

1 of 3 Methods: Sending one document with loan or third party providers data

In the previous flash video: Action Plans - #6 Using the Correct Loan or Contact Data in an Action Plan & Documents, we told you there are three ways of sending documents to clients that need to have loan or third party provider data populated with the data in your WorkCenter database. They again are:

Option #1: You can print or email a single document by opening a contact record and highlighting the selected loan and third party.

Options #2: You can send multiple contacts documents that populate from a single loan or multiple contact loans by using a specific Action Plan.

Option #3: You can create a one step Action Plan that will address sending multiple contacts a document that is populated from one or more specific loans.

This Flash video will demonstrate Option #1. For all of these examples, we will be using one of the Sue Woodard During Purchase letters: # 4 Listing Agent Beginning Transaction. We will also open this letter and show you the mail merge field names we have already programmed into the letter. This letter needs to be addressed to the “Listing Agent” and it will refer to the property address in a specific loan file.

Option #1: Print a single letter with loan data inserted.

Follow these steps:

Step #1: Open your contact record that has the specific loan you wish to refer to when populating the letter. For this example, we will be using the George Bush contact record. When your contact record opens, click the Loan Tab.

Step #2: Select the loan you wish with a single mouse click and then click on the Contacts Tab.

Step #3: Select the associated third party vendor with a single mouse click. For this example, we will select the “Listing Agent”. Once selected, close your contact record.

Step #4: Select the “Listing Agent Contact Record” which in this example is Amy Sellsmore. Then click the letter you wish to populate. The letter in this example is “# 4 Listing Agent Beginning Transaction”

Step #5: Click on your printer icon and you will now see the letter is populated with the property address of the loan and is also addressed to Amy Sellsmore with her contact personal information.