

Synchronizing your Calyx Point Data Files into WorkCenter

WorkCenter gives you a quick and seamless process for syncing your Calyx Point Borrower and Prospect files into WorkCenter. WorkCenter is a “Relational Database”. Being a relational database, when Calyx Point files are imported into WorkCenter, the software will also bring across any associated parties to each of the files. Associated parties for example are appraisers, title companies, loan officers, real estate agents, etc. As a Calyx Point user, you will notice all associated parties by going to the Tracking fields and select Agent tracking.

This is a great feature allowing you the option to see everyone associate with each loan file with a single click of your mouse.

Step #1: Programming your default Calyx point folder inside WorkCenter: Click on TOOLS, SETUP OPTIONS and select the “Loan origination tab”.

Step #2: Set your default loan file directory by clicking the line item and selecting your default Calyx File Folder. Keep in mind that WorkCenter will read individual folders or if you select a folder that has other folders directly under it, WorkCenter will import all files in these folders. To explain this in detail, if you use the PNTDATA folder on your local C: drive and you have a Borrower and a Prospect Folder under the PNTDATA folder and wish to import both of these folders, you would set the default to C:\PNTDATA. The Borrower and Prospect files would be imported since they are folders directly under the folder you selected.

Step #3: You can set the defaults to import Borrower, Prospect or Borrower and Prospect files under the “Loan Type Files Heading”.

Step #4: You can also import only individual files pertaining to a loan officer or processor by choosing the filters loan files selection. If you choose this option, you will need to type the loan officer or processor names exactly as you have them in Calyx in order to import those files.

Step #5: When you have completed the programming, close the box and then click on TOOLS, VSYNC and choose “LOANS”. WorkCenter will go to the folder you have programmed and import the files with all associated parties into your database.

Step #6: vSync Date: When you have completed the synchronization of your data, WorkCenter will automatically change the sync date in the setup option file to read yesterday’s date. The next time you sync your Calyx files into WorkCenter, the software will only look for changed or modified files from the last sync date.