2 of 3 Methods: Sending multiple documents with Loan or third party providers data

In the previous flash video: Action Plans - #6 and #7, we told you there are three ways of sending documents to clients that need to have loan or loan third party provider data populated with the data in your WorkCenter database. They again are:

Option #1: You can print or email a single document by opening a contact record and highlighting 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.

This Flash video will demonstrate Option #2. For this example, we will be using one of the Sue Woodard During Purchase letters Action Plans that has four designated letters. We will also open this Action Plan and show you the letters and recipients. For the sake of this demonstration, we will open one of the letters named: 03 Selling Agent Beginning Transaction. As you can see this letter has mail merge field names already programmed.

Option #2: Print multiple documents with loan data inserted.

Follow these steps:

Step #1: We will be using one of our pre-programmed Sue Woodard Action Plans for this demonstration. That Action Plan is the: "Sue Woodard English during purchase". If we open the plan, you will notice the steps that have already been programmed. We will be sending 4 letters the first day with this plan. The letters will go to the following contacts: Contact – Seller – Selling Agent and Listing Agent.

Step #2: We will now need to decide which loan or loans that are associated with this action plan. For this example, we will only select one loan record using our "All Loans Report" found in the Loan Tab. We will select George Bush. Once selected, we will right click on the George Bush loan and select Add to List…

Step #3: For this example, we have already programmed a contact list manager list to be associated with this Action Plan. We will now select that list: Sue Woodard English – Letters During Purchase and complete the loan transfer. As you can see, we have one contact loaded in that list. If you click into the library tab and then filter the contact list with a right click, George Bush will be displayed in the left filtered contacts view.

Step #4: We will now process the Action Plan with clicking on "Calculate Items Due". Notice that there are 4 letters to be processed to the four contact records identified in the plan.

Step #5: We will choose to select all items to be processed and then we will click on the process items button.

Step #6: These are screen views of all four letters that have been populated with this action plan. For this demonstration, we have chosen to view all print or email documents prior to sending them to the printer or sending them out by email. You can view that option in the Setup Options menu for Action Plans.

WorkCenter was able to determine what to populate in the letters from the recipients programme d in the Action Plan steps. WorkCenter also selected the loan records and not the contact records in this procedure.

For more information, please refer to our WorkCenter Quick Start Reference Guide or view the additional flash videos.