Overview of Setup Options and Individual Tabs

Please pay particular attention to this area of WorkCenter. The Setup Options and individual tabs control the basic function and operation of your contact management and client relationship management CRM software.

In this video we will cover the basic tabs and overview. For more detail and explanations, please refer to the Quick Start Guide for WorkCenter 2.0. This 91-page Adobe Acrobat form can be found, printed and/or saved to your computer by the following steps.

1. **Click on the Web Center Tab located at the top right section of your main screen view of WorkCenter.**
2. **Click on the Training Center Tab located in the middle of the screen.**
3. **Scroll down and double click on the WorkCenter 2.0 Quick Start Guide. You may also see a Quick Start Guide for the previous versions of WorkCenter in this same area.**
4. **You have the option to use bookmarks or go to the page identified for the topic you choose to review. We highly suggest you print and read this guide before using your WorkCenter Software. You will then be familiar with it and will continue to use it as you navigate thru WorkCenter. This guide is designed to give you narratives and screen shots to walk you through the major features and usage of the software.**

Overview Setup Options:

The Setup Options can be found by clicking on TOOLS, SETUP OPTIONS and then selecting the individual icon button on the left side of the screen. You can view each of the major Options by double clicking on the specific icon button.

We suggest that you keep the default settings intact until you become more familiar with the use of WorkCenter. As you can see by this video, you have the following Icon buttons to choose from when programming and or modifying existing settings.

General
Email/Fax
Loan Origination
Custom Fields
Scripts
Security
Action Plans
Options/Lists