Email-It

Overview:

Email-it automatically sends emails to a group of email address, in one or more loan files, when a triggered Event is reached. In the quick send mode it will send emails to selected email addresses for manually selected loan files. As each Event is completed a new Conversation Log will be added in the loan file with up to three Alerts.

Email-it allows the user to create unlimited email templates with merged Encompass fields in both the subject and body of the emails. All the available email address in the loan file can be used including custom email fields created in the custom or bankers versions of Encompass. Unlimited Events with triggers can be setup. In an Event each recipient can be setup to use the default template or a unique template.

Email-it will maintain a list of logs showing the time, day and date an email has been sent. It will also display a list of the setting used, email addresses and status. This log list can be accessed anytime using the "view all logs" button on the bottom of the main window. The log can be printed using the print button or deleted at any time using the "delete" button on the log window.

The recipient list is a list of all the possible email addresses available in a loan file. Each recipient is made up of the recipient name and Encompass field id. Even custom email fields can be added to this list.

Email templates are comprised of the email subject line and the body of the email with merged Encompass fields. If an exchange server is used the body of the email can use all the available HTML formatting. And all outgoing mail will be saved in each of the "Sent Items" boxes.

Events are comprised of three windows "Index searches", "Advanced searches" and "Email From/To". The Index searches window is where the loans folders and current milestone can be selected. The Advanced searches window is used to set triggered Events. Triggered Events are made up of Encompass fields and formulas. An example would be a loan amount in the range great than or equal to $10,000.00 and less than 1 million dollars. It would be entered as "[#2] >= 10000 and [#2] < 1000000)". Formulas can use all the standard fields, milestones and document tracking fields. A Query Builder can be used to create most search queries. Formulas can also use IsDate (checks to make sure the date format is correct and is equal to the current date), DateDiff (days between dates), Today (current date) and AND/OR statements and more... The email from/to window allows the user to enter an email address that the email is coming from, select which recipients to send emails too and which template too use for each recipient.

The Automation window allows the user to select which Event or Events to send and how often to run the process. The timer can be set to run once a day or every few hours or minutes.

The Quick Send window allows the user to search for loan files by loan number, first name or last name. Once the list is displayed the user can select which recipient or recipients to send the emails too and which Event or Events to send. The user has the option to review the Events before selecting them.

Once the Events have been processed a new General Log Event and save the current date. If the user tries to send an Event and there is a date in General Log already, then the emails for that Event will not be sent again. Also, up to 3 Alerts can be set for each General Log entry. Each Alert will be set for the Persona selected in the set up window and set the date to follow-up.

Requirements:
Email-it requires Professional, Custom or Bankers edition. Email-it requires the use of the SDK license and is limited to the number of users restricted by the SDK license. If you need more users please contact your Ellie Mae sales representative.

Email-It

Installation:

Emailitinstall.exe –

[ ] save to a temp folder and run this install on the server or on each workstation that will be using the interface. The install will create a \dmcc\email-it folder.

Createconfigfile.exe –

[ ] save and run this file from the \dmcc\email-it folder.

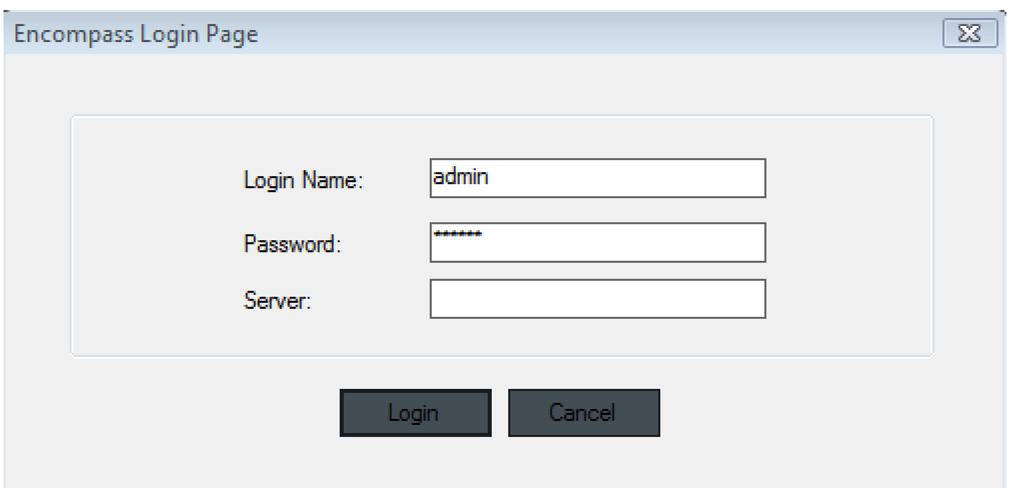
Setup:

Email-it will add an icon to the desktop.

[ ] click on the email-it icon and open the program.

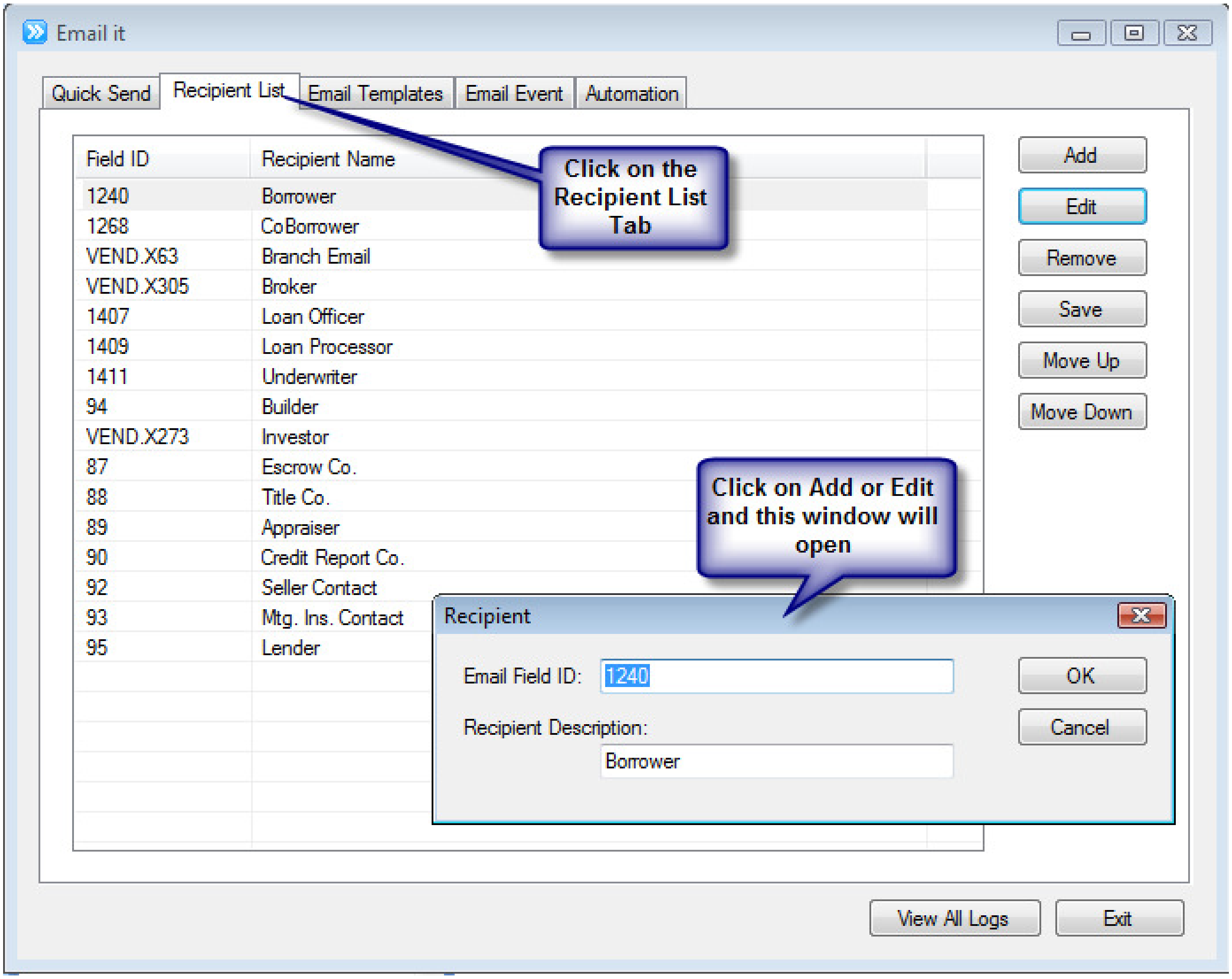
[ ] click on the Encompass login tab and enter the same login information you enter when you open Encompass. We suggest you use an admin login so you have access to all files.

