Loan Tab Overview in the Contact Records

Each contact that has a loan or is associated with a loan inside WorkCenter will have that record displayed. If your contact has multiple loans with you or is associated with multiple loans such as a real estate agent or loan officer, all of these loans will be displayed for your review.

To access this information inside WorkCenter, open an individual contact record by double clicking on the selected contact name. Once the contact screen appears, click on the "Loans Tab" located in the top right corner of the screen view.

You will notice that all loans are listed at the top of the screen. If you have multiple loans, they are each independently linked to the "Loan Info Tab" at the bottom of the screen.

Loan Info Tab: This tab will reflect the current information for the loan that is highlighted or selected above. As you can see, if we select a second loan at the top, the information on the loan information screen has changed to that loan.

Dates Tab: This tab will reflect any loan dates when you sync your Calyx Point or LOS data into WorkCenter. These dates come from the tracking fields inside the LOS system. This area will give you a quick overview of your loan in process steps. You can also re-arrange the order of these dates. See the following video: Contact Records - #10 Re-arranging the order of Custom Fields and dates.

Contacts Tab: This tab will show you all associated parties to the loan you have selected above. This tab works the same as the "Loan Info Tab" explained above. If you have this tab open and select another loan in the above screen, you will notice the information change to reflect all parties to the specific loan. WorkCenter is a relational database giving you the option to see all parties to your loan with this screen view.

Notes Tab: This tab gives you the option to manually type any additional notes into the contact loan record inside WorkCenter.

Loan Notes Tab: This tab will be automatically populated with notes from your Calyx Point or LOS loan files when you sync those files into WorkCenter.

Custom Fields: This custom fields tab reflects the loan custom fields that have been programmed into WorkCenter. Since WorkCenter is an industry specific CRM solution unlike ACT! or Goldmine, we have already incorporated the majority of any custom fields you may need into the database. We have programmed 25 custom fields for your use above the other database fields. You can re-arrange the order of these custom fields or re-name them to meet your specific database needs. For more information on these functions, see the flash video: Contact Records - #9 Contact Loan Custom Fields - Using and Renaming and video: Contact Records - #10 Re-arranging the order of Custom Fields and dates.