



CNX605	DataPro – ReplacePro
	The ReplacePro function allows for the ability to setup a modification or change to data within a set field for records that meet specific qualifications. It will cut down the time it'll take to accomplish the change to a click of a button rather than a series of clicks.
Order of Steps	Tasks
Step 1	Log into CenTrax NEXT
	The active Institution and File will display in the upper right-hand section to the left of the name of the user logged in.
Step 2	Click Data Processing
Step 3	Click DataPro
Step 4	Click ReplacePro from the menu on the left hand side
Note: ReplacePro items require a saved filter be applied so the filters must be created and saved within Discovery/Research before building the replacement. Please refer to CNX402 Research – Filtering.pdf for procedures on how to build and save filters.	
Step 5	To create a new replacement, click the green Add New button
5.1	Type a description into the Name box
5.2	Make the Select Filter selections:
	<ul style="list-style-type: none">Click drop down arrow to select the Filter GroupClick drop down arrow to select the Filter
5.3	Make the Field to Replace selection:
	<ul style="list-style-type: none">Click the drop down arrow to select the Field GroupClick the drop down arrow to select the Field
5.4	Select the Replace with option:
	<ul style="list-style-type: none">ValueField
5.5	Type in or make the selection within the Value/Field box
5.6	Click Save to complete the ReplacePro setup
	The replacement will now display at the top of the ReplacePro window with a Process box to the left of the Name

Step 6	To run the replacement manually, place a check mark in the Process box next to the replacement name
6.1	Click the gray Run Now button
6.2	A pop up message will appear when it completes. To see the results of the replacement, click the Results menu item located on the left-hand side of the page
	<p>The screenshot shows the MARQUIS DataPro interface. The top navigation bar includes 'Dashboard', 'Discovery', 'Data Entry', 'Data Processing' (highlighted), 'Filing', 'Settings', and 'Administration'. The breadcrumb trail is 'Data Processing > DataPro > Configuration > ReplacePro'. The left sidebar shows 'DataPro' selected, with sub-items: 'Automation Manager', 'Import', 'Data Conversion', 'CASS Certify', 'Geocode', 'ReplacePro' (highlighted), 'DeletePro', and 'Results'. The main content area displays a table of replacement processes. The table has two columns: 'Process' and 'Name'. The first row is 'Gross Rev Code <=1M' and the second is 'Reverse Mortgage is Blank'. The first row is selected, and its configuration is shown below. The configuration includes fields for Name, Select Filter, Group, Filter, Field to Replace, Group, Field, and Replace with (Value or Field).</p>
Step 7	To Edit a replacement, simply click on the Name of the replacement within the list
7.1	Make the desired changes
7.2	Click Save
Step 8	To Delete a replacement, simply click on the Name of the replacement within the list
8.1	Click the Delete button
8.2	Click Yes in the confirmation message
Note: A replacement may also be created in Discovery/Research, after a filter has been activated. To see the results of the replacement, return to DataPro and click the Results menu item.	

MARQUIS

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Dashboard | **Discovery** | Data Entry | Data Processing | Filing | Settings | Administration

Discovery > Research

Field Group: DataEntry Report Default | Open | Show: 50 | Accounts | Output: Select Output

Quick Search

Application Details Loan ID (UL/NULL)	Application Details Account Number	Application Details Loan Number	Applicant 1 Applicant 1 First Name	Applicant 1 Applicant 1 Last Name	Applicant 1 Applicant 1 Marital Status Code	Applicant 1 Applicant 1 Marital Status	Application Details Address
100000148							3000 MARYLAND AVE
100000147							2517 W JEFFERSON BLV
100000146							2202 MEADOW CRST
100000019							2604 PROVINCE LN
100000016							5012 GASTON AVE
000000014							
000000015							
000000016							
000000017							
000000018							
000000019							
000000020							

Showing 1 to 50 of 977 accounts

Loans 971	Low/Mod Tract Activity 199	Originations 951	Non-Geocoded Records 1
Deposits 0	High Tract Minority Activity 365	Denials 9	Records with Edits 971

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Discovery > Research

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Field to Replace

Group:

Field:

Replace with: ☒ Value ☐ Field

Value:

Apply Cancel

Note 2: While the replacement can be run manually here, it can also be set up to automatically processed within the Automation Manager.