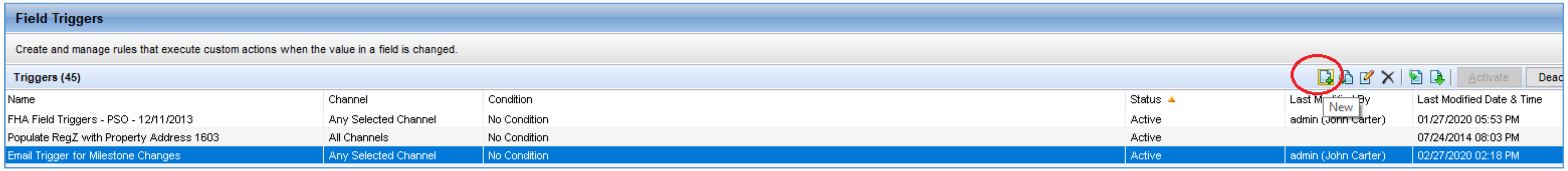
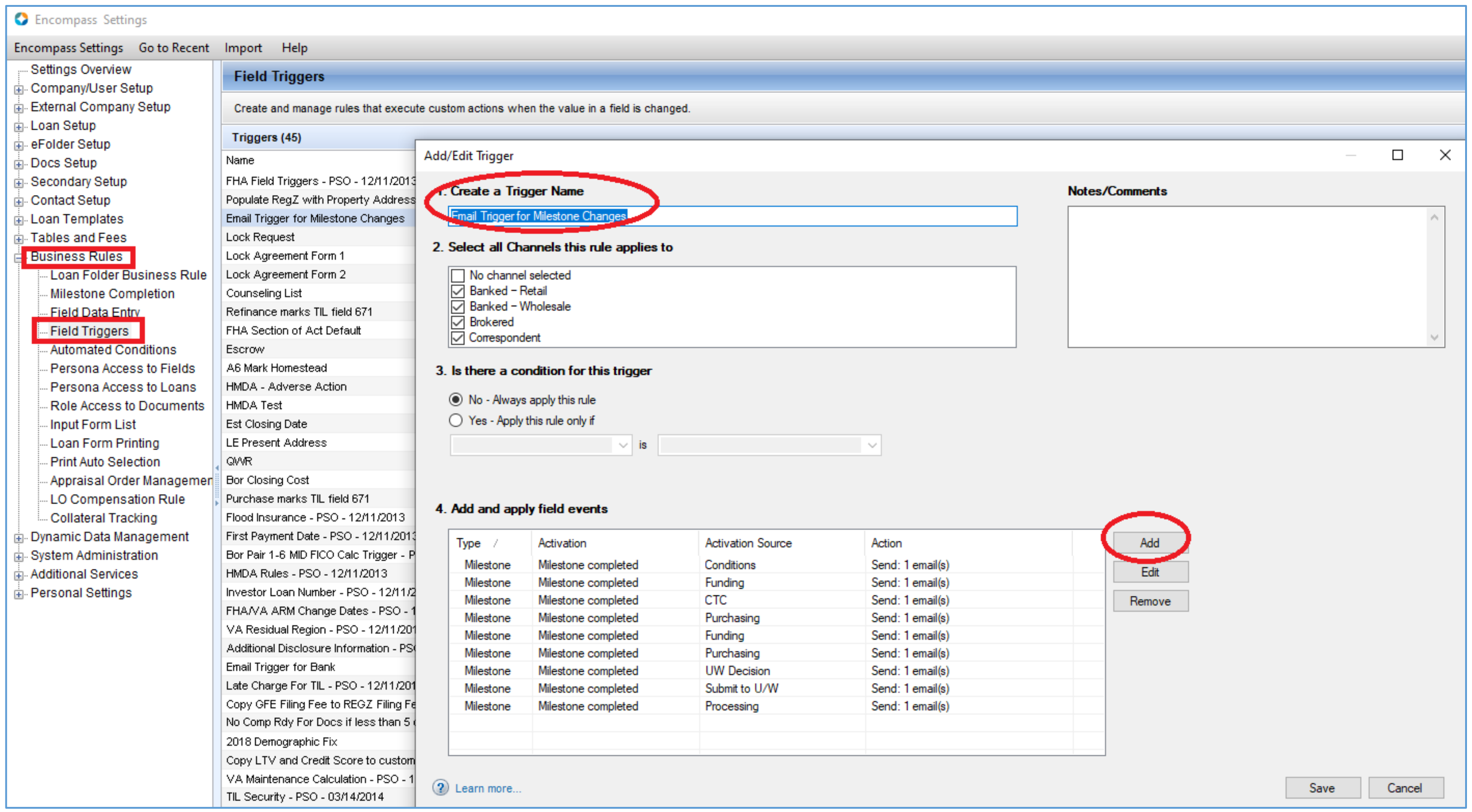
This is a typical biz rule we use here for milestone completion, but there are other uses.

