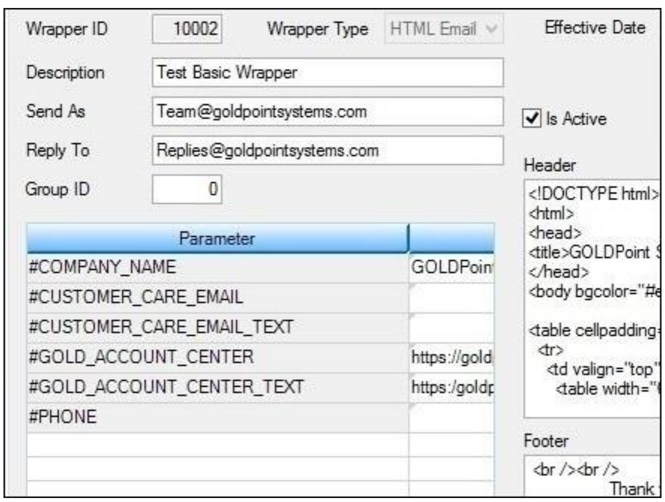
Notification System

Creating Automatic Emails

Step 1. Set Up a Wrapper

1. Open CIM GOLD.
2. Navigate to the Summary tab on the Notification System > [Wrappers screen](). **Note:** Wrappers display your institution's logos, advertising, select wording, etc. in the headers and footers of the email notifications.
3. Click <Create New> to load a blank template onto the Detail tab.
4. Enter the information for the new wrapper template into the fields on the Detail tab.

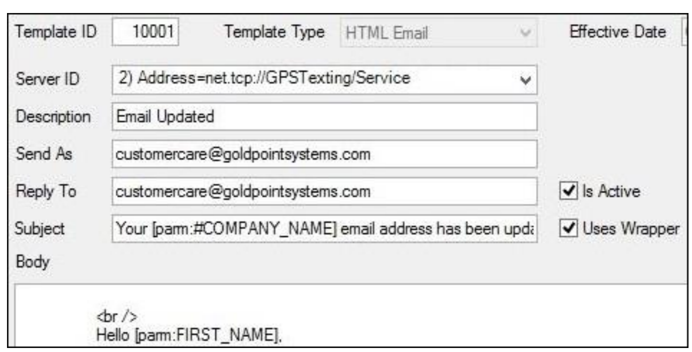


5. Click <Test> to render a test wrapper to ensure the header and footer of the wrapper have been set up correctly (see the following example).
6. After you have checked to make sure everything is set up how you want, click <Save Changes> to activate and save the wrapper.

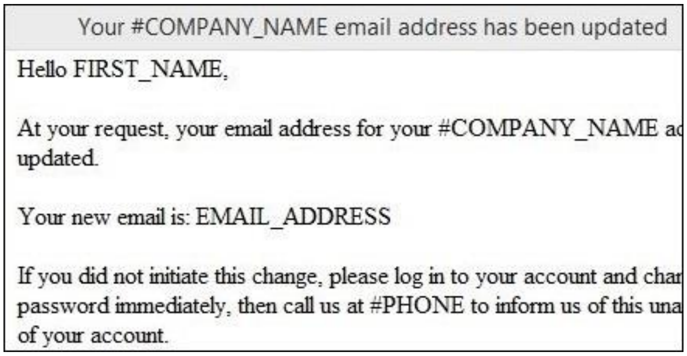
For more detailed information and screenshots, see the [Create New Wrapper]() section in DocsOnWeb.

Step 2. Create an Email Template

1. Open CIM GOLD.
2. Navigate to the Summary or Detail tab on the Notification System > [Templates screen]().
3. Click <Create New> to load a blank template onto the Detail tab.
4. Enter the information for the new email notification template into the fields on the Detail tab.



5. Click <Test> to render a test email notification to ensure the body, subject, etc. of the email have been set up correctly.



6. After you have checked to make sure everything is set up correctly, click <Save Changes> to activate and save the new template.

For more detailed information and screenshots, see the Create New Templates section in DocsOnWeb.

Step 3. Set up a Trigger

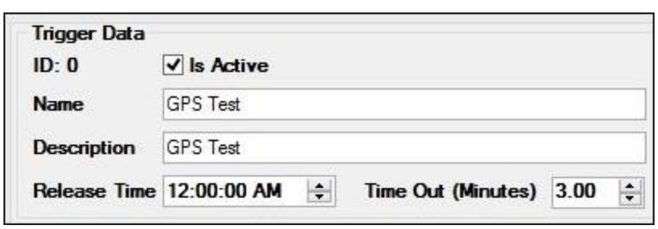
1. Open CIM GOLD.

2. Navigate to the Manage tab on the Notification System > Triggers screen.

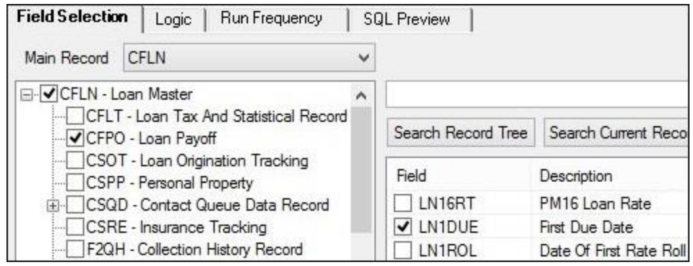
   Note: Triggers allow you to automatically send emails at scheduled times to a list of accounts. For example, you could set up a trigger to send an email to borrowers at 9:00 AM their time every time a payment is five days late.

3. Click <New> on the Manage tab to bring up the Trigger Definition Builder dialog.

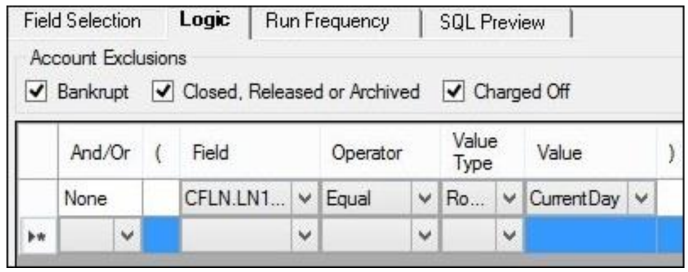
4. Enter information for the new trigger, including the name, description, type, template, etc., in the required fields.



5. Next, select the Field Selection tab and select the fields, account types, etc. to be used by the new trigger.



6. Now, select the Logic tab and enter the logic you would like to use for the new trigger. For example, you could use the logic to tell the system to send a notification to anyone who is over 30 days late making a payment.



7. Preview the notification on the Logic tab to ensure that you have selected the correct template and wrapper.

8. Next, select the Run Frequency tab and schedule when you want notifications sent for the new trigger (daily, weekly, at monthend, etc.).

9. Then select the SQL Preview tab to view the SQL (Structured Query Language) that you have set up for the trigger. Make sure everything is set up correctly.

10. Once you have entered in all the data for the new trigger and have verified that it is set up correctly, click <Save> to create the new trigger.

For more detailed information and screenshots, see the Create a New Trigger section in DocsOnWeb.