

Notification System User's Guide

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Notification System



The Notification System allows you to completely manage all of your notification messages. Using the various screens, you can retrieve archived messages, manage any queued messages with errors, create or modify notification templates, search and view the notification templates set up for your institution, manually re-queue messages, and so much more.

Note: If your institution used the alert system, you will need to have institution option UNST (Use Notification System) set up in order to transfer alerts and messages over to using the Notification system.

Check out our QuickStart Guide to learn how to quickly create automatic emails. Creating Automatic Emails

See the following descriptions of the screens within the Notification System to learn more about what you can accomplish using each screen.

Notification Screens

Archive Manager Screen Client Text Notifications Screen Manual Notification Handler Screen Queue Error Manager Screen Relocation Tool Screen Right-click Menu Notification Pop-up Screen Solutions by Text History Screen Solutions by Text Mapping Screen Templates Screen Texting History Screen Triggers Screen Wrappers Screen

Archive Manager Screen

Use the Archive Manager screen to retrieve archived messages. Archived messages include any message that the Notification Processor has transmitted. This screen also allows you to search through messages using a specific date range. When an archived message is selected, the details of the message are displayed on the lower part of the screen. Learn More

Client Text Notifications Screen

Use the Client Text Notifications screen to search for and view text message conversations. You can also use this screen to send and receive text messages with your customers. Learn More

Manual Notification Handler Screen

Use the Manual Notification Handler screen to manually re-queue messages. Messages with errors are sent to this screen from the Queue Error Manager screen and archived messages are sent to this screen from the Archive Manager screen. Learn More

Queue Error Manager Screen

Use the Queue Error Manager screen to search for and display all queue error messages and queued messages that have errors. Queue errors are for messages that the Notification Processor failed to transmit. This screen displays a maximum of 100 messages with errors at a time. When a message is selected, the message details are displayed on the lower portion of the screen. You can select more than one message and right-click to reattempt all of the selected messages. **Note:** You cannot re-queue more than one message because the Manual Notification Handler can only handle one message at a time. Learn More

Relocation Tool Screen

Use the Relocation Tool screen to export and import notification templates and wrappers. This tool makes it easy to export notification templates and wrappers that you were testing on your Beta machine and import them onto your Production machine so that you don't have to re-enter any data. You simply select the the notification templates and wrappers that you want from one machine (e.g., your Beta machine), save them as a file on your computer, and then import that file into another machine (e.g., your Production machine). The Relocation Tool screen also enables you to save a backup file of all your notification templates and wrappers on your computer. Learn More

Solutions by Text History Screen

Use the Solutions by Text History screen to retrieve archived text messages and view the details of those messages. Archived text messages include any text message that has been created. **Note:** This screen is used only for third-party texting and for those institutions with Institution Option USBT set up. Learn More

Solutions by Text Mapping Screen

Use the Solutions by Text History screen to select a Solutions by Text template and map it to a specific template within the Notification System. You can also create new mapped templates, delete mapped templates no longer used, and modify mapped templates. **Note:** This screen is used only for third-party texting and for those institutions with Institution Option USBT set up. Learn More

Templates Screen

Use the Notification Templates screen to create, modify, or delete notification templates. You can also use this screen to view the notification templates set up for your institution, delete notification templates, activate inactive notification templates, and to render a test notification to ensure that the body, subject, etc. of a notification have been set up correctly. This screen combines the functionality of the Template Detail screen and the Template Summary screen. Learn More

Texting History Screen

Use the Texting History screen to retrieve archived text messages and view the details of those messages. Archived text messages include any text message that has been created. This screen also allows you to narrow your search of text messages using a variety of search parameters. When an archived text message is selected, the details of the message are displayed in a pop-up dialog. You can also save your data to a CSV file. Learn More

Triggers Screen

Use the Triggers screen to build, manage, and test notification triggers. Triggers allow you to automatically send notifications (texts, emails, and HTML emails) at scheduled times to a list of accounts. For example, you can use this screen to send a text to all text-capable borrowers at 9:00 AM their time every time a payment is five days late or you could set up a trigger to send an email to all borrowers every month. Notification triggers make it so that you no longer have to worry about manually sending notifications, everything is automatic. Learn More

Wrappers Screen

Use the Notification Wrappers screen to create, modify, or delete notification wrappers. You can also use this screen to view the notification wrappers set up for your institution, search for a specific wrapper, activate inactive notification wrappers, and to render a test wrapper to ensure that the header, footer, etc. of a wrapper have been set up correctly. Wrappers are the institution branding that is applied to the notifications. Wrappers display your institution's logos, advertising, and selected wording in the header and footer of the notification. Learn More

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This Notification System is accessed by going to the Notification section in CIM GOLD.



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System Basics

Use these help sections to become familiar with the basic terminology used in CIM GOLD help documentation. This help section also contains information about common CIM GOLD functions and general information about the program.

See the help sections below to learn more system basics:

Basic CIM GOLD Concepts and Terminology

Customer Search Screen

Right-Click Functionality

General Navigation Information

Using Help

Basic CIM GOLD Concepts and Terminology

This help section explains basic concepts essential to understanding CIM GOLD.

Afterhours ProcessingAlert BarDollar and Rate AmountsError Provider IconFieldFile MaintenanceList Icon and List ViewMnemonicSecurityWarning Provider Icon

Afterhours Processing

Afterhours Processing refers to the information processing that occurs during the night. This processing typically includes printing reports and statements, sending ACH transmissions, amortizing fees, generating notices, processing late charges, assigning delinquency statuses, and much more. Afterhours processing is automatically performed by GOLDPoint Systems programs. Many Update Functions are set up when institutions first convert onto GOLDPoint Systems. Update Functions are set up by GOLDPoint Systems and they tell the system when certain activity should occur in the afterhours (such as when to assess late charges or when to automatically charge off severely delinquent accounts).

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Alert Bar

The red alert bar at the top of screens explains certain alerts and account statuses. For more information, see the <u>Account Status</u> topic in the Loans system.

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Dollar and Rate Amounts

Generally, the system enters decimal points and commas in numeric **Fields** as necessary. However, these symbols can also be added manually. Do not forget to proofread data before saving, particularly in regards to changes on customer accounts.

Original Loan Fees	6,000.00
Original APR	18.25000

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Error Provider Icon

These icons appear on CIM GOLD screens to indicate which which **Fields** are mandatory (or require an error correction). If this icon appears on any screen, data cannot be saved until all errors are corrected. If this icon appears on next to a field on any screen, you will not be able to save any changes until all errors are corrected. If you hover your cursor over the error provider, the system gives you additional information as to what is causing the error, as shown below:



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Field

Field is the term used to describe a location on a CIM GOLD screen where data is entered (either by a user or the system) and/or displayed. See **File Maintenance** below for more information about how fields are populated with information.

Conversion Da	ate 05/03/2018	~	
Roll Due Da Roll Due Da Roll Due Da Bemaining F	Date Within te Amount te Type O Percent Portion Due	 Dollar 	
Originated	Purchased Application # 367	✓ Purchased/Deale 5ABC	er
GOLDTrak PC	Checks Disbursed	5,2	16.66
Originating Ap	plication Office		3,675
Origination Co	de 50 - Other		
Account	Consumer Informa	tion Indicator	
8947000002	A - Petition Chapter	7 Bankruptcy	

CIM GOLD field examples

There are 6 basic types of CIM GOLD fields:

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- Alphanumeric/Numeric: Data input fields where numbers and/or letters are entered and displayed (see GOLDTrak PC Application # field in the example screenshot above).
- Checkbox: Square fields that are either populated with a checkmark or left blank to indicate whether a certain function/option) is present/active (see Purchased/Dealer field in the example screenshot above).
- Date: Calendar input fields that allow the user to select a date (see Conversion Date field in the example screenshot above).
- **Drop-down Menu:** Fields that are populated by making a selection from a menu that appears when the field button is clicked (see **Origination Code** field in the example screenshot above).
- List View: A table that display information relevant to the current screen, divided into columns and rows (see table at the bottom of the example screenshot above). Data is typically added to list views (and can often be edited) via other CIM GOLD fields. <u>Right-Clicking</u> on most list views opens up a menu that allows the user to access editing, printing, exporting, and resizing functions. Clicking column headers in most list views organizes the list view's information by that column's information type (either in alphabetical or numeric order).
- Radio Button: Similar to checkbox fields; circular fields that are either selected or left blank to indicate whether a certain function (or option) is present (or active). Radio buttons are typically used in pairs or groups where only one can be selected at a time (see **Percent** and **Dollar** fields in the example screenshot above).

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File Maintenance

File Maintenance (commonly abbreviated as "F/M") is the term used to describe information being entered or changed in CIM GOLD **Fields**. If information can be manually added to a **Field** by the user, it is considered *file maintainable*. Not all CIM GOLD **Fields** are file maintainable, and <u>Field-Level Security</u> can be set up to limit the file maintenance on certain **Fields** depending on your institution's needs. Some **Fields** are file maintainable by the system and populated automatically.

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List Icons and List Views

For many fields in CIM GOLD, you click a list icon 📰 to view and select possible entries for that field. Information for these lists are populated by GOLDPoint Systems, or in some cases, by someone at your institution who sets up information using the Loans > <u>System Setup Screens</u> or one of the Deposits > <u>Definitions screens</u>.

The following is an example of a list that appears after a user clicks the list icon:

Pmt Method 3	t Method 3 - Precomputed					
Pmt Frequency 1	Payment Methods					
General Category	Description	Code				
Hold Code 1	Conventional Loan	0				
Hold Code 2	Growth Equity	2				
Hold Code 3	Precomputed	3				
Hold Code 4	Line-of-Credit	5				
	Interest Bearing	6				
Prepayment Penalty	ARM - Adjustable Rate	7				
0 -	Rental Account 8					

List views are tables of information about a given account. They usually appear at the top of many screens, as shown below:

Open Delinquent Category 0													
	These are list view tables.												
Next Due Dat	e 11	/18/20)15 🦯	Matu	rity Date	05/1	18/201	8		Date	Last Ma	rketed	
Account Nbr	Туре	Class	Principal	Balance	Balanc	e + Fees	Term	Pay	ment	Date	of Loan	Statu	s Ba
09 000123 1	11	47	:	3,257.92		3,507.92	38	38	85.11	03/18	/2015	Releas	ed
01 00990 1	11	47		3,257.92		3,507.92	38	- 38	85.11	03/18	/2015	Oper	
Name		Preferre	ed Name	Owner	rship	Em	ployer		Credi	t Limit	Cash A	vailable	
Mary Mullins				Account	Owner	Goodwill	Industr	ies					
<													
Delinquent	aymer	nts (Contact	Custom	er Com	ments	CIF	Fi	nancia	I Sumr	nary	Collate	aral 📔
Payments	Due									- I	Charles		Dalard
Total Due	Loan	Payoff	Due			307.3	39			SINKIPLC	y Cnptr	7	впктр
Partial Payr	ment Du	Je								Misc Fie	elds		Last P
									0	Collecto	r	0	Next F
Due Date	SU	mmary lumber	of Pasti	Due Pay	ments	Total			[Days La	te	551	CQ Co
Due Date		uniber	e 1	ayment		TULA			[Olnqnt (Cat	0	Chrg C
									5	Status			Reaso
									F	lecency	/ Cat	0	Last R

You can right-click any list view to export the data to a spreadsheet. For more about list view tables, see <u>Right-click Functionality</u>.

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Mnemonic

A *mnemonic* is a code number assigned to a **Field**. Mnemonics are mainly used by GOLDPoint Systems personnel. See the <u>GOLDWriter User's Guide</u> on DocsOnWeb for more information. The mnemonics of CIM GOLD fields are indicated alongside the fields in <u>Help</u> tables, as shown below. The **Mnemonic Dictionary** button at the top-right of the <u>F1 Help</u> dialog opens the <u>GOLDWriter Mnemonic Dictionary</u> in a separate dialog. This dictionary provides the CIM GOLD source location for <u>GOLDWriter</u> field mnemonics.



Security

CIM GOLD requires a user name and security code, which must be set up by your institution for individual employees. See the <u>CIM GOLD Security</u> topic for more information.

In addition, <u>Field-level Security</u> can be set up to limit the **File Maintenance** on certain **Fields** depending on your institution's needs (see also the Security > <u>Setup screen</u> help). For example, if a certain employee's job does not require data entry of any kind, your institution can limit that employee's use of CIM GOLD to simply viewing customer information rather than editing it.

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Warning Provider Icon

This icon functions similarly to the **Error Provider** icon (above). Warning provider icons appear on CIM GOLD screens (as yellow triangles, see below) to indicate which **Fields** contain potentially problematic errors. Hover your cursor over the icon to view additional information about the cause of the error. The main difference between these icons and **Error Provider** icons is that changes to the current CIM GOLD screen can still be saved if a warning provider icon is present.

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See the help pages below to learn more system basics:

Right-Click Functionality

General Navigation Information

Using Help

Customer Search Screen

The **Customer Search** screen is the first screen that appears when CIM GOLD is opened in the standard interface. It can also be accessed from the top of the CIM GOLD tree view.

Use this screen enter selection criteria to find an account owner, account number, address, or card number. After pressing <Enter> or clicking the <Submit> button, results are displayed in the <u>Search Results list view</u> (and <u>Names Downloaded</u> fields) to the right. Single-clicking an item in this box will reveal additional customer information in the <u>Account Numbers list view</u>.

CIF Search Parameters Match SSN/EIN/IDN Individual ID Last Name First Name Middle Name Suffix Address Phone HH Nbr HH Seq OSSN OEIN OIDN @Card Last 4 Foreign Phone Phone Address O E-Mail View Closed Accounts ✓ View Released Accounts View Unopened Accounts View Archived Accounts Account Parameters Office Account Default Office LOC Card Parameter Number Individual ID Parameter Number Card Number Description Name 1 Name 2 Card Parameters ANSI Nbr Card Number Names Downloaded Displaying Account Numbers HH Number Account Number Seq Ownership Status Type Balance Balance + Fees Description P/I Constant Clear Submit << Previous Next >>

See the following example of the Customer Search screen.

CIM GOLD Customer Search Screen

You will likely be able to find the customer's information you want just by entering information in the <u>Name</u> field. However, if your search returns too much information, you can limit the search by entering more search

criteria in the fields. You may first need to click Clear, and then new information in any of the following field groups:

<u>CIF Search Parameter</u>

Account Parameters

LOC Card Parameter

Individual ID Parameter

Card Parameters

If your search returns more accounts than can be shown in the Search Results list view, click the

Next >> or or or def buttons to scroll through the list of accounts.

Note: You can set up an option to limit the number of account that can be shown on the Search Results list view. This option, Max Nbr to Display in Customer Search, is set up under the Options > User Preferences menu.

The <u>Displaying</u> field shows the range of search results you are looking at. The list view can only show up to 50 results at a time, so this field explains which numbers are displayed. For example, for the first 50 names, this

field would display "0 thru 50 hits." If you click Next >> , this field would then display "50 thru 100 hits," and so on (see example below).

Displaying 50 thru 100 hits

Tips on Searching

The following are a few hints to help you use the Customer Search screen:

- If you are unsure of the spelling of a name, type at least the first two letters of the last name in the Name field. For example, if you know your customer's last name begins with Sm (such as Smith or Smythe), type "SM," and then click Submit.
- You can limit a name search by typing the last name, a space, and the first letter of the first name in the **Name** field. For example, to look up John Smith, type "Smith J."
- Clicking _____ at the bottom of the screen will quickly clear all data in search fields and list views.

Note: If you do not have security to view employee accounts (set up on the Security > Columnation), then balance information will be blank for any names marked as an employee. If the Is Employee field (NDISEM), the Is Officer field (NDISOF), or both fields are checked for a customer on the Customer Relationship Management > Enurcholds excert, then the system will read accounts tied to that customer as employee accounts.

Security

In order to use this screen, your institution must:

- Subscribe to it on the Security > <u>Subscribe To Mini-Applications</u> screen.
- Set up employees and/or profiles with either Inquire (read-only) or Maintain (edit) security for it on the <u>CIM GOLD</u> tab of the Security > **Setup** screen.

CIF Search Parameters field group

The fields in this field group on the <u>Customer Search Screen</u> are used to search for accounts based on customer information, including names, identification numbers, phone numbers, and addresses.

CIF Search Para Name	ameters	
O SSN O EIN Phone	O IDN	Card Last 4 ign Phone
Address	E-Mail	
 ✓ View Closed Acc ✓ View Released A ✓ View Unopened A ✓ View Archived A 	ounts accounts Accounts accounts	

To further refine your search, use the <u>Account Parameters fields</u>.

The fields in this field group are as follows:

Field	Description	
Name	To search for an account by a customer's last name, type in all or part of the name in this field. To perform the search, press <enter> or click <submit>. Any matching results will be displayed in the <u>list view</u> to the right. You will likely be able to find the customer's information you want just by enterin information in this field. However, if your search returns too much information, yo can limit the search by entering more search criteria in the other fields in this fiel group. You can also limit a name search by typing the last name, a space, and the first letter of the first name in the Name field. For example, to look up John Smith, type "Smith J."</submit></enter>	
SSN/EIN/IDN/Card Last 4 Radio Buttons	 Use the SSN, EIN, IDN, or Card Last 4 to search for a specific customer using a type of identification number. SSN is for Social Security number. EIN is for Employee Identification number. IDN is for the customer's identification number, as set up on the Customer Profile screen. The IDN is defined and assigned by your institution. See also the Individual ID Parameter Number. Card Last 4 is for the last 4 digits of a customer's card number (if applicable). 	

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	After selecting the appropriate radio button, enter the actual number in the text field below.
	To perform the search, press <enter> or click <submit> and any matching results will be displayed in the list view to the right.</submit></enter>
	These fields will not be file maintainable if <u>Default Office</u> is marked.
Phone	To search for an account by a customer's telephone number, type the number in this field. This can be a business, home, cell, or other phone number tied to the account holder in the CIF system. <i>Hint:</i> You only need to type in numbers, and the system will add dashes or parenthesis.
	If you check the Foreign Phone checkbox, the system will only search for phone numbers designated as foreign (as set up on the Customer Relationship Management > <u>Households</u> screen).
	This field will not be file maintainable if <u>Default Office</u> is marked, unless Foreign Phone is also marked.
	To perform the search, press <enter> or click <submit> and any matching results will be displayed in the list view to the right.</submit></enter>
Address/Email	You can search by address or e-mail address by selecting the appropriate radio button, and then entering the address in the text field belowd.
	 For physical address, this can be a business, home, P.O. box, or other address tied to the account holder in the CIF system. To update physical addresses, use the Customer Relationship Management (CIF) > Households screen, <u>Addresses</u> tab.
	 For e-mail address, any part of the e-mail address can be entered in this field. For example, if an e-mail address was "maryjones@email.com," you could just enter "maryjones" and the system would find it. Or you could enter the complete address. However, only 13 spaces are available, so e-mail addresses will likely need to be shortened. E-mail addresses are set up for customers using the Customer Relationship Management (CIF) > Households screen, Email tab.
	To perform the search, press <enter> or click Submit and any matching results will be displayed in the <u>Search Results</u> list view to the right.</enter>
	Email options will not be available if <u>Default Office</u> is marked.
View Closed Accounts	Check this box if you want to include closed accounts in your search. Closed accounts are accounts that have not been sent to archives, but have closed due

	 to a payoff, charge off, or write off. Your institution determines when closed accounts are moved to archives (institution option ARCM). Another institution option, OFLM, determines when archived accounts are completely removed from the system and can no longer be searched for. This option can also be set through the <u>User Preferences</u> screen (Under Options in the top menu bar in CIM GOLD).
View Released Accounts	Checking View Release Accounts includes accounts that have been released (LNRLSD = "Yes") in your search.
	This option can also be set through the <u>User Preferences</u> screen (Under Options in the top menu bar in CIM GOLD).
View Unopened Accounts	Check the View Unopened Accounts box if you want to include accounts that have not been opened in your search. This could include accounts where the loan process was initiated in GOLDTrak, but the loan wasn't funded and opened.
	This option can also be set through the <u>User Preferences</u> screen (Under Options in the top menu bar in CIM GOLD).
View Archived Accounts	Check the View Archived Accounts box if you want to include accounts that have been archived. Your institution determines when closed accounts are moved to archives (institution option ARCM). Another institution option, OFLM, determines when archived accounts are completely removed from the system and can no longer be searched for.
	This option can also be set through the <u>User Preferences</u> screen (Under Options in the top menu bar in CIM GOLD).

Account Parameters field group

The **Account Parameters** fields on the <u>Customer Search Screen</u> can be used to search for accounts based on the office or account number.

