THE WORKCENTER CONTACT LIST MANAGER OVERVIEW

The Contact List Manager can be accessed by clicking on the Contact Lists Icon located at the top of the main screen view of WorkCenter. It shows two people. This Contact List Manager is a very powerful tool inside WorkCenter allowing you the option to focus on specific groups or contacts.

This list manager enables you to place contacts into specific groups allowing you to specify different functions or information to be distributed to these group members. Once these groups have been established, they will be used to handle targeted marketing campaigns and scheduling for follow ups, and can be set for specific database tracking. Your Action Plans are driven off these specific Contact Manager Lists. All you need to do is add your contacts to these lists and then assign the specific lists to Action Plans.

The Contact List Manager Lists will become essential in your use of WorkCenter. As explained above, it is a very easy way to group your contacts in a fashion for quick access. Once you have your contacts loaded into a list, you can double click on that list and only those contacts will be displayed.

To open your Contact List Manager, simply click on the “Contact List Icon” at the top of your WorkCenter screen view. The icon looks like two people directly under the TOOLS and WINDOWS options.

If you use the tracking fields inside your Calyx Point software, WorkCenter will automatically place your contacts into lists under the “Loan Status” grouping. These lists can be viewed by clicking the “+” key next to the heading: “Loan Status”.

Note that your contacts are listed down the left side of your WorkCenter Screen. The heading is marked “CONTACTS” which tells you that all contacts are now shown. For this example, we will double click on the “Appraisal Order” list found under the “Loan Status Group Heading”. Notice the contact list at the left is now showing “Appraisal Ordered”. You have now filtered your contacts by that list allowing you to concentrate only on those selected contacts.

To show all contacts again in the left side of the screen, you have two options: Right click your mouse on any contact record and select SHOW ALL CONTACTS. The second option is to Click on CONTACTS at the top of the screen and select SHOW ALL CONTACTS. We suggest that you always return to the “All Contacts” view after completing your specific tasks.

Please view the other videos about Contact List Manager Options for more information and refer to the WorkCenter 2.0 Quick Start Guide.