[ ] enter the login name
[ ] enter the password
[ ] enter the server name if you are on a workstation or leave it blank if this is a standalone version of Encompass.



Email-It

[ ] click on the Recipient List tab



- [ ] if you would like to add to the list click on the "add" button
  - [ ] enter the Encompass field id
  - [ ] enter the description
  - [ ] click on the "ok" or "cancel" button
- [ ] to edit an existing recipient
  - [ ] highlight the recipient
  - [ ] click on the "edit" button
  - [ ] make the changes
  - [ ] click on the "ok" or "cancel" button
- [ ] to remove a recipient
  - [ ] highlight the recipient
  - [ ] click on the "remove" button
- [ ] click on the "save" button

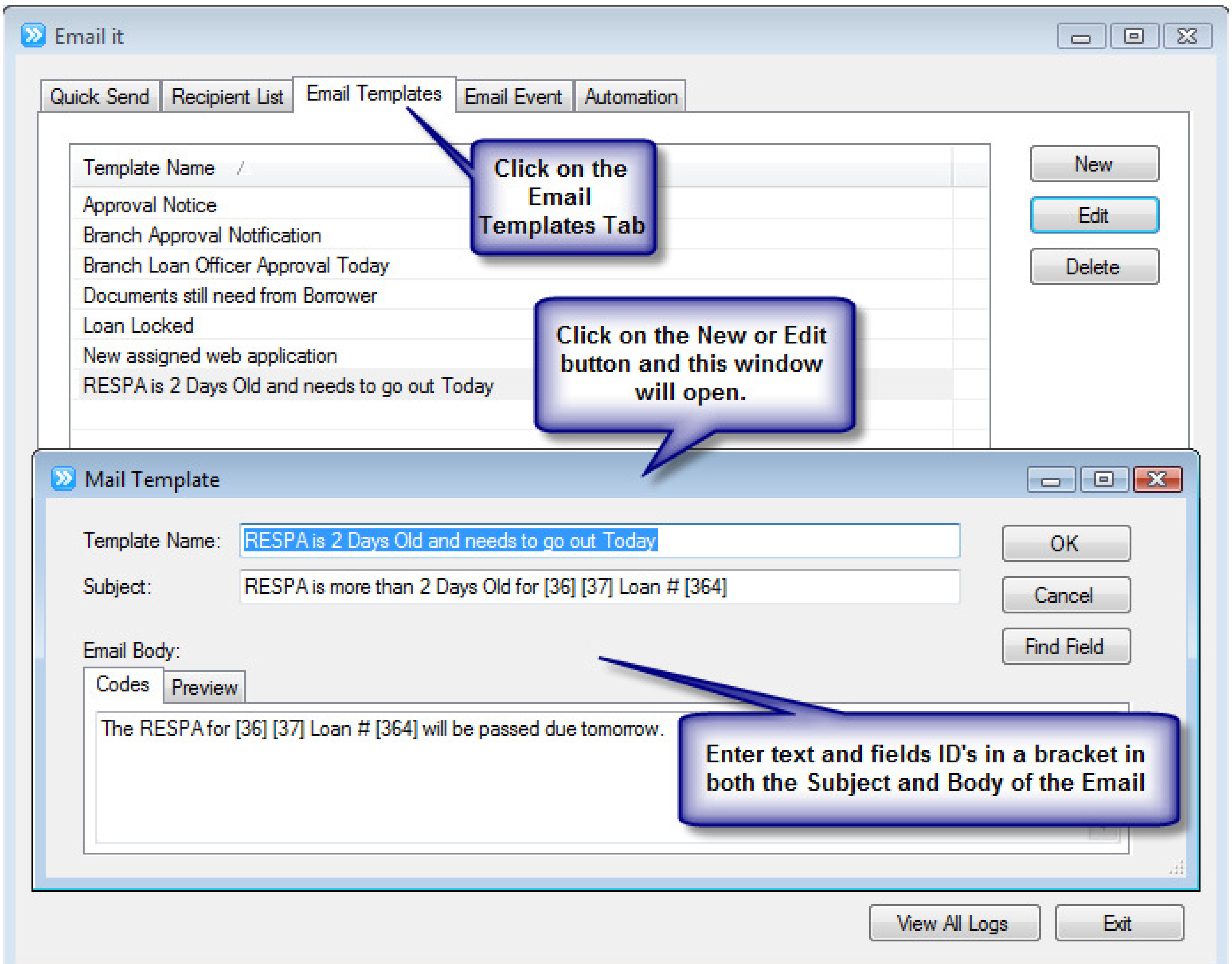
Email-It

[ ] click on the "Email Template" tab

- [ ] click on the "new" button
- [ ] enter a template name
- [ ] enter the subject line