Account Parameters					
Office	Account				
Default Office					

To search for an account by a customer's office number, type the number in the **Office** field. **Hint:** You do not need to type zeros that come first in the office number. For example, if the office number were "0001," you can enter just "1" in this field and the system will automatically add the preceding zeros.

To search for an account by a customer's account number, type the number in the **Account** field. **Hint:** You do not need to type zeros that come first in the account number. For example, if the account number were "000000009," you can enter just "9" in this field and the system will automatically add the preceding zeros.

Marking the **Default Office** checkbox field will automatically enter the office number you are signed on with in the **Office** field. Marking this field disables the <u>SSN/EIN/IDN/Card Last 4</u>, <u>Phone</u>, <u>Email</u>, <u>LOC Card Parameter</u>, <u>Individual ID Parameter</u>, and <u>Card Parameter</u> fields.

To perform the search, press <Enter> or click <Submit> and any matching results will be displayed in the <u>list</u> <u>view</u> to the right.

LOC Card Parameter field group

This field is only available if <u>Institution Option HSLC</u> is set up for your institution. Use this field to indicate a LOC card number to search the system for on the <u>Customer Search Screen</u>.

LOC Card Paramet Number	er

To perform the search, press <Enter> or click Submit and any matching results will be displayed in the <u>Search Results list view</u> to the right.

This field will not be file maintainable if <u>Default Office</u> is marked.

Individual ID Parameter field group

This field is only available if <u>Institution Option HSID</u> is set up for your institution.

Individual ID Parameter Number

The **Individual ID Number** is a master number given to a single customer. The Individual Identification Number links all deposit accounts, Ioan accounts, LOC cards, safe deposit boxes, etc., for a customer.

To search for an account by a customer's Individual ID Number, type the number in this field. This number is tied to the account owner in the CIF system (found on the Customer Relationship Management (CIF) > Households screen > Names tab > Detailed Personal Information tab).

To perform the search, press <Enter> or click Submit and any matching results will be displayed in the <u>Search Results list view</u> to the right.

This field will not be file maintainable if <u>Default Office</u> is marked.

Card Parameters field group

These fields are only available if <u>Institution Option HSCP</u> is set up for your institution. Use these fields to indicate card information to search the system for on the <u>Customer Search Screen</u>. An **ANSI Nbr** and/or **Card Number** can be indicated.

Card Parameters					
ANSI Nbr	Card Number				

To perform the search, press <Enter> or click Submit and any matching results will be displayed in the <u>Search Results list view</u> to the right.

These fields will not be file maintainable if <u>Default Office</u> is marked.

Customer Search list views

The **Search Results** list view at the top right of this screen displays all search results matching the search parameters indicated in the fields on the <u>Customer Search</u> screen. It shows the customer's name as well as information about the associated SSN/EIN/IDN, household, sequence and telephone numbers. The **Match** column shows which of your search criteria the returned item matched. To print the list, right-click on the list view and use the print menu options that appear.

Match	SSN/EIN/ID	Last N	lame	First Na	me M	iddle Na	me Suffi	x		Address	
<											>
Names Accoun	Downloaded t Numbers		Dis	playing					_		
HH Nu	imber Accoi	nt Number	Seq	Ownership	Status	Туре	Balance	Balance + Fee	es Description	P/I Constant	

When you have found the customer you were searching for, single-click on the name and information about all accounts tied to that name will appear in the **Account Numbers** list view at the bottom right of this screen.

- If you click on an account number in this list, it will highlight that account.
- If you double-click an account in this list, it takes you to the main screen in deposits or loans (depending on which type of account you clicked).
- To print the list, right-click on the list view and use the print menu options that appear.

Above the **Account Numbers** list view are fields displaying the number of names that were **Downloaded** and which accounts are currently displayed in the **Search Results** list view (**Displaying**). That list view can only show up to 50 results at a time, so the **Displaying** field explains which numbers are displayed. For example,

for the first 50 names, this field would display "0 thru 50 hits." If you click Next >> ____, this field would then display "50 thru 100 hits," and so on (see example below).

Displaying 50 thru 100 hits

Right-Click Functionality

Depending on where you click in CIM GOLD, and what additional features you have, different pop-up selections appear when right-clicking in CIM GOLD.

Right-clicking on List View Tables

Right-clicking on most list view tables in CIM GOLD opens up a menu, as shown below:

Code/Description	Last Assessed		Assessed	Assessed Counter	Last Paid	Paid
1 - Miscellaneous Fee	02/19/2015		20.00	1		
5 - Duplicate Copy Fee	02/19/2015		10.00	1		
Edit Printing	;					
Export Auto Resize Find	•	Exp Exp Exp	oort to Repo oort Selectio oort All To	ort Manager on to Tab Delimite Tab Delimited Text	d Text File	

The functions accessed from this menu are as follows:

Edit	Use this menu to copy cell data (or select all cell data to be copied). Once list view data is copied, it can be pasted into another program (such as Microsoft [®] Excel.
Printing	Use this menu to print information from a list view. Printer/paper setup, print previews, page orientation, and margin settings can all be set from this menu.
Export	 Use this menu to export the list view directly to another file or program. The three possible export choices are: Export to Report Manager: Select this function to export the data in the list view to the GOLDPoint Systems <u>Report Manager program</u>.
	• Export Selection to Tab Delimited Text File: Select this function to save the selected portion of the list view as a tab-delimited text file. Any tab-delimited program (or even Microsoft [®] Word, Wordpad, or Notepad) can then be used to review the selection.
	• Export All To Tab Delimited Text: Select this function to save the entire list view as a tab-delimited text file. Any tab-delimited program (or even Microsoft [®] Word, Wordpad, or Notepad) can then be used to review the selection.
Auto Resize	Use the this menu to resize the list view table in order to display all data. The three possible resize choices include:
	• Auto Resize Grid: Resizes the entire list view (both columns and rows) to fit the data.

	 Auto Resize Columns: Resizes columns only. Auto Resize Rows: Resizes rows only.
Find	Use this function to enter terms to use in searching the list view. After <find> is clicked, the system displays all matching information in a table. Select an item in the table to be redirected to that item in the original list view.</find>

Right-clicking on Tree Navigation

Right-clicking on the left tree navigation allows you to bring up a pop-out screen of CIM GOLD. See <u>Pop-out Screens</u> in the <u>General Navigation Information</u> section for more information.



Right-clicking on Screens

After finding and selecting an account, and then accessing any screen in CIM GOLD, you can right-click the screen and a pop-up menu appears. This pop-up menu may be different depending on which features your institution has set up.

For example, if your institution uses File Services Plus, the following menu appears:

Open Construction	File Services Plus menu items
Origination/Maturity	Valuation/Billing Daily Sta
Original Balance	View Attached Files
Term in Months	Attach Files D
Date Opened	Send Alert 🕨 🕫
First Due Date	10/31/2014 v Purchase D

For more information on File Services Plus, see the <u>user's guide in DocsOnWeb</u>.

Notice the Send Alert selection:



This function allows you to send either an email or text alert to the account owner. This is part of the Notification System. For more information, see the <u>Right-click Menu Notification Pop-up Screen</u> topic in the Notification System User's Guide.

GOLD Document Imaging

If your institution uses GOLDDocument Imaging, then the following functions appear when you right-click a screen in CIM GOLD:



GOLDPoint Systems is phasing out GOLDDocument Imaging to use File Services Plus instead.

See these other help pages to learn more system basics:

Basic CIM GOLD Concepts and Terminology

General Navigation Information

Using Help

General Navigation Information

This topic provides general instructions for navigating in CIM GOLD. See the following subtopics:

Navigating CIM GOLD

Pop-out Screens

Finding Customer Accounts

Navigating CIM GOLD

In CIM GOLD, the tree view on the left side of the screen is used to access all CIM GOLD screens, as shown below:

()	Expar	nd All Collapse All Show Hidden Items In Tree	Released Matur	red Cons	sumer			Delinquent	Category 120 Adv		
No.		Clear									
ιž	[0	Customer Search Screen]	Account	ntintion	Tax/leaurance/ll		Addresses)	Late/NC	E Pre-Payment Penalty	Interest Datail	Payment Detail
atio	Þ	Cards	- Paymont and	dusues I Classifi	ication Fields	icc Maines	Addresses	Laterivor		Interest Detail	r ayment Detain
з		Customer Relationship Management	Principal Balance	De Cidasalli	1,255,999.99	Due Date	09/04/2016	¥	Institution Balance	1,255,999.99	
			Next Payment [Due	1,596.00	Date Opened	01/05/2016	~	LIP Information		
	Þ	Dealer Setup	Balance + Fees	;	1,255,999.99	Maturity Date	01/15/20	017	LIP Disbursed Balance	1,255,999.99	
	Þ	Dealer System	PI Constant		1,596.00	- Term in Months	01710720	12	Undisbursed Balance		
	Þ	Deposits	Next PI Const			Next PI Effective			LIP Interest Rate		
	Þ	Financial Applications	Reserve 1/2 Co	onstant	0.00				0 -		
		GOLD Services	Applied To Pay	ment	34.65	Assume Date					
		doeb ocivices	Accrued Interes	st		Pay Off Date			LOC Information		
	Þ	GOLDPoint Systems	Date Last Accr	ued	11/01/2016	SIC			LOC Limit		
	₽	History	Date Interest Pa	aid To	12/15/2016	NAICS			Security Acct		
	Þ	Internet and Phone Systems	Payment Applic	ation	4721	Entire Payment	t Rolls Due Date		Transfer Acct		
	4	Loans	Interest Rate		18.91519				Miscellaneous Loan I	nformation	
		Account Adjustment	YTD Interest						Times Extended		~
			Original Balance	e	1,032.00	Last Transacton	11/15/2016		Times Renewed		~
		Account Mormation	Type		10	Last Activity	05/17/2017		Charge off Date		
		Account Identifiers	Class		10	Type of Activity			Charge off Posted Date		
		Actions Holds and Event Letters				2 -	File Maintenar	nce	Charge off Amount		
		Additional Loan Fields	Pmt Method	3	- Precomputed				Converted Account #	3675000001273	2
		Amortizing Fees And Costs	Pmt Frequency	1	 Monthly Payment 				Use Internet	507500001275	-
		ARM Information	General Catego	ory 6	- Installment Loans				Use GOLDPhone		
		Call Report Classifications	Hold Code 1						Name and Address In	formation	
		Consumer Line-of-Credit	Hold Code 2								
		Dealer Information	Hold Code 3								
		Deferred Fees	Hold Code 4								
		Invalid Accounts	Prepayment Pe	natv							
		Notepad	0 -								
		Payment Information	Tr		avigation						
		Precomputed Loans		66 M	avigation						
		Renewals & Modifications & Extens	Plan Description	n							
		Reserves	Collateral Descr	ription	,PP						

CIM GOLD tree view

There are two ways to navigate this tree view:

 Manually click through the tree view by expanding screen groups until you locate the desired screen. For example, in order to access the <u>Account Detail</u> screen, the <u>Loans</u> screen group must be expanded (by clicking on the grey "+" symbol to the left), followed by the <u>Account Information</u> screen group. The <u>Account Detail</u> screen is part of the <u>Account Information</u> screen group. Use the search function beneath the tree view. Enter search terms in the search field, and the system
will search for matching screen names. For example, entering "Collateral" in the search field will locate
the Loans > <u>Collateral Detail</u> screen.

All CIM GOLD <u>Help</u> screens indicate the navigation necessary to locate the selected screen, tab, or field group by using breadcrumb navigation as shown below:

⊏> Forward	Print	Options	Search Master Help	Mnemonic Dictionary					
Navigation: Account Information Screen > Account Information tab: Account information field group									
Use this field gro	up to view an	d edit general in	formation about the o	customer deposit account.					
Account Inform	ation								
Date Opened			12/11/2002						
Date Closed									
Reason Closed									
Account Type]					
General Category	05 - Reg	ular Savings	~						
Sub Category	01 - Public Funds		~						
Statement Cycle	012 - Anr	nual Statement	~	•					
Account Represer	ntative	1 - Cindy Fisher	~	•					
Plan Number									
	Navigat	ion information p	provided on help scree	en					

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Pop-out Screens

One nice feature about the left tree navigation is that each screen can be opened separately in a pop-out window. The great thing about this feature is that you can be working on one screen with one account, pop that screen out on its own, then navigate back to CIM GOLD to other screens or to view other accounts.

To pop-out a screen, simply right-click the screen name in the left tree navigation. The following dialog appears:

4 I L	.oans		Interest Rate	
_	Account Adjustm	ent	Original Balance	
	Account Inform	nation	Туре	
	Account Detai	1	Clase	
	Account Ide	Pin To Home Screen		
	Actions, Ho	Open Screen In New CIM		
	Additional Loa	in Fields	- me method	
	Amortizing Fe	es And Costs	Pmt Frequency	

When you select "Open Screen in new CIM," the screen opens in a separate window with the selected account displayed. You can go back to the previous CIM GOLD instance and access other screens and accounts. The pop-out screen will remain on the account that was selected at the time. In the example screenshot below, see that one pop-out instance of CIM GOLD has been created and set to view one client's information on the **Account Detail** screen while the original instance of CIM GOLD is able to view another client's information on the **Additional Loan Fields** screen:

δ i	CIM C	GOLD Additional Loan Fields JAGTA	AR			
File Screen History Refresh Print Screen File Se	vices Plus Options Help 🏠 🚮 🕶 🤤 🌍					
Expand All Collapse All Show Hidden Items In Tree Clean	Open Matured	Delinquent Category 0 DNA	l.			
Customer Search Screen]	Origination/Maturity Valuation/Billing Daily Original Balance Odd Term in Months Elle Sereen H	Statistics & Fees Classification/Purpose CIM GO	LD Account Detail BRITTENY			X
Dealer System Deposits	Date Opened 01/03/2t The Schenning First Due Date 02/17/2t © Expand All Cell Material: Date 01/17/2t © Expand All Cell	lapse All Show Hidden Items In Tree Oper	n Matured	Delinquent Category	0 DNA	^
Financial Applications GOLD Services COLD Services	Due Date Day Original Maturity Date 01/17/20	er Search Screen] Acc Pr mer Relationship Management	count Statistics Tax/Insurance/UCC 1 syment and Classification Fields ncipal Balance 2,198.70 Due Date	cs Tax/Insurance/UCC Names Addresses Late/NSF Pre-Payment Penalty ssification Fields 2,198.70 Due Date 09/06/2005 v Institution Balance	Pre-Payment Penalty Interes	t Detail Pa ,198.70
History Internet and Phone Systems	Original Maturity Term De Dealer Original Term Diginal Term Dealer	r Setup Ba r System Pi	of Payment Due 219.26 Date Ope lance + Fees 2,484.70 Maturity C Constant 219.26 Term in M	med 02/05/2004 v I Date 02/06/2008 Ionths 48	LIP Information LIP Disbursed Balance 2 Undisbursed Balance LIP Interest Bate	198.70
Loans Account Adjustment	Original Loan Fees Depos	cial Applications Ap	et PI Const Next PI E serve 1/2 Constant 0.00 plied To Payment Assume D	ffective Date	LIP Method Code D -	
Account Information Account Detail Account Identifiers Actions, Holdo and Events etters	Original APR GOLD Original LTV GOLD Current LTV Fisher	y Services Ac Point Systems Da	crued Interest Pay Off D te Last Accrued 04/19/2017 SIC te Interest Paid To 04/19/2017 NAICS	Payment Bolls Due Date	LOC Information LOC Limit Secuty Acct Transfer Acct Miscellaneous Loan Information Times Extended	
Additional Loan Fields Amortizing Fees And Costs ARM Information	Maximum Combined LTV Originating Officer Loans Security Code	et and Phone Systems Fa	erest Rate D Interest			n
Call Report Classifications Consumer Line-of-Credit Dealer Information	Colateral Code 221 - Cone ACCON Origination Code Acc	count Information Ty count Detail Ca	Balance 8,187.99 Last Transacton 04/19/2 62 46 Last Activity 04/19/2 Type of Activity 5, December 20, 20, 20, 20, 20, 20, 20, 20, 20, 20,	Isacton 04/19/2017 Vity 04/19/2017 Activity	Times Renewed 010/20 Charge off Date 00/20 Charge off Posted Date 03/20	✓ 29/2005 18/2010
Invalid Accounts Notepad Payment Information	Henewed Account Number Ac Ad An AF	tions, Holds and Event Letters Iditional Loan Fields Print mortizing Fees And Costs Print 3M Information Get	5 - Payment or oth t Method 6 - Interest Bearing t Frequency 1 - Monthly Payment meral Category 82 - Charge-Off Non-Real Estate	Property	Charge off Amount Converted Account # Use Internet Use GOLDPhone	2,417.96 0
Renewals & Modifications & Extens Renewals & Modifications & Extens Reserves Signature Loan Details	Ca Ca De	all Report Classifications Ho onsumer Line-of-Credit Ho ealer Information Ho formed Fees	ld Code 1 2 - Charge-Off Id Code 2 92 - Voluntary Surrender Id Code 3		Name and Address Information	, ,

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Finding Customer Accounts

The first screen that appears after the user logs in to CIM GOLD (and the screen at the top of the tree view) is the <u>Customer Search</u> screen. Use this screen to find the person or account whose information you want to view or edit

Additionally, there are several buttons and fields at the top CIM GOLD that allow the user to access a customer account quickly, as shown below:



- Clicking **First** takes the user to the (numerically) first account in your institution's system.
- Clicking Previous takes the user to the (numerically) previous account.
- The Fast Goto Account fields can be used to manually enter the desired account number.
- Clicking Next takes the user to the (numerically) subsequent account.
- Clicking Last takes the user to the (numerically) last account in your institution's system.

The two green arrow buttons to the left of the **First** button can be used to cycle through your CIM GOLD usage history since login. They function identically to the "Back" and "Forward" functions in standard Internet browsers.

<u>O</u> ptions	<u>H</u> elp	00	4	••	

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For information about the menus in CIM GOLD, see help for the <u>Main Menu Bar</u>. See the help pages below to learn more system basics:

Basic CIM GOLD Concepts and Terminology

Right-Click Functionality

Using Help

Using Help

To view help documentation for specific field groups, tabs, or screens directly from CIM GOLD, place your cursor in the desired field (or, for screen help, make sure no field is selected in the opened screen) and press <F1> on your keyboard (or select **Mini-Application Help** from the Help menu on the <u>Main Menu Bar</u>). A new F1 Help dialog will open (an example is shown below).



CIM GOLD <F1> Help Example Page

CIM GOLD help documentation provides information about the use of fields and screens in CIM GOLD and also typically includes mnemonic information (as explained in <u>Basic CIM GOLD Concepts and Terminology</u>) as well as breadcrumb navigation information (as explained <u>General Navigation Information</u>). The table of contents on the left side of the dialog can be used to locate other CIM GOLD help documentation and is organized identically to the <u>CIM GOLD tree view</u>.

CIM GOLD help documentation is organized into screens, tabs, and field groups. Information about individual fields is organized into tables which can be viewed on field group/tab help pages. Pressing F1 with your cursor in a CIM GOLD field will open F1 Help to the selected field's location on the relevant help page.

Searching Help

- To search **only** the current CIM GOLD system for certain keywords, use the **Search** tab above the table of contents on the F1 Help dialog.
- To search the **entire** CIM GOLD help database, select "Master Help Search" from the **Help** menu on the <u>Main Menu Bar</u> to open the Master Help File (shown below) and navigate to the **Search** tab there.

Follow the instructions below to optimize your search.



CIM GOLD Master Help File

On the Search tab (shown below), enter search terms in the search field and click <Display>. The system will search for matching text within the help system. Placing quotation marks around a search phrase (e.g., "amortization method") forces the system to only find terms matching that *exact phrase*. The screen the field is found on is displayed in the Location column. There may be more than one instance of that term, therefore, the Location may come in handy to quickly find the information you are looking for. See below:

<u>i</u>		CI	M GOLD Master Help File					
	¢	⇒	de 6-	[
Locate	Back	Forward	Print Options	Search N				
<u>Contents</u> Index <u>Search</u> Favorites Type in the word(s) to search for:			Navigation: Amortizing f General Ledger Informati	ees And Cost on field group				
"amortization method" 🔫		~ F	Amortization Method					
List To	opics D	isplay	Entry: User, alphanumeric					
Select topic:	Found: 87		Mnemonic: F1GMET					
Title	Location	^	Screen: Loans > Account Inform	ation > Amor				
Amortization Code	Dealer Groups		screen					
Amortization Method Loan Master LN fields Method Amortization Method Force Place LPD Insur Amortization Method Event 47, Consumer In Setup G/L and Commis Amortization Method Original Rate Loan Master LN fields Amortization Method D	Amortizing Fees and GOLDWriter Precomputed Loans Cards and Promotion Insurance Force Plai Insurance Policy Del GOLDE vent Letters Setup G/L and Com Deferred Fees Scree Loans ARM Informat Mnemonic Dictionary Signature Loan Deta	Costs Scree Is Scr ce Sc tail missic en tion S y sils Sc >	This is the amortization method or costs earned by your institution These methods determine how re Ledger each month. This amortize the amortization method used we amount in the case of early payor the Amortization Method field in group). When an account owner between what is refunded to the the General Ledger is finalized (a for the difference). The G/L account associated with is set up when the fee or cost is	used to calcu on and sent to nuch is amort cation method hen calculatin off or cancellat the Fee/Cost pays off the li borrower and a G/L transact of the amortiza created using				
✓ <u>M</u> atch similar words Sea <u>r</u> ch titles only			See also:	escriptions si				

In the example above, the term "amortization method" was searched. After selecting the Location of Amortizing Fees and Costs screen, each instance of "amortization method" is highlighted.

