

Importing your LTB Business Booster Letters into WorkCenter

If you are a LoanToolBox member and wish to import some of your LTB marketing forms and Business Booster Letters into WorkCenter, follow these instructions.

You will follow the same steps and procedures as explained in flash video: Outlook - #3 Adding forms received via Outlook to your library,

Step #1: Email your flyer to yourself. Open your Outlook and select the email containing your LTB marketing flyer with a single mouse click.

Step #2: Click the down arrow on the “WorkCenter Button” at the top of your Outlook screen. You created this button when you installed WorkCenter on your computer. Select the option “Add to Library” and you will notice a Library Item box appear.

Step #2: We strongly suggest you name the “Category” box so it refers to LoanToolBox. For a suggestion, you could use “LTB Business Booster Flyers”.

Step #3: Name the marketing flyer in the “Document Name “ box. We would also suggest you name the marketing flyer the same name as the LoanToolBox flyer name.

Step #4: Click on “OK” and your marketing flyer will be loaded in your WorkCenter library under the appropriate heading with your selected flyer name.