

WorkCenter Library Overview

WorkCenter comes standard with letters and email messages. Each of these documents has already been programmed with mail merge field listing names to expedite your use of the forms. You can find these library forms by clicking on the “Library Tab” found at the top of the WorkCenter screen view. You can print, email or attach these documents to an Action Plan. Each time one of the documents is printed or emailed to a client, WorkCenter will automatically log this into the contacts journal listings. You can access this journal tab by opening one of the contacts with a double click and then clicking on the Journal tab.

As you can see, there are two tabs showing, Emails and Letters. You have the ability to create an unlimited number of new forms and letters for your use. While creating those letters you can also create additional tabs across the top for categorizing different plan communication items.

You also have the ability to acquire add-on libraries from vForms. We suggest you look at the Sue Woodard English and Spanish marketing and follow up communication letters, emails and documents. These libraries have been programmed for mail merge fields and also Action Plans that will facilitate your loan and profit productions.

Read the WorkCenter Quick Start Reference Guide and watch the flash videos covering the use of the libraries in WorkCenter. If you have any questions about new libraries being offered by vForms, please contact your personal business development officer at 877.498.6888.