

WorkCenter by vForms

By Stephen Breden

I have been waiting for a product that achieves the contact management power of ACT! and integrates this information with the Loan Origination System I use, Calyx Point. vForms of Redmond, Wash. has released a very impressive product that promises some real progress in this direction.

Overview

WorkCenter provides an integrated panel that allows the user to efficiently manage their contacts, from such basic capabilities as database management, scheduling, and alarming, up to more advanced features such as generating reports and merge letters. It also enables users to integrate this information on an ongoing basis with Calyx Point, eliminating the common problem faced by those of us who have long struggled with separate databases for each.

A list of contacts appears in the left-hand side, and tabs appear in the right-hand side for Contacts, Schedule, Reports, Library, and Web Center. The tab for Action Plans is also ready for the next sub-release of WorkCenter, when customizable marketing campaigns will be available. The left-hand side features panes for Contacts, Reports, and Webs and Wizards. Some functions such as the Reports feature may be accessed in the left-hand pane, or from the tab on the right-hand side.

WorkCenter offers a true relational database structure. Multiple sources of data can be linked together and managed within one interface, and an Import Wizard allows the user to easily bring in leads lists in a variety of formats, including text, Excel, XML, and Access. A Microsoft Outlook plug-in is provided to integrate WorkCenter with Outlook e-mail, as well as to easily allow the exchange of Outlook contact information with WorkCenter. WorkCenter also allows data export to the very fine Agosoft Loan Analyzer and Comparator (previously reviewed in *M.O.M.*), as well as Mortgage Coach. Data exchange with FNMA 3.2 format is coming in the next version.

Contacts and Scheduling

WorkCenter provides a panel that is roughly similar to Microsoft Outlook. A list of contacts appears in the left-hand panel, and each record is highlighted within a panel in the right-hand side. I was amazed at how intuitive the interface was, after having learned the ACT! techniques of using key combinations or the menu commands. In WorkCenter, you only need to type in the first few letters of the person's last name to see the record highlighted on the left. A simple click will bring this record up in the

right-hand side to review particular information.

Once you have opened up the record, you may use the system like any other contact management system. It is a

PRODUCT OVERVIEW

Name: WorkCenter from vForms

Recommended System Requirements:

Windows 2000, XP (Windows 98 or ME not supported), 1.0 Gigahertz (GHz) or higher processor, 250 Megabytes (MB) free disk space, 256 Megabytes (MB) of RAM or Better, Internet Explorer 5.5 or newer.

Price: \$550 per user (home and office seats included)

Phone: 877/498-6888

Web site: <http://WorkCenter.vforms.com/>

matter of either a right-hand mouse click to schedule an appointment, call, breakfast, drinks after work, and so on, or the contact may be dragged onto a calendar where the user can then highlight the date and time the activity is desired. This drag and drop capability is much easier to use than the scheduling capability within ACT!.

Alarms will appear on a regular schedule, consistent with what the user has decided they want to appear during setup of the program. Unlike ACT!, the alarms do not block your view of the contact information screen, but are located in the lower right corner, visible but not disruptive. Key activities may be scheduled by clicking icons on the top, for calls, appointments, and others. Any user of Outlook or ACT! should have no problems adapting to this basic layout in a few minutes.

A feature called Contacts List Manager provides the equivalent of Grouping in ACT!, but is more versatile and powerful. Dragging and dropping allows contacts to be added to a list, and a rule may be developed and employed if desired, to automatically bring contacts into a selected list.

An optional do-not-call-list module allows the user engaged in telemarketing to be notified when contacts were accessed that should not be called. This do-not-call list capability can be subscribed to by area code, and maintained by the main servers at vForms headquarters.

Data Synchronization

vForms has already established itself in the market as an efficient data transfer and merging tool with various loan origination systems, and the vSync feature has been

heavily used by mortgage professionals. I expected a powerful and relatively seamless exchange of data with Point, and I was not disappointed. As had been the case with vSync, this process appears to be genuinely robust in its operation.

Once you have designated the folder or folders in Point that you want synchronized, you simply have to create a new file in Point, and upon the next synchronization with WorkCenter, the new files would automatically appear in WorkCenter. If you elect to synchronize the files regularly, you will find that not only are all the new files added but also the existing files in WorkCenter will receive the most current updated information from Point.

If data folder management is done correctly within Point (files are moved to the appropriate archive folder upon closing), the system will automatically break the link between Point and WorkCenter once a loan is completed. All subsequent contact management activity would be performed within WorkCenter. I do recognize that two-way synchronization would be desirable, and I have been assured this will be added in an early sub-release, including customizable scheduling and field triggers.

Mail Merging

A simple mail merge is achievable by simply clicking on a library item from within the Library tab, located along the top. Double clicking a letter will allow the user to generate a mail merge letter or e-mail on the fly. This has always been the strong point of ACT! over other contact management systems, and I was pleasantly surprised to see it was even easier in WorkCenter. I simply moved from the contact list on the left to the Library tab of letters on the right. Upon double clicking the desired marketing letter, it appeared within several seconds, within its own Word-compatible word processor.

It was a simple matter to select the mail merge dropdown list, and merge data from the Contact list, or from Loans, or directly from Point. While key contact information is available from the Contacts tab, you may always elect to merge data directly from the loan file itself when loan-specific information is desired. Inserting mail merge fields was essentially either a drag-and-drop operation, or the selection of the appropriate location in the marketing document followed by double clicking of the mail merge field.

I tried to bring in a document from Microsoft Word, and discovered that a number of formats were supported. I simply dragged the document from my desktop and dropped it into the Library window on the portion of the list of documents that I wanted it to appear. It was very easy to edit existing documents by inserting a graphic or logo if desired.

Reporting on Your Activity


WorkCenter features a report generator that summarizes your contact activity. This report generator allows one to run reports on activity within the loan origination system, the contacts section of WorkCenter, or both at the

same time. If I want to easily answer such questions as "Active Loans" or "All Loans Cancelled," I may select the desired report from the left-hand list of reports once I have selected the Reports tab on the right or bottom left. Almost immediately, the list of associated contacts will appear on the right side, along with any documents or letters associated with that status, all available in the date sequence the associated question was made. A heavy degree of customization is also available in this part of WorkCenter, but the built-in reports are very adequate to answer the major questions that you might want to ask about your office origination and marketing activities.

Conclusion

WorkCenter will offer automated marketing campaigns in the next sub-release of the existing product, once sufficient feedback has been gained to allow the developers to accurately forecast how these campaigns should be structured. Online automated updating is a key feature of WorkCenter, and these updates will be performed automatically as they become available.

This is a very impressive first generation product, from an acknowledged industry leader in data exchange and synchronization. Among other advantages, it is demonstrably faster in operation than the latest versions of ACT!. It is an admittedly complex product, with an array of features that I have only touched upon. Even for long-term ACT! fanatics such as myself, the existing features and long-term potential are a real temptation to make a switch.

If you will devote the time to set up and learn a sophisticated package such as WorkCenter, the rewards will be considerable in improved follow-up with your referral customers, as well as more effective management of your loans while they are in process. 



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