

## **Opening and Editing a Calyx Point File from inside WorkCenter**

**WorkCenter will allow you to open your Calyx Point software from inside our software. Please keep in mind that Calyx Software will allow only one copy of their software open at any time. If you already have the Calyx program open on your computer, do not use this process. You can toggle between WorkCenter and Calyx.**

**You will want to use this process to quickly open Calyx, edit a file and close Calyx. Once you have closed Calyx you can hit your “F4” key to sync in your changes. You can also click on TOOLS, VSYNC and select LOANS.**

**Step #1: Open a contact record and then click on the LOANS TAB located at the top of the record.**

**Step #2: Point your mouse to one of the loans listed in your contact loan screen and right click and select “Edit Item”. WorkCenter will open your Calyx Software so you can make a change in the record or view the borrower or prospect file.**

**Step #3: Edit the appropriate fields inside Calyx and then close and save your edits.**

**Step #4: If you wish to sync these new changes into WorkCenter, press the “F4” key or click on TOOLS, VSYNC and then select LOANS. The changes will be updated inside your WorkCenter database.**

**You can also open the all loan reports and perform the same steps to open Calyx by selecting a borrower name.**