Contact List Manager Lists that automatically update when you sync using WorkCenter

WorkCenter will automatically populate the loan status lists when you synchronize your Calyx Point data files into it. In order for this process to work, you must be inputting dates in your Calyx tracking fields.

You can view these lists in the Contact List Manager by clicking on the icon located at the top of the WorkCenter screen. The icon looks like two people. Click on the box with the "+" sign next to the Loan Status Group title. These individual lists will populate based on the dates you have placed in your tracking fields.

This is a great opportunity to tie these lists to Action Plans if you wish to run campaigns to your contacts. A good example would be to create a letter or email in an action plan notifying your borrower that the appraisal has been ordered. If the tracking field was added, the borrower would be loaded into this group when you synced your data files into WorkCenter. You can then process this action plan and the letter or email would be sent to the contact updating them on the appraisal order for their financing.

For more information regarding Action Plans, watch the flash videos or read the WorkCenter Quick Start Guide.