Reports – Making Global Changes to Data in your Database

WorkCenter allows you to make global changes to data in your database. If you find that you need to change data in a field inside WorkCenter it is very easy to accomplish that task.

Let's say for this example that you wish to cleanup your database and not all of your loans that were synced in from Calyx Point show as "closed" and you know they are closed.

Here are the steps needed to accomplish the task of changing the status to closed on all of your loans:

1. **Go to the reports section and sort your specific report in the data order to get the fields you desire. In this case, we will open the "All Loans" report and tab over to the "Status" column. The status column is already showing in this report. If it was not showing, we would click on the "show visible fields" icon which looks like 5 lines stacked on top of each other, and check the box next to the loan officer heading.**
2. **Next for convenience, let's move the column next to the application column name. Left click and hold down your mouse on the column heading title "status" and drag that column to the left. When we have it placed correctly, notice the two green arrows, release your mouse and the column will be inserted.**
3. **I will now click on the application column heading once to sort that field numerically by date. This will give me assurance that the application date corresponds to the fact that it is a closed file.**
4. **In this case, I know all loans with an application date before 2004 were closed, so I will click into the status cell for the first loan in the top loan.**
5. **Hold down your shift key and click into the status cell for the last loan with an application date before 2004. Now you have several columns highlighted.**
6. **Press your "F2" key on your keyboard and you will now see the last cell open for editing.**
7. **In that cell, type your desired global change. For this example we will type "closed" and then hit your "Enter Key". You will notice all highlighted columns now have been changed in the status field to reflect "closed".**

We will show you a second example of changing data globally. In this example, let's say we just imported excel data into WorkCenter and that data came from a particular source like Fidelity Title. We now wish to use one of our custom contact fields to identify the "Lead Source" so we can track our closing rate on these leads.

IMPORTANT STEP: In previous videos we have suggested you sync data into WorkCenter from Excel or other sources first thing in the morning before you make any changes to your data. If you follow that process, you can identify any changed or updated contact data by using the "Modified Contacts Today" report.

Step #1: We will rename the contact custom field Text1 to "lead source". Click on TOOLS, SETUP OPTIONS and then select OPTIONS/LISTS Tab.

Step #2: Click the down arrow in the view and select "Contact Custom Fields" and type "lead source" to the right of Text1=. Your line will now look like this: Text1=Lead Source.

Step #3: Open the "Modified or added Report" under "Contacts – Added or Modified" in your loan tab.

Step #4: Make sure the Text1 field is showing. If not, check the box after you have selected the "view visible columns icon".

Step #5: Follow the same steps as outlined in our first example. Click the top cell in the "Text1" column, hold down your Shift key and then select the last line in the report. Keep in mind this approach of using the modified or changed report will only work if you have not changed or added any contact data prior to you syncing in your excel spreadsheet data. If you have, all changed or modified data will appear in this report.

Step #6: Press your "F2" key and then type "Fidelity Title" in the last cell and hit your "Enter" key. You will now see all the Text1 fields read "Fidelity Title".

You can use this approach with other custom fields such as date or numbers. Once you have entered this information, you can always use the reports to sort contact records using this Text1 field. If you are using loan data, we suggest you use the "Contact Loan Custom Fields".

For more information, watch the other flash videos, read the WorkCenter Quick Start Reference Guide and watch for notification of our WebnR coaching and training sessions.