

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.

Wrapper ID	10002	Wrapper Type	HTML Email	Effective Date														
Description	Test Basic Wrapper																	
Send As	Team@goldpointsystems.com	<input checked="" type="checkbox"/>	Is Active															
Reply To	Replies@goldpointsystems.com																	
Group ID	0	Header																
<table border="1"> <thead> <tr> <th>Parameter</th> <th></th> </tr> </thead> <tbody> <tr> <td>#COMPANY_NAME</td> <td>GOLDPoint</td> </tr> <tr> <td>#CUSTOMER_CARE_EMAIL</td> <td></td> </tr> <tr> <td>#CUSTOMER_CARE_EMAIL_TEXT</td> <td></td> </tr> <tr> <td>#GOLD_ACCOUNT_CENTER</td> <td>https://gold</td> </tr> <tr> <td>#GOLD_ACCOUNT_CENTER_TEXT</td> <td>https://goldp</td> </tr> <tr> <td>#PHONE</td> <td></td> </tr> </tbody> </table>		Parameter		#COMPANY_NAME	GOLDPoint	#CUSTOMER_CARE_EMAIL		#CUSTOMER_CARE_EMAIL_TEXT		#GOLD_ACCOUNT_CENTER	https://gold	#GOLD_ACCOUNT_CENTER_TEXT	https://goldp	#PHONE		<pre><!DOCTYPE html> <html> <head> <title>GOLDPoint \$ </head> <body bgcolor="#f <table cellpadding= <tr> <td valign="top" <table width="100% </pre>		
Parameter																		
#COMPANY_NAME	GOLDPoint																	
#CUSTOMER_CARE_EMAIL																		
#CUSTOMER_CARE_EMAIL_TEXT																		
#GOLD_ACCOUNT_CENTER	https://gold																	
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		Footer																
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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.

Template ID	10001	Template Type	HTML Email	Effective Date
Server ID	2) Address=net.tcp://GPSTexting/Service			
Description	Email Updated			
Send As	customercare@goldpointsystems.com			
Reply To	customercare@goldpointsystems.com			
Subject	Your [parm:#COMPANY_NAME] email address has been updi			
	<input checked="" type="checkbox"/>	Is Active		
	<input checked="" type="checkbox"/>	Uses Wrapper		
Body	<pre>
 Hello [parm:FIRST_NAME],</pre>			

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

Your #COMPANY_NAME email address has been updated

Hello FIRST_NAME,

At your request, your email address for your #COMPANY_NAME account has been updated.

Your new email is: EMAIL_ADDRESS

If you did not initiate this change, please log in to your account and change your password immediately, then call us at #PHONE to inform us of this unauthorized change of your account.

- 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

- Open CIM GOLD.
- 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.

- Click <New> on the Manage tab to bring up the Trigger Definition Builder dialog.
- Enter information for the new trigger, including the name, description, type, template, etc., in the required fields.

Trigger Data	
ID: 0	<input checked="" type="checkbox"/> Is Active
Name	GPS Test
Description	GPS Test
Release Time	12:00:00 AM
Time Out (Minutes)	3.00

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

Field Selection	Logic	Run Frequency	SQL Preview
Main Record: CFLN			
<input checked="" type="checkbox"/> CFLN - Loan Master <input type="checkbox"/> CFLT - Loan Tax And Statistical Record <input checked="" type="checkbox"/> CFPO - Loan Payoff <input type="checkbox"/> CSOT - Loan Origination Tracking <input type="checkbox"/> CSPP - Personal Property <input type="checkbox"/> CSQD - Contact Queue Data Record <input type="checkbox"/> CSRE - Insurance Tracking <input type="checkbox"/> F2QH - Collection History Record			
Search Record Tree		Search Current Record	
Field	Description		
<input type="checkbox"/> LN16RT	PM16 Loan Rate		
<input checked="" type="checkbox"/> LN1DUE	First Due Date		
<input type="checkbox"/> LN1ROL	Date Of First Rate Roll		

- 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.

Field Selection	Logic	Run Frequency	SQL Preview			
Account Exclusions						
<input checked="" type="checkbox"/> Bankrupt <input checked="" type="checkbox"/> Closed, Released or Archived <input checked="" type="checkbox"/> Charged Off						
And/Or	(Field	Operator	Value Type	Value)
None		CFLN.LN1...	Equal	Ro...	CurrentDay	

- Preview the notification on the Logic tab to ensure that you have selected the correct template and wrapper.
- Next, select the Run Frequency tab and schedule when you want notifications sent for the new trigger (daily, weekly, at monthend, etc.).

Run Frequency	
<input checked="" type="radio"/>	Daily
<input type="radio"/>	Weekly On Monday
<input type="radio"/>	Month End
<input type="radio"/>	Quarterly
<input type="radio"/>	Year End
<input type="radio"/>	1 Of Month
<input type="radio"/>	1 Of January

- 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.
- 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.