

Renaming Custom Field Names (Contact and Loans)

Your copy of WorkCenter comes standard with 25 custom contact and 25 custom loan fields. In this version of WorkCenter, you have the ability to rename these custom fields to meet your specific needs. For the Contacts and Loan records, you have 10 text fields (Text1-10); 5 date fields (Date1-5); 5 number fields (Number1-5) and 5 Yes/No fields (Yes/No1-5);

These custom fields are especially useful when importing data into WorkCenter to specifically identify your import data. One example of using a custom field could be to mark in your contact record where the lead came from, such as “lead source”.

For your information, WorkCenter has multiple tables in the database. Two of these tables are for contact information and loan information. That gives you the unique opportunity to sort or filter your data by contact information or loan information. See the section on reports for more details regarding this topic.

When changing the custom field names, you will follow these instructions:

1. Open WorkCenter, click on TOOLS, SETUP OPTIONS and then choose OPTION LISTS. At the drop down menu screen choose “Contact Custom Fields” to change the contact fields and choose “Loan Custom Fields” for loan fields. As you see in this video, you have several additional lists in this drop down. In this video we will only deal with the “Custom Contact and Loan Fields”. See the video “Adding or Modifying Option Lists” for the other lists shown in the drop down menu.
2. For this example, we will edit the “Text1” Contact Custom Field and change it to “Lead Source” by typing and then accepting the changes by clicking the “OK” box.
3. You can now open one of your contact records with a double click of your mouse and click on the “Custom Fields” tab located at the bottom of the pop up box. As you can see, the Text1 field has now been changed to “Lead Source”.
4. When you change a custom field name, it will make the change globally for all records.
5. If you change the custom loan field, you will be able to find that change by clicking on the contact loan tab and then the Custom Fields tab.