

Data Syncing Overview for WorkCenter

WorkCenter has several data synchronization options built into the software. In this flash video, we will cover the major topics. For more detail on individual topics, we suggest you read the WorkCenter Quick Start Reference Guide, view the other flash videos and watch for notification from vForms about upcoming WEBnR coaching and training sessions.

Here are the four major areas that WorkCenter has data synchronization capabilities built within the software:

1. **LOS syncing** – Once your LOS syncing has been programmed, you can click on **TOOLS, vSYNC** and select **Loans**
2. **Outlook Contact Syncing** – no programming is needed by the user for this synchronization. To sync your contacts to WorkCenter from Outlook, click on **TOOLS, vSYNC** and then select **Outlook Contacts**. As you can see by this screen, you have the option for two way Outlook contact syncing if you have acquired the add-on module. This is particularly beneficial if you use a PDA such as a Blackberry or Treo. Speak with your business development officer at vForms for more information about the 2-way Outlook syncing module.
3. **Outlook Calendar syncing** – Again, no programming is needed by the user for this feature. Click on **TOOLS, vSYNC** and select **OUTLOOK CALENDAR**. The 2 way add-on Outlook syncing module will also allow you to sync calendar items in WorkCenter back to your Outlook. It is important to designate the program that has the highest priority when syncing. For more information pertaining to Outlook contacts and calendar syncing, view this flash video: [Data Synchronizing - #3 Syncing Outlook contacts and Calendar items into WorkCenter](#)
4. **Importing data using the WorkCenter Import Wizard**. This wizard will allow you to import or sync data from numerous file types into WorkCenter. Excel is the most common file type used by our WorkCenter users. To use the import wizard, click on **FILE, IMPORT** and select **CONTACTS/LOANS**.

You can also use our scripts to secure outside data from certain LOS systems and data suppliers. For additional information, please view the flash videos, read the WorkCenter Quick Start Reference Guide and watch for the next notification of our WEBnR coaching and training seminars.