

Reports - Making Global Changes - Enter LO Names into Contact Owner Field

In the Flash Video: [“Reports #6 - Making Global Changes to your Database Data”](#) you learned how to make global changes to fields in your WorkCenter database.

We at vForms have received several inquiries regarding how to take the loan officer names from the loan data tables and populate the contact record “Owner” field. These inquiries are primarily coming from WorkCenter users that are sharing a common database. They want to open a contact record and see who “owns” or is associated with that contact. You can see the contact owner field by opening one of your contacts and looking at the box directly above the contact phone numbers area.

This flash video will give you step by step instructions on how you can accomplish this task. It will require us to do the following:

1. Create a contact list manager group with a sub list for each loan officer in your database
2. Filter your all loan report by loan officer name sorted in alphabetical order
3. Take all loans for each individual loan officer and add those items to their appropriate list
4. You will need to filter each loan officer list and then open the All Contacts report
5. You will then need to make the global change for this loan officer in the “Owner” field
6. Repeat the process for each of the remaining loan officers

We are using this process since you wish to sort your loans or contact data using the loan tables and then change a field in the contact table. After you have accomplished these steps, you will be able to open a contact record and that loan officer name will be entered into the “Owner Field Box”.

Follow these steps:

1. Open WorkCenter and then open your contact list manager list. Click on the “+” key at the bottom of the list manager screen and create this new group: “Loan Officers”. Then create a separate list for each of your loan officers. For this example, we will only create two lists: one for John Broker and one for Sally Smith who are both loan officers in our sample database.
2. Go to the reports section and open the “All Loans” report and move the Loan Officer column next to the borrower name. Once you have accomplished that, single click on the column header name “Loan Officer”. You will now see all your loans sorted by loan officer.
3. Click on the first line showing “John Broker” as the loan officer. Hold down your Shift key and select the last line that shows “John Broker” as the loan officer. You now have highlighted all loan records that are associated with John Broker as a loan officer. Right click in the highlighted area and select “Add items to a list...”.
4. Find the “Loan Officer” group name and John Broker sub list and click “OK”. John Broker’s loans and contacts have been added to his specific contact manager list. Repeat the process for “Sally Smith”.
5. Open the “Loan Officer” group in your Contact List Manager and you will see each list populated with the number of contacts that we have transferred into the list. When we filter these contact records, we will need to be out of the loan reports tab, so we will now click on the Schedule tab.
6. Double click on the John Broker list and you will see only his filtered contacts appear in the left screen. Now click back into the Loan Tab and select “All Contacts Report” found under the Contacts heading. The reason we are selecting the Contact reports is that the “Owner” field is found in the contact records and not the loan records.
7. You will now need to select the John Broker contact filtered list so it appears in the left side of your screen view. To do this click on the “John Broker” filtered tab at the bottom left of your screen.
8. Double click on the John Broker list again and you will see the report filtered at the right of the screen to reflect only John’s contacts. You will need to do this in the order we have just described for best results.

- 9. You can now change all the field names in the “Owner” field using the global change process you learned in the first flash video.**
- 10. Display the “Owner” column by selecting the view visible fields icon and checking the box. Tab over to the column and click into the first cell under the “owner column”. Hold down your shift key and select the last line in the same column.**
- 11. Hit your “F2” key and you will see a box appear in the last column cell. Type “John Broker” into that cell and press your “Enter” key.**
- 12. You will notice that all cells under the “Owner” column have been changed to reflect “John Broker”.**
- 13. Repeat the process for all other loan officers. You have now globally added the loan officer names to their appropriate owner field. You can use this global change process for any need you have in updating your database. If you wish, you can delete the contact list manager lists you have created or leave them in your database for future use.**

For more information, please view the other flash videos, reach the WorkCenter Quick Start Reference Guide and watch for our announcement of WebnR coaching and training sessions.