

Contact Loan Custom Fields – Using and Renaming these Fields

WorkCenter CRM is an industry specific contact management and client relational management database solution. Unlike ACT! or Goldmine, WorkCenter already has multiple industry custom fields incorporated for your use.

We at vForms programmed 25 custom loan and 25 custom contact fields for your use. You also have the ability to rename these custom fields to meet your specific needs. This video will cover the “Contact Loan Fields” only. See the flash video on the “Contact Custom Fields” for more information.

Custom Fields Available for Contact Loan Records:

Open an individual contact record by double clicking on that contact. When the screen view appears, click on the “Loans Tab” located at the top right corner of the screen view. Once that is completed, click on the “Custom Fields Tab” at the bottom of the screen view. You will notice that we have given you the following custom fields:

Text 1 through Text 10

Date 1 through Date 5

Number1 through Number 5

Yes/No 1 through Yes/No 5

If you need a specific custom field that you do not find in our database, you have the option to select one for the list above. You also have the option to rename these custom fields to reflect an appropriate name for your customized database.

To re-name the custom fields for Contacts, follow these steps:

Step #1: Click on TOOLS, SETUP OPTIONS and then select the OPTIONS/LISTS button located at the left of the screen.

Step #2: Under the Option lists, click the down arrow and select “Loans Custom Fields”.

Step #3: If you wish to rename an item, type that name to the right of the list item. For this example, we will rename “Text1 to “Lead Source”. When completed, click the “OK” button to save your edits.

Step #4: To test this change, open another contact record and click on the Custom Fields tab located under the “Loans Tab”. You will now notice the custom field has been renamed to “Lead Source”.

Changing the custom loan fields to your desired name will allow you to import data into WorkCenter from Excel or other media and have those fields populate with the data. This will also give you the opportunity to manually add information in the custom fields for your review. Once the data has been added to the custom fields, you can then use the reports to filter contacts with that appropriate field name.