

Importing Excel data into WorkCenter Using the Import Wizard

WorkCenter will allow you to import data from several formats. We suggest Excel since it is the most common system that mortgage professionals use. This video will cover importing excel data into WorkCenter using our import wizard incorporated in the software.

For this example, we will use the Excel spreadsheet that we created in the other Excel flash video pertaining to organizing and concatenating your excel data. We have eliminated several columns to expedite the import flash video. This Excel spreadsheet will only show 7 columns. We have both contact information and loan information to import into WorkCenter.

We also suggest you read the WorkCenter Quick Start Guide for step by step procedures and screen shot views of importing contact and loan data into WorkCenter from an Excel spreadsheet.

Step #1: Click on FILE, IMPORT and select LOANS/CONTACTS. The import Wizard screen will appear. Select “Excel File” and click the “Next Button”

Step #2: Click the box with the three dots to the right of “Import from File” and go to the Excel spreadsheet you wish to open and import and click on the “OPEN” button and then select “NEXT”.

Step #3: Change the first row to read “1” since we will want to view the column headings when importing data. This will expedite your process if you have many columns of data in your Excel spreadsheet. Click the NEXT button.

Step #4: You will now need to map each of the columns to the appropriate WorkCenter field. You will notice that the mapping process starts with Loans and then will show Contacts. Click the down arrow on Column “A” and select “Contact.Full Name” since that is the information in this column.

Step #5: Repeat the process for the other columns choosing Contact or Loan fields based on your Excel spreadsheet. Once that process is completed click on the “NEXT” button.

Step #6: You will now need to check the boxes that you have chosen to be your “Key” fields. WorkCenter needs at least one of these boxes checked in order to compare your data to the existing data in the software database. We suggest that you mark two boxes: Contact Full Name and Contact FileAs” and then click the “NEXT BUTTON”.

Step #7: The next screen is your “Data Preview Screen”. Review this screen and then click the “NEXT BUTTON”.

Step #8: We recommend the default setting for “Amend” on the Summary Screen. Before you click on “Execute”, we recommend you save this format by clicking on the “Specification Box” and then “Save”. Name this import with an appropriate name in the “Import Specification Box” and then the “OK” button and then select the “Execute Button”. Your data will now be imported into WorkCenter.