- 2. The system will display a list consisting of the **Title**, **Location**, and relevancy **Rank** of all help topics that include the search term. Click any column header to organize the list by that column's information type.
- 3. Select a help topic in the list to view that topic on the main help screen (the master help search function and help topic list will still be visible on the left). All phrases matching the search phrases will be highlighted blue within the text of the help topic.

To tailor a search further:

- Use the **Search previous results** field to indicate whether the search is performed within the results of your previous search.
- Use the **Match similar words** field to indicate whether search results should include any words similar to the search terms entered.
• Use the **Search titles only** field to indicate whether the system search should only return results within help topic titles (not main text)

Clicking the arrow button to the right of the search field reveals a list containing the words AND, OR, NEAR, and NOT. These words can be used to qualify terms entered in the search field and function as follows:

- AND The system will only display results containing both words, not necessarily together.
- OR The system will display results containing either word.
- NEAR The system will display results in which both words appear close to each other.
- NOT The system will display results in which the first word appears and the second word does not.

B		CIM	I GOLD Master I
Locate	Back Forv	> vard	Print
<u>Contents</u> <u>Index</u> <u>Search</u> Type in the <u>w</u> ord(s) to search	Favorites h for:		General L
"amortization method"	~	£	AND
List To	pics <u>D</u> isplay		OR
Select topic:	Found: 87		NEAR
Title	Location	^	NOT
Amortization Code Amortization Method Loan Master LN fields Method Amortization Method Force Place LPD Insur Amortization Method Event 47, Consumer In Setup G/L and Commis Amortization Method Original Rate Loan Master LN fields Amortization Method D	Dealer Groups Amortizing Fees and Costs GOLDWriter Precomputed Loans Scree Cards and Promotions Scr Insurance Force Place Sc Insurance Policy Detail GOLDE vent Letters Setup G/L and Commissio Deferred Fees Screen Loans ARM Information Sc Mnemonic Dictionary Signature Loan Details Sc	*	This is the amor or costs earned These methods Ledger each mo the amortization amount in the ca the Amortization group). When ar between what is the General Led for the difference The G/L account is set up when t
 Search previous res<u>ults</u> ✓ Match similar words Search titles only 			Setup Screens :

Help Options

The **Back** and **Forward** buttons can be used to cycle through your F1 Help usage history. They function identically to the "Back" and "Forward" functions in standard Internet browsers.

See the help pages below to learn more system basics:

Basic CIM GOLD Concepts and Terminology

Right-Click Functionality

General Navigation Information

Archive Manager Screen

Use the Archive Manager screen to retrieve archived messages. Archived messages include any message that the Notification Processor has transmitted. This screen also allows you to search through messages using a specific date range. When an archived message is selected, the details of the message are displayed on the lower part of the screen.

How To Items

This screen allows you to:

- Export a report of the archived messages
- Print a report of the archived messages
- <u>Render an archived message</u>
- Re-size columns and rows in the Archive Manager list view
- Search for archived messages by account number
- Search for archived messages by date
- Search for archived messages by template ID
- Search the results in the Archive Manager list view
- Select an archived message to edit and resend using the Manual Notification Handler screen
- View the details of an archived message

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Notification Archive</u> <u>Manager Screen Details</u> section.

This screen is accessed by going to Notification > Archive Manager in the CIM GOLD tree view.

	d	Previous	Next								
Selecti	on Criteri	ia									
Start Da	ate	~	Account			Template Id	Wrapper Id				
End Da	ate	~	Recipient			Те	emplate Type	0) Any		~	
Archive	Account Number	Time	Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13088	18011064	2/28/2017 2	:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014		🖌 J/	AMESF@GOLDPOINTS
3087	0	2/28/2017 1	1:04:25 AM	17	10001	Secure Message sent by Cu.	Text Message	02/10/2017		+	18013723723
3086	0	2/28/2017 1	1:04:25 AM	143	1	Feedback Submitted (To FI)	HTML Email	11/18/2014	~	🖌 ja	mesf@goldpointsystem
13085	0	2/28/2017 1	1:04:25 AM	17	1	Secure Message sent by Cu.	. HTML Email	11/11/2014		🔽 ja	mesf@goldpointsystem
3083 (0	2/28/2017 1	1:03:24 AM	17	1	Secure Message sent by Cu.	HTML Email	11/11/2014		🖌 J/	AMESF@GOLDPOINTS
< Account I	Number ()	Temp	plate ID 17	,	Template Type HT	AL Email		E	ffective I	>Date 11/11/2014
< Account I Destinatio Subject	Number (on Address •TEST• !) 10.0.0.5 Secure Mes	Temp sage <mark>Sent</mark>	olate ID 17 Errors	7	Template Type HTI Destination Port 25	4L Email		E	ffective I	> Date 11/11/2014
< Account I Destinatio Subject Status De) Relay	Number (on Address •TEST• : tails F ed to Tra) 10.0.0.5 Secure Mess Relayed Insmission S	Tem; sage Sent erver.;	olate ID 17 Errors	,	Template Type HTI Destination Port 25	4L Email		E	ffective I	>Date 11/11/2014
< Account : Destinatio Subject Status De I) Relayo Message <idoctt chtml> chead> dittle> Fin c/head></idoctt 	Number (on Address •TEST• : tails F ed to Tra YPE html: nance C) 10.0.0.5 Secure Mess Relayed nsmission S > ompany <td>Tem; sage Sent erver.; le></td> <td>Diate ID 17</td> <td>,</td> <td>Template Type HTI Destination Port 25</td> <td>4L Email</td> <td></td> <td>E</td> <td>iffective I</td> <td>> Date 11/11/2014</td>	Tem; sage Sent erver.; le>	Diate ID 17	,	Template Type HTI Destination Port 25	4L Email		E	iffective I	> Date 11/11/2014

See also:

Notification Archive Manager Screen Details Manual Notification Handler Screen Notification System

Archive Manager Screen Details

Use the Archive Manager screen to retrieve archived messages. Archived messages include any message that the Notification Processor has transmitted.

This screen also allows you to search through messages using a specific date range. When an archived message is selected, the details of the message are displayed on the lower part of the screen.

See the following example of this screen followed by field and button descriptions.

Rea	d	Previous	Next								
Select	ion Crite	ria				7 <u></u>					
Start D	ate	×	Account			Template Id	Wrapper Id				
End D	ate	~	Recipient			Те	mplate Type	0) Any		~	
Archive ID	Account Number	t Time	e Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13088	18011064	2/28/2017 2	:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014		 Image: A start of the start of	JAMESF@GOLDPOINTS
13087	0	2/28/2017 1	1:04:25 AM	17	10001	Secure Message sent by Cu	Text Message	02/10/2017		~	+18013723723
13086	0	2/28/2017 1	1:04:25 AM	143	1	Feedback Submitted (To FI)	HTML Email	11/18/2014	~	~	jamesf@goldpointsystem
13085	0	2/28/2017 1	1:04:25 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014			jamesf@goldpointsystem
13083	0	2/28/2017 1	1:03:24 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014		 Image: A start of the start of	JAMESF@GOLDPOINTS
<											>
Account Destinati Subject	Number on Addres •TEST•	0 s 10.0.0.5 Secure Mes	Tem sage Sent	plate ID 11	7	Template Type HTM Destination Port 25	IL Email		B	ffectiv	e Date 11/11/2014
1) Relay Message DOCT<br <html> <head> <title>F <body b<="" td=""><td>YPE htm inance (gcolor='</td><td>ansmission S II> Company<td>Server.; :le> :yle="margin</td><td>n: 0; pado</td><td>ling: 0;"></td><td></td><td></td><td></td><td>View</td><td>Messa</td><td>v ge Edit/Resend Message</td></td></body></title></head></html>	YPE htm inance (gcolor='	ansmission S II> Company <td>Server.; :le> :yle="margin</td> <td>n: 0; pado</td> <td>ling: 0;"></td> <td></td> <td></td> <td></td> <td>View</td> <td>Messa</td> <td>v ge Edit/Resend Message</td>	Server.; :le> :yle="margin	n: 0; pado	ling: 0;">				View	Messa	v ge Edit/Resend Message

Notification Archive Manager Screen

Field Descriptions

Field	Description
Start Date	Enter a beginning date to use for your search parameter. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.
End Date	Enter an ending date to use for your search parameter. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.
Account	Enter an account number in this field to search the Archived Messages database and display archived messages that were sent with the account number entered in this field.

Field	Description
Recipient	Enter a phone number or email address for a recipient in this field to search the Archived Messages database and display archived messages that were sent with the recipient entered in this field.
Template ID	Enter a template ID number in this field to search the Archived Messages database and display archived messages that were sent with the template ID number entered in this field.
Wrapper ID	Enter a wrapper ID number in this field to search the Archived Messages database and display archived messages that were sent with the wrapper ID number entered in this field.
Template Type	Select a template type from this drop-down field to search the Archived Messages database and display archived messages that were sent with the selected template type.
Archive Manager List View	This list view displays all the archived messages that meet the parameters entered in the Selection Criteria fields. Archived messages include any message that the Notification Processor has transmitted.
	 The following columns appear in this list view and can be used to sort: Archive ID: This displays the archive identification number assigned to the archived message. Account Number: This displays the account number that the message is tied to. Time Sent: This displays the last time the message was sent. Template ID: This displays the identification number of the template. Wrapper ID: This displays the identification number of the template. Template Description: This displays the description of the template. Template Description: This displays the description of the template. Template Type: This displays the type of template used to create the message. Effective Date: The displays the date the message became effective in MM/DD/YYYY format. Has Errors: This displays whether or not the message has errors (a check in this column indicates that the message has been sent (a check in this column indicates that the message was sent). If the status of a notification is "Restricted" or "Failed," the Sent box is not checked and the row will be highlighted red. Recipient: This displays the email address or phone number of the message's intended recipient.

Field	Description
Account Number Display	This field displays the account number that the message is tied to.
Destination Address	This field displays the destination server address.
Subject	This field displays the subject line of the notification.
Status Details	This field displays the status of the notification and the status message.
Message	This field displays the body of the message.
Template ID Display	This field displays the identification number of the template.
Template Type Display	This field displays the type of template used to create the message.
Destination Port	This field displays the destination port.
Errors	This field displays the error code and a description of the error that occurred.
Effective Date	This field displays the date the message became effective in MM/DD/YYYY format.

Button Descriptions

Button	Description
<read></read>	Click this button to read the Notification Processor and display all the queue error messages and queued messages with errors that fit the search parameters. See the <u>Search for Archived Messages</u> section for more details.
<previous></previous>	Click this button to search for messages that match the selection criteria before your current selection.
<next></next>	Click this button to search for messages that match the selection criteria after your current selection.
<view message=""></view>	Click this button to display the message as it would render (display in an HTML renderer) if the processor uses the current effective template. See the <u>Render a Message</u> section for more details.
<edit message="" resend=""></edit>	Click this button to open the selected archived message with the Manual Notification Handler screen with all of the data populated so the message can be altered and re-queued. See the <u>Select a</u> <u>Message to Edit/Resend</u> section for more details.

See also:

View Message Details Search for Archived Messages Select a Message to Edit/Resend Notification Archive Manager Screen

Export or Print a Report

You can create a report of the archived messages in the <u>Archive Manager</u> list view using the Archive Manager screen.

This screen allows you to:

- Export a report of the archived messages
- Print a report of the archived messages

Export an Archived Messages Report

There are three different ways to export the Archive Manager Report:

- 1. Export to Report Manager
- 2. Export Selection to Tab Delimited Text File
- 3. Export All to Tab Delimited Text

Export to Report Manager

To export a report of the archived messages in the <u>Archive Manager</u> list view to Report Manager:

1. Right-click on the **Archive Manager** list view.

Edit	•		
Printing	,		
Export	•	Export to Report Manager	
Auto Resize Find	۲	Export Selection to Tab Delimited Text File Export All To Tab Delimited Text	5

Right-click Menu with Export to Report Manager Selected

2. Select Export > Export to Report Manager to open the Save As dialog.

🕅 Save As									
🚱 💿 🗢 📙 « Docum 🕨 My HelpAndManual Projects 🕨 📼 🍫 🛛 Search My HelpAndManual Pr 🔎									
Organize 🔻 New	folde	·		H • 🕡					
🜟 Favorites 📃 Desktop	-	Documents library My HelpAndManual Projects	Arrange by	/: Folder 🔻					
Downloads	Ξ	Name	Date modified	Туре					
🕍 Recent Places		鷆 Examples	4/12/2013 11:52 AM	1 File folder					
🥽 Libraries		📄 My HelpAndManual Projects	2/26/2007 6:58 PM	Text Document					
Documents									
👰 Computer	-	< III		- F					
File <u>n</u> ame:	Archiv	eManagerReport		•					
Save as <u>t</u> ype:	Text Fil	es (*.txt)		•					
) Hide Folders			Save	Cancel					

Save As Dialog

- 3. Enter the name of the report in the File name: field and click <Save>.
- 4. The report is saved and automatically opens in Report Manager.

🛥 Repo	rt Mana	ger - [Ard	:hiveM	anagerRe	eport]										×
💭 File	Edit	Process	ing C	ptions	View	Window	Help							_ 1	Ξ×
DØ		X 🖻 (2 8	a _5	ぬ	₩ T L	F 🞒 🔋	?							
Archive ID	Accou Numbe	unt Time er	e Sent	5		Template ID	e Template	Description		Tempi Type	late	Effective Date	Has Errors	Email	-
6	0	8/1	4/2013	3 3:26:	24 PM	1113	Consumer	Application	Saved	HTML	Email	05/30/2013	False	jamesf@goldpointsystems.com	m
5	0	6/5	/2013	3:55:3	1 PM	1112	Consumer	Application	Submitted	HTML	Email	05/30/2013	False	jamesr@goldpointsystems.com	<u>n</u>
4	0	6/5	/2013	3:51:2	6 PM	1113	Consumer	Application	Saved	HTML	Email	05/30/2013	False	jamesr@goldpointsystems.com	m
3	0	6/5	/2013	11:21:	59 AM	1112	Consumer	Application	Submitted	HTML	Email	05/30/2013	False	jamesr@goldpointsystems.com	m
2	0	6/4	/2013	3:13:3	3 PM	1112	Consumer	Application	Submitted	HTML	Email	05/30/2013	False	jamesr@goldpointsystems.com	m
1	0	6/4	/2013	3:03:2	8 PM	1112	Consumer	Application	Submitted	HTML	Email	05/30/2013	False	jamesr@goldpointsystems.com	^m ▼
•															
For Help	, press Fi	1													//

Archive Manager Report in Report Manager

Export Selection to Tab Delimited Text File

To export a report of a single archived message from the <u>Archive Manager</u> list view to a tab delimited text file:

- 1. Select a message in the Archive Manager list view.
- 2. Right-click on the selected message to open the Right-click menu.

Cons	umer Application Sub	omitte	d HTML Email	05/30/2013		jamesr@gold
Со	Edit	•	HTML Email	05/30/2013		jamesr@gold
Сог	Printing	•	d HTML Email	05/30/2013		jamesr@gold
Сог	Export	•	Export to Re	port Manager		old
Со	Auto Resize	•	Export Selec	tion to Tab Delir	nited Text Fi	ile <mark>old</mark>
	Find		Export All To	o Tab Delimited ⁻	Text	13

Right-click Menu with Export Selection to Tab Delimited Text File Selected

3. Select Export > Export Selection to Tab Delimited Text File to open the Save As dialog.

GM Save As				×						
🕢 🖓 🗸 🖟 🕹 🐨 Documents 🕨 My HelpAndManual Projects 🕨 🔹 😽 🚽 Search My HelpAndManual Pr 🔎										
Organize 🔻 Nev	v fold	er		!≡ ▼ 🕡						
ጵ Favorites 📃 Desktop		Documents library My HelpAndManual Projects	Arrange b	y: Folder 🔻						
鷆 Downloads	E	Name	Date modified	Туре						
🔛 Recent Places		🐌 Examples	4/12/2013 11:52 AM	File folder						
📇 Libraries		📋 ArchiveManagerReport	11/27/2013 6:46 AM	Text Document						
Documents		📄 My HelpAndManual Projects	2/26/2007 6:58 PM	Text Document						
📕 Videos	Ŧ	•		, the second sec						
File name:	Archi	veManagerReportSelection.txt		•						
Save as type:	Text F	iles (*.txt)		-						
) Hide Folders			Save	Cancel						
		Save As Dialog								

- -
- 4. Enter the name of the report in the File name: field and click <Save>.
- 5. The report is saved.

1	Ar	chive	ManagerRe	portSel	lection - No	tepad								×
Fi	le	Edit	Format	View	Help									
5	(2	6/5/2013	3 3:5	5:31 PM	1112	Consumer	Application	Submitted	HTML Email	05/30/2013	False	jamesr@goldpointsystems.com	1 🔺
														Ŧ
													Þ	

Archive Manager Selection Report in Tab Delimited Text File

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Export All to Tab Delimited Text File

To export a report of the archived messages in the Archive Manager list view to a tab delimited text file:

1. Right-click on the **Archive Manager** list view.



Right-click Menu with Export All to Tab Delimited Text Selected

2. Select Export > Export All to Tab Delimited Text to open the Save As dialog.

🕅 Save As				×
COO - 📕 « Do	cument	ts 🕨 My HelpAndManual Projects 🔸	🝷 🍫 Search My HelpA.	ndManual Pr 🔎
Organize 🔻 Ne	w folde	r		∷ • 0
🚖 Favorites 📃 Desktop	Î	Documents library My HelpAndManual Projects	Arrange by	r: Folder 🔻
Downloads	=	Name	Date modified	Туре
🕍 Recent Places		🌗 Examples	4/12/2013 11:52 AM	File folder
📄 Libraries		📄 ArchiveManagerReport	11/27/2013 6:46 AM	Text Document
Documents		ArchiveManagerReportSelection	11/27/2013 6:51 AM	Text Document
J Music		📄 My HelpAndManual Projects	2/26/2007 6:58 PM	Text Document
📑 Videos	-	•		F
File name:	Archiv	/eManagerReportAlltxt		•
Save as type:	Text Fi	les (*.txt)		•
) Hide Folders			Save	Cancel

Save As Dialog

- 3. Enter the name of the report in the File name: field and click <Save>.
- 4. The report is saved.