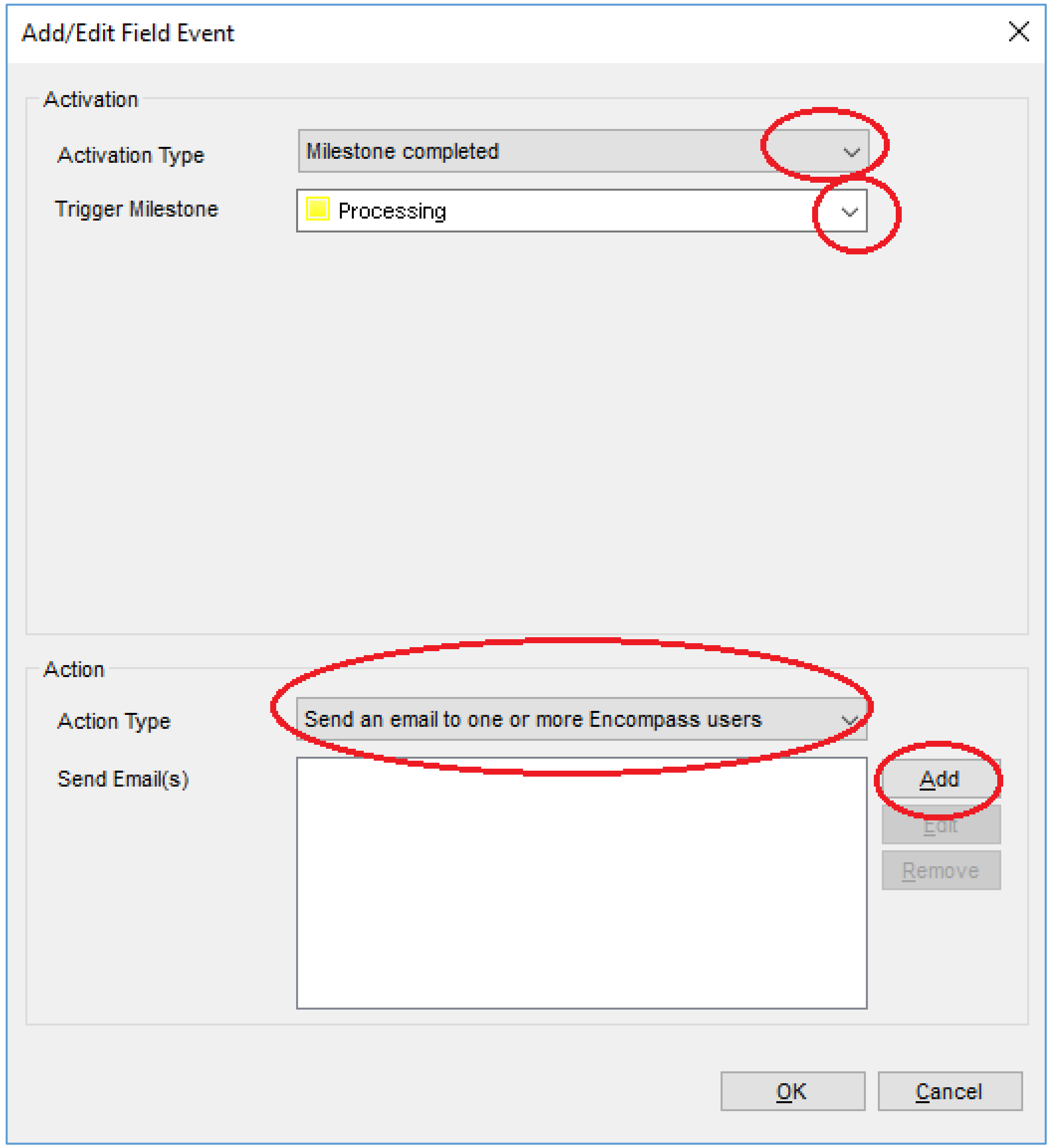
1. Go to Encompass Settings
2. Go to Business Rules
3. Go to Field Triggers
4. Click on the “New” icon



