Reports – Overview of Reports Inside WorkCenter

The Reports feature inside WorkCenter is a very powerful tool for you to mine the data you have collected in your WorkCenter database. One of the main reasons to accumulate data in a contact management and customer relationship management software solution is to access this data to generate more loans and more income profit potential.

WorkCenter gives users the ability to create and edit real-time database reports. These reports will automatically display the information from the WorkCenter database and allow for custom sorts and queries. To access the reports section click on the tab called REPORTS located in the top center screen in WorkCenter. Inside here you will see the Report List on the left hand side and the Default Report in the main view screen on the right. As you can see, WorkCenter comes installed with 35 pre-programmed reports for your use. You also have the ability to create unlimited additional reports filtered to meet your business needs.

As you can see by our standard list of reports, you have the ability to run reports on the following major data areas inside your WorkCenter:

Calendar Items
Contact Records
Modified Contact Records
Journal items
Leads
Loan Data Records

To access these individual reports, click on the "+" sign next to the report heading.

Once you have created a report or use an existing report, these reports become "real time" reports. When you synchronize additional loans or contact data into your database that meet the report criteria these new loans will be listed in the report.

For more detailed instructions on using the Reports, please watch the additional flash videos, read the WorkCenter 2.0 Quick Start Guide (91 pages) and watch for notice of our upcoming WebnR coaching and training seminars. This Quick Start Guide can be found under the "Web Center Tab" and then the "Training Center Tab" inside your WorkCenter.