

This is a typical biz rule we use here for milestone completion, but there are other uses.

1. Go to Encompass Settings
2. Go to Business Rules
3. Go to Field Triggers
4. Click on the “New” icon

Field Triggers						
Create and manage rules that execute custom actions when the value in a field is changed.						
Triggers (45)						
Name	Channel	Condition	Status	Last Modified By	Last Modified Date & Time	
FHA Field Triggers - PSO - 12/11/2013	Any Selected Channel	No Condition	Active	admin (John Carter)	01/27/2020 05:53 PM	
Populate RegZ with Property Address 1603	All Channels	No Condition	Active		07/24/2014 08:03 PM	
Email Trigger for Milestone Changes	Any Selected Channel	No Condition	Active	admin (John Carter)	02/27/2020 02:18 PM	

5. Add the name of the rule and decide if you want to exempt any “channels.” (probably not)
6. Click “add”

Encompass Settings

Encompass Settings Go to Recent Import Help

Field Triggers

Create and manage rules that execute custom actions when the value in a field is changed.

Triggers (45)

Name

FHA Field Triggers - PSO - 12/11/2013

Populate RegZ with Property Address

Email Trigger for Milestone Changes

Lock Request

Lock Agreement Form 1

Lock Agreement Form 2

Counseling List

Refinance marks TIL field 671

FHA Section of Act Default

Escrow

A6 Mark Homestead

HMDA - Adverse Action

HMDA Test

Est Closing Date

LE Present Address

GWR

Bor Closing Cost

Purchase marks TIL field 671

Flood Insurance - PSO - 12/11/2013

First Payment Date - PSO - 12/11/2013

Bor Pair 1-6 MID FICO Calc Trigger - P

HMDA Rules - PSO - 12/11/2013

Investor Loan Number - PSO - 12/11/2

FHA/VA ARM Change Dates - PSO - 1

VA Residual Region - PSO - 12/11/201

Additional Disclosure Information - PS

Email Trigger for Bank

Late Charge For TIL - PSO - 12/11/201

Copy GFE Filing Fee to REGZ Filing Fe

No Comp Rdy For Docs if less than 5

2018 Demographic Fix

Copy LTV and Credit Score to custom

VA Maintenance Calculation - PSO - 1

TIL Security - PSO - 03/14/2014

Learn more...

Save Cancel

Add/Edit Trigger

1. Create a Trigger Name

Email Trigger for Milestone Changes

2. Select all Channels this rule applies to

No channel selected

Banked - Retail

Banked - Wholesale

Brokered

Correspondent

3. Is there a condition for this trigger

No - Always apply this rule

Yes - Apply this rule only if

4. Add and apply field events

Type	Activation	Activation Source	Action
Milestone	Milestone completed	Conditions	Send: 1 email(s)
Milestone	Milestone completed	Funding	Send: 1 email(s)
Milestone	Milestone completed	CTC	Send: 1 email(s)
Milestone	Milestone completed	Purchasing	Send: 1 email(s)
Milestone	Milestone completed	Funding	Send: 1 email(s)
Milestone	Milestone completed	Purchasing	Send: 1 email(s)
Milestone	Milestone completed	UW Decision	Send: 1 email(s)
Milestone	Milestone completed	Submit to U/W	Send: 1 email(s)
Milestone	Milestone completed	Processing	Send: 1 email(s)

Add

Edit

Remove

7. Pick "Milestone completed"
8. Pick the Milestone you want to focus on
9. For action type, I am going to choose to send an email to one or more Encompass users
10. Click the "add" button

The screenshot shows a dialog box titled "Add/Edit Field Event" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Activation" and "Action".

Activation Section:

- Activation Type:** A dropdown menu with "Milestone completed" selected. A red circle highlights the dropdown arrow.
- Trigger Milestone:** A dropdown menu with "Processing" selected. A red circle highlights the dropdown arrow.