File Edit Format View Help 6 0 8/14/2013 3:26:24 PM 1113 Consumer Application Saved HTML Email 05/30/2013 False jamesr@goldpointsystems.com 5 0 6/5/2013 3:55:31 PM 1112 Consumer Application Submitted HTML Email 05/30/2013 False jamesr@goldpointsystems.com 4 0 6/5/2013 3:51:26 PM 1112 Consumer Application saved HTML Email 05/30/2013 False jamesr@goldpointsystems.com 3 0 6/5/2013 11:21:59 AM 1112 Consumer Application submitted HTML Email 05/30/2013 False jamesr@goldpointsystems.com 2 0 6/4/2013 3:13:33 PM 1112 Consumer Application submitted HTML Email 05/30/2013 False jamesr@goldpointsystems.com 1 0 6/4/2013 3:03:28 PM 1112 consumer Application submitted	🗐 Arch	niveManagerReportAll - Notepad							
6 0 8/14/2013 3:26:24 PM 1113 Consumer Application Saved HTML Email 05/30/2013 False jamesf@goldpointsystems.com 5 0 6/5/2013 3:55:13 PM 1112 Consumer Application Saved HTML Email 05/30/2013 False jamesr@goldpointsystems.com 4 0 6/5/2013 11:21:59 AM 1112 Consumer Application Saved HTML Email 05/30/2013 False jamesr@goldpointsystems.com 3 0 6/5/2013 3:13:33 PM 1112 Consumer Application submitted HTML Email 05/30/2013 False jamesr@goldpointsystems.com 2 0 6/4/2013 3:03:28 PM 1112 Consumer Application submitted HTML Email 05/30/2013 False jamesr@goldpointsystems.com 1 0 6/4/2013 3:03:28 PM 1112 Consumer Application submitted HTML Email 05/30/2013 False jamesr@goldpointsystems.com	File E	dit Format View Help							
	6 0 5 0 4 0 3 0 2 0 1 0	8/14/2013 3:26:24 PM 6/5/2013 3:55:31 PM 6/5/2013 3:51:26 PM 6/5/2013 11:21:59 AM 6/4/2013 3:13:33 PM 6/4/2013 3:03:28 PM	1113 1112 1113 1112 1112 1112 1112	Consumer Consumer Consumer Consumer Consumer Consumer	Application Saved Application Submitt Application Saved Application Submitt Application Submitt Application Submitt	HTML Email ed HTML Email HTML Email ed HTML Email ed HTML Email ed HTML Email	05/30/2013 05/30/2013 05/30/2013 05/30/2013 05/30/2013 05/30/2013	False False False False False False	jamesf@goldpointsystems.com jamesr@goldpointsystems.com jamesr@goldpointsystems.com jamesr@goldpointsystems.com jamesr@goldpointsystems.com

Archive Manager Report in Tab Delimited Text File

Print an Archived Messages Report

To print a report of the archived messages in the Archive Manager list view:

1. Right-click on the Archive Manager list view.

Edit	•			
Printing	•	Print	Ctrl+P	
Export	►	Printer	Settings	3
Auto Resize	•	Print Pr	eview	
Find		Page Se	tup	

Right-click Menu with Printing Selected

2. Select Printing > Page Setup to open the Page Setup dialog.

Page Setup				- ×-
	New York State of the State of			
Paper				
Size:	etter			•
Source:	utomatically	Select		•
Orientation	Margins	: (inches)		
Portrait	Left	0.5	Right:	0.5
Landscape	Тор:	0.5	Bottom:	0.5
			ОК	Cancel

Page Setup Dialog

- 3. The Archive Manager Report is a wide report, so you will want to change the orientation to **Landscape** and narrow the margins to 0.5 to fit the report on the page.
- 4. Click <OK> to apply the new settings.
- 5. Right-click on the **Archive Manager** list view again.

Edit	•	
Printing	•	Print Ctrl+P
Export	•	Printer Settings
Auto Resize	•	Print Preview
Find		Page Setup

Right-click Menu with Printing Selected

- 6. Select Printing > Print to print the Archive Manager Report. **Note:** You can select Printing > Print Preview to preview the report before actually printing it. You can also change the printer that you are using and the printer's settings by selecting Printing > Printer Settings.
- 7. The Archive Manager Report is printed using the printer set up in Printing > Printer Settings.

Archive ID	Account Number	Time Sent	Template ID	Template Description	Template Type	Effective Date	Has Errors	Email
6	0	8/14/2013 3:26:24 PM	1113	Consumer Application Saved	HTML Email	05/30/2013		jamesf@goldpointsystems.com
5	0	6/5/2013 3:55:31 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com
4	0	6/5/2013 3:51:26 PM	1113	Consumer Application Saved	HTML Email	05/30/2013		jamesr@goldpointsystems.com
3	0	6/5/2013 11:21:59 AM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com
2	0	6/4/2013 3:13:33 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com
1	0	6/4/2013 3:03:28 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com
11/27/2013	11/27/20136:5522 AM Page 1 of 1							
	Archive Manager Report Example							

See also:

Search for Archived Messages Notification Archive Manager Screen Notification Archive Manager Screen Details

Render a Message

You can render an archived message using the Archive Manager screen. This is useful if you want send an archived notification again. Using the render tool, you can view the notification to ensure that it is the correct notification that you want sent again. You can also see if any changes need to be made before it is sent. The render tool can also be used to see how the archived messages looked to customers when they were sent as notifications.

To render an archived message using the Archive Manager screen:

1. Select an archived message in the <u>Archive Manager</u> list view.

Archive ID	Account Number	Time Sent	Template ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
6	0	8/14/2013 3:26:24 PM	1113	Consumer Application Saved	HTML Email	05/30/2013		×	jamesf@goldpointsystems.com
5	0	6/5/2013 3:55:31 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		V	jamesr@goldpointsystems.com
4	0	6/5/2013 3:51:26 PM	1113	Consumer Application Saved	HTML Email	05/30/2013		1	jamesr@goldpointsystems.com
3	0	6/5/2013 11:21:59 AM	1112	Consumer Application Submitted	HTML Email	05/30/2013		¥	jamesr@goldpointsystems.com
2	0	6/4/2013 3:13:33 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		¥	jamesr@goldpointsystems.com
1	0	6/4/2013 3:03:28 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		1	jamesr@goldpointsystems.com
•					11				•

Archive Manager List View

Click the <u><View Message> button</u>, or double-click on the message, to render a notification in a new window. Note: The <View Message> button is enabled only if a message is selected in the Archive Manager list view.



3. Click <OK> to close the rendered archive message window.

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See also:

Notification Archive Manager Screen Notification Archive Manager Screen Details

Re-size Archive Manager List View

The Archive Manager screen gives you the ability to manipulate and re-size the Archive Manager list view.

- <u>Re-size the width of the Archive Manager list view columns</u>
- Re-size the height of the Archive Manager list view heading row
- Manipulate the Archive Manager list view to view data that has been cut off

Re-size Column Width

To re-size the width of the columns in the **Archive Manager** list view:

1. Hover between the column headings of the list view to bring up the double-arrow icon.

Archive ID+	+Account Number			
6	0			
5	0			
4	0			
3	0			
2	0			
1	0			
Archive Manager List View with Double-arrow Icon				

2. Press and hold down the left-click button and drag to the right or left to increase or decrease the column width. In the following example the width of the Archive ID column has been decreased.

Archiv	^{/e} . <mark> </mark>	umber
6	0	
5	0	
4	0	
3	0	
2	0	
1	0	

Archive Manager List View with Column Width Decreased

Back to Top

Re-size Heading Row Height

To re-size the height of the heading row of the Archive Manager list view:

1. Hover on the bottom border of the heading row in the list view to bring up the double-arrow icon.

Archive	Account Number				
6 Ŧ	0				
5	0				
4	0				
3	0				
2	0				
1	0				
Archive Manager List View with Double-arrow Icon					

2. Press and hold down the left-click button and drag down or up to increase or decrease the heading row height.

Archive ID	Account Number				
6 -	0				
5	0				
4	0				
3	0				
2	0				
1	0				
Archive Manager List View with Column Height Increased					

Back to Top

Manipulate the Archive Manager List View to See Data that has been Cut Off

To view text that has been cut off:

1. Hover between the column headings of the list view to bring up the double-arrow icon.

Time Sent ↔	, →Template ID
8/14/2013	1113
6/5/2013	1112
6/5/2013	1113
6/5/2013	1112
6/4/2013	1112
6/4/2013	1112



2. Press and hold down the left-click button and drag to the right to increase the column width. In the following example the width of the Time Sent column has been increased to display the entire date and time.

Time Sent 🔸	→Template ID
8/14/2013 3:26:24 PM	1113
6/5/2013 3:55:31 PM	1112
6/5/2013 3:51:26 PM	1113
6/5/2013 11:21:59 AM	1112
6/4/2013 3:13:33 PM	1112
6/4/2013 3:03:28 PM	1112

Column Width Increased in Archive Manager List View

Back to Top

See also:

Notification Archive Manager Screen Notification Archive Manager Screen Details

Search for Archived Messages

You can search for archived messages using the Archive Manager screen.

This screen allows you to:

- Search by date
- Search by account number
- Search by template identification number
- Search by wrapper identification number
- Search by recipient
- <u>Search by template type</u>
- Search using multiple search criteria

Search by Date

To search for archived messages by the date they were effective:

- 1. Enter a beginning date to use for your search parameter in the <u>Start Date</u> field. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.
- Enter an ending date to use for your search parameter in the <u>End Date</u> field. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.

Read	Previous	Next			
Selection	Criteria				
Start Date	01/31/2017	✓ Account	Template Id Wrapper I		
End Date	03/06/2017	V Recipient	Template Typ	e 0) Any	~

Dates Entered in the Selection Criteria

- 3. Click the <Read> button (<u>Read</u>). The system searches for any archived message that has an effective date within the range specified in the **Start Date** and **End Date** fields.
- 4. The results are displayed in the <u>Archive Manager</u> list view.

Rea	be	Previous	Next								
Select	tion Criteri	ia									
Start [Date 01/3	1/2017 🗸	Account			Template Id	Wrapper Id				
End D	ate 03/06	6/2017 🗸	Recipien	t		Te	mplate Type	0) Any		¥	
Archive ID	Account Number	Time	Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13089	0	3/1/2017 8:1	6:11 AM	1001	0	Dealer Submitted Application	HTML Email	05/26/2016		~	lauraw@goldpointsystem: ^
13088	18011064	2/28/2017 2:	05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014		1	JAMESF@GOLDPOINTS
13087	0	2/28/2017 11	:04:25 AM	17	10001	Secure Message sent by Cu	Text Message	02/10/2017		~	+18013723723
13086	0	2/28/2017 11	:04:25 AM	143	1	Feedback Submitted (To FI)	HTML Email	11/18/2014	~	~	jamesf@goldpointsysteme
13083	0	2/28/2017 11	:03:24 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014		~	JAMESF@GOLDPOINTS V
1		The second s									>

Search by Date Results Displayed in the Archive Manager List View

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Search by Account Number

To search for archived messages by account number:

1. Enter the account number that you want to search for in the **Account** field. **Note:** Entering partial account numbers searches for any archived messages that include the partial numbers entered.

Read	Previous	Next					
Selection Cri	iteria		10011001	- • • • -			
Start Date	~	Account	18011064	lemplate Id	Wrapper Id		
End Date	~	Recipient			Template Type	0) Any	~

Account Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any archived message that has an account number that matches the number entered in the **Account** field.
- 3. The results are displayed in the <u>Archive Manager</u> list view.

Select	ion Criteri	ia			_						
Start D)ate	~	Account	t 180110	64	Template Id	Wrap	oper Id			
End D	ate	~	Recipie	nt			Template	e Type 0)	Any		~
Archive ID	Account Number	Time S	ent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
3088	18011064	2/28/2017 2:0	5:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014			JAMESF@GOLDPOINTSYS1

Search by Account Results Displayed in the Archive Manager List View

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Search by Template Identification Number

To search for archived messages by template identification (ID) number:

1. Enter the template ID number that you want to search for in the **Template ID** field. **Note:** You must enter the complete ID number. Partial numbers cannot be used to search.

Read	Previous	Next				
Selection Cri	iteria			-		
Start Date	¥	Account	Template Id 9140	Wrapper Id		
End Date	~	Recipient		Template Type	0) Any	~

Template ID Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any archived message that has a template ID number that matches the number entered in the **Template ID** field.
- 3. The results are displayed in the <u>Archive Manager</u> list view.

Rea	d	Previous	Next									
Selecti	ion Criteri	ia					-		_			
Start D	ate	¥	Account			Template Id 9140	Wrappe	er Id				
End Da	ate	~	Recipien	t			Template	Гуре	0) A	ny		¥
Archive D	Account Number	Time	Sent	Template ID	Wrapper ID	Template Description	Template Type	Effec Da	ctive ite	Has Errors	Sent	Recipient
3088	18011064	2/28/2017 2:	05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24	/2014			JAMESF@GOLDPOINTSYSTE /
3072	18012120	2/27/2017 3:	37:06 PM	9140	0	Payment Confirmation	HTML Email	11/24	/2014			NotificationBetaAlert@goldpoints
3071	18014920	2/27/2017 3:	36:06 PM	9140	0	Payment Confirmation	Text Message	05/12	/2016			+13853853853
3067	18014920	2/27/2017 3:	36:05 PM	9140	0	Payment Confirmation	HTML Email	11/24	/2014			NotificationBetaAlert@goldpoints >

Search by Template ID Results Displayed in the Archive Manager List View

Search by Wrapper Identification Number

To search for archived messages by wrapper identification (ID) number:

1. Enter the wrapper ID number that you want to search for in the **Wrapper ID** field. **Note:** You must enter the complete ID number. Partial numbers cannot be used to search.

Read	Previous	Next				
Selection Cri Start Date	teria V	Account	Template Id	Wrapper Id	10001	
End Date	Ý	Recipient		Template Type	0) Any	¥

Wrapper ID Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any archived message that has a wrapper ID number that matches the number entered in the **Wrapper ID** field.
- 3. The results are displayed in the <u>Archive Manager</u> list view.

Rea	ad F	revious	Next									
Select	ion Criteria											
Start D)ate	~	Account		Ter	nplate Id	Wrapper Id	10001				
End D	ate	¥	Recipient			1	Template Type	0) Any		~		
Archive ID	Account Number	Ті	me Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient	ſ
13087	0	2/28/2017	11:04:25 AM	17	10001	Secure Message sent	Text Message	02/10/2017			+18013723723	
13084	0	2/28/2017	11:03:24 AM	17	10001	Secure Message sent	Text Message	02/10/2017			+18013723723	
13079	0	2/28/2017	11:02:21 AM	17	10001	Secure Message sent	Text Message	02/10/2017			+18013723723	
13057	0	2/24/2017	5:28:45 PM	17	10001	Secure Message sent	Text Message	02/10/2017			+18013723723	
12947	0	2/15/2017	7:31:16 PM	10001	10001	Test text template	Text Message	05/19/2016			+18016026023	•

Search by Wrapper ID Results Displayed in the Archive Manager List View

Back to Top

Search by Recipient

To search for archived messages by the intended recipient's email address or phone number:

2. Enter the email address or phone number that you want to search for in the **Recipient** field. **Note:** You can enter a partial email address or phone number.

		.				
End Date	Ý	Recipient jamesf@	goldpointsystems.com	Template Type	0) Any	~
Start Date	~	Account	Template Id	Wrapper Id		
Selection Cri	iteria					
Read	Previous	Next				

- 4. Click the <Read> button (<u>Read</u>). The system searches for any archived message that has an email address or phone number that matches what was entered in the **Recipient** field.
- 5. The results are displayed in the <u>Archive Manager</u> list view.

Rea	be	Previous	Nex								
Select	ion Crite	ria							772		
Start D)ate	~	Account			Template Id	Wrappe	r Id			
End D	ate	~	Recipie	nt jamesf@	goldpoints	vstems.com	Template T	ype 0) An	У		¥
Archive ID	Account Number	Time S	ent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
3086	0	2/28/2017 11:0	4:25 AM	143	1	Feedback Submitted (To	HTML Email	11/18/2014	 Image: A start of the start of	~	jamesf@goldpointsystems.com
3085	0	2/28/2017 11:0	4:25 AM	17	1	Secure Message sent by	HTML Email	11/11/2014			jamesf@goldpointsystems.com
3083	0	2/28/2017 11:0	3:24 AM	17	1	Secure Message sent by	HTML Email	11/11/2014			JAMESF@GOLDPOINTSYST
3078	0	2/28/2017 11:0	2:21 AM	17	1	Secure Message sent by	HTML Email	11/11/2014			jamesf@goldpointsystems.com

Search by Recipient Results Displayed in the Archive Manager List View

Back to Top

Search by Template Type

To search for archived messages by template type:

3. Select the template type that you want to search for from the **Template Type** drop-down list.

Read	Previous	Next				
Selection Cri	teria					
Start Date	~	Account	Template Id	Wrapper Id		
End Date	¥	Recipient		Template Type	1) Text Email	<
		Template	Type Field in the Search C	riteria		

- 6. Click the <Read> button (<u>Read</u>). The system searches for any archived message that has a template type that matches the type selected from the **Template Type** drop-down list.
- 7. The results are displayed in the <u>Archive Manager</u> list view.

d P	revious	Next									
ion Criteria					_			7	12		
ate	~	Account		Т	emplate Id		Wrapper	ld	_		
ate	¥	Recipient					Template Ty	pe 1)	Text	Email 🗸	
Account Number	Tim	e Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent		Recipient
1313000013	6/13/2016	11:56:06 AM	9110	0	Loan Paid Off	Text Emai	12/09/2015			NotificationBeta	Alert@goldpointsystems.com
	d P ion Criteria ate Account Number 1313000013	d Previous ion Criteria ate v Account Tim 1313000013 6/13/2016	d Previous Next ion Criteria ate Account ate Recipient Account Number Time Sent 1313000013 6/13/2016 11:56:06 AM	d Previous Next ion Criteria ate Account ate Recipient Account Time Sent Template 1313000013 6/13/2016 11:56:06 AM 9110	d Previous Next ion Criteria ate Account T ate Recipient Account Time Sent Template Wrapper Number 11:56:06 AM 9110 0	d Previous Next ion Criteria ate Account Template Id ate Recipient Account Time Sent Template Wrapper Template ID Description 1313000013 6/13/2016 11:56:06 AM 9110 0 Loan Paid Off	d Previous Next ion Criteria ate Account Template Id ate Recipient Account Time Sent Template Wrapper Template ID Description Type 1313000013 6/13/2016 11:56:06 AM 9110 0 Loan Paid Off Text Email	d Previous Next ion Criteria ate V Account Template Id Wrapper ate V Recipient Template UTEmplate Type Account Time Sent Template Wrapper Template Description Template Effective Date 1313000013 6/13/2016 11:56:06 AM 9110 0 Loan Paid Off Text Email 12/09/2015	d Previous Next ion Criteria ate V Account Template Id Wrapper Id ate V Recipient Template Type 1) Account Time Sent Template Wrapper Template Description Template Effective Has Number 1313000013 6/13/2016 11:56:06 AM 9110 0 Loan Paid Off Text Email 12/09/2015	d Previous Next ion Criteria Account Template Id Wrapper Id ate V Account Template Id Effective Account Time Sent Template Unable Template Effective Has Number Time Sent Template Wrapper Template Template Effective Has 1313000013 6/13/2016 11:56:06 AM 9110 0 Loan Paid Off Text Email 12/09/2015	d Previous Next ion Criteria Template Id Wrapper Id ate Account Template Id Wrapper Id ate Previous Recipient Template Id Effective Account Time Sent Template ID Description Template Type Has 1313000013 6/13/2016 11:56:06 AM 9110 0 Loan Paid Off Text Email 12/09/2015 Image: Constraint of the sent of the

Search by Template Type Results Displayed in the Archive Manager List View

Search Using Multiple Search Criteria

To search for archived messages using multiple search criteria:

4. Enter all of the search criteria that you want to use to narrow your search in the Selection Criteria fields. In our example, we entered information in the **Start** and **End Date** fields, the **Recipient** field, and the **Template Type** field.

Read	Previous	Next				
Selection Start Date	Criteria 02/27/2017 V	Account	Template Id	Wrapper Id		
End Date	03/06/2017 🗸	Recipient iamesf@	goldpointsystems.com	Template Type	2) HTML Email	~

Multiple Fields Used in the Search Criteria

- 8. Click the <Read> button (<u>Read</u>). The system searches for any archived message that matches all of the search criteria entered.
- 9. The results are displayed in the <u>Archive Manager</u> list view. In our example the archived messages that appear in the results were sent within the time frame specified by the **Start** and **End Date** fields, the recipient's email address matches the one entered in the **Recipient** field, and the template type is "HTML Email" which was specified using the **Template Type** field.

Rea	be	Previous	Next								
Select	tion Criteri	a									
Start [)ate 02/27	/2017 🗸	Account			Template Id	Wrappe	rld			
End D	late 03/06	/2017 🗸	Recipient	jamesf@g	oldpointsyst	tems.com	Template T	ype 2) HT	ML Em	ail	v
Archive ID	Account Number	Time	Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13088	18011064	2/28/2017 2:	:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014			JAMESF@GOLDPOINTSYS 🔺
13086	0	2/28/2017 1	1:04:25 AM	143	1	Feedback Submitted (To	HTML Email	11/18/2014	~	~	jamesf@goldpointsystems.com
13085	0	2/28/2017 1	1:04:25 AM	17	1	Secure Message sent by	HTML Email	11/11/2014			jamesf@goldpointsystems.com
13083	0	2/28/2017 1	1:03:24 AM	17	1	Secure Message sent by	HTML Email	11/11/2014			JAMESF@GOLDPOINTSYS
13078	0	2/28/2017 1	1:02:21 AM	17	1	Secure Message sent by	HTML Email	11/11/2014			iamesf@coldpointsvstems.com ¥

Search by Multiple Search Criteria Results Displayed in the Archive Manager List View

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See also:

Notification Archive Manager Screen Notification Archive Manager Screen Details

Search the Results

To search the results in the Archive Manager list view using the Archive Manager screen:

1. <u>Perform a search</u> to populate the **Archive Manager** list view.