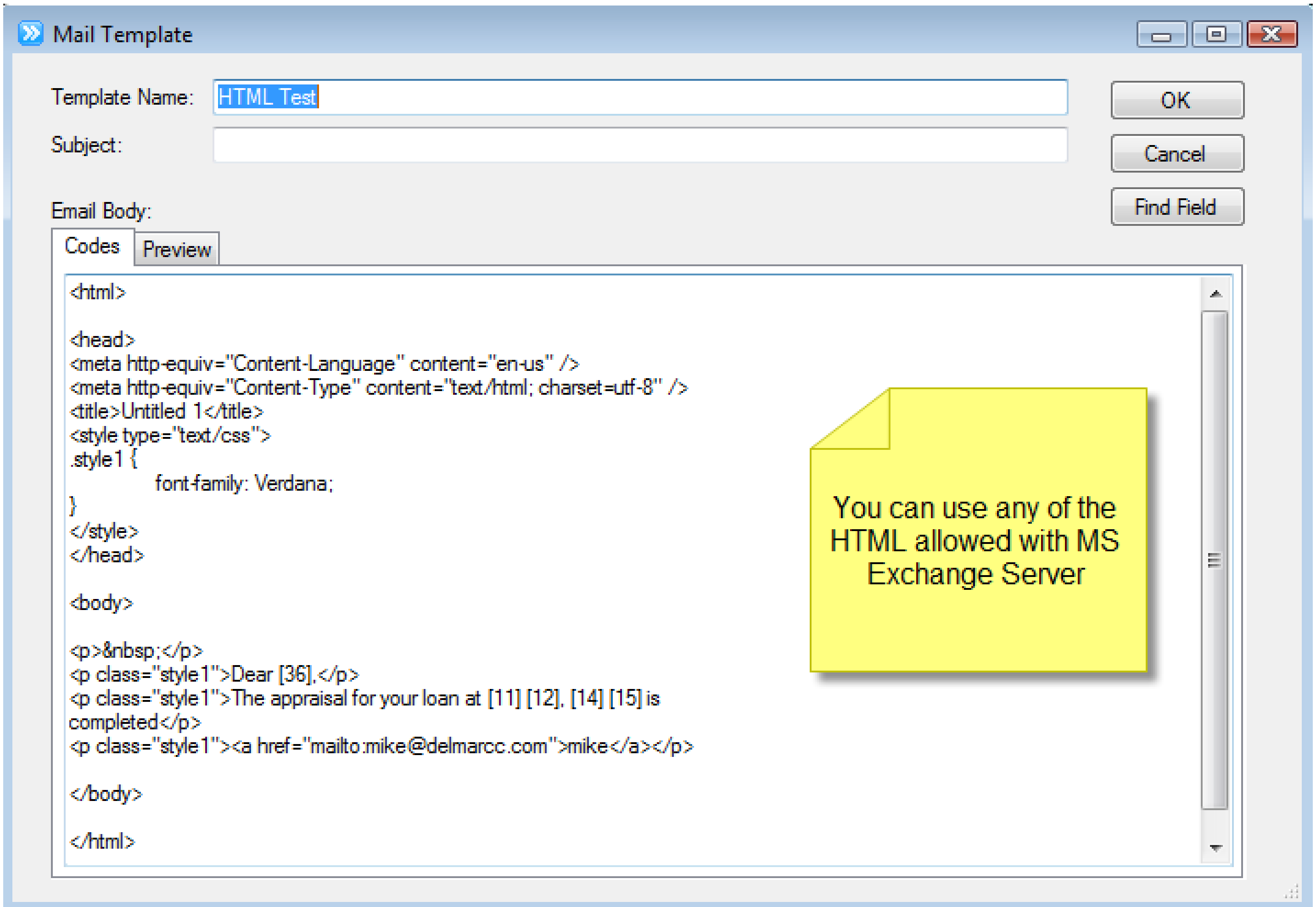
  to add merged field from Encompass just enter the field id inside brackets ("[" 36 "]").
  merged fields can be added to the subject and body on the email. If you as using an exchange server then you can use all the HTML formatting features that are available. If you are not using an exchange server then format will be plain text and merged fields only.

- [ ] click on the codes tab
- [ ] enter the body of the email including the merged Encompass field id's.
- [ ] click on the "preview" tab to see the formatted email.
- [ ] click on the "ok' or "cancel" button



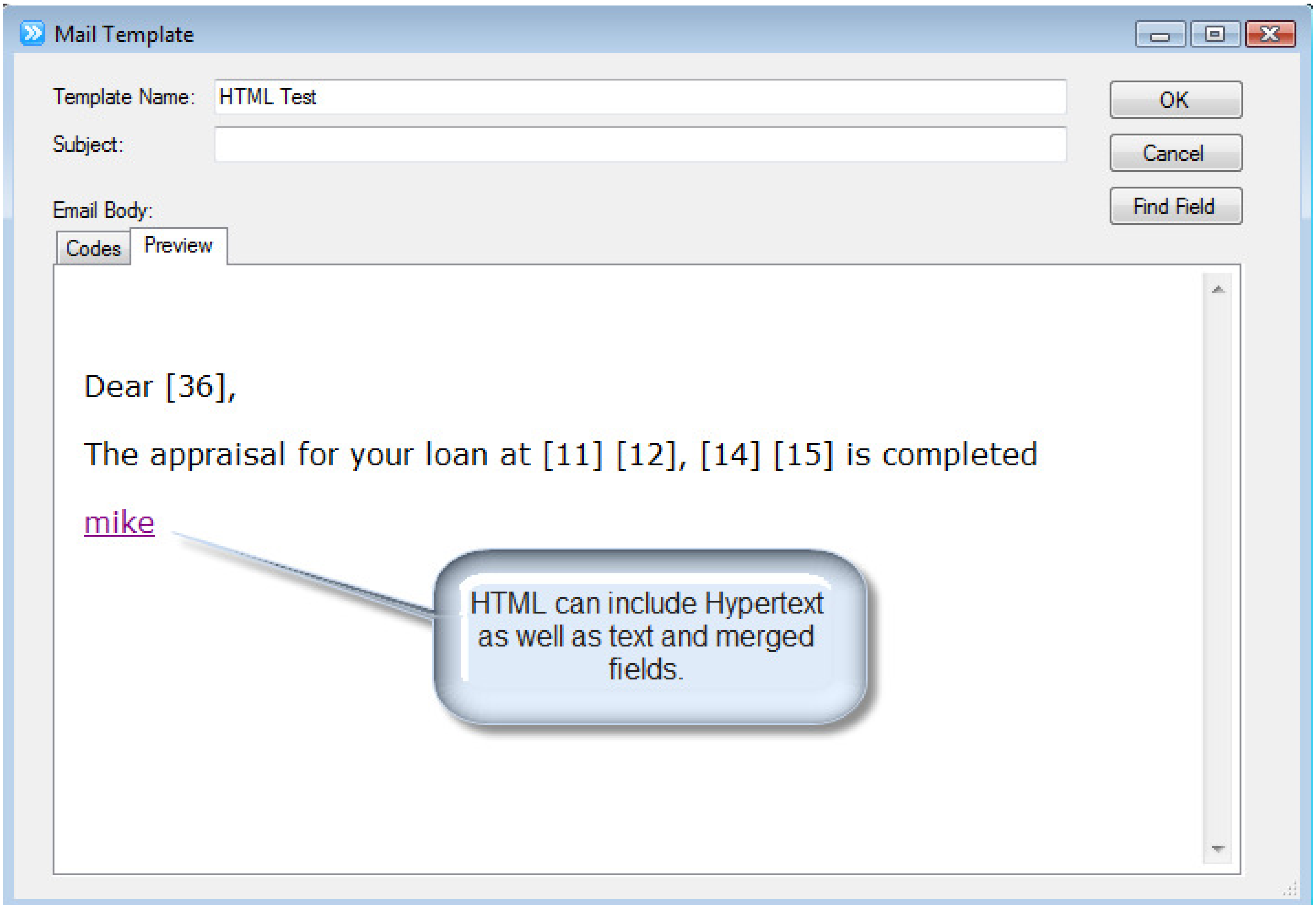
Email-It

If you as using an exchange server then you can use all the HTML formatting features that are available.



