

Creating Your Personal Information Tab

The personal information screen inside WorkCenter is a very important feature. This information is used to register your software and populate your personal information in your letters, documents and email messages.

You will be asked to complete this screen when you initially download your copy of WorkCenter. You always have the option to change or modify these fields whenever you choose.

To confirm your personal information is correct and accurate, follow these steps.

1. Click on **TOOLS, SETUP OPTIONS** and then select **“CUSTOM FIELDS”**. Make sure you have then selected the **“My Information”** tab. To add or modify any of the line items, click into that line and type your changes.
2. You will also note there are lines for **“Satisfied Customer”**; **Satisfied Quote 1 through 3**; and **Builder Names**. If these lines are completed, you will have the option to use these fields and quotes in customizing your letters and emails for marketing and communications.
3. If you have elected to use these fields, see the following video on how to insert these specific Field Listing Names into your library documents: [“#5 Adding Mail Merge Features to your Documents”](#).
4. If you add these Field List Names into specific documents, the selected letters or emails will automatically be populated from the data in these fields.