Rea	b	Previous	Next								
Select	ion Criteri	a									
Start D	ate	*	Account			Template Id	Wrapper Id				
End D	ate	~	Recipient			Т	emplate Type	0) Any		~	
Archive ID	Account Number	Time	Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13088	18011064	2/28/2017 2	:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014		~	JAMESF@GOLDPOINTS ^
13087	0	2/28/2017 1	1:04:25 AM	17	10001	Secure Message sent by Cu	Text Message	02/10/2017		~	+18013723723
13086	0	2/28/2017 1	1:04:25 AM	143	1	Feedback Submitted (To FI).	HTML Email	11/18/2014	~	~	jamesf@goldpointsystem
13085	0	2/28/2017 1	1:04:25 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014		~	jamesf@goldpointsystem
13083	0	2/28/2017 1	1:03:24 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014		 Image: A start of the start of	JAMESF@GOLDPOINTS
<											>

Archive Manager List View

2. Right-click inside the **Archive Manager** list view to bring up the Right-click Menu.



3. Select "Find" from the menu to open the Find dialog.

🖳 Find				×
			Find	
Row Number	Column Name	Field		
_				

Find Dialog

4. Enter the text to search for in the **Search** field. In the following example, we will search for the text, "Dealer."

Dealer	Find

Enter text in the Search Field

5. Click <Find> to populate the Find list view with the results from the search. In our example we found all the archived messages that involved a "Dealer" application. Note: To narrow the results, enter more specific text in the Search field.

	Find	
	Find	
Column Name	Field	
Template Description	DEALER SUBMITTED APPLICAT	ION (CUSTOMER)
	Column Name Template Description	Find Find Column Name Field Template Description DEALER SUBMITTED APPLICAT

Find List View Populated with the Results of the Search

The **Find** list view displays all of the items that include the text entered in the **Search** field. It also lists what row number they are on in the **Archive Manager** list view, the name of the column that the search text was found in, and the field that contained the search text.

Double-clicking on an item in the **Find** list view closes the Find dialog and displays the **Archive Manager** list view with that item automatically selected.

Another effective way to use the Find dialog is to use it to search for archived messages set up with a specific email address (see the example below).

8	🖁 Find			3
	jamesr		Find	
	Row Number	Column Name	Field	
	1	Email	JAMESR@GOLDPOINTSYSTEMS.COM	
	2	Email	JAMESR@GOLDPOINTSYSTEMS.COM	
	3	Email	JAMESR@GOLDPOINTSYSTEMS.COM	
	4	Email	JAMESR@GOLDPOINTSYSTEMS.COM	
	5	Email	JAMESR@GOLDPOINTSYSTEMS.COM	

Results for a Search for the Part of an Email Address

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See also:

Notification Archive Manager Screen Notification Archive Manager Screen Details Search for Archived Messages

Select a Message to Edit/Resend

To select an archived message to edit and/or resend using the Archive Manager screen:

1. <u>Perform a search</u> to populate the <u>Archive Manager</u> list view.

Rea	b	Previous	Next								
Select	ion Criteri	a				1					
Start D	ate	~	Account			Template Id	Wrapper Id				
End D	ate	~	Recipient			Те	mplate Type	0) Any		~	
Archive ID	Account Number	Time	Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13088	18011064	2/28/2017 2	:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014			JAMESF@GOLDPOINTS ^
13087	0	2/28/2017 1	1:04:25 AM	17	10001	Secure Message sent by Cu.	Text Message	02/10/2017		~	+18013723723
13086	0	2/28/2017 1	1:04:25 AM	143	1	Feedback Submitted (To FI)	HTML Email	11/18/2014	~	~	jamesf@goldpointsystem
13085	0	2/28/2017 1	1:04:25 AM	17	1	Secure Message sent by Cu.	HTML Email	11/11/2014			jamesf@goldpointsystem
13083	0	2/28/2017 1	1:03:24 AM	17	1	Secure Message sent by Cu.	HTML Email	11/11/2014		v	JAMESF@GOLDPOINTS
<											>

Archive Manager List View

Rea	be	Previous	Next								
Select	tion Crit	teria				0 <u>1</u>					
Start D)ate		Account			Template Id	Wrapper Id				
End D	ate		Recipien	t		Те	mplate Type	0) Any		~	
Archive ID	Accou Numb	unt Tin	ne Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13088	180110	64 2/28/2017	2:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014		🖌 J.	AMESF@GOLDPOINTS
13087	0	2/28/2017	11:04:25 AM	17	10001	Secure Message sent by Cu	Text Message	02/10/2017		+	18013723723
13086	0	2/28/2017	11:04:25 AM	143	1	Feedback Submitted (To FI)	HTML Email	11/18/2014	~	🗸 ja	mesf@goldpointsystem
13085	0	2/28/2017	11:04:25 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014		🔽 ja	mesf@goldpointsystem
13083	0	2/28/2017	11:03:24 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014		🖌 J.	AMESF@GOLDPOINTS
<											>
Account Destinati Subject Status D	Number ion Addre •TEST etails	0 ess 10.0.0.5 F* Secure Ma Relaved	Tem i essage Sent	plate ID 17	7	Template Type HTN Destination Port 25	IL Email		E	ffective	Date 11/11/2014
1) Relay	ved to 1	Transmission	Server.;								

2. Select an archived message in the **Archive Manager** list view.

Archived Message Selected to Edit and/or Resend

 Click <Edit/Resend Message> to open the message on the Notification > <u>Manual Notification Handler</u> screen. Once the message is on the Manual Notification Handler screen, you can add to, change, and re-queue the message.

66 Notification System

necipient	jamesf@goldpointsystems.com	Template	17 Secure Message sent by	Customer HTML Ema	ail 11/11/2014	~
Override Subject*	*TEST* Secure Message Sent	Wrapper	1 Basic Wrapper HTML Ema	il 05/17/2016		×
Account Number	0		Parameter	Value		0
Priority	1000		FIRST_NAME			
Release Date	×					
Release Time	12:00:00 AM					
*Optional F	ìeld					
			10 March 10			
Override Message	An overriden message will be rer	ndered "AS-IS"	and not by the current ca	ched template	Add/Chan	ge Delete
Ovenide Message	An overriden message will be rer	ndered "AS-IS" :	and not by the current ca	ched template	Add/Chan	ge Delete
Override Message html <html> <head></head></html>	An overriden message will be rer	ndered "AS-IS" :	and not by the current ca	ched template	Add/Chan	ige Delete
Override Message html <html> <head> <title>Finance Corr </title></head></html>	An overriden message will be rer	ndered "AS-IS" (and not by the current ca	ched template	Add/Chan	ge Delete
Ovemide Message html <html> <head> <title>Finance Com </title></head> <body bgcolor="#e</td><td>An overriden message will be rer
npany </title>
ededed" style="margin: 0; padding: 0;"></body></html>	ndered "AS-IS" ;	and not by the current ca	ched template	Add/Chan	ige Delete	
Override Message html <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <html> <ht< td=""><td>An overriden message will be rer npany ededed" style="margin: 0; padding: 0;"> ="0" border="0" bgcolor="#ededed" hei</td><td>ndered "AS-IS" ; ght="100%" width</td><td>and not by the current ca ="100%"></td><td>ched template</td><td>Add/Chan</td><td>ige Delete</td></ht<></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html></html>	An overriden message will be rer npany ededed" style="margin: 0; padding: 0;"> ="0" border="0" bgcolor="#ededed" hei	ndered "AS-IS" ; ght="100%" width	and not by the current ca ="100%">	ched template	Add/Chan	ige Delete
Override Message html <html> <head> <title>Finance Corr </title></head> dtile>Finance Corr dtody bgcolor="#e dtrailse dtailse valign="top"</html>	An overriden message will be rer npany ededed" style="margin: 0; padding: 0;"> ="0" border="0" bgcolor="#ededed" hei > 500" style="margin: auto;">	ndered "AS-IS" : ight="100%" width	and not by the current ca	ched template	Add/Chan	ige Delete

Selected Message on the Manual Notification Handler Screen

Back to Top

See also:

Notification Archive Manager Screen Notification Archive Manager Screen Details Manual Notification Handler Screen Search for Archived Messages

View Message Details

To view the details of an archived message using the Archive Manager screen:

1. <u>Perform a search</u> to populate the <u>Archive Manager</u> list view.

Rea	be	Previous	Next								
Select	tion Criteri	a									
Start D)ate	~	Account			Template Id	Wrapper Id				
End D	ate	~	Recipient			Т	emplate Type	0) Any		~	
Archive ID	Account Number	Time	Sent	Template ID	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient
13088	18011064	2/28/2017 2	:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014		~	JAMESF@GOLDPOINTS ^
13087	0	2/28/2017 1	1:04:25 AM	17	10001	Secure Message sent by Cu	Text Message	02/10/2017		~	+18013723723
13086	0	2/28/2017 1	1:04:25 AM	143	1	Feedback Submitted (To FI).	HTML Email	11/18/2014	~	~	jamesf@goldpointsystem
13085	0	2/28/2017 1	1:04:25 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014			jamesf@goldpointsystem
13083	0	2/28/2017 1	1:03:24 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014			JAMESF@GOLDPOINTS
<											>

Archive Manager List View

2. Select an archived message in the **Archive Manager** list view to display the details of the message in the fields below the **Archive Manager** list view.

Rea	be	Previous	Next									
Select	ion Criteri	a				0 <u>1</u>						
Start D)ate	~	Account			Template Id	Wrapper Id					
End D	ate	Ŷ	Recipien	t		Te	mplate Type	0) Any		~		
Archive ID	Account Number	Time	e Sent	Template	Wrapper ID	Template Description	Template Type	Effective Date	Has Errors	Sent	Recipient	
13088	18011064	2/28/2017 2	:05:56 PM	9140	0	Payment Confirmation	HTML Email	11/24/2014			JAMESF@GOLDPOINTS	-
13087	0	2/28/2017 1	1:04:25 AM	17	10001	Secure Message sent by Cu	Text Message	02/10/2017		1	+18013723723	
13086	0	2/28/2017 1	1:04:25 AM	143	1	Feedback Submitted (To FI)	HTML Email	11/18/2014	~	~	jamesf@goldpointsystem	1
13085	0	2/28/2017 1	1:04:25 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014			jamesf@goldpointsystem	1
13083	0	2/28/2017 1	1:03:24 AM	17	1	Secure Message sent by Cu	HTML Email	11/11/2014		v	JAMESF@GOLDPOINTS	÷.,
<											>	
Account Destinati Subject	Number 0 on Address •TEST• \$	10.0.0.5 Secure Mes	Tem sage <mark>Sent</mark>	plate ID 17	7	Template Type HTM Destination Port 25	IL Email		E	fective	e Date 11/11/2014	^
1) Relay Message DOC1<br <html> <head> <ittle>F</ittle></head></html>	YPE html:	nsmission S	Server.; :le>									*

Details of Archived Message Displayed

In addition to viewing the details of a message, you can also <u>render the message</u> or <u>send the message</u> to the <u>Manual Notification Handler</u> screen to edit and/or re-queue the message.

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See also:

Notification Archive Manager Screen Notification Archive Manager Screen Details Search for Archived Messages Render a Message Select a Message to Edit/Resend

Client Text Notifications Screen

Use the Client Text Notifications screen to search for and view text message conversations. You can also use this screen to send and receive text messages with your customers.

The Client Text Notifications screen allows your employees to contact borrowers using two-way texting from directly within CIM GOLD. Two-way texting shows conversations between the borrower and your institution via text. For example, if the system sends the borrower a reminder text for payments, and the borrower responds by doing what the text requested, you can view the conversations of both the system and the borrower.

Two-way texting works with our own Notification System, or we can interface with Solutions by Text, where the texts route through their system and back to CIM GOLD.

To find out how to send text messages on any screen in CIM GOLD, see the help for the <u>Right-click Menu Pop</u> Up screen.

How To Items

This screen allows you to:

- Delete Conversations
- Filter Conversations by Phone
- Filter Conversation Threads by Message
- Search for Conversations
- Send a Free-form Text
- <u>Send a Text Message</u>
- Send a Text Using a Template
- Send a Text Using a Wrapper
- <u>View Conversation Threads</u>

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Client Text</u> <u>Notifications Screen Details</u> section.

Options

There are several options available for texting including, No Saturday Texts, No Sunday Texts, Minutes Required Between Texts, etc. These options can help you stay in compliance with federal and state regulations. If you are interested in setting up additional options, please contact your GOLDPoint Systems client solutions specialist.

This screen is accessed by going to Notification > Client Text Notifications in the CIM GOLD tree view.

Search			Conversation	Thread +18016696696	;
Branch			Filter by mes	sage	
Phone			·	Sunday, August 21, 2	016
Start	7/24/2016 12:0	0 AM 🔹 🕶		*TEST* Please call us too vehicle's insurance info.	day concerning your The purpose of this
End	8/24/2016 11:5	9 PM 🔷 🕶		communication is to colle	ect a debt.
	Search Conve	ersations			4:08 PM
Conversations			I got State	e Farm already. Lol	
Filter by phone			4:09 PM		
+180166966 Acct: 1-00	96 0002	8/21/2016		*TEST* Why would you want state progressive?	farm? Don't you like
+180169169 Acct: 0001	19 000002	8/21/2016		Sent by GFS. Reply Stop	4-23 PM
+180137237 Acct: 9000	20 002088	8/16/2016	Because	State Farm has sheep	4.231 M
+180160260 Acct: 0001	23 -0000000007	8/23/2016	4:24 PM	See Conversations Arro	es Branches
60 +180160260 Acct: 0060	23 123456	8/16/2016	Template	Jee Conversations Acto	v
					Send
			Close Cor	versation Refresh	Clear Auto Refresh: OFF

Client Text Notifications Screen

See also:

Client Text Notifications Screen Details Notification System

Client Text Notifications Screen Details

Use the Client Text Notifications screen to <u>search for</u> and <u>view</u> text message conversations. You can also use this screen to <u>send</u> and receive text messages with your customers.

See the following example of this screen followed by field and button descriptions.

Search		Conversation Thread +18016696696
Branch		Filter by message
Phone		
Start	7/24/2016 12:00 AM 🔷 🗸	*TEST* Please call us today concerning your vehicle's insurance info. The purpose of this
End	8/24/2016 11:59 PM 🚔 🕶	communication is to collect a debt.
	Search Conversations	4:08 PM
Conversations		I got State Farm already. Lol
Filter by phone		4:09 PM
-1 +18016696696 Acct: 1-0000	02 8/21/2016	*TEST* Why would you want state farm? Don't you like progressive?
+18016916919 Acct: 000100	8/21/2016	4-23 PM
+18013723720 Acct: 90000	8/16/2016	Because State Farm has sheep
+18016026023 Acct: 0001-0	8/23/2016	4:24 PM
60 +18016026023 Acct: 006012	8/16/2016	Template v Wrapper v
		Send
		Clear Close Conversation Refresh Auto Refresh: OFF

Client Text Notifications Screen

Field Descriptions

Field	Description
Branch	Enter a branch number in this field to limit your search to conversations by branch.

Field	Description
Phone	Enter a phone number in this field to limit your search to only the conversations associated with that phone number. Note: You must enter a complete phone number to be able to search.
Start	Enter or use the up and down arrows or calendar to select a starting date and time to limit your search to conversations that occurred within a specific time period. You can select a part of the date or a section of the time and use the up and down arrows to increase or decrease the number. You can also select a part of the date or time and manually enter in the number you want in that spot. In addition, you can press the large down arrow to open the calendar to select a date.
End	Enter or use the up and down arrows or calendar to select an ending date and time to limit your search to conversations that occurred within a specific time period. You can select a part of the date or a section of the time and use the up and down arrows to increase or decrease the number. You can also select a part of the date or time and manually enter in the number you want in that spot. In addition, you can press the large down arrow to open the calendar to select a date.
Filter By Phone	Use this field to filter the results by phone number. As you type a phone number into this field the search results will automatically adjust to show only those conversations that match the numbers you are typing in.
Conversations List View	 The Conversations list view displays the conversations that meet the search parameters entered. You can filter the results by phone number using the Filter By Phone field. Selecting a conversation in this list view opens and displays that conversation in the Conversation Thread Message Display. The following information is displayed in the Conversations list view: Branch Number: The branch number is displayed in the circle on the left. You can use the Branch search parameter to limit your results by branch number. Phone Number: Displays the phone number associated with the conversation. You can use the Phone search parameter to limit your results by phone number. Account Number: Displays the account number associated with the conversation.
Field	Description
--------------------------------------	---
	• Date: Displays the date (in MM/DD/YYYY format) of the conversation. You can use the <u>Start</u> and <u>End</u> fields to limit your results to a specific time period.
Filter By Message	Use this field to filter the conversation thread by parts of a message. As you type into this field the conversation thread will automatically adjust to show only those parts of the conversation that match the characters you are typing in. Note: This field is <i>not</i> case sensitive. For example, if you type "payments" into this field, only the threads that contain the word "payments" will remain in the <u>Message Display</u> box.
Message Display	This display box displays the conversation threads for the conversation selected in the <u>Conversations</u> list view. You can filter the conversations threads by the contents of the messages using the <u>Filter By Message</u> field. You can also add more threads to the conversation using the <u>Text Message</u> field.
Free Form	Check this box to type your text message using free form. This will let CIM GOLD know that you do not want to include a template or a wrapper.
See Conversations Across Branches	Check this box to view the conversations for this thread across all branches instead of only seeing the conversations for this thread for a single branch.
Template	Select a template from this drop-down list to use a template for your text message.
Wrapper	Select a wrapper from this drop-down list to use a wrapper for your text message.
Text Message	Use this field to type a text message to be sent to the phone number selected in the <u>Conversations</u> list view. You can send a plain message or you can use prefabricated <u>templates</u> and <u>wrappers</u> .

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Button Descriptions

Button	Description
<search conversations=""></search>	Click this button to <u>search for conversations</u> that meet the conditions set by the search parameters.

Button	Description
<send></send>	Click this button to <u>send a text message</u> to the phone number selected in the <u>Conversations</u> list view.
<clear></clear>	Click this button to erase the text entered in the Text Message field.
<close conversation=""></close>	Click this button to <u>close the conversation</u> . Warning: Clicking this button with end the conversation and remove it from the <u>Conversations</u> list view, making it so that you can no longer access the conversation.
<refresh></refresh>	Click this button to refresh the conversation in the Message Display box.
<auto refresh=""></auto>	Click this button to force CIM GOLD to automatically refresh the conversation in the Message Display box.

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See also:

Client Text Notifications Screen Notification System

Delete Conversations

To delete a conversation using the Client Text Notifications screen:

- 1. <u>Search for a conversation</u>. All of the conversations that match the search parameters are displayed in the <u>Conversations</u> list view.
- 2. Select the conversation that you want to delete in the Conversations list view. This displays the conversation in the <u>Message Display</u>.
- 3. Click on the <Close Conversation> button. **Warning:** This deletes the conversation and completely removes it. You will no longer be able to search for the conversation once it has been deleted.

Search			Conversation Thread +18013763767
Branch			Filter by message
Phone			communication is to collect a debt.
Start		2/28/2016 12:00 AM	1:43 PM
End		8/24/2016 11:59 PM 🔶	TEST FREEFORMTEXT
		Search Conversations	1:45 PM Thursday, June 30, 2016
Conversati	ions		
Filter by	y phone Acct: 0009016718	1	*343.00 has been processed and applied to your account on JUNE 30, 2016.
	+19016026022		*TEST*
-1	Acct: 9999000291	6/27/2016	11:47 AM
•	+18013123127 Acct: 00000023002536	6/27/2016	*TEST* Dear COREY, Your Payment of \$343.00 has been processed and applied to your account on JUNE 30, 2016
-1	+18017177171 Acct: 17-000763	6/21/2016	*TEST*
	+18013763767 Acct: 10-008708	6/15/2016	11:47 AM Free Form See Conversations Across Branches
42	+18013723720 Acct: 0042004242	7/6/2016	Template v Wrapper v
60	+18016026023 Acct: 0060123456	8/16/2016	Send
9001	+18018858853 Acct: 9001911119	6/17/2016	Clear Close Conversation Refresh Auto Refresh: OFF

Conversations Displayed

4. The conversation is removed from the **Conversations** list view and can no longer be searched for.



Selected Conversation Removed from Conversations List View

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See also:

<u>Client Text Notifications Screen</u> <u>Client Text Notifications Screen Details</u> <u>Search for Conversations</u> <u>Notification System</u>

Filter Conversations by Phone

To filter conversations by phone number using the Client Text Notifications screen:

1. <u>Search for a conversation</u>. All of the conversations that match the search parameters are displayed in the <u>Conversations</u> list view.