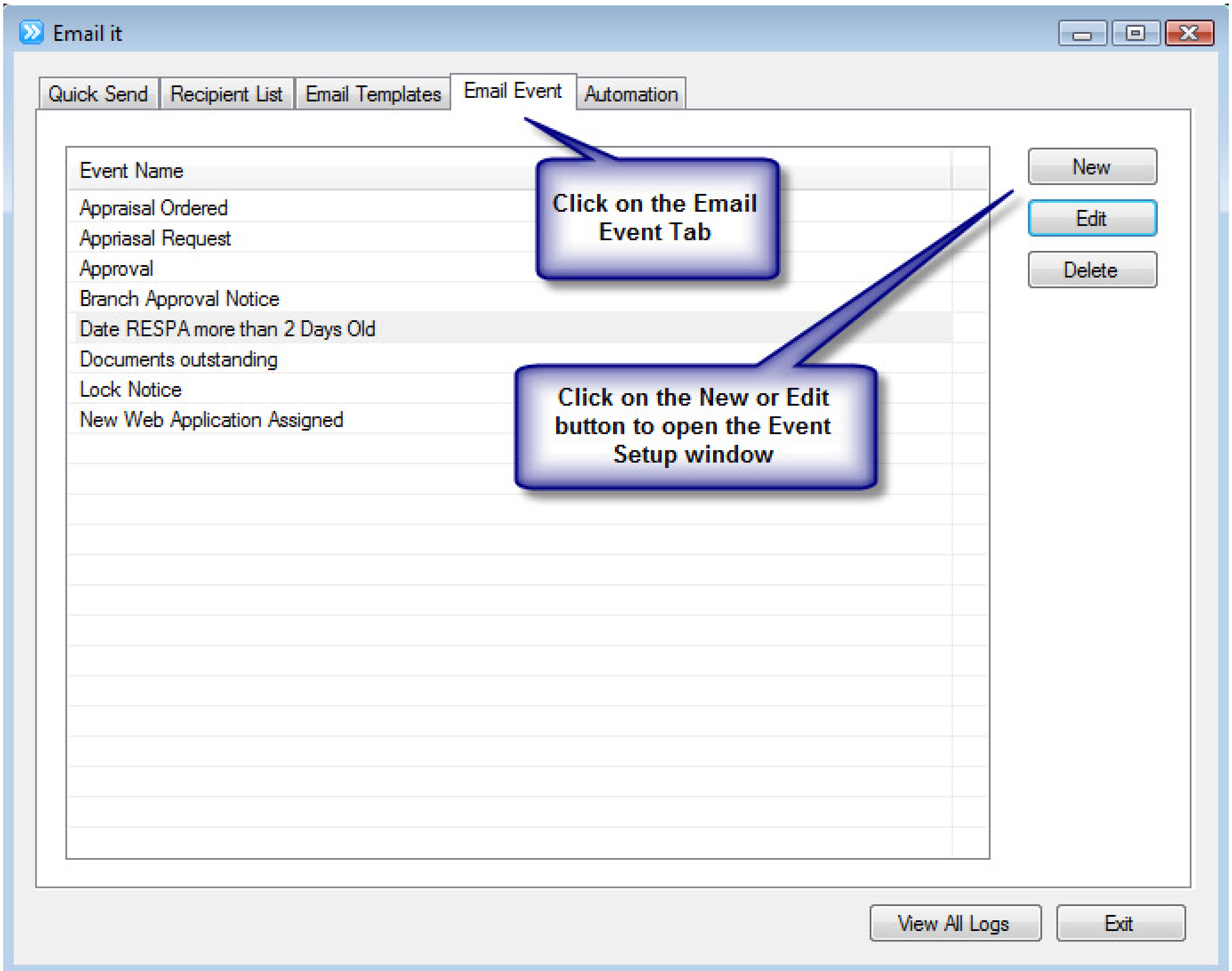
Email-It

Click on the Preview to display a sample of the converted HTML.



[ ] click on the “Email Event” tab

Email-It


Email it
Quick Send
Recipient List
Email Templates
Email Event
Automation
Event Name
Appraisal Ordered
Appriasal Request
Approval
Branch Approval Notice
Date RESPA more than 2 Days Old
Documents outstanding
Lock Notice
New Web Application Assigned
New
Edit
Delete
Click on the Email Event Tab
Click on the New or Edit button to open the Event Setup window
View All Logs
Exit

Email-It

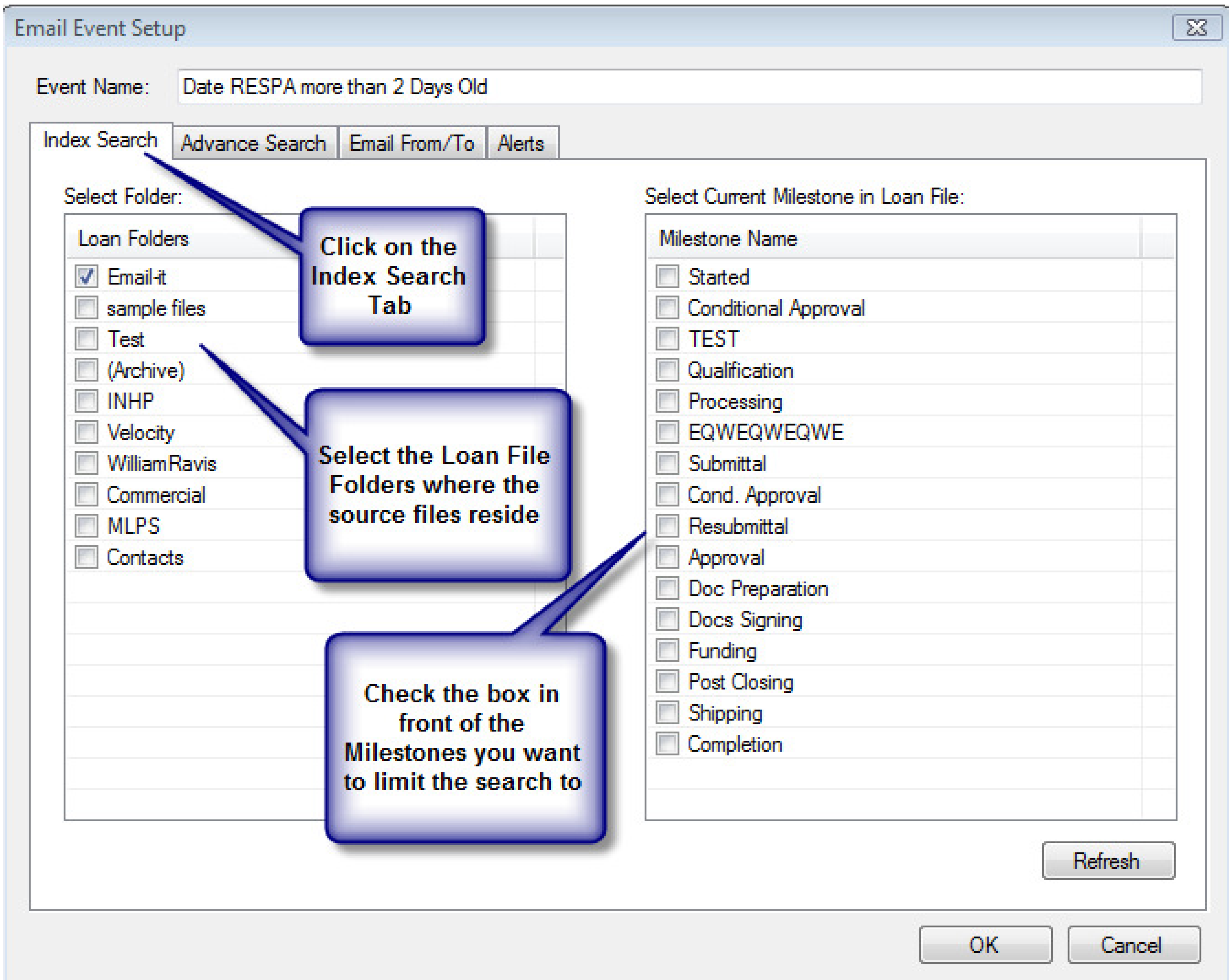
[ ] click on the "new" button

[ ] enter an Event name

[ ] On the Index Search window click on the "refresh" button to update the Encompass folder list

[ ] select the folders that contain the loan files that your want to send emails too

[ ] if you want to limit the emails too one milestone then enter the milestone name.



Email-It

[ ] click on the "advance search" tab

[ ] click on the "add" button

[ ] enter the query string. Samples are listed on the bottom of the window. To see more samples click on "more information" highlighted in blue.

