Contact Record Overview Including Individual Tabs

One of the major enhancements of the WorkCenter 2.0 version is the detachment of the contact tab and records. To access an individual contact record in WorkCenter, double click on that contact. The Contact tab will now open and it has improved tabs and data access abilities.

As you can see by the new Contact record you now have 7 major tabs across the top. In this video, we will list these tabs and give you a brief overview of their use.

<u>Contact Screen:</u> This is your main information tab for contact data. This tab also has 4 additional sub-tabs for additional information:

Contact Lists: This will show you each Contact List Manager List that this Contact is associated with or that has been add to that specific list

Interests: This tab will allow you to mark and track any interests your contact has. You can also add or modify these lists by going to TOOLS, SETUP OPTION and choosing OPTIONS/LISTS

Links: This tab will allowyou to link contacts together. A good example of this would be to show the relationship between contacts such as referred to or referred by.

Custom Fields: This screen displays Contact Custom fields. These custom fields can be renamed and used to track specific attributes not available in other data fields. You can see the flash videos regarding custom fields under Setup Options videos.

<u>Info Screen:</u> This information screen displays information about the contact, spouse, employment, family, financial objectives and internal contact survey.

<u>Notes Screen:</u> This screen is provided for additional notes on your contact record.

<u>Journal Screen Tab:</u> This journal screen will display all communications including email, letters, and calendar items that you sent or activated for this contact. This is a very powerful tool to be able to go to a contact record and see the entire history of all communications you have had with a specific contact or client.

<u>Document Screen Tab:</u> The document tab is designed to link documents from your computer folders To a specific contact or client. A great example of this would be to link loan Appraisal forms or documents to the client record.

<u>Schedule Screen Tab:</u> This tab will show annual calendars for the specified contact record. You can Quickly view all calendar scheduled items for the contact as a single screen view.

<u>Loans Screen Tab:</u> The loans tab will display all loans you have been involved with for this specific Client. This tab also has 6 sub-tabs. Loan info, Dates, Contacts associated with the Loan file, notes, Loan notes and custom loan fields. See the flash videos on WorkCenter setup options for loan custom fields for additional information.