Action Plans - #9 3 of 3 One step Action Plan sending multiple contacts documents populated with loan or 3rd party loan provider info.

In the previous flash video: Action Plans - #6, #7 and #8, 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 #3.

For this example, we will be using one of the Sue Woodard During Purchase letters Action Plan that has four designated letters. We will also open this Action Plan and show you the letters and recipients. For 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 #3: Single step Action Plan - Print multiple documents with loan data inserted.

Follow these steps: As we explained in other flash videos, when you are sending or printing documents that you wish populated with loan information or with related 3rd party provider information such as seller, listing agent, selling agent and others, you must identify the loan from which you will be getting your data.

For this example, we have created a one step action plan that will print letters addressed to the Contact or Borrower, Seller, selling agent and the listing agent. We will open the plan and show you that we have selected the four contacts in the plan to be 'recipients". Now all we need to do is the following:

Step #1: We have created a new Action Plan (Contact-Seller-Selling Agent-Listing Agent) with the same first 4 steps that are in the "Sue Woodard – English – During Purchase" plan. We have also tied this new Action Plan to a contact list manager list. If we open the plan, you will notice the steps that have already been programmed. This plan is designed to send 4 letters the first day. The letters will go to the following contacts: Contact – Seller – Selling Agent and the Listing Agent.

Step #2: We will now need to decide which loan or loans are associated with this action plan. For this example, we will only select three loan records using our "All Loans Report" found in the Loan Tab. We will select George Bush; Jimmy Carter and Ty Cobb. We will highlight all three loan records and right click one of the highlighted loans 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. That list name is: Sue Woodard English – Letters During Purchase. As you can now see, when we complete the transfer from the loan report, we have three contacts loaded in that list. If you click into the library tab and then filter the contact list with a right click, George, Jimmy and Ty will be displayed in the filtered contacts view on the left.

Step #4: We will now process the Action Plan by clicking on "Calculate Items Due". Notice that there are 12 letters to be processed associated with the three loan records. These letters will be printed for the four contact recipients.

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

Step #6: To expedite this flash video, we will only show you a couple of the populated letters. For this demonstration, we have again 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 programmed in the Action Plan steps and then selecting the loan records rather than the contact records in this procedure. If you use a one step Action Plan, you can continue to add loan records to this Contact List Manager List and the plan will identify all new contacts and allow you to run the designated plan items on the new items.

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