[ ] click on the "validation" button to check the code

[ ] click on the "ok" or "cancel" button

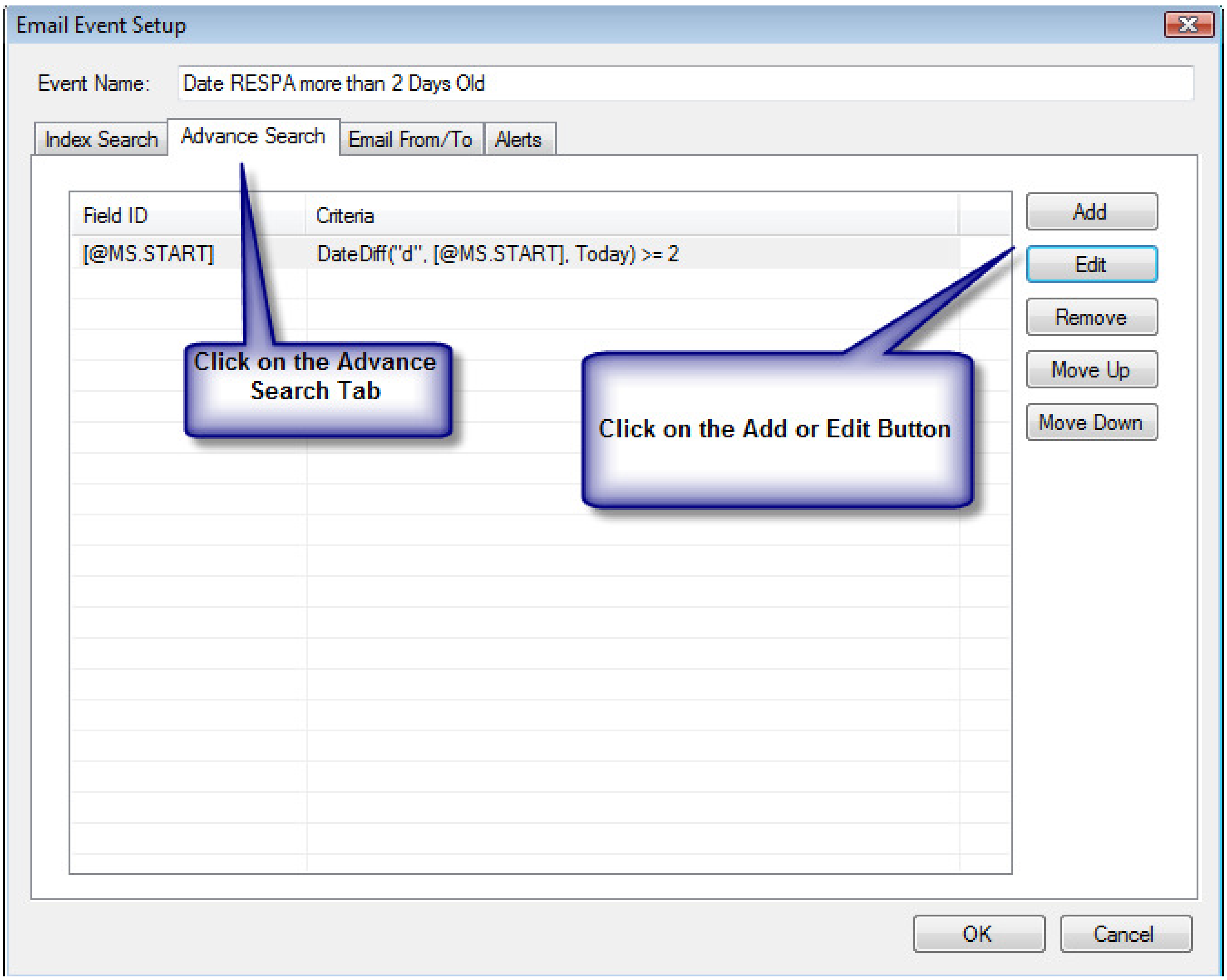
[ ] to edit an existing search

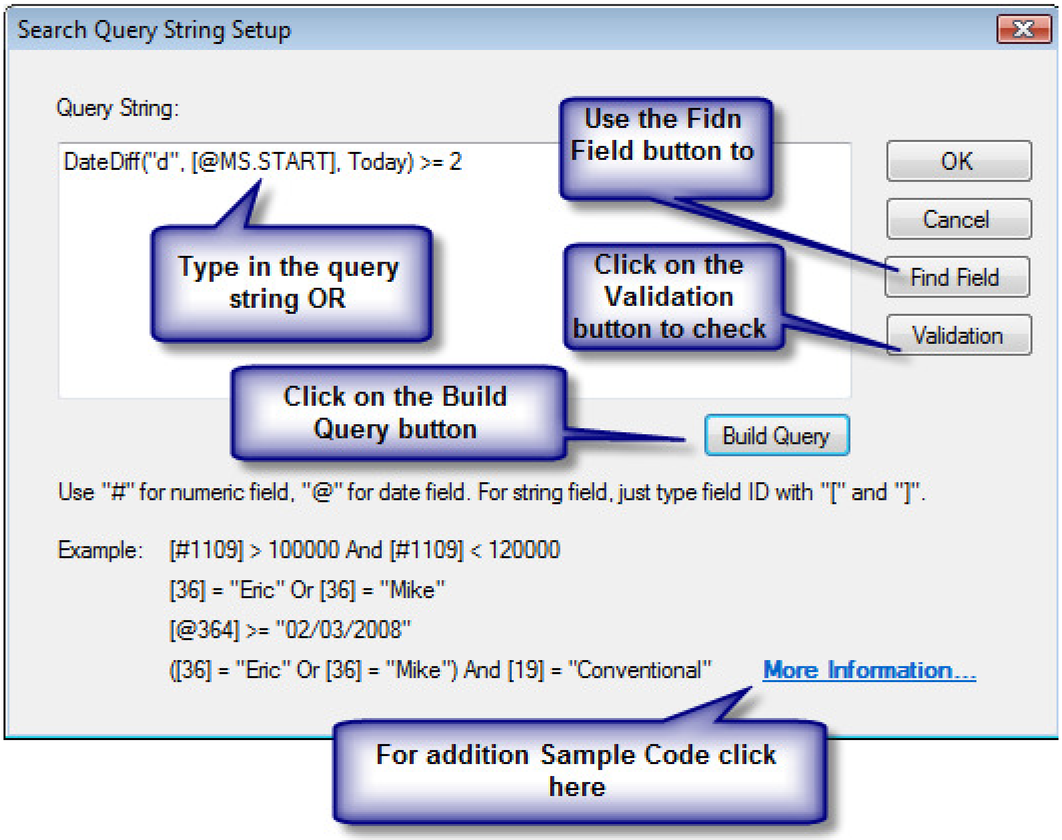
[ ] highlight the search line

[ ] click on the "edit" button

[ ] make the changes

[ ] click on the "ok" or "cancel" button

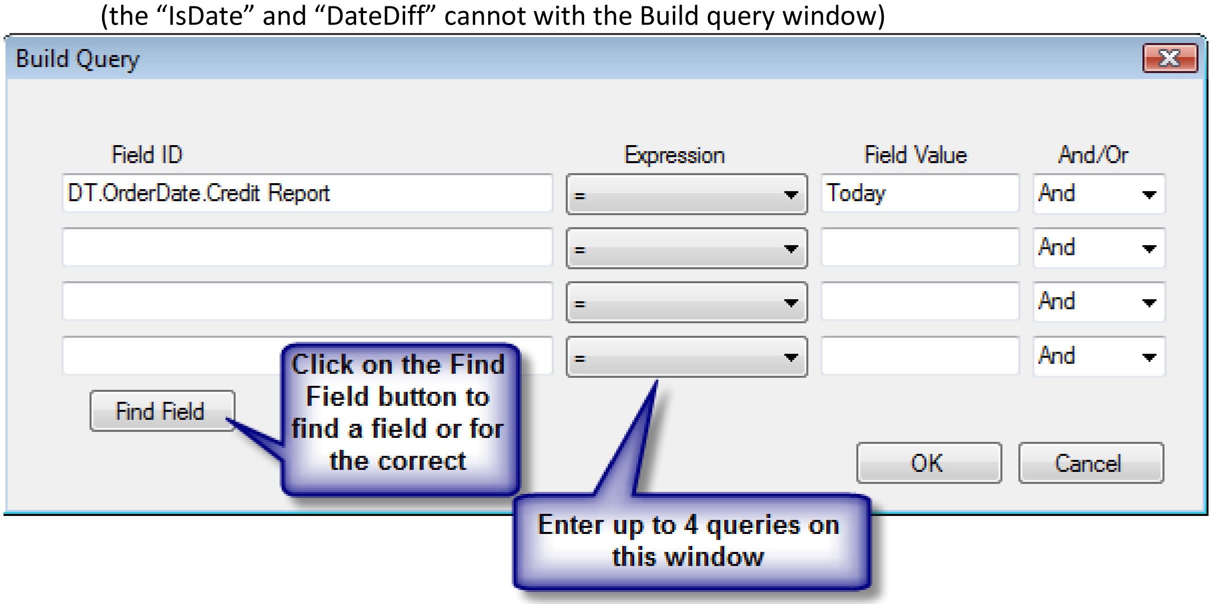




[ ] Click on the Build Query button

[ ] Enter up to 4 queries on the window. If you need to add more queries then add them manually to the Search Query String setup window.

(the “IsDate” and “DateDiff” cannot with the Build query window)



[ ] to remove a line of search

[ ] highlight the search line

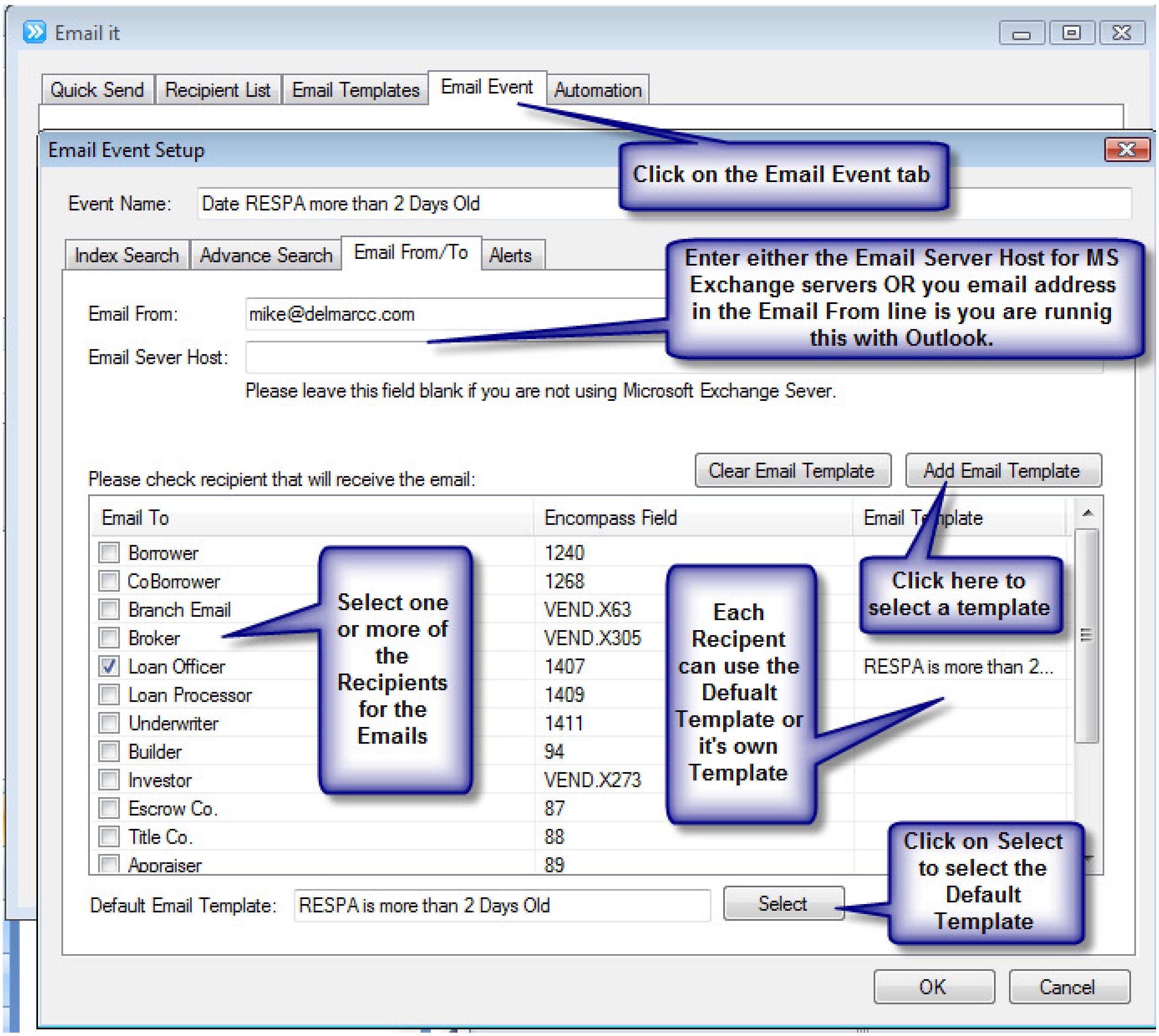
[ ] click on the “remove” button

[ ] to move a search line in the list click on either the “move up” or move down” button

Email-It

[ ] click on the "Email From/To" tab

- [ ] enter your Email Address in the Email From line
- [ ] If you are using an Exchange Server the enter the Email Server Host
- [ ] In the Email To column select the names to send Emails too
- [ ] Click on the Select button on the Default Email Template line and select the Template to use if you do not select a specific template for a user name.
- [ ] If you want to use a specific template rather than the default then highlight one of the Names and then click on the "Add Email Template" button
- [ ] Select a template to use for the selected name. Repeat the last 2 steps for each Name you would like to send an Email to.

