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Custom Actions Plugin

Purpose

The Custom Actions plugin allows you to write business rules around the loan opening, saving, and closing (although there is not much you can do around closing except display a message).

Activation

1. Login to Encompass as a Super Admin
2. Open PowerTools by clicking the Encompass menu and then click "LTK PowerTools..."
3. Click the "Settings" button on the top right corner.
4. Click on the "Power Tools Expert" tab (Requires you to have at least an Expert level contract with Lender Toolkit).
5. Click the "ON" button for "Custom Actions".
6. Click the OK button on the popup requesting permission to install the tool.
7. Click the OK button on the popup saying it was successfully installed.
8. Exit out of all the Power Tools Windows and Restart Encompass.

Instructions for Use

Three new fields have now been added to your Encompass system. They are:

1. CX.LOAN.SAVE
2. CX.LOAN.OPEN
3. CX.LOAN.CLOSE

You can use any three of these fields in a business rule trigger to do what you want when the loan is opened, right before the loan gets saved, or when the loan closes.

For example, lets save every time that someone pushes the loan save button, I want to change the first name of the borrower to "Mark". I would add a business rule and use "CX.LOAN.SAVE" as the field trigger. It would look something like this:

Add/Edit Field Event

Activation

Activation Type: Field value modified

Trigger Field ID: CX.LOAN.SAVE Find

Description: Loan Save Event

Criterion: When field is set to a specific value

Value: X

Action

Action Type: Update the value of one or more fields

Field ID	Value
4000	Mark

Add Edit Remove

OK Cancel

You must choose CX.LOAN.SAVE as the trigger field and say every time it equals "X". Now everytime the loan got saved the borrower's first name would be changed to "Mark". It's also important to note that this is a BEFORE SAVE event so that change you make will get saved with the loan.

You may also use CX.LOAN.OPEN the same way except this time the event happens when the user opens the loan.

You may also use CX.LOAN.CLOSE the same way, but it's important to note, you changes will not be saved with the loan if you use this one because the loan will have already saved. You

can fire an alert box to the user on loan close, however, if you'd like to notify them of something on loan close.

This product installs the following to encompass:

Plugins

CustomActionsPlugin.dll.dll v:1.1.1.3

Custom Fields

CX.LOAN.SAVE Loan Save Event

CX.LOAN.CLOSE Loan Closing Event

CX.LOAN.OPEN Loan Open Event