Automatic Journaling Systems overview inside WorkCenter:

The Journal section inside the WorkCenter contact screen enables you to track correspondence with your borrowers and contacts. WorkCenter also allows for automatic journal creation. This automatic journaling is programmed in your WorkCenter as a default setting when you download the software. Unless you change the settings in your default download, WorkCenter will automatically log entries into the contact record for activity to that specific contact for all calendar and scheduled task items, printed items and emailed letters. With a single click of your mouse, you will have a complete history of communications with your contact.

To view the Journals area in a Contact record, double click on the Contact and a separate window will open. Once the specific contact is opened you will notice a Journal Tab Button located at the top of your contact record. You can click on this Journal Button to display your contact specific journal screen. As you can see by this video, all communications with your contact are displayed for your convenience and viewing.

If you print a letter using WorkCenter, email a message using the forms library, or schedule an appointment or task using the calendar scheduling drag and drop technology, the procedure will create the journal history for your client.

TO MANUALLY CREATE A JOURNAL ENTRY IN A CONTACT RECORD:

To create a manual journal item, click on the PLUS sign located at the bottom left corner of the journal screen. It will display a new line inside the journal screen with headings of Type, Created, Start and Caption. Slowly Double click in the highlighted box under the first column heading of “TYPE”. An arrow will appear. Click the arrow and you will see a drop down menu appear. Select the appropriate Icon you wish to use to describe the action and left click on that feature.

Now do the same process with a double click in the created column, start column and the caption column. Enter the appropriate information under each heading.

You also have the option to click the drop down arrow and select from the drop down lists the appropriate information.

When finished simply click your mouse out of the newly created journal item and this entry will be saved for future viewing.

TO CREATE AUTOMATIC JOURNAL ENTRIES:

WorkCenter allows you to program journal entries to automatically be entered into your contact record when communicating with your contacts. If you have printed or emailed a client letters from the LIBRARY and you do not see the journals being automatically created, you will need to check your default settings inside WorkCenter.

To do this:

Select Tools, then Setup Options at the top of your WorkCenter screen. Click on the General Button located at the left side of the window and then click on the plus sign next to Journal Entries. You will now see a drop down box appear listing 5 options available with a Blue link to the right of each heading. You will notice the 5 options are named: **On Send Email**, **On Schedule**, **On List Add, On Print Letter, On Telephone Call and Purge Items Older Than**. Next to each option you will see a blue link that will either say Yes or No. If you click the link it will toggle between yes and no. We recommend you set each feature to YES. Make sure these settings are programmed for YES and then click on the OK button. Refresh your database by clicking on the "Refresh Icon" under the contacts list.

There is also a 6th Option for Purge Items Older Than and it is set to Never. If you click on the blue link you can change that to 2, 3, 4, or 5 Years. This will automatically delete any journal item older then the selected time frame.

For more information on using WorkCenter, view the other flash videos and read the WorkCenter Quick Start Help Manual.