

Linking External Documents to your Contact Records

WorkCenter allows you the ability to link or tie computer files to individual contact records. A great example of this would be to tie an appraisal form or loan documents that you have stored on your computer to a specific contact record.

This process is very simple to use. Open the desired contact record by double clicking on that contact name. Once the contact screen shows, click the “Documents Tab” located at the top of the screen view.

To link or tie a computer file to this record, follow these steps:

Step #1: Click the “+” sign located at the bottom of the screen view and a WorkCenter Documents Screen will appear.

Step #2: Search your computer and find the computer folder and file you wish to link to this contact record. Click on the file and then click on the “OPEN” button located at the bottom of the screen.

Step #3: You will notice the file has now been linked to this contact record. If you wish to open the file, double click on the file name. If you wish to delete a link, single click on the line item and then click on the “-“ icon located at the bottom of the screen.

When WorkCenter links outside documents to your selected contact, we will copy that file into a “Documents” folder in the same directory where your WorkCenter program is located. If you have taken the standard defaults in downloading and programming WorkCenter, the folder would be:
C:\Program Files\WorkCenter

You also have the option to set your documents directory to any folder on your computer or network system. To do this, click on TOOLS, SETUP OPTIONS and then select the GENERAL TAB. Select the box with the “+” sign next to the “Document Setting” heading found on the right portion of your screen. Click into the word “Documents” and select the computer folder from the drop down menu. We recommend that the folder you select should be one that is consistently backed up by your computer system. Once this is set, any document you link to a contact record will be copied and placed in that specific folder.