Action Section:

- Action Type:** A dropdown menu with "Send an email to one or more Encompass users" selected. A red oval highlights the entire dropdown menu.
- Send Email(s):** A large empty text area for entering email addresses.
- Buttons:** To the right of the text area are three buttons: "Add" (highlighted with a red circle), "Edit", and "Remove".

Bottom Section:

- Two buttons: "OK" and "Cancel".

11. I keep my notifications simple, as I put the description of the email in the subject and use Encompass Field IDs to identify the borrower's first name, last name and the loan number/lender case number. You can add those field IDs there or in the body section. You have to enclose them in the right brackets which are []
12. You can assign specific users to receive the emails and/or include only those that have a role for that specific loan. So, only the LO for that loan would be notified. I have managers that want to be included on all notifications, so I can add them under "users."
13. You hit "OK" or "Save" all the way back out.

Email Trigger Settings

The Subject and Body can include loan data by specifying the Field ID within square brackets (e.g. [1109]).

Subject: Loan submitted to Processing for [4000] [4002] - [305]

Body: Loan has been submitted for Processing

Display email information in Loan Log

Select the user(s) and/or role(s) that will receive this message:

Users	Roles
Kara Mahsetky-Rogers	Loan Officer
Courtney Mendoza	Loan Processor

OK Cancel

Here are some examples of how we use this rule.



Mon 4/6/2020 2:29 PM

Kim Bly

Loan has been advised for J... n Ca

To Kim Bly; John Carter; Ruby Perez; Sara Rush; Kara Mahsetky-Rogers; Renee Lamb

[Bing Maps](#)

This loan 141... has been marked Application withdrawn as of 4/6/2020 12:00:00 AM in Encompass



Tue 3/24/2020 11:44 AM

Stacey Walton

Loan submitted to Processing for K... K... - 141...

To Kara Mahsetky-Rogers; Courtney Mendoza

[Bing Maps](#)

Loan has been submitted for Processing



Tue 3/24/2020 12:40 PM

Jeff Knowles

UW Decision complete for J... E... - 141

To Kara Mahsetky-Rogers; Stacey Walton; DeLois Craddock

[Bing Maps](#)

Your loan has been marked as decisioned in Encompass. Please review conditions carefully.



Wed 4/8/2020 11:48 AM

Melinda Summers

The loan for S... BA... has been purchased

To John Carter; Brianna Calderon

[Bing Maps](#)

Loan number 141... has been marked as purchased in Encompass. The investor for this loan is Caliber Home Loans, Inc.

We also use this email alert a lot.

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Email Trigger for Milestone Changes
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Lock Agreement Form 1
Lock Agreement Form 2
Counseling List
Refinance marks TIL field 671
FHA Section of Act Default
Escrow
A6 Mark Homestead
HMDA - Adverse Action
HMDA Test
Est Closing Date
LE Present Address
QWR
Bor Closing Cost
Purchase marks TIL field 671
Flood Insurance - PSO - 12/11/2013
First Payment Date - PSO - 12/11/2013
Bor Pair 1-6 MID FICO Calc Trigger - P
HMDA Rules - PSO - 12/11/2013
Investor Loan Number - PSO - 12/11/2013
FHA/VA ARM Change Dates - PSO - 12/11/2013
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Late Charge For TIL - PSO - 12/11/2013
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Copy LTV and Credit Score to custom

Add/Edit Trigger

1. Create a Trigger Name
Est Closing Date

2. Select all Channels this rule applies to

- No channel selected
- Banked - Retail
- Banked - Wholesale
- Brokered
- Correspondent

3. Is there a condition for this trigger

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 Yes - Apply this rule only if

Rate is L

4. Add and apply field events

Type /	Activation
Field	Any change in field value

Add/Edit Field Event

Activation

Activation Type: Field value modified
Trigger Field ID: 763
Description: Trans Details Est Closing Date
Criterion: Any change in field value

Action

Action Type: Send an email to one or more Encompass users
Send Email(s): Change in Est Closing Date - [4002]

Buttons: Add, Edit, Remove, OK, Cancel