

WorkCenter Database Management Training Agenda

Important System Items:

Location and security of your WorkCenter database files

Program Default: C:\Program Files\WorkCenter\WorkCenter.mdb

WorkCenter Database Default Name: WorkCenter.mdb

Backup Default: C:\Program Files\WorkCenter\Backup

Documents Default: C:\Program Files\WorkCenter\Documents

Database backup procedures and file location

WorkCenter Icons and Quick Key Strokes (F5-refresh; F4-sync; F9-scripts, Ctrl Alt “S”)

Use the “Bookmarks” on user guide manuals

Backup your database before you make any significant changes to the data!

If you importing data using the import wizard – suggest you do it before anyone access WorkCenter

Security: Database Password Protection & Social Security Number encryption

WorkCenter CRM Short Cut Primary Keys:

F4 – LOS database syncing

F5 – Database refresh

F9 – WorkCenter scripts

Ctrl Alt “S” – Save

WorkCenter CRM – Relational Database – Use of Contacts:

Contacts - That have a loan or loans

Contacts - That are associated with loans

Contacts – “Aunt Mary” or prospect (no loan & not associated with any loans)

Why do I want all of these contacts and their relationships?

System Setup Options:

Backup Folders

Documents Folders

Loan Origination Settings:

Use of the “YES” Automated Loan Status Lists after initial data syncing

Spouse Contact Records

Co-Borrower Contact Records

Action Plan Setup Tab – Mark “YES” to View Emails and Letters

Use of Loan Status Lists in Action Plans

Contact List Manager Lists:

Auto-populating Contact Manger Lists:

Dates Lists

Loan Status Lists

Vendor Lists

Creating lists manually

Creating lists using reports

Linking lists to Action Plans

Adding Contacts or Loans to your Contact List Manager List

WorkCenter CRM Steps to Use Action Plans Effectively:

- Data in your database must be accurate
- Edit and create your library forms and documents
- Create the Action Plan
- Activate your Action Plan
- Understand the use of the Contact List Manager Lists
- Tie the Action Plan to a specific contact list manager list
- Add contacts to your linked contact list manager list
- Process your Action Plan

WorkCenter Shared Database Considerations:

- Consider renaming your Database(s) (WorkCenter.mdb)
- Multiple databases – database contains all letters, documents, reports & action plans
- All WorkCenter CRM software users must be using the same version
- All WorkCenter CRM software needs to be programmed identically
- “Data Backup” and “Documents” system settings especially critical
- Consider only one person syncing LOS Data
- Consider only one person responsible for changing the home/mail address to property address
- Create one event calendar notification to run the address script
- Shared database must be in a folder that all can access, read and write to that folder
- “Resources” must be used if you wish to share calendars or assign calendar action plan steps
- Viewing calendars using the “Resource Layout Editor” – setting per desktop
- Larger databases – users should be familiar with refreshing the database
- Become familiar with the Custom Employee information merging Fields in library documents





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Excerpts WorkCenter 3.0 User Guide: Pages 101-103

R. DATABASE MANAGEMENT SUGGESTIONS AND OPTIONS:

Managing your database is very easy to accomplish using WorkCenter. As a WorkCenter user, here are a few ideas and suggestions to assist you in getting started. These suggestions range from single users to multiple branch office users of WorkCenter.

A. Single User – One WorkCenter Database: As explained above, when you download and install WorkCenter on your computer, the software is defaulted to load and install in this directory on your computer: **C:\Program Files\WorkCenter** The actual database file is named: **WorkCenter.mdb** No customization is needed or recommended for a single user with only one computer and using only one database file.

B. Single User – Office computer and home or laptop computer using the same WorkCenter.mdb database: Install the software as explained in “A” above on both your office and laptop computers. We suggest you then sync your Calyx Point files, Outlook contacts and Outlook Calendar on your office computer copy. Make sure the emails, letters, reports and Action Plans are designed and customized on the office computer.

Once that database has been updated with all of your LOS and contact data and the Reports, Letters and Action Plans are designed to meet your specifications, we suggest you copy that database from your office computer and paste it into your laptop or home computer.

The only file you will need to copy is WorkCenter.mdb and it will be located at C:\Program Files\WorkCenter folder. Paste this file into the same folder on your laptop or home computer.

Many users have elected to purchase a “Flash Drive” memory stick and copy the WorkCenter.mdb file from the office computer and place it on the memory stick. When using the laptop or home computer, they simply open WorkCenter, click on FILE and OPEN and select the database on the memory stick. Once completed, they will copy the database from the memory stick and paste it back to their office computer to update their database. A later version of WorkCenter will allow for data transfer between access databases.

C. Single User – Accessing Multiple WorkCenter Databases: If you are going to have multiple databases, you will need to customize your WorkCenter.mdb database for letters, emails, reports and action plans. Making the master copy will eliminate the need to create the emails, letters, reports and action plans multiple times. Copy that WorkCenter.mdb file to a computer folder and rename it to reflect your particular database (i.e., WorkCenter.mdb to Internet_Leads.mdb). Make sure you keep the same “.mdb” extension on your file.

Keep in mind that your WorkCenter software will open the last database you have opened when you closed the software. To access the desired database, click on **FILE** and then **OPEN** and choose your database. If you do not know what database is opened, simply click on **FILE** and then **REOPEN**. You will notice the database that is open has a check mark next to the database name.

D. Multiple Users – Sharing one database with a single Calendar: Same procedure on customizing your WorkCenter.mdb database for emails, letters, reports and action plans. Copy this database to a location on your server that all users can access. They will open WorkCenter on their computers. Then click on **FILE** and **OPEN** and go to the folder on your server where you loaded the WorkCenter.mdb file. With multiple users accessing one database file, you can have one shared calendar for everyone or you may wish to have separate calendars for each of your users. See the section below on “**Shared Calendars**” using WorkCenter.

E Multiple Users – Sharing one database with individual Calendars with the ability to access other user Calendars: Same procedure as “D.” above except read the comments about Separate or Shared Calendars for Multiple Users Accessing One Database File noted in “U.” below.

CAUTION: IF YOU ARE USING A SHARED DATABASE, ALL COPIES OF WORKCENTER MUST BE ON THE SAME VERSION. If you experience database error messages after updating your WorkCenter, close all WorkCenter software programs and update each machine separately. Once the computer is updated, go to the next computer until all are on the same version.

F. Multiple Company Users – Need for company consistent letters, emails, documents, Action Plans and reports (company branding and consistencies): Managers or owners that have multiple employees using WorkCenter CRM software should consider customizing one copy of the database and then reproducing this file for their employee WorkCenter.mdb file. If you customize a single database for emails, letters, reports and Action Plans, you can maintain your consistent office branding, image and communication content. Once the database is customized, you can distribute this database to your employees for use with their copy of WorkCenter. If the manager or owner wishes to gain access to these individual database files, you should rename each employee’s database with their name (keeping the “.mdb” extension) and load the files in a server location. For example, you have two loan officers: Larry and Jane – you could rename the database to **Larry.mdb** and **Jane.mdb**. This approach will allow you to have multiple databases in the same folder and not have any name conflicts.

G. Duplicating additional WorkCenter.mdb database files: See “C” in the user manual.

H. Managers/Owners accessing employee database files: One consideration for owners and managers that wish to access their employee database for review and content is to have the employee’s WorkCenter.mdb database in a folder that can be accessed by the owner or manager. If you wish to have all of these database files in a single server folder, you will need to rename the WorkCenter.mdb database to reflect each users name as explained in “F” above.