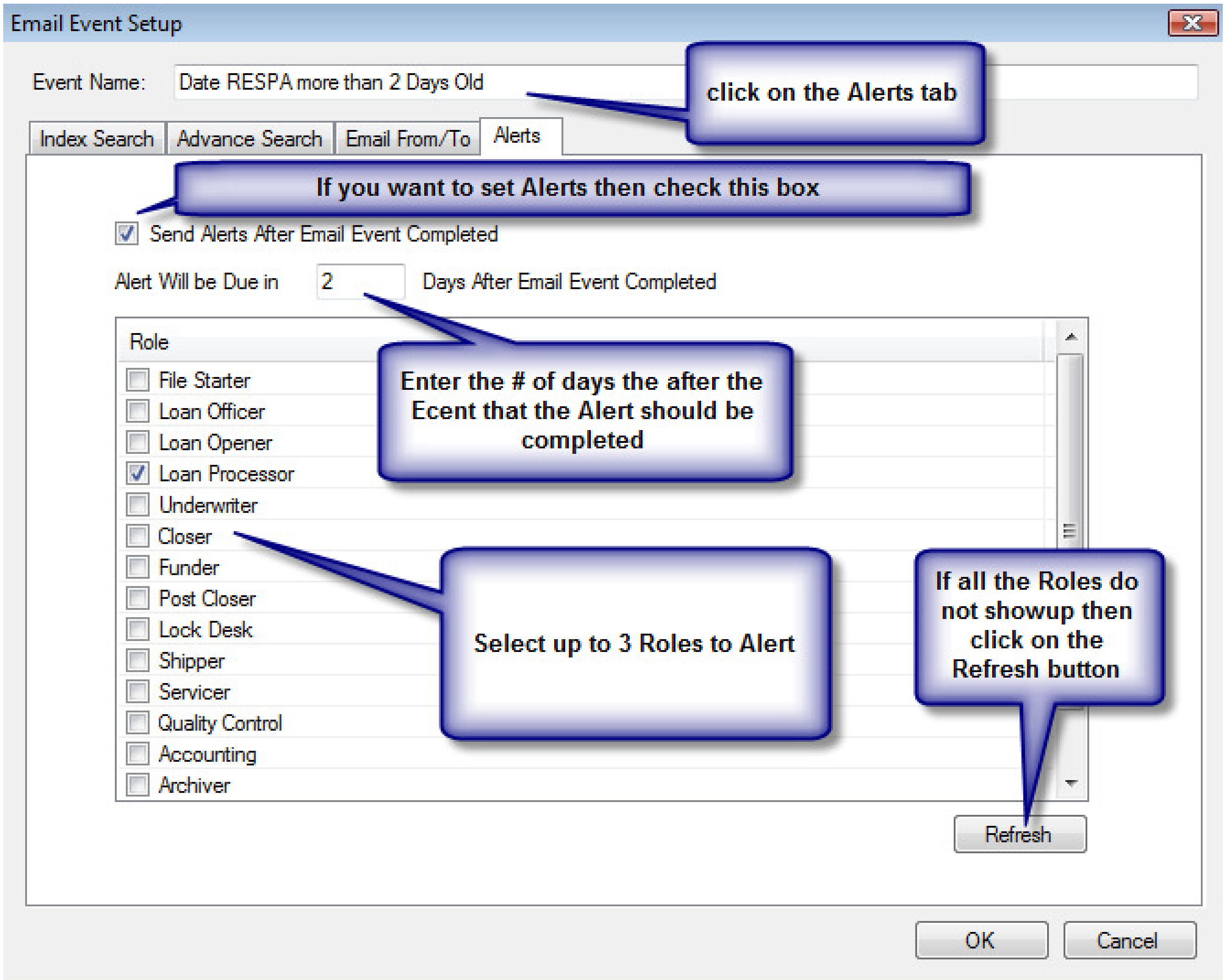


Email-It

[ ] click on the "Alerts" tab

[ ]

[ ] click on the "ok" or "cancel" button



Email-It

Daily operation:

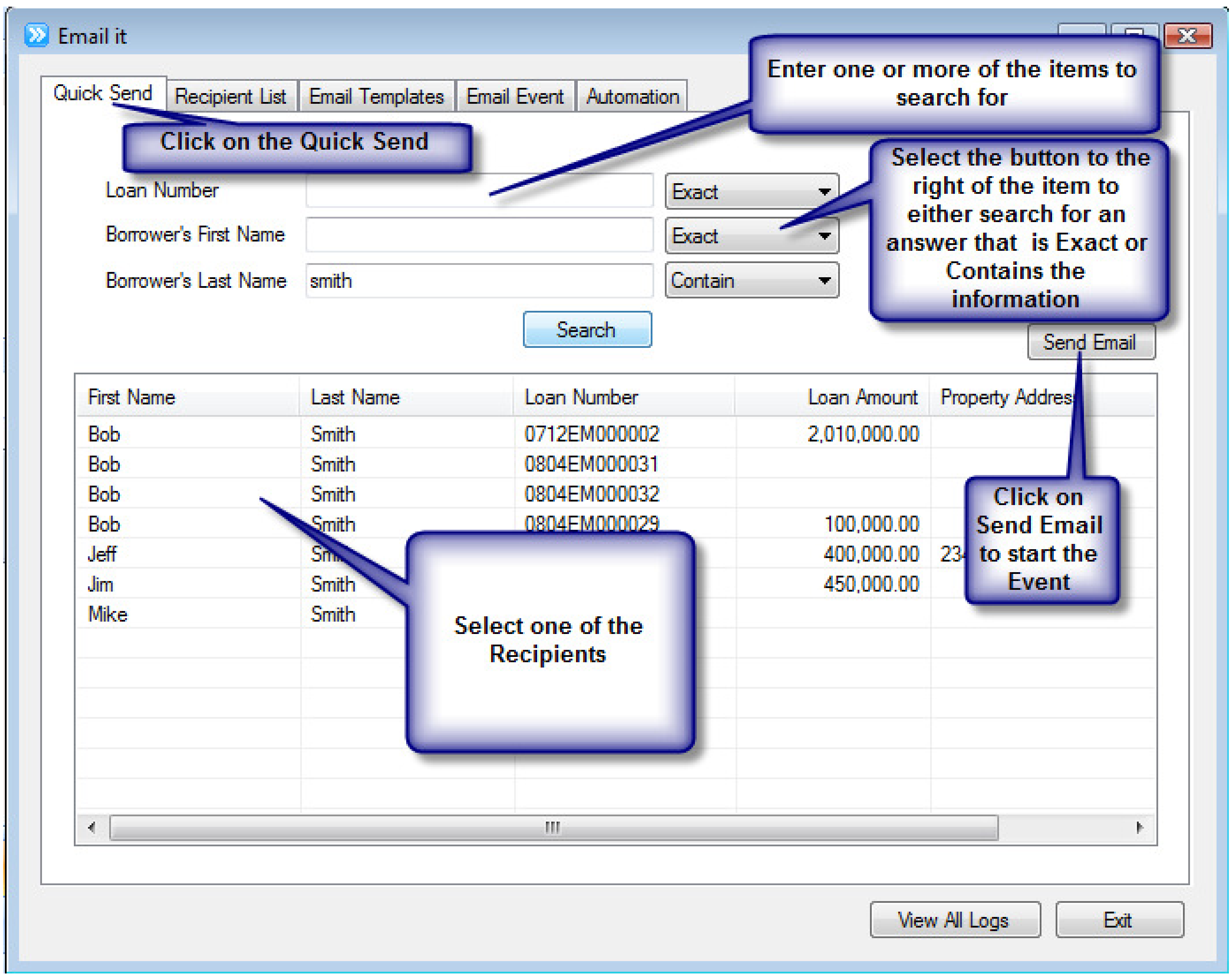
[ ] click on the email-it icon to open the program.

Note: The program can be use to send Email using Events to one recipient or using the automation it will use one or more Event to send emails to one or more recipients using triggers. If you use the Quick Send the Trigger are NOT used.

