How To Set Up Notifications On Encompass

1. Login to Encompass
2. Click on Encompass, settings
3. Click on Additional Services, Company Status Online
4. There we will see the current Company Status Online Templates
5. Click the add button on top right to create a status update that can either be automatic or manual
6. Select a trigger, or no trigger
7. You must create a status title, the detailed description is optional
8. Below is where you select if you want a manual update or an automatic update
9. If you select a manual update, you must select whether you want no reminder or to remind users when the exit the loan (this gets very repetitive and continually reminds you)
10. In section 3 you have the option to send a notification email that you must have previously created (instructions on step 14)
11. You select the email template you previously created in the list of dropdowns
12. Select from the list who the email is from
13. Check the boxes of who you want to send the email to and then click save
14. To create a new email template click on the email template tab right next to company status online templates
15. Click the add button on top right
16. Fill out all the information and select save
17. Then make sure you select the users tab to the right of the email templates tab. Select the users that can publish status online updates and configure personal status online in their personal settings.