflected on the HUD. Simply put, it's the expected funds in and the expected funds out. Deposits, or funds in, are entered on the first page of the HUD. You should click on the blue number for that line and then click on "Deposit" for the allocation. Some amounts are automatic, such as the loan and deposit amounts (line 201). To allocate a check, or funds going out, enter the amount, click on the blue HUD line number, and choose to "Issue Check" in that amount. Make sure you select a payee when issuing the check. If the payee is not listed you can type the name in and click on the "+" icon to permanently save the name. If you want to add all of your payees at once you can go to Utility Files, Vendor Maintenance and add them in there. This Disbursement Printout is triggered by clicking on the Suitcase of Money icon on either page of the HUD. This printout is just a worksheet, and should not be taken as an official reconciliation of the account.

Copy and Paste: To copy and paste within the HUD: Copy: use "Control C". Paste: use "Control V". To navigate vertically on the HUD, use the Page Up and Page Down keys.

Backup: You will want to back up your data files from time to time. You can use burning software to save a copy of LiteData.mdb to a CD. Or, better still, you could copy the data file onto a removable flash drive. LiteData.mdb is usually located in the C:\Program Files\GenX2009\Lite folder. If you don't know where it's located go to the opening screen of GenX2009Lite and left click on the GenX2009Lite box at the top of the screen.