

Programming your LOS Synchronization Setting

You will need to program your WorkCenter to access the appropriate files on your computer in order to properly sync the borrower and prospect data files into WorkCenter. As we explained in the Quick Start User Guide and other flash videos, WorkCenter CRM is a relational database management software solution. That means that we either give you the ability to tie the relationship together for your clients or we automatically perform that task when importing LOS data.

To explain this further, each of your LOS files will have associated parties. These associated parties range from the loan officer, processor, appraiser, listing and selling agents and title contacts, to mention just a few. When we sync LOS data into WorkCenter, we will create contact records for all associated parties and then tie them to the original borrower or prospect file. That gives you the end user of WorkCenter the ability to see everyone associated with the contact or loan record with a click of your mouse.

For this example, we will program WorkCenter to use Calyx Point data and tell WorkCenter where we have the Calyx Point borrower and prospect files located on our computer network or local drive.

#1. Open WorkCenter, click on TOOLS, SETUP OPTIONS and then select the LOAN ORIGINATION TAB located on the left side of the screen.

#2. As you can see by the screen view, we will start by selecting the LOS using the drop down menu. If you are using an LOS that is not shown in the screen, please refer to the Quick Start Users Guide, other flash videos on data synchronization or call your business development officer at vForms on the toll free number 877.498.6888. For this example, we will select Point.

#3. You now need to direct WorkCenter to the correct folder where you store your LOS data. WorkCenter will take all sub-folders for a single directory tree in syncing data from your LOS. To explain this further, let's say we have the following folders under the C:\PNTDATA folder: Borrower, Closed Loans 2005, and Prospects. If we program WorkCenter to start with the top level: C:\PNTDATA, we will then sync all data in the folders under that directory or in this case, the borrower, closed loans 2005 and Prospects.

If you have archived or closed loans in other folders, you will need to sync them in individually. After syncing each folder, you will then need to change the vSync date shown in the screen view back to a past date. After you have synced, WorkCenter will change the vSync date to a current date. The next time you sync, we will only look at files added, modified or updated since that sync date.

#4. Choose whether you wish Borrower, Prospect or both Borrower and Prospect files to be synced. For this example, we will only choose Borrower files by changing the selection.

#5. FNMA directory: Select the computer folder where you wish any FNMA files created to be placed. For Calyx Point users, the standard default setting is: C:\Winpoint\Work.

#6. If you wish to sync only loan officer or processor files, set the default in the next settings. When filtering these files of Loan officer or processor, the type d name needs to be identical to the name in your Calyx Point or LOS software.

#7. Last vSync Date: This date reflects the time shown on the last data synchronization. Each time you sync data, we will change this date to reflect the day before the synchronization date. That allows WorkCenter to look at only data files modified, added or updated since that date.

#8. We recommend you keep the additional fields set at their default standard settings.