Exporting Contact and Loan data to a FNMA file format

WorkCenter is a contact management and Client Relationship Management software solution. One of the main reasons you have WorkCenter as a CRM is to track your clients from cradle to grave. In the process of communicating to these contacts, you will find it beneficial to export this data into a FNMA file. Once it is in the FNMA file, you can import it into your LOS system using the import steps for FNMA. These steps vary based on the LOS system you have chosen.

This video will show you the following:

1. **Exporting Contact data to a FNMA file**
2. **Exporting basic Loan data into a FNMA file**

Make sure you have a FNMA folder designated in your system setup procedures

Program your default FNMA folder by using the following steps:

Step #1: Click on TOOLS, SETUP OPTIONS and choose the LOAN ORIGINATION TAB

Step #2: You will notice in the center of this screen "FNMA Directory". Click in the box to the right of this heading and a windows box will appear. Select the folder you wish to have these FNMA files placed into when you create them.

Step #3: We are using Calyx Point in this copy of WorkCenter. Calyx Point uses the following default folder for their FNMA files: C:\WinPoint\Work. That is the folder we have chosen.

For exporting Contact data to a FNMA file, open your "All Contacts" report located by clicking on the "Reports Tab". Then double click on the "All Contacts" Report. Single click on the contact record you wish export to a FNMA file and then click on TOOLS and RUN SCRIPTS. Check the circle next to "Export to FNMA" and then accept this by clicking on the "OK" button.

The file will be created and placed in the default folder for FNMA files you created earlier. To test this, open that folder. For this example, we will go to the C:\Winpoint\Work folder and you will see your contact record there. To import that file into your LOS, follow the steps recommended by the LOS system you have chosen.

In order to export Basic loan data into a FNMA file, follow the same steps as explained earlier except you will open the "All Loans" report located under the heading "loans".

To verify your file has been created, go to the default folder you have programmed in your default settings and check to make sure the file has been created.