Using Correct Loan or Contact Data in Action Plans and Documents

It is very important to understand how to use the documents and contact and/or loan data in WorkCenter to populate your letters, emails and documents. As we explained in previous videos, borrowers, prospects and contacts once imported or synced into a contact management or CRM solution such as WorkCenter become "Contact Records". There are three types of contact records inside your WorkCenter CRM software:

#1. Contacts that have loans or have been previous borrowers

#2. Contacts that is associated with loans such as loan officers, processors, listing and selling agents, appraisers and other third party providers.

#3. Contacts that are not associated with any loans nor do they have a loan in your database. An example could be a prospect, Outlook contact or family member.

Knowing the differences in your contacts and their relationships with borrower loans will enhance your ability to use WorkCenter to it's fullest capacity when printing, emailing or sending documentation to contacts using the Action Plans.

If you design a letter or email that needs specific loan data populated from your database, you will need to identify that specific loan or third party associated vendor in order to properly populate your documentation or marketing plan. Since many of your contacts have multiple loans, it is necessary to tell WorkCenter what loan record you wish to identify in order to populate letters, emails and documents with the correct information. It is further necessary for you to understand that all correspondence you populate with data is coming from "Contact Records" and maybe from a specific loan that contact record has or is associated with in your database.

To further explain this concept, we suggest you download, print and read the documentation we have created for anyone using the Sue Woodard add-on English or Spanish marketing and follow up or contact letters and documents. This adobe form can be found on our www.vForms.com website by clicking on the Training/Support icon located on the left side of the website page. You can also locate the document by clicking on your Web Center tab inside WorkCenter and then selecting the Training Center tab.

You have three options when populating a document with specific loan data or with third party providers to that specific loan:

Option #1: You can print or email a single document by opening a contact record and highlight the selected loan and third party.

Options #2: You can send multiple contacts documents that populate from a single loan or multiple contact loans by using a specific Action Plan.

Option #3: You can create a one step Action Plan that will address sending multiple contacts a document that is populated from one or more specific loans.