Filter	by phone	
-	+18016696696 Acct: 1-000002	8/21/2016
-1	+18016916919 Acct: 0001000002	8/21/2016
-1	+18013723720 Acct: 9000002088	8/16/2016
1	+18016026023 Acct: 0001-000000007	8:40 AM
60	+18016026023	8/16/2016

Conversations Displayed

- 2. Enter a phone number into the <u>Filter by Phone</u> field. As you enter in the number, the conversations are automatically filtered.
- 3. Once the entire phone number is entered, only conversations by that phone number appear in the <u>Conversations</u> list view.



Conversations Filtered by Phone Number

4. Now you can click on a conversation to view the conversation thread.

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See also:

<u>Client Text Notifications Screen</u> <u>Client Text Notifications Screen Details</u> <u>Search for Conversations</u> <u>View Conversations Threads</u> <u>Notification System</u>

Filter Conversation Threads by Message

Filtering a conversation thread can help you to quickly find the specific information that you are looking for. To filter a conversation thread using the Client Text Notifications screen:

1. <u>Search for a conversation</u>. All of the conversations that match the search parameters are displayed in the <u>Conversations</u> list view.

Search			Conversation Thread	
Branch			Filter by message	
Phone				
Start	7/24/2016 12:0	• • MA 00		
End	8/24/2016 11:	59 PM 🔷 👻		
	Search Conv	ersations		
Convers	ations			
Filter	by phone			
-1	+18016696696 Acct: 1-000002	8/21/2016		
	+18016916919 Acct: 0001000002	8/21/2016	Free Form See Conversations Across Branches	
•	+18013723720 Acct: 9000002088	8/16/2016	Wrapper	~
	+18016026023 Acct: 0001-000000007	8/23/2016	S	end
60	+18016026023 Acct: 0060123456	8/16/2016	Close Conversation Refresh Auto Refresh: (ear DFF

Conversations Displayed in Conversations List View

2. Select the conversation that you want to view in the **Conversations** list view. This displays the conversation thread in the <u>Message Display</u>.

Search		Conversation Thread +18016696696
Branch		Filter by message
Phone		
Start	7/24/2016 12:00 AM 🔷 👻	*TEST* Please call us today concerning your vehicle's insurance info. The purpose of this
End	8/24/2016 11:59 PM 🜩 👻	communication is to collect a debt.
	Search Conversations	4:08 PM
Conversations		I got State Farm already. Lol
Filter by phone		4:09 PM
+18016696696 Acct: 1-000002	8/21/2016	*TEST* Why would you want state farm? Don't you like progressive?
+18016916919 Acct: 000100000	8/21/2016	4-23 PM
+18013723720 Acct: 900000208	8/16/2016	Because State Farm has sheep
+18016026023 Acct: 0001-0000	000007 8/23/2016	4:24 PM
60 +18016026023 Acct: 006012345	8/16/2016	Template v Wrapper v
		Send
		Close Conversation Refresh Auto Refresh: OFF

Conversation Thread Displayed in the Message Display

3. Begin typing text into the <u>Filter by Message</u> field. As you enter in the text, the conversation threads are automatically filtered to display only those threads that contain the text typed in the **Filter by Message** field.

Conversation	Thread +180	16696696		
TEST				
	Sunda	ay, August 2	1, <mark>2016</mark> —	
	*TEST*P vehicles i communit	lease call us nsurance inf cation is to c	today con o. The pur ollect a del	cerning your pose of this ot.
				4:08 PM
	TEST wny would progressive Sent by G	you want sta ? PS. Reply S	ate farm? [top to can)on't you like cel.
				4:23 PM
Free Form	See Conv	ersations Ac	ross Branc	hes 🗌
Template				Ŷ
Wrapper				v
				Send
-				Clear
Close Cor	versation	Refresh	Aut	o Refresh: OFF

Filtered Conversation Thread Displayed

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See also:

<u>Client Text Notifications Screen</u> <u>Client Text Notifications Screen Details</u> <u>Search for Conversations</u> <u>View Conversation Threads</u> <u>Notification System</u>

Search for Conversations

You can use the Client Text Notifications screen to search for conversations.

- Search for a Conversation by Date and Time
- Search for a Conversation by Branch
- Search for a Conversation by Phone Number



Search Overview

Search for a Conversation by Date and Time

- 1. Select a starting date and time using the <u>Start</u> field.
- 2. Select an ending date and time using the <u>End</u> field.
- 3. Click <Search Conversations>.
- 4. Conversations are displayed in the middle <u>Conversations</u> list view that occurred within the time and date parameters entered in the **Start** and **End** fields.

Once you are viewing the conversations in the Conversations list view, you can <u>filter the conversations</u> by phone number to search for a conversation with a specific phone number.

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Search for a Conversation by Branch

1. Enter the branch number for the conversation in the <u>Branch</u> field.

Last updated: 2/17/2021

- 2. If you want to narrow your search results by a specific phone number, enter the number in the <u>Phone</u> field. Otherwise, leave it blank to show all phone numbers from the accounts in that branch.
- 3. If you want to limit your search to a specific time range, select a starting and ending date and time using the <u>Start</u> and <u>End</u> fields.
- 4. Click <Search Conversations>.
- 5. Any conversations matching the search parameters are displayed in the <u>Conversations</u> list view.

Once you are viewing the conversations in the Conversations list view, you can <u>filter the conversations</u> by phone number to search for a conversation with a specific phone number.

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Search for a Conversation by Phone Number

- 1. Leave the <u>Branch</u> field blank.
- 2. Enter the phone number for the conversation in the <u>Phone</u> field. **Note**: You must include the full phone number, including the country calling code (a "1" for a United States phone number). Also, do not use any dashes or parenthesis.
- If you want to limit your search to a specific time range, select a starting and ending date and time using the <u>Start</u> and <u>End</u> fields. *Tip*: To search for all conversations with that phone number, set the **Start** date back two or more years and put today's date in the **End** field.
- 4. Click <Search Conversations>.
- 5. Any conversations matching the search parameters are displayed in the <u>Conversations</u> list view.

Pro Tip: Sometimes it is a lot easier to perform a search and then <u>filter the conversations</u> by phone number rather than to search for a conversation by phone number.

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See also:

<u>Client Text Notifications Screen</u> <u>Client Text Notifications Screen Details</u> <u>Filter Conversations by Phone</u> <u>View Conversations Threads</u> <u>Notification System</u>

Send a Text Message

You can use the Client Text Notifications screen to send text messages.

- Send a Free-form Text
- Send a Text Using a Template
- Send a Text Using a Wrapper

Send a Free-form Text

Free-form texts allow you to write whatever you would like and send it. This is how most people text on their phones. To send a free-form text using the Client Text Notifications screen:

1. <u>Search for a conversation</u>. All of the conversations that match the search parameters are displayed in the <u>Conversations</u> list view.

Search			Conversation	Thread	-
Branch			Filter by me	ssage	
Phone					
Start	7/24/2016 12	2:00 AM 🔷 👻			
End	8/24/2016 1	1:59 PM 🔷 👻			
	Search Co	nversations			
Conversations					
Filter by phone					
+1801665	96696 Acct: 1-000002	8/21/2016			
+180169 Acct: 0	16919 001000002	8/21/2016	Free Form	See Conversatio	ons Across Branches
+1801372 Acct: 9	23720 000002088	8/16/2016	Wrapper		· · · · · · · · · · · · · · · · · · ·
+1801602 Acct: 0	26023 001-0000000007	8/23/2016			Send
60 +1801602 Acct: 0	26023 060123456	8/16/2016	Close Co	onversation R	Clear Auto Refresh: OFF

Conversations Displayed in Conversations List View

2. Select the conversation that you want to view in the **Conversations** list view. This displays the conversation thread in the <u>Message Display</u>.

Conversation	n Thread +180	013723720	
Filter by me	essage		
		Monday, August 1, 2016	
	TEST J payment	ust a friendly reminder that your payment is today. The purpose of this communication	s due. Please mail your is to collect a debt.
			11:07 AM
Free Form	See Con	versations Across Branches	~
Wrapper			v
			Send
			Clear
		Close Conversation Refresh	Auto Refresh: OFF

Conversation Thread Displayed

3. Check the <u>Free Form</u> field to open the <u>Text Message</u> area.

Free Form 🔽 Se	ee Conv	ersations Acros	ss Branches	
FREEFORMTEXT				Send
				Clear
Close Conversa	ation	Refresh	Auto Ref	fresh: OFF

Free Form Field Checked

4. Enter your text into the **Text Message** area and click <Send> to send the text to the customer.

Free Form 🖌 Se	e Conversations Across Bra	nches		
TEST This is fun!				Send
				Clear
	Close Conversation	Refresh	Auto Re	efresh: OFF

Free Form Text Ready to Send

86 Notification System

 The message is sent and displayed as one of the threads in the Message Display area. Warning: This screen does *not* stop you from sending text messages within your institution's Minutes Required Between Texts period, if you have that <u>option</u> set.

ilter by r	message
	Monday, August 1, 2016
	TEST Just a friendly reminder that your payment is due. Please mail your payment today. The purpose of this communication is to collect a debt.
	11:07 AM
Thank	c you I will mail that right now!!
11:13 /	c you I will mail that right now!! AM
11:13 /	AM Tuesday, August 16, 2016
11:13 /	AM Tuesday, August 16, 2016 *TEST* This is fun!

Free Form Text Sent and Visible in Message Display Area

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Send a Text Using a Template

To send a text using a template on the Client Text Notifications screen:

1. <u>Search for a conversation</u>. All of the conversations that match the search parameters are displayed in the <u>Conversations</u> list view.

Search			Conversation Thread	
Branch			Filter by message	
Phone				
Start	7/24/2016 1	2:00 AM 🔹 👻		
End	8/24/2016 1	1:59 PM 🔷 👻		
	Search Co	nversations		
Conversations				
Filter by phon	le			
+1801	16696696 Acct: 1-000002	8/21/2016		
+1801 Acct	16916919 ± 0001000002	8/21/2016	Free Form See Conv	ersations Across Branches 🗌
+1801 Acct	13723720 ± 9000002088	8/16/2016	Wrapper	~
+1801 Acct	16026023 ± 0001-0000000007	8/23/2016		Send
60 +1801 Acct	16026023 ± 0060123456	8/16/2016	Close Conversation	Clear Refresh Auto Refresh: OFF

Conversations Displayed in Conversations List View

2. Select the conversation that you want to view in the **Conversations** list view. This displays the conversation thread in the <u>Message Display</u>.

Filter by m	ssage	
	Monday, August 1, 2016	_
	TEST Just a friendly reminder that your payment is due. Please mail your payment today. The purpose of this communication is to collect a debt.	ĺ
	11:07 AM	
11:13 A		
11:13 Al Free Form [Template	See Conversations Across Branches	
11:13 Al Free Form [Template Wrapper	See Conversations Across Branches	>
11:13 Al Free Form [Template [Wrapper]	See Conversations Across Branches	2 2
11:13 Al Free Form [Template [Wrapper	See Conversations Across Branches	2 2

Conversation Thread Displayed

- 3. Select a template from the drop-down <u>Template</u> field to enter the template text into the <u>Text Message</u> area.
- Click <Send> to send the text to the customer. Warning: This screen does not stop you from sending text messages within your institution's Minutes Required Between Texts period, if you have that option set.

Template	3 Notice 2 3 05/31/2016 v				
Wrapper					
Please be	so kind as to ca	ll us today abou	ut your past		
to collect a	ent. The purpose a debt.	e of this commu	nication is	Send	
to collect a	ent. The purpose a debt.	e of this commu	nication is	Send Clear	

Template Text Visible in Text Message Area and Ready to Senc

5. The message is sent and displayed as one of the threads in the **Message Display** area.



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Send a Text Using a Wrapper

To send a text using a wrapper on the Client Text Notifications screen:

1. <u>Search for a conversation</u>. All of the conversations that match the search parameters are displayed in the <u>Conversations</u> list view.

Search			Conversation Thread	
Branch			Filter by message	
Phone				
Start	7/24/2016 1	2:00 AM 🗘 👻		
End	8/24/2016 1	1:59 PM 🔹 👻		
	Search Co	onversations		
Conversations				
Filter by phone				
+18016696	696 Acct: 1-000002	8/21/2016		
+180169169 Acct: 000)19 1000002	8/21/2016	Free Form See Conversations Across Branches	
+18013723 Acct: 900	720 0002088	8/16/2016	Wrapper	Ų
+180160260 Acct: 000)23 1-0000000007	8/23/2016	Se	
60 +180160260 Acct: 006)23 0123456	8/16/2016	Close Conversation Refresh Auto Refresh: C	

Conversations Displayed in Conversations List View

2. Select the conversation that you want to view in the **Conversations** list view. This displays the conversation thread in the <u>Message Display</u>.

Conversation	n Thread +1801	13723720		
Filter by me	essage			
		Monday, August 1, 2	016	
	TEST Jus payment to	st a friendly reminder that you day. The purpose of this com	r payment is du munication is to	ue. Please mail your o collect a debt.
				11:07 AM
11-13 AN	A	at right how ::		
11:13 AM Free Form [Template [1 See Conve	ersations Across Branches]	v
11:13 AM Free Form [Template [Wrapper]	1 See Conve	ersations Across Branches]	~
11:13 AM Free Form [Template [Wrapper [1 See Conve	ersations Across Branches]	v V Send
11:13 AM Free Form [Template [Wrapper [1 See Conve	ersations Across Branches]	v Send Clear

Conversation Thread Displayed

3. Select a template from the drop-down <u>Template</u> field to enter the template text into the <u>Text Message</u> area.

Template	3 Notice 2 3 05/31/2016				
Wrapper				Ŷ	
Please be due payme	so kind as to ca	II us today abou	ut your past		
to collect a	a debt.	e of this commu	inication is	Send	
to collect a	a debt.	e of this commu	Inication is	Send Clear	

Template Text Visible in Text Message Area

- 4. Select a wrapper from the drop-down <u>Wrapper</u> field to attach the wrapper to the template text in the **Text Message** area.
- 5. Click <Send> to send the text to the customer. **Warning:** This screen does *not* stop you from sending text messages within your institution's Minutes Required Between Texts period, if you have that <u>option</u> set.



Template Text with Wrapper Visible in Text Message Area and Ready to Send

6. The message is sent and displayed as one of the threads in the **Message Display** area.

ter by me	essage
	Monday, August 1, 2016
	TEST Just a friendly reminder that your payment is due. Please mail your payment today. The purpose of this communication is to collect a debt.
	11:07 AM
Thank y	ou I will mail that right now!!
Thank y 11:13 AM	ou I will mail that right now!! I ——————————————————————————————————
Thank y 11:13 AM	Tuesday, August 16, 2016 Tuesday, August 16, 2016 TEST* Please be so kind as to call us today about your past due payment. The purpose of this communication is to collect a debt. Sent by GPS. Reply Stop to cancel.
Thank y	Tuesday, August 16, 2016 Tuesday, August 16, 2016 *TEST* Please be so kind as to call us today about your past due payment. The purpose of this communication is to collect a debt. Sent by GPS. Reply Stop to cancel. 2:11 PM

Template Text with Wrapper Sent and Visible in Message Display Area

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See also:

<u>Client Text Notifications Screen</u> <u>Client Text Notifications Screen Details</u> <u>Notification System</u>

View Conversation Threads

To view the conversation thread for a conversation using the Client Text Notifications screen:

1. <u>Search for a conversation</u>. All of the conversations that match the search parameters are displayed in the <u>Conversations</u> list view.

Search			Conversation Thread
Branch			Filter by message
Phone			
Start	7/24/2016 1	2:00 AM 🔷 🕶	
End	8/24/2016 1	1:59 PM 🔷 🕶	
	Search Co	nversations	
Conversatio	ons		
Filter by	phone		
•	+18016696696 Acct: 1-000002	8/21/2016	
	+18016916919 Acct: 0001000002	8/21/2016	Free Form See Conversations Across Branches
	+18013723720 Acct: 9000002088	8/16/2016	Wrapper v
	+18016026023 Acct: 0001-000000007	8/23/2016	Send
			Clear

Conversations Displayed in Conversations List View

2. Select the conversation that you want to view in the **Conversations** list view. This displays the conversation thread in the <u>Message Display</u>.

Search		Conversation Thread +18016696696
Branch		Filter by message
Phone		
Start	7/24/2016 12:00 AM 🔷 👻	*TEST* Please call us today concerning your vehicle's insurance info. The purpose of this
End	8/24/2016 11:59 PM 🔷 🕶	communication is to collect a debt.
	Search Conversations	4:08 PM
Conversations		l got State Farm already. Lol
Filter by phone		4:09 PM
+18016696696 Acct: 1-000002	8/21/2016	*TEST* Why would you want state farm? Don't you like progressive?
+18016916919 Acct: 0001000002	8/21/2016	4-23 PM
+18013723720 Acct: 9000002088	8/16/2016	Because State Farm has sheep
+18016026023 Acct: 0001-0000000	007 8/23/2016	4:24 PM
60 +18016026023 Acct: 0060123456	8/16/2016	Template v
		Send
		Clear Close Conversation Refresh Auto Refresh: OFF

Conversation Thread Displayed in the Message Display

Once you are viewing a conversation thread, you can <u>filter that thread</u> to search for specific information and you can <u>send a text message</u>. You can also view all of the conversations for that thread across all of the branches by checking the <u>See Conversations Across Branches</u> field.

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See also:

<u>Client Text Notifications Screen</u> <u>Client Text Notifications Screen Details</u> <u>Search for Conversations</u> <u>Filter Conversations Threads by Message</u> <u>Send a Text Message</u> <u>Notification System</u>

Manual Notification Handler Screen

Use the Manual Notification Handler screen to manually re-queue messages. Messages with errors are sent to this screen from the <u>Queue Error Manager</u> screen and archived messages are sent to this screen from the <u>Archive Manager</u> screen.

Anything entered in the <u>Override Subject</u> or <u>Override Message</u> fields on this screen overrides anything previously entered in those fields.

How To Items

This screen allows you to:

- Add or change a parameter of a message
- Add the parameter and value changes to a message (render the changes to the parameters)
- Delete a parameter of a message
- Find and replace text in the body of a message
- Queue (send) a message
- <u>Re-queue (or resend) a message</u>
- Re-size columns and rows in the Manual Notification list view
- <u>Select a message to modify</u>
- <u>View a message as it would be displayed (rendered) to customers</u>

Right-click Menu Notification Pop-up Screen

The Right-click Notification Pop-up screen can be accessed on multiple screen throughout CIM GOLD using the Right-click Menu. You can use this screen to set up email and text notifications to be sent to your customers. **Note:** If you want to be set up to be able to sent notifications via text (SMS), please contact your GOLDPoint Systems client solutions specialist.

To learn more about this screen, see the Right-click Menu Notification Pop-up Screen section.

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Manual Notification</u> <u>Handler Screen Details</u> section.

This screen is accessed by going to Notification > Manual Notification Handler in the CIM GOLD tree view.

96 Notification System

Recipient	clarkkent@goldpointsystems.com	Template	e 1111 Consumer Submitted To Branch HTML Email 05/26/2016			
Override Subject*	Online Application Submitted	r 1 Basic Wrapper HTML Email 05/17/2016				
Account Number	123456789		Parameter	Value		[
Priority	100		NAME			
Release Date	03/09/2017		EMAIL			
			AMOUNTREQUE	STED		
Release Time	12:00:00 AM		LOANTYPE			
*Optional Fi	eld An overriden messade will be rend	ered "AS-IS" a	and not by the cu	ment cached ten	Add/Chan	ge Delete
GOLDPoint System	s,					^
[parm:NAME],						
Has submitted an or they have applied f	nline application to your branch. Their en or is a [parm:LOANTYPE].	nail is [parm:EMAI	L], they have reque	sted \$[parm:AMOUN	ITREQUESTED]. The	e type of loan
			Find/Replace	Render Override	Preview Message	Queue Message
	Mar	nual Notificat	ion Handler Sc	reen		

See also:

Manual Notification Handler Screen Details Right-click Menu Notification Pop-up Screen Archive Manager Screen Queue Error Manager Screen Notification System

Manual Notification Handler Screen Details

Use the Manual Notification Handler screen to manually re-queue messages. Messages with errors are sent to this screen from the <u>Queue Error Manager</u> screen and archived messages are sent to this screen from the <u>Archive Manager</u> screen.

