

Syncing LOS & Other Data into WorkCenter

We have learned in previous flash videos that WorkCenter CRM is a relational contact management and client relational management database solution. We at vForms have designed many solutions or ways of synchronizing your other client and prospect data into our proprietary WorkCenter software. In this flash video we will address several of the main syncing methods incorporated within the software:

- 1. Outlook Calendar and Outlook Contact items:** To sync your Outlook calendar scheduled appointments and your Outlook Contact records, click on TOOLS, vSYNC and select either the “Outlook Calendar” or “Outlook Contacts” option. WorkCenter will review your Outlook and sync in this data without any programming on your part. If you have acquired the 2-way Outlook syncing module for your copy of WorkCenter, you will have the option to sync calendar and contact records both ways to and from WorkCenter.
- 2. Calyx Point, Byte and BytePro Syncing:** At the time this video was created, we have a direct synchronization of your Calyx Point, Byte and BytePro LOS data into WorkCenter. You can accomplish this synchronization with a simple programming step for you to direct WorkCenter to the appropriate LOS data file folders and designate your LOS system in the setup menu. Please review the WorkCenter Quick Start Guide or watch the flash video: Setup Options - #6 Programming your LOS Synchronization Settings. Once you have the proper settings, click on TOOLS, vSYNC and select “Loans”. WorkCenter will look at your LOS borrower and prospect files and synchronize all updated or changed file data since your last vSync date. This vSync date can be found in your system setup files under the Loan Origination Tab. Once you sync LOS data into WorkCenter, the software will automatically update the vSync date. The next time you sync data into WorkCenter, it will only sync data in borrower or prospect files that have been updated or changed since that sync date.
- 3. For Contour, Genesis and LoanSoft LOS syncing,** watch for future releases on WorkCenter’s ability to access these LOS systems. In the interim, you can export your data from the appropriate LOS folders into an Excel spreadsheet and then import that data using the WorkCenter import wizard. For more information, please contact your vForms personal business development officer at 877.498.6888.
- 4. Encompass syncing:** Watch the flash video: Data Synchronizing - #5 Importing Encompass Data into WorkCenter for detailed instructions on importing Encompass data into WorkCenter.
- 5. Contact management and other LOS data files:** All software programs will export their data in an Excel spreadsheet format. You can use the WorkCenter import wizard to bring that data into our database structure. We have also established specific “scripts” within WorkCenter that will go directly to the third party database and sync the data into WorkCenter. If you have any questions on our scripts, review the appropriate flash video or call your personal business development officer at vForms toll free number 877.498.6888.
- 6. Many times, for unique synchronization solutions,** the vForms technical programming team can create a software script at a nominal fee that will enable you to bring third party data into WorkCenter. Call our toll free number 877.498.6888 and speak to your personal business development officer about this process.