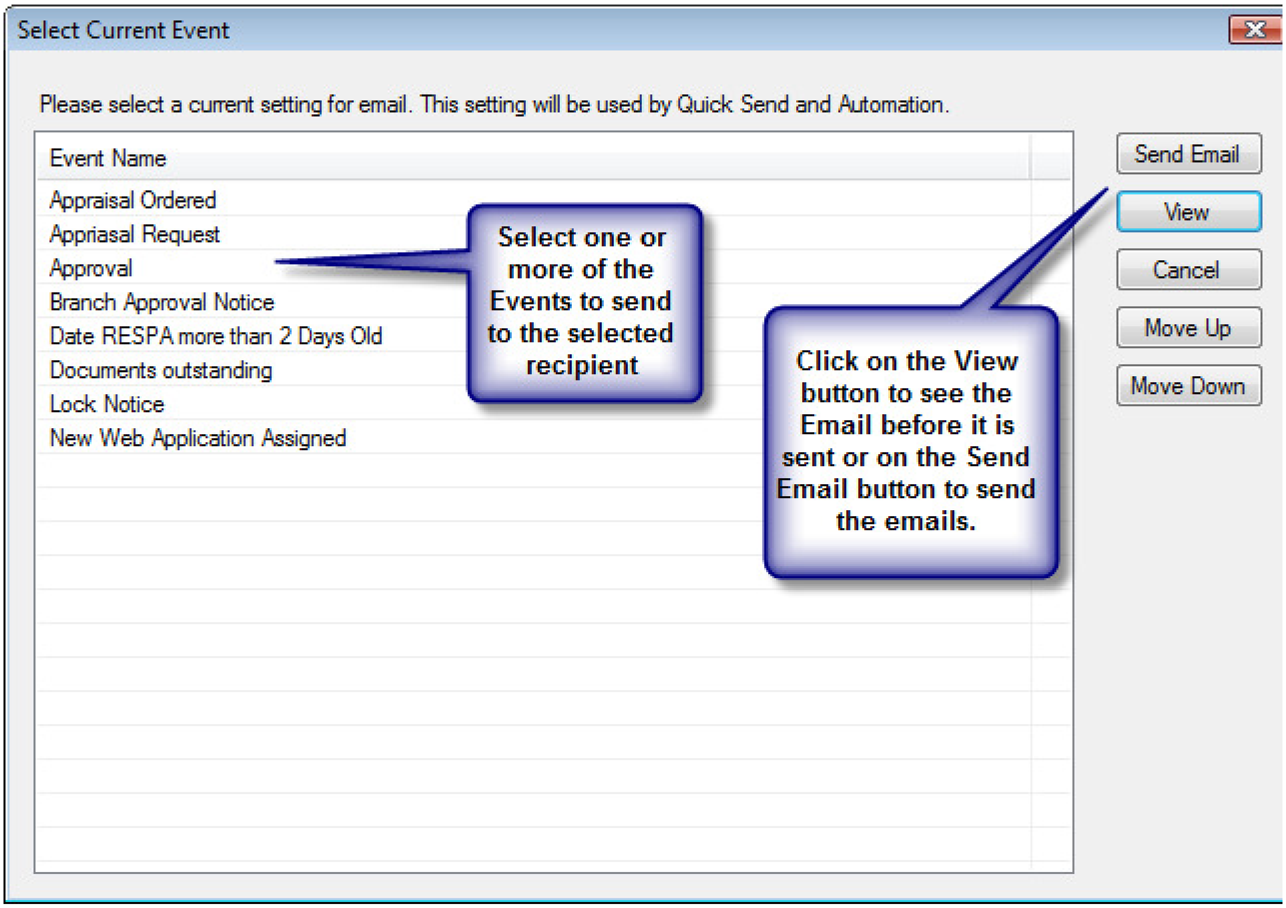
Send emails Events for a single loan file

[ ] click on the "quick send" tab.

- [ ] enter the loan number, borrower first name or last name.
- [ ] click on the "search" button.
- [ ] when the list of matching loan files is displayed click on the record that you would like to send the Emails too.
- [ ] click on the "send email" button.



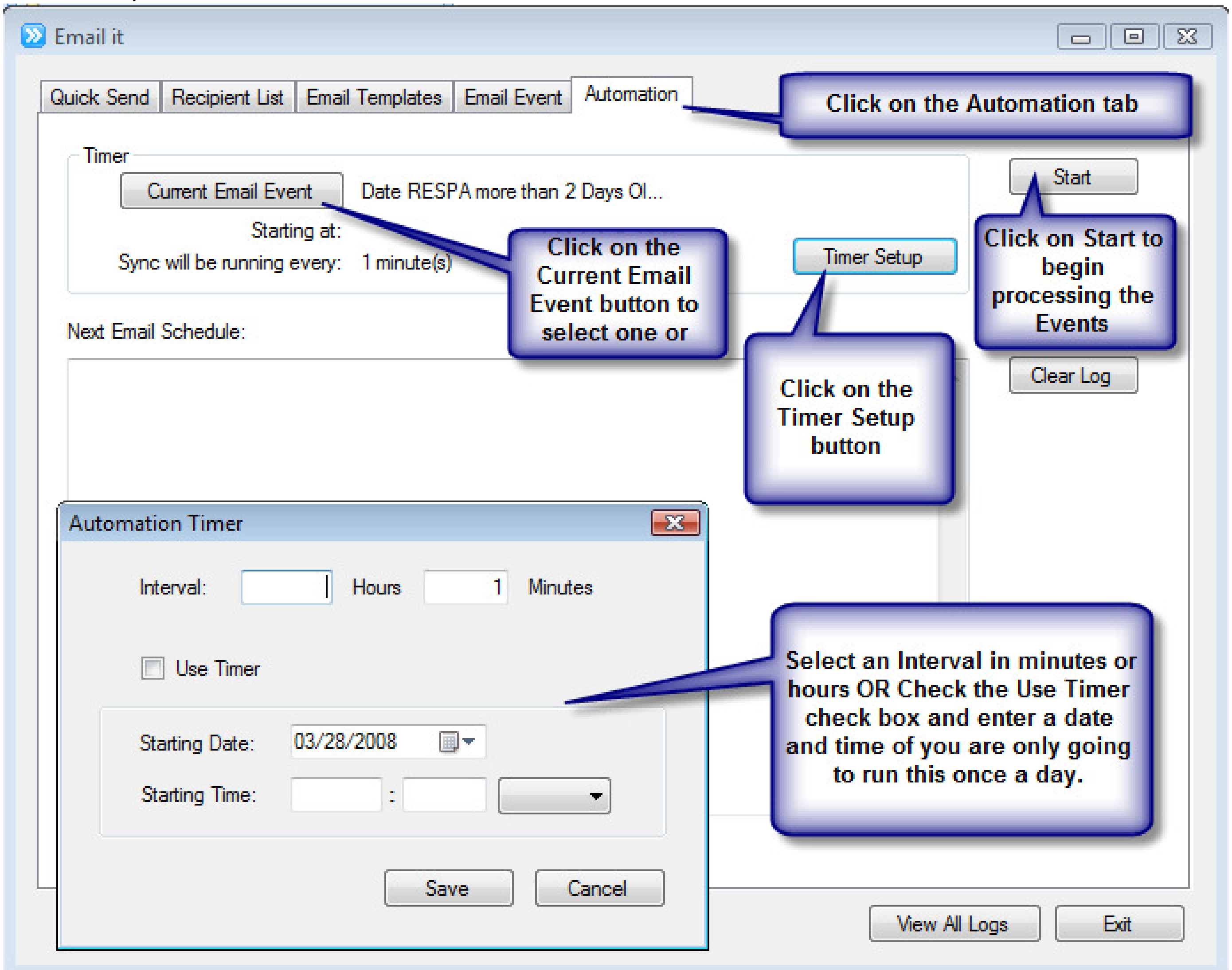
You can select one or more Event to send to the selected Recipient



Automatically, using a timer, send a batch of emails for one or more loan files using triggered Events.

[ ] set current email setting (the selected setting will be displayed to the right of the “current email settings” button.
[ ] click on the “current email settings” button
[ ] click on one of the “setting names”
[ ] click on the “view” button to review the settings
[ ] click on the “select” button to select the highlighted setting
[ ] click on the “timer setup” button
[ ] either enter the interval time or use the timer
[ ] interval
[ ] enter the hours and minutes between batch processing
[ ] click on the use timer checkbox
[ ] enter the starting date
[ ] enter the starting time
[ ] click on the “save” or “cancel” button
[ ] to start the batch processing click on the “start button
[ ] to stop the batch processing click on the “stop” button
[ ] to clear the log of the last process click on the “clear log” button. Each log will be saved until

manually deleted.



[ ] logs

[ ] to view the logs click on the “view all logs” button

[ ] to delete all the logs click on the “delete” button

[ ] click on the “close” button

[ ] Document Tracking

[ ] Open an Encompass Loan file and go to the Document Tacking list. A new Document for each processed Event will show up on the list and the Ordered date will be the date the Event was processed by Email-It.