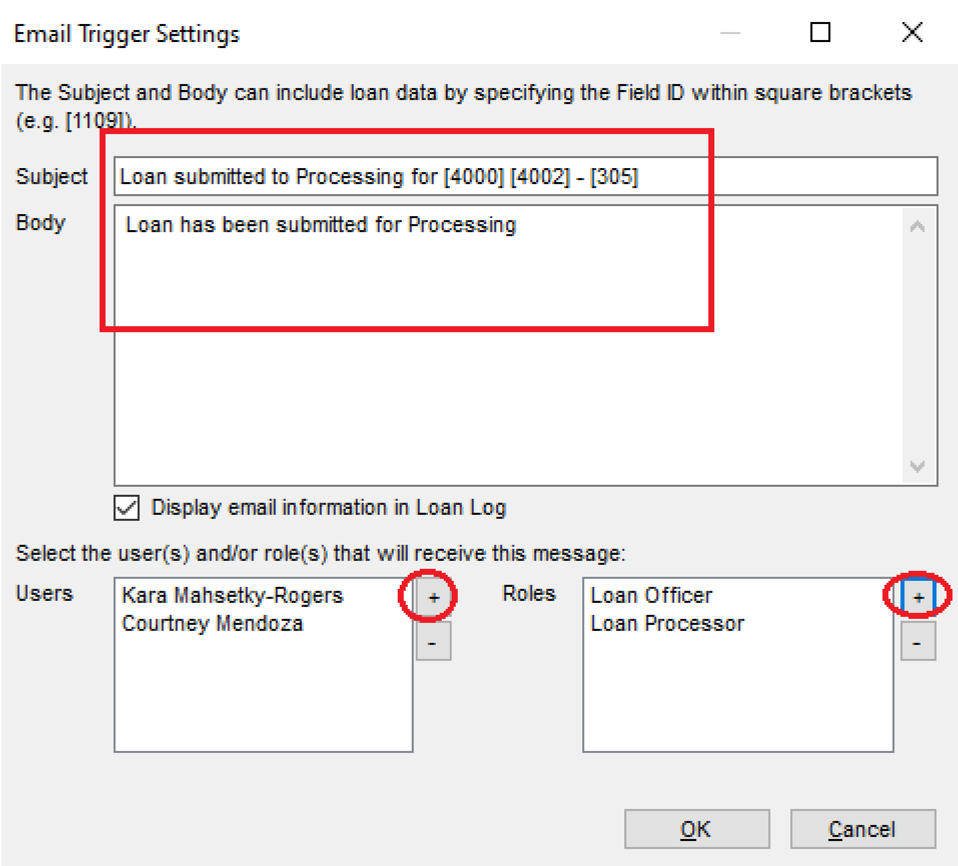
5. Add the name of the rule and decide if you want to exempt any “channels.” (probably not)
6. Click “add”



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



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.



Here are some examples of how we use this rule.

Mon 4/6/2020 2:29 PM

Kim Bly

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This loan 141 has been marked Application withdrawn as of 4/6/2020 12:00:00 AM in Encompass

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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.