

Editing, modifying and creating new reports from existing reports

Your personal copy of WorkCenter comes standard with over 35 pre-programmed reports. Being a relational database, WorkCenter offers you the ability to sort, filter and mine your database for profit opportunities. It is very easy to take one of the existing reports and edit and/or modify it to meet your particular needs.

These pre-programmed reports cover the following areas: Calendar items; Contacts; Modified Contact Records; Journals; Leads and Loans.

If you are interested in mining your database for contact information, we suggest you use the “All Contacts” report to start. If it is Loan information you are searching for, we suggest you start with the “All Loans” report.

When you decide to mine your database, at a minimum you will want to consider the following items when modifying or editing an existing report:

1. Columns you need to view in your report
2. Order of these columns in your report
3. What filters you wish to use to be able to filter the database to meet your needs
4. Is there a need to add footers or group footers to this report for totaling
5. Is this a report that you will want to keep for future reference? If so, then you will need to save this report.
6. Do you want to use this report to add contacts to a Contact List Manager List for use with Action Plans.

For this example, we have decided to mine the database for all Conventional loans in excess of 6% for possible refinances. Since it is loan data we wish to mine, we will start with the “All Loans” pre-programmed report found under the “Loans” heading. Open the report by double clicking on the title.

This video will show you the steps taken to modify this report for your needs:

1. Select the columns you wish displayed by clicking on the “View Columns Icon”. All columns you wish to view, click the appropriate box next to their name and uncheck any heading that you do not wish to view.
2. to change the order of the columns, simply LEFT click and hold down your mouse and drag the column to the appropriate location. When you see the two green arrows, release your mouse and the column will be inserted.
3. Use the “Filter Icon” to set the appropriate filters to meet your needs. For this example, we will filter for the following:
 - a. Interest Rate Greater Than 6%
 - b. LoanType Equals Conventional
 - c. After you’ve selected your filters, click “apply the settings” and then click OK
4. We have decided to add footers to the “Loan Amount” column only.
5. We have also decided that we will want to use this report in the future so we will “Save” this report by a right mouse click inside the report and select: “Save Report As...”. We will name the report under the “Loans Heading” and name the individual report as “All Conventional Loans in Excess of 6%”.

View the additional videos on Reports for more details and we also suggest you read the WorkCenter 2.0 Quick Start Guide. You can also view the following flash video: **WorkCenter - #4 Quick Start Guide - Overview and Use**