

# **Syncing Calyx Point Files to WorkCenter Using Point Prospect Marketing Tools**

**We at vForms have been a major alliance partner with Calyx Point for years. We are shown as a marketing partner with Calyx Point inside your Point software. With this interface, you have the flexibility to import a single prospect or borrower file directly into your WorkCenter software database. This is especially beneficial if you have changed or created a new Point file and do not wish to import all changed files into WorkCenter at this time. You can find vForms in your interfaces drop down menu when you have a borrower or prospect file open.**

**If you wish to use this advanced syncing feature to sync a single file from Calyx Point or the Point Data Server, you will need to follow these instructions. This direct interface will give you a quick and flexible process in syncing data files from Point to WorkCenter by selecting only one file.**

**Open your Calyx Point software and then select the file you wish to sync into WorkCenter. For this example, we will be using the John Homeowner borrower file. Once the file is loaded inside your Calyx Software view, you will need to follow these steps:**

- 1. Click on “Interfaces” at the top of your Calyx Point screen and then choose “Prospect Marketing”**
- 2. When the interfaces pop up box appears, single click on “vForms” and click on the “Send Data” button**
- 3. You will see WorkCenter refresh open on your screen. Once WorkCenter has added the file to the database, you will see all the contact records displayed down the left side of the screen. At this time, close your Calyx Point interface screens and close out of your borrower file.**
- 4. Inside WorkCenter, press your “F5” keyboard key to refresh your database and you will now see the “John Homeowner” contact record has been synced into your database.**

**For more information on how best to use your WorkCenter CRM software, view the other flash videos, read the WorkCenter Quick Start Reference Guide and watch for the notices of our WEBnR coaching and training sessions.**