Anything entered in the **Override Subject** or **Override Message** fields on this screen overrides anything previously entered in those fields.

See the following example of this screen followed by field and button descriptions.

Recipient	clarkkent@goldpointsystems.com	Template	1111 Consumer Submitted	To Branch HTML E	mail 05/26/2016	~
Override Subject*	Online Application Submitted	Wrapper	1 Basic Wrapper HTML En	nail 05/17/2016		~
Account Number	123456789		Parameter	Value		1
Priority	100		NAME			
Release Date	03/09/2017		EMAIL			
			AMOUNTREQUESTED			
Release Time	12:00:00 AM		LOANTYPE			
*Optional Fi	eld					
Override Message	An overriden message will be rend	ered "AS-IS" a	nd not by the current ca	ached template	Add/Change	Delete
GOLDPoint System [parm:NAME], Has submitted an o they have applied f	s, nline application to your branch. Their en or is a [pam:LOANTYPE].	ail is [pam:EMAI	L], they have requested \$[pa	arm:AMOUNTREQU	ESTED]. The type	of loan
			Find/Replace Rende	r Override Preview	w Message Que	eue Message

Manual Notification Handler Screen

Field Descriptions

Field	Description
Recipient	Enter the email address or phone number that the message will be sent to in this field. If the template selected is an email template, the address entered must be the email address of the recipient. If the template selected is a text template, the address entered must be the phone number of the recipient.
Override Subject	Enter the new subject line of the message in this field. This subject line will override any subject line previously entered.
Account Number	Enter the account number that the message will be tied to in this field.
Priority	Enter the priority number in this field. The lower the value entered, the higher the priority of the message. If the server has many messages

Field	Description
	to transmit, the highest priority messages are transmitted first. The default priority for most messages is 100.
Release Date	Enter the date to release the message. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date. The message will not be sent until the date and time indicated in the Release Date and <u>Release Time</u> fields.
Release Time	Enter the time to release the message. Enter the time using HH/MM/SS format, or use the arrows to select the time. The message will not be sent until the date and time indicated in the <u>Release Date</u> and Release Time fields.
Override Message	Enter the code for the new body of the message in this field. This message will override any message body previously entered.
Template	Select the template from this drop-down field. This field displays the type and identification number of each template available. Selecting a template automatically enters that template's parameters into the <u>Manual Notification</u> list view.
Wrapper	Select the wrapper from this drop-down field. This field displays the type and identification number of each wrapper available. Selecting a wrapper automatically enters that wrapper's parameters into the <u>Manual Notification</u> list view.
Manual Notification List View	This list view displays the parameters and values currently set up to use for substitution when rendering the message. You can select the parameters and values in this list view to update or delete them. You can also add new parameters and values to this list view using the <add change=""> button to add the information in the the <u>Parameter</u> and <u>Value</u> fields.</add>
	 The following buttons affect this list view: <<u>Add/Change></u>: Click this button to update the Manual Notification list view with the information in the Parameter and Value fields. <<u>Delete></u>: Click this button to delete the parameter selected in the Manual Notification list view.
Parameter	Enter or update parameters in this field and click <add change=""> to modify the Manual Notification list view.</add>
Value	Enter or update values in this field and click <add change=""> to modify the Manual Notification list view.</add>

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Button Descriptions

Button	Description
<add change=""></add>	Click this button to update the <u>Manual Notification</u> list view with the information in the <u>Parameter</u> and <u>Value</u> fields. See the <u>Add or Change</u> <u>Parameters</u> section for more details.
<delete></delete>	Click this button to delete the parameter selected in the <u>Manual</u> <u>Notification</u> list view. See the <u>Delete Parameters</u> section for more details.
<find replace=""></find>	Click this button to perform a find and replace function in the body of the message in the <u>Override Message</u> field. See the <u>Find and Replace</u> <u>Text</u> section for more details.
<render override=""></render>	Click this button to render the message with the parameters and values set up in the <u>Manual Notification</u> list view. Note: Once you click <render> the first time, you cannot change the parameters or values and click <render> again.</render></render>
	The parameters and values in the Manual Notification list view are ignored when rendering the subject if anything is entered into the <u>Override Subject</u> field. They are also ignored when rendering the body of the message if anything is entered into the <u>Override Message</u> field.
	See the <u>Render Changes to Parameters</u> section for more details.
<preview message=""></preview>	Click this button to display the message as it would render (display in an HTML renderer) if the processor uses the current effective template. See the <u>View Messages</u> section for more details.
<queue message=""></queue>	Click this button to queue the message. See the <u>Queue or Re-queue</u> <u>a Message</u> section for more details. Note: This button appears only for new messages.
<requeue message=""></requeue>	Click this button to re-queue the message. If the message being queued had an error, the error is automatically marked as handled. See the <u>Queue or Re-queue a Message</u> section for more details. Note: This button appears for previously-created messages that you want to send again.

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See also: Queue or Re-queue a Message Manual Notification Handler Screen Archive Manager Screen Queue Error Manager Screen

Add or Change Parameters

The Manual Notification Handler screen allows you to add and change parameters and their values using the <u>Manual Notification</u> list view. The parameters and values are used to automatically populate messages with substitution data when rendering the messages. **Note:** Parameters and values set up for the subject are ignored if overriding data is entered into the <u>Override Subject</u> field. Also, parameters and values set up for the body of the message are ignored if overriding data is entered into the <u>Override Subject</u> field. Also, parameters and values set up for the body of the message are ignored if overriding data is entered into the <u>Override Message</u> field.

- Add parameters and values
- Change parameters and values

Add Parameters and Values

To add parameters and values to the Manual Notification list view:

1. Enter a parameter into the <u>Parameter</u> field. In the example below, we have entered "LOANTYPE."

Parameter	Value
NAME	Í
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	
	Add/Change Delete Render

"LOANTYPE" Entered in Parameter Field

2. Enter a value for the parameter in the <u>Value</u> field, or leave the **Value** field blank if you do not wish to add a specific value. In our example, we have entered "Consumer Loan."

Parameter	Value
NAME	Ĩ Î
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	Consumer Loan
	Add/Change Delete Render



3. Click the <Add/Change> button (Add/Change) to add the new parameter and value to the Manual Notification list view.

Parameter	Value
NAME	Ĩ
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	Consumer Loan
	Add/Change Delete Render

Click <Add/Change> Button to Add Parameter and Value

4. The parameter and value are added to the **Manual Notification** list view.

Parameter	Value
NAME	Clark
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	Consumer Loan
LOANTYPE	Consumer Loan
	Add/Change Delete Render

New Parameter and Value Added to the Manual Notification List View

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Change Parameters and Values

To change parameters or values in the Manual Notification list view:

1. Select a parameter or value in the **Manual Notification** list view. In the example below, we have selected "LOANTYPE."

Parameter	Value
NAME	
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	Ν
	L3
LOANTYPE	
	Add/Change Delete Render

Parameter Selected in the Manual Notification List View

- 2. Once the parameter has been selected, it automatically populates the <u>Parameter</u> field.
- 3. Make the desired changes to the parameter or value using the **Parameter** and <u>Value</u> fields. In our example, we have entered "Consumer Loan" as the value associated with the parameter, LOANTYPE.

Parameter	Value
NAME	
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	
LOANTYPE	Consumer Loan
	Add/Change Delete Render

"Consumer Loan" Entered in the Value Field

4. Click the <Add/Change> button (Add/Change) to make the changes to the parameter and value in the Manual Notification list view.

Parameter	Value
NAME	
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	
LOANTYPE	Consumer Loan
	Add/Change Delete Render

Click <Add/Change> Button to Change the Parameter and Value

5. The changes to the parameter and value have now been applied to the **Manual Notification** list view. Now that the changes to the parameter and value have been applied to the **Manual Notification** list view, you can add the new changes (render the changes) to the message.

Parameter	Value
NAME	Clark
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	Consumer Loan
LOANTYPE	Consumer Loan
	Add/Change Delete Render

Changes Applied to the Manual Notification List View

6. Click the <Render> button to add the new changes to the message.

Parameter	Value
NAME	Clark
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	Consumer Loan
LOANTYPE	Consumer Loan
	Add/Change Delete Render

<Render> Button Highlighted

7. The changes to the parameter and value are applied to the message.

Override Message An overriden message will be rendered "AS-IS" and not by the current cached template

GOLDPoint Systems,

[parm:NAME],

Has submitted an online application to your branch. Their email is: [parm:EMAIL], they have requested \$[parm:AMOUNTREQUESTED]. The type of loan they have applied for is a [[parm:LOANTYPE].]

Body of the Message Before the Changes to the Parameter and Value Were Applied

Override Message An overriden message will be rendered "AS-IS" and not by the current cached template

GOLDPoint Systems,

[parm:NAME],

Has submitted an online application to your branch. Their email is: [parm:EMAIL], they have requested \$[parm:AMOUNTREQUESTED]. The type of loan they have applied for is a Consumer Loan.

Body of the Message After the Changes to the Parameter and Value Are Applied

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See also:

Queue or Re-queue a Message Render Changes to Parameters Delete Parameters Manual Notification Handler Screen Manual Notification Handler Screen Details

Render Changes to Parameters

You can add changes (render the changes) made to the parameter and value fields in the <u>Manual Notification</u> list view to the message using the Manual Notification Handler screen. Changes made to the the parameter and value fields are applied to both the body and the subject of the message at the same time if the changes apply to both. For this section, we have provided two examples of how changes can be applied to the message.

- <u>Render changes to the body of the message</u>
- <u>Render changes to the subject and body of the message</u>

Render Changes to Body of Message

To add changes (render the changes) made to the parameter and value fields in the <u>Manual Notification</u> list view to the message using the Manual Notification Handler screen:

- 1. <u>Add new parameters or values</u> to the **Manual Notification** list view or <u>make changes to the</u> <u>parameters and values</u> in the **Manual Notification** list view.
- 2. Once the changes to the parameter and value fields have been applied to the **Manual Notification** list view, you can add the new changes (render the changes) to the message. In our example, we changed the value of the LoanType parameter to "Consumer Loan."

Parameter	Value		
NAME	Clark		
EMAIL			
AMOUNTREQUESTED			
LOANTYPE	Consumer Loan		
LOANTYPE	Consumer Loan		
	Add/Change Delete Render		
Value Changed to "Consumer Loan" and Applied to the Manual Notification List View			

3. Click the <Render> button to add the new changes to the message.

Parameter	Value
NAME	Clark
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	Consumer Loan
LOANTYPE	Consumer Loan
	Add/Change Delete Render

<Render> Button Highlighted

4. The changes to the parameter and value are applied to the message.

Override Message An overriden message will be rendered "AS-IS" and not by the current cached template
GOLDPoint Systems,
[parm:NAME],

Has submitted an online application to your branch. Their email is: [parm:EMAIL], they have requested \$[parm:AMOUNTREQUESTED]. The type of loan they have applied for is a [[parm:LOANTYPE]].

Body of the Message Before the Changes to the Parameter and Value Were Applied

Override Message An overriden message will be rendered "AS-IS" and not by the current cached template

GOLDPoint Systems,

[parm:NAME],

Has submitted an online application to your branch. Their email is: [parm:EMAIL], they have requested \$[parm:AMOUNTREQUESTED]. The type of loan they have applied for is a Consumer Loan.

Body of the Message After the Changes to the Parameter and Value Are Applied

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Render Changes to Subject and Body of Message

To add changes (render the changes) made to the parameter and value fields in the <u>Manual Notification</u> list view to the subject and body of the message using the Manual Notification Handler screen:

1. <u>Add new parameters or values</u> to the **Manual Notification** list view or <u>make changes to the</u> <u>parameters and values</u> in the **Manual Notification** list view.

Subject	[parm:NAME] Submitted An Application
	Farameter to be changed is mame

Parameter	Value			
NAME				
EMAIL				
AMOUNTREQUESTED				
LOANTYPE				
NAME				
	Add/Change Delete	Add/Change Delete Render		

Name Parameter Selected to be Changed

2. Once the changes to the parameter and value fields have been applied to the **Manual Notification** list view, you can add the new changes (render the changes) to the message. In our example, we changed the value of the LoanType parameter to "Consumer Loan."

NAME	Clark
"Cla	rk" Entered as New Value for Name Parameter

Parameter	Value	
NAME	Clark	
EMAIL		
AMOUNTREQUESTED		
LOANTYPE		
NAME	Clark	
	Add/Change Delete	Render

Value Changed to "Clark" and Applied to the Manual Notification List View

3. Click the <Render> button to add the new changes to the message.

Parameter	Value	
NAME	Clark	
EMAIL		
AMOUNTREQUESTED		
LOANTYPE		
NAME	Clark	
	Add/Change Delete	Render

<Render> Button Highlighted

4. The changes to the parameter and value are applied to the message.

Recipient		Template	1115 Consumer Submitted To Branch HTML Email 12/17/2013 V			
Override Subject*	Clark Submitted An Application	Wrapper	1 Basic Wrapper HTML Email 05/17/2016			~
Account Number		_	Parameter	Value		1
Priority			NAME	Clark		
Release Date			EMAIL			
			AMOUNTREQUESTED			
Release Time	12:00:00 AM 🚖		LOANTYPE	Consumer Loan		
*Optional Fi	eld					
			LOANTYPE	Consumer Loan		
Override Message	An overriden message will be ren	dered "AS-IS" a	nd not by the current ca	ched template	Add/Change	Delete
GOLDPoint System Clark has submitted is a Consumer Loar	is, I an online application to your branch. T n.	heir email is: EMAI	L, they have requested \$AMI	DUNTREQUESTE). The type of loan	submitted
			Find/Replace Render	Override Preview	w Message Que	eue Message
Subj	ect and Body of the Message	e After the Ch	nanges to the Parame	eter and Value	Were Applie	d

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See also:

Queue or Re-queue a Message Add or Change Parameters Manual Notification Handler Screen Manual Notification Handler Screen Details
Delete Parameters

To delete parameters from the Manual Notification list view using the Manual Notification Handler screen:

1. Select a parameter in the **Manual Notification** list view.

Parameter	Value
NAME	
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	N
	13
LOANTYPE	
	Add/Change Delete

Parameter Selected in Manual Notification List View

2. Click the <Delete> button.

Parameter	Value
NAME	
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	
LOANTYPE	
	Add/Change Delete

<Delete> Button Highlighted

3. The parameter and its value are immediately removed from the **Manual Notification** list view.

Parameter	Value
NAME	
EMAIL	
AMOUNTREQUESTED	
LOANTYPE	
	Add/Change Delete



See also:

Queue or Re-queue a Message Manual Notification Handler Screen Manual Notification Handler Screen Details Back to Top

Find and Replace Text

To quickly find and replace text within the body of a message using the Manual Notification Handler screen:

- 1. <u>Select a message</u> to modify using the <u>Manual Notification Handler screen</u>, the <u>Archive Manager</u> <u>screen</u> or the <u>Queue Error Manager screen</u>.
- 2. The selected template is now displayed on the Manual Notification Handler screen.

Recipient	clarkkent@goldpointsystems.com	Template	1111 Consumer Submitted	To Branch HTML E	mail 05/26/2016	~
Override Subject*	Submitted Application Received	Wrapper	1 Basic Wrapper HTML Em	ail 05/17/2016		~
Account Number	123456789		Parameter	Value		
Priority	1		NAME			î
Release Date	03/09/2017		EMAIL			
			AMOUNTREQUESTED			
Release Time	12:00:00 AM			1		
*Optional Fi	eld		-			
Override Message	An overriden message will be rend	ered "AS-IS" a	and not by the current ca	ched template	Add/Change	Delete
<table bgcolor="#0</td><td>000000" height="100%" width="100%"></table>					~	
<0>	<table style="width:99%;marg</td><td>in:8px;border:1px</td><td>: #ddd solid;background:#fff;p</td><td>adding:8px;border-</td><td>radius:10px;"></table>					
	>					~
			Find/Replace Render	Override Preview	w Message Que	eue Message

Message Displayed on Notification Manual Handler Screen

- 3. Search the body of the message for the text that you want to display.
- 4. Highlight the text and press <Ctrl> "C" to copy the text.

Override Message An overriden message will be rendered "AS-IS" and not by the current cached template
 br />
If you have questions regarding your recent application, feel free to contact one of
our Client Services Representatives during <a href="http://www.lendmarkfinancial.com/" style="color:</th></tr><tr><th>#023872;cursor:pointer;text-decoration:underline">business day hours
at 1-801-344-6776.
Thank you for choosing <a href="http://www.goldpointsystems.com/" style="color:</th></tr><tr><th colspan=6>#023872;cursor:pointer;text-decoration:underline">GOLDPoint Systems !
Kindest Regards,
GOLDPoint Systems br/>

Text to be Replaced Selected in Body of the Message

5. Click the <Find/Replace> button (Find/Replace) in the lower, right-hand corner of the screen to bring up the Notification Find and Replace dialog.

Notification Find and Replace							
Find what:	www.goldpointsystems.com	Find Next					
Replace with:	Replace						
📝 Match Case		Replace All					
		Cancel					

Notification Find and Replace Dialog

- 6. Put your cursor in the **Find what:** field and press <Ctrl> "V" to paste the copied text into the field. You can also manually enter the text into the field.
- 7. Enter the text that you want to use in the **Replace with:** field. Note: If you want to retain any capitalization entered into the Find what: field or the Replace with: field, check the Match Case field.
- 8. Use the <Find Next> and <Replace> buttons to go through the body of the message and replace each occurrence of the text one-by-one or use the <Replace All> button to go through the body of the message and replace all occurrences of the text instantaneously.
- 9. The previous text in the body of the message is replaced with the new text.

Override Message An overriden message will be rendered "AS-IS" and not by the current cached template						
If you have questions regarding your recent application, feel free to contact one of our Client Services Representatives during <a href="http://www.lendmarkfinancial.com/" style="color:</td></tr><tr><td>#U23872;cursor:pointer;text-decoration:underline">business day hours						
at 1-801-344-6776.						
Thank you for choosing <a "="" href="http://www.goldpointsystemswebhome.com" style="color:</td></tr><tr><td>#023872;cursor:pointer;text-decoration:underline">GOLDPoint Systems !						
Kindest Recards. kindest Recards.						
GOLDPoint Systems br/>						
Text Penlaced in Body of the Message						

Text Replaced in Body of the Message

10. If all of the previous text has been replaced by the new text, a message appears if you click <Find Next> or <Replace All> informing you that there are no more occurrences of the old text.

Manual Notification	n Handler 🛛 🔜
No more occurran	ices found
(ОК

Manual Notification Handler Dialog

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See also: Queue or Re-queue a Message Select a Message to Modify Manual Notification Handler Screen Manual Notification Handler Screen Details

Queue or Re-queue a Message

You can use the Manual Notification Handler screen to manually queue and re-queue a message.

- Queue a Message
- <u>Re-queue a Message</u>

Queue a Message

To manually queue a message using the Manual Notification Handler screen:

1. Navigate to the Notification > <u>Manual Notification Handler screen</u>.

Recipient		Template				¥
Override Subject*		Wrapper				¥
Account Number			Parameter	Value		
Priority						
Release Date	~					
Release Time	12:00:00 AM 😩					
*Optional Fi	eld					
Override Message	An overriden message will b	e rendered "AS-IS"	and not by the cur	rent cached tem	Add/Chan	ge Delete
						^
				1	1	¥
			Find/Replace	Render Override	Preview Message	Queue Message

Manual Notification Handler Screen

- 2. Enter information into the <u>fields</u> on the screen. You must enter a <u>Recipient</u> and give the message a <u>Priority</u>.
- 3. Select a <u>Template</u> and a <u>Wrapper</u>.

Recipient	clarkkent@goldpointsystems.com	Template	1111 Consumer Submitted To Branch HTML Email 05/26/2016		
Override Subject*	Online Application Submitted	Wrapper	1 Basic Wrapper HTML Email 05/17/2016		
Account Number	123456789	0	Parameter	Value	1
Priority	100		NAME		Î
Release Date	03/09/2017		EMAIL		
			AMOUNTREQUESTED		
Release Time	12:00:00 AM				
*Optional Fi	eld				

Information Entered into Manual Notification Screen Fields and Template and Wrapper Selected

- 4. Once a template and wrapper are selected, the <u>Manual Notification list view</u> contains the parameters and values that are used in the template.
- 5. <u>Enter the values for the parameters</u> in the **Manual Notification** list view.

Parameter	Value
NAME	Clark Kent
EMAIL	clarkkent@goldpointsystems.com
AMOUNTREQUESTED	100.00
AMOUNTREQUESTED	100.00

Manual Notification List View

- 6. Once all of the values have been entered, you can <u>view the message</u> using the render tool to see if the message is set up correctly. **Note:** You can also enter a new message in the <u>Override Message</u> field if you want to override the message in the selected template.
- 7. After you have viewed the message and have made sure that it is set up correctly, click the <Queue Message> button (Queue Message) to queue the message according to the parameters set up. The message will be sent on the date and time set up in the <u>Release Date</u> and <u>Release Time</u> fields.

Recipient	clarkkent@goldpointsystems.com	Template	1111 Consumer Submitted	To Branch HTML Ema	ail 05/26/2016	~
Override Subject*	Online Application Submitted	Wrapper	1 Basic Wrapper HTML Email 05/17/2016			~
Account Number	123456789		Parameter	Value		
Priority	100		NAME	Clark Kent		
Release Date	03/09/2017		EMAIL	clarkkent@goldp	ointsystems.com	
Palanas Tima	12.00.00 AM		AMOUNTREQUESTED	100.00		
nelease nine	12.00.00 AM					
*Optional Fi	ield					
			AMOUNTREQUESTED	100.00		
Override Message	An overriden message will be rend	dered "AS-IS"	and not by the current c	ached template	Add/Chan	ge Delete
					-16	~
						~
			Find/Replace	Render Override	Preview Message	Queue Message

Message on the Manual Notification Handler Screen

8. Once you have clicked the <Queue Message> button, you will receive a message informing you that the message has been queued. Click <OK> to close the Information Message dialog.



Re-queue a Message

To manually re-queue a message using the Manual Notification Handler screen:

- 1. <u>Select a message</u> to modify using the <u>Manual Notification Handler screen</u>, the <u>Archive Manager</u> <u>screen</u> or the <u>Queue Error Manager screen</u>.
- 2. The selected template is now displayed on the Manual Notification Handler screen and can be modified and re-queued.

Recipient	clarkkent@goldpointsystems.com	Template Wrapper	1111 Consumer Submitted To Branch HTML Email 05/26/2016 1 Basic Wrapper HTML Email 05/17/2016			
Override Subject*	Online Application Submitted					
Account Number	123456789		Parameter	Value		
Priority	100		NAME			
Release Date	03/09/2017		EMAIL			
			AMOUNTREQUEST	ED		
Release Time	12:00:00 AM		LOANTYPE			
*Optional Fi	eld					
Override Message	An overriden message will be rend	lered "AS-IS" a	and not by the curre	ent cached template	Add/Chang	e Delete
GOLDPoint System	s.					^
[parm:NAME],						
Has submitted an o they have applied f	nline application to your branch. Their er or is a [parm:LOANTYPE].	nail is [parm:EMAI	L], they have requested	d \$[parm:AMOUNTREC	QUESTED]. The	type of loan
			Find/Replace F	Render Override Prev	view Message	Requeue Message

Message Displayed on Manual Notification Handler Screen

- 3. Make any necessary changes to the message. The message can be modified by changing or entering information into the <u>fields</u> on the screen. You can change the account number that the message is associated with, the email address of the recipient, the level of priority, the subject line that appears in the **Subject** field of the email, the date and time the message will be sent/released, and the details of the body of the message. The message can also be modified by <u>changing the parameters and values</u> associated with the message.
- 4. Once all of the changes have been made, you can <u>view the message</u> using the render tool to see if the message is set up correctly.

5. After all of the changes have been made and verified, click the <Requeue Message> button (

Requeue Message) to re-queue the message according to the parameters set up. The message will be sent on the date and time set up in the <u>Release Date</u> and <u>Release Time</u> fields.

Recipient	clarkkent@goldpointsystems.com	Template	1111 Consumer Submitted To Branch HTML Email 05/26/2016				
Override Subject* Online Application Submitted		Wrapper	1 Basic Wrapper HTML Email 05/17/2016				
Account Number	123456789		Parameter	Value		[
Priority	100		NAME				
Release Date	03/09/2017		EMAIL				
			AMOUNTREQUE	STED			
Release Time	12:00:00 AM		LOANTYPE				
*Optional Fi Override Message	eld An overriden message will be rend	lered "AS-IS" a	and not by the cu	rrent cached tem	plate Add/Char	ige Delete	
GOLDPoint System [parm:NAME], Has submitted an o they have applied f	s, nline application to your branch. Their en or is a [parm:LOANTYPE].	nail is (parm:EMA)	L], they have reques	ted \$[parm:AMOUN	TREQUESTED]. The	e type of loan	
			Find / Paula	Dender Oueride	Denview Measured	V.	
			rina/ Replace	nender Overfide	Freview Message	nequeue message	

Re-queue Message on the Manual Notification Handler Screen

6. Once the message has been re-queued, you will receive a message informing you that the message has been queued. Click <OK> to close the Information Message dialog.



Information Message Dialog

Back to Top

See also:

Select Message to Modify View Rendered Messages Manual Notification Handler Screen Manual Notification Handler Screen Details Archive Manager Screen Queue Error Manager Screen

Re-size Manual Notification List View

The Manual Notification Handler screen gives you the ability to manipulate and re-size the <u>Manual Notification</u> list view.

- Re-size the width of the Manual Notification list view columns
- <u>Re-size the height of the Manual Notification list view heading row</u>
- Manipulate the Manual Notification list view to view data that has been cut off
- <u>Automatically Re-size Manual Notification List View</u>

Re-size Column Width

To re-size the width of the columns in the **Manual Notification** list view:

1. Hover between the column headings of the list view to bring up the double-arrow icon.

Parameter	- ∯Value
FIRSTNAME	TEST
GENERATEDAPPSTRING	http://10.0.230.52/Consumer/Home/GuestStatus?refn

Manual Notification List View with Double-arrow Icon

2. Press and hold down the left-click button and drag to the right or left to increase or decrease the column width. In the following example the width of the Parameter column has been decreased.

Parameter +	₩alue
FIRSTNA	TEST
GENERA	http://10.0.230.52/Consumer/Home/GuestStatus?refn

Manual Notification List View with Column Width Decreased

Back to Top

Re-size Heading Row Height

To re-size the height of the heading row of the Manual Notification list view:

1. Hover on the bottom border of the heading row in the list view to bring up the double-arrow icon.

Parameter	Value
FIRSTNA	TEST
GENERA	http://10.0.230.52/Consumer/Home/GuestStatus?refn

Manual Notification List View with Double-arrow Icon

2. Press and hold down the left-click button and drag down or up to increase or decrease the heading row height.

Parameter	Value
FIRSTNA	TEST
GENERA	http://10.0.230.52/Consumer/Home/GuestStatus?refn

Manual Notification List View with Column Height Increased

Back to Top

Manipulate the Manual Notification List View to See Data that has been Cut Off To view text that has been cut off:

1. Hover between the column headings of the list view to bring up the double-arrow icon.

Parameter	Value +	t
FIRSTNAME	TEST	
GENERATEDAPPSTRING	http://10.0.230.52/Consumer/H	

Manual Notification List View with Text Cut Off

2. Press and hold down the left-click button and drag to the right to increase the column width. In the following example the width of the Value column has been increased to display the value.

Parameter	Value +	₽
FIRSTNAME	TEST	
GENERATEDAPPSTRING	http://10.0.230.52/Consumer/Home/GuestStatus?refnum=2088	

Column Width Increased in Manual Notification List View

Automatically Re-size Manual Notification List View

To automatically re-size the Manual Notification list view:

1. Right click on the **Manual Notification** list view to bring up the Right-click Menu.



Manual Notification List View Right-click Menu

2. Select Auto Resize to bring up a list of options. Using the Right-click Menu you can: automatically resize the entire Manual Notification list view (select Auto Resize > Auto Resize Grid), automatically resize the columns of the Manual Notification list view (select Auto Resize > Auto Resize Columns), and automatically resize the rows of the Manual Notification list view (select Auto Resize > Auto Resize Auto Resize > Auto Resize Columns). In the example below, we selected Auto Resize > Auto Resize Grid. This resizes the columns and rows to fit in the list view space available without any blank columns.

Parameter	Value
FIRSTNAME	TEST
GENERATEDAPPSTRING	http://10.0.230.52/Consumer/Home/GuestStatus?refnum=2088

Manual Notification List View Automatically Re-sized

Back to Top

See also:

Queue or Re-queue a Message Manual Notification Handler Screen Manual Notification Handler Screen Details

Right-click Menu Notification Pop-up Screen

Use the Right-click Notification Pop-up screen to manually queue messages. Using this pop-up screen, you can set up email and text notifications to be sent to your customers.

This screen can be accessed on multiple screens throughout CIM GOLD using the Right-click Menu. This screen works similarly to the <u>Manual Notification Handler screen</u>.

Note: Field-level security for this screen is set up on the <u>Field Level tab</u> on the Security > <u>Setup screen</u> in CIM GOLD. You can control which employees can send alerts using the Right-click menu using the following field-level security options:

- **Right Click Email** (FSNEML): This field ensures that the option to send a notification e-mail using the right-click screen is inaccessible if the user does not have the proper security.
- **Right Click Text** (FSNTXT): This field ensures that the option to send a notification text using the rightclick screen is inaccessible if the user does not have the proper security.

The following alert notifications can be set up using this screen:

- Email Notifications
- <u>Text Notifications</u>

Email Notifications

To set up an email notification using the Right-click Menu Notification Pop-up screen:

- 1. Right-click on a screen in CIM GOLD to bring up the Right-click Menu.
- 2. Select Send Alert and then select E-Mail to send a notification as an email message.

View Attached Files	
Attach Files	
Send Alert	E-Mail
	Text

Right-click Menu

- 3. This brings up the notification pop-up screen.
- 4. Select the template you want to use in the **Template** field and then set the date and time that you want the notification sent using the **Release Date** and **Release Time** fields.

🖷 Send Email						×	
emplate					*	Wrapper	
Information Account Num Recipients Name	ber 9000 - 0	02136	t Marketing Email	Opt Out Marketing			
<	T - Account Own			`			
E-Mails							
Name	Email Prim	ary Sent	Sent Error				
Subject							
		_					
Paramete	r Value	8					
			Rer	nder			0
elease Date	N	P Release	Time 12:00:00 A	M 🚖			Gueue Message

Notification Pop-up Screen—Send Email

2	Send Email	×
Template 7 New Password Generated HTML Email 11/12/2014	V Wrapper 1 - Basic Wrapper	¥
Information Account Number 9000 - 002136 Recipients Name Ownership Opt Out Marketing Email Opt Out Marketing TEST TEST 1 - Account Owner	Dear FIRST_NAME, A new Password has been generated for you. WEB_PASSWORD is the new generated password . It is all UPPER CASE. Please use this password on your next logon.	^
Parameter Value FIRST_NAME		v
Release Date 03/22/2017 V Release Time 10:00:00 AM	Queue I	Message

Template, Wrapper, and Release Date and Time Selected

- 5. Now select the person/entity that the notification should be sent to from the **Recipients** list view.
- 6. Then select the email address that the notification should be sent to from the E-Mails list view.
- 7. Enter the values for the parameters in the **Value** fields.

	Send Email	×
emplate 7 New Password Generated HTML Email 11/12/2014	V Wrapper 1 - Basic Wrapper	~
Information Account Number 9000 - 002136 Recipients Name Ownership Opt Out Marketing Email Opt Out Marketing TEST TEST 1 - Account Owner	Dear FIRST_NAME, A new Password has been generated for you. WEB_PASSWORD is the new generated password . It is all UPPER CASE. Please use this password on your next logon.	^
Name Email Primary Sent Sent Error TEST TEST@TESTFINANCING.COM Image: Compared and the sent sent sent sent sent sent sent sen		
Subject A New Password has been Generated		
Subject A New Password has been Generated Parameter Value IRST_NAME Test		
Parameter Value 'IRST_NAME Test 'EB_PASSWORD Test Password		
Subject A New Password has been Generated		

Account and Email Address Selected and Parameter Values Entered

8. When the notification is ready to be sent, click <Render> to preview the notification and ensure that it is set up correctly.

2	Send Email
emplate 7 New Password Generated HTML Email 11/12/2014	V Wrapper 1 - Basic Wrapper
Information Account Number 9000 - 002136 Recipients Name Ownership Opt Out Marketing Email Opt Out Mark TEST TEST 1 - Account Owner	eing GOLD POINT
C E-Mails TEST TEST @TESTFINANCING.COM C Subject A New Password has been Generated	 Dear Test, A new Password has been generated for you. TEST PASSWORD is the new generated password . It is all UPPER CASE. Please use this password on your next logon.
Parameter Value	Thank you for choosing GOLDPOINT Systems Kindest Regards, GOLDPOINT Systems
IRS_NAME Test VEB_PASSWORD TEST PASSWORD	Find your local branch by visiting www.goldpointsystems.com
	We take identity theft seriously. If you believe someone is using your email address or this email was sent in error, please contact a customer service representative.
Render Ielease Date 03/22/2017 v Release Time 10:00:00 AM	C Queue Message

Notification Rendered

- 9. Once you have finished setting up the notification, click <Queue Message> to add the notification to the messaging queue.
- 10. The notification is then added to the messaging queue and will be sent according to the date and time selected in the **Release Date** and **Release Time** fields.



Message Queued Successfully

Text Notifications

To set up a text notification using the Right-click Menu Notification Pop-up screen:

1. Right-click on a screen in CIM GOLD to bring up the Right-click Menu.

2. Select Send Alert and then select Text to send a notification as a text message.



- 3. This brings up the notification pop-up screen.
- 4. Select the template you want to use in the **Template** field and then set the date and time that you want the notification sent using the **Release Date** and **Release Time** fields.

Send Text			
mplate	V Wrapper		
nformation Account Number 9000 - 002136			
Name Ownership Opt Out Marketin	a Email Opt Out Marketing		
TEST TEST 1 - Account Owner			
<	>		
1			
Name Phone Number Primary Sent Se	at Error		
Subject			
Parameter Value			
	Kender	One le Mess	
elease Date v Release Time 12	00:00 AM	Studio Moss	

Notification Pop-up Screen—Send Text

5. Now select the person/entity that the notification should be sent to from the **Recipients** list view.

2	Send Text ×
Template 10090 marketing happy birthday! Text Message 10/17/2016	V Wrapper 10001 - Test Text Wrapper V
Information Account Number 9000 - 002136 Recipients Name Ownership Opt Out Marketing Email Opt Out Marketing TEST TEST 1 - Account Owner	Happy birthday! We appreciate your business. FIRST_NAME
Phones Name Phone Number Primary Sent Sent Error	
Subject .	
Parameter Value	
Render	~
Release Date 03/22/2017 v Release Time 10:00:00 AM	Queue Message

Template, Wrapper, and Release Date and Time Selected

- 6. Then select the phone number that the notification should be sent to from the **Phones** list view.
- 7. Enter the values for the parameters in the **Value** fields.

nplate 10090 marketing happy birthday! Text Message 10/17/20	016	✓ Wrapper	10001 - Test Text Wrapper	
nformation ccount Number 9000 - 002136 ecipients	Happy birthday! We a	ppreciate your business.	FIRST_NAME	
Name Ownership Opt Out Marketing Email Op EST TEST 1 - Account Owner	ot Out Marketing			
	>			
Name Phone Number Primary Sent Sent Error				
FOT TEOT VOOD OOT OOTO				
EST TEST (801) 801-8010				
LEST TEST (801) 801-8010				
EST TEST (801) 801-8010				
EST TEST (801) 801-8010				
EST TEST (801) 801-8010				
EST TEST (801) 801-8010				
EST TEST (801) 801-8010				

Phone Number Selected and Parameter Values Entered

8. When the notification is ready to be sent, click <Render> to preview the notification and ensure that it is set up correctly.

Indexteding happy bithday! Text Message 10/17/2016 Indomation Indomation </th <th></th> <th>Send Text</th> <th></th>		Send Text	
Advanced Parameter Value Parameter Value Parameter Value Test Value Parameter Value Test Value Parameter Value Test Test Value Test Test Value Test Value	10090 marketing happy birthday! Text Message 10/17/2016	V Wrapper 10001 - Test Text Wrapper	
Count Number 9000 - 002136 Happy bithday. We appreade your business. Test Sert by GPS. Reply Stop to cancel. Name Ownership Account Owner Image: Sert Error Reply Stop to cancel. Name Name Nome Name Your Durines Your Durines Name Your Durines Your Durine Your Durines You	ormation		
seripients Name Opt Out Marketing Email Opt Out Marketing EST TEST 1- Account Owner Name Phone Number Name Phone Number Name Phone Number Value Image: Name Ima	count Number 9000 - 002136	Happy birthday! We appreciate your business. Test	
Name Ownership CPL Out Marketing Email Opt Out Marketing EST TEST	cipients	Sent by GPS. Reply Stop to cancel.	
Parameter Value	Name Ownership Opt Out Marketing Email Opt Out Marketing		
Image: Sent Sent Error Barameter Value ST_NAME Fest Image: St_NAME Fest Image: St_NAME Fest			
hones Name Phone Number Primary Sent Sent Error EST TEST (801) 801-8010 ubject arameter Value ST_NAME Test Est Est Ender	>		
	Name Phone Number Primany Sent Sent Error		
Parameter Value	EST TEST (801) 801-8010		
adoject Parameter Value Parameter Value Render Cuerue Messe			
ubject Parameter Value Parameter Value Render			
Parameter Value Parameter Value Render			
Parameter Value ST_NAME Test	bject		
Parameter Value IST_NAME Test Render			
Parameter Value IST_NAME Test Render Render			
Parameter Value ST_NAME Test Render			
and neter value ST_NAME Test	arameter Value		
Render	ST NAME Test		
Render			
nericer Queue Mess	Pander		
	nender	Queue Me	sa

Notification Rendered

- 9. Once you have finished setting up the notification, click <Queue Message> to add the notification to the messaging queue.
- 10. The notification is then added to the messaging queue and will be sent according to the date and time selected in the **Release Date** and **Release Time** fields.



Message Queued Successfully

See also:

Queue or Re-queue a Message Manual Notification Handler Screen Notification System

Notification System	131

Select Message to Modify

The Manual Notification Handler screen allows you to modify and manually <u>queue and re-queue messages</u>. Messages with errors are sent to this screen from the <u>Queue Error Manager</u> screen and archived messages are sent to this screen from the <u>Archive Manager</u> screen.

- Select a message to modify using the Manual Notification Handler screen
- Select a message to modify using the Archive Manager screen
- Select a message to modify using the Queue Error Manager screen

Select a Message Using the Manual Notification Handler Screen

To select a message to modify using the Manual Notification Handler screen:

1. Click on the <u>Template</u> drop-down field to display all of the message templates that are currently set up for your institution.

Template		٦
	1111 Consumer Submitted To Branch HTML Email 05/30/2013	45
	1112 Consumer Application Submitted HTML Email 05/30/2013	
	1113 Consumer Application Saved HTML Email 05/30/2013	
	1114 Consumer Application Submitted HTML Email 10/29/2013	
	1115 Consumer Submitted To Branch HTML Email 12/17/2013	

Template Drop-down Field

2. Select a template from the **Template** drop-down field to insert the details of the template into the fields on the screen.

Template	
	1111 Consumer Submitted To Branch HTML Email 05/30/2013 🔪 👘
	1112 Consumer Application Submitted HTML Email 05/30/2013
	1113 Consumer Application Saved HTML Email 05/30/2013
	1114 Consumer Application Submitted HTML Email 10/29/2013
	1115 Consumer Submitted To Branch HTML Email 12/17/2013

Template Selected

3. The selected template is now displayed on the Manual Notification Handler screen and can be modified and queued.

Recipient	clarkkent@goldpointsystems.com	Template	1111 Consumer Submitted To Branch HTML Email 05/30/2013				
Override Subject*	Online Application Submitted	Wrapper	1 Basic Wrapper H	HTML Email 05/17/	2016	v	
Account Number	123456789		Parameter	Value			
Priority	100		NAME				
Release Date	03/09/2017		EMAIL				
			AMOUNTREQUESTED				
Release Time	12:00:00 AM		LOANTYPE				
*Optional Fi	eld						
Override Message	An overriden message will be rend	lered "AS-IS" a	and not by the cu	rrent cached ten	Add/Char	nge Delete	
GOLDPoint System	s,					~	
[parm:NAME],							
Has submitted an o they have applied f	nline application to your branch. Their en or is a [parm:LOANTYPE].	nail is [parm:EMAI	L], they have reques	sted \$[parm:AMOUN	ITREQUESTED]. Th	e type of loan	
			Find/Replace	Render Override	Preview Message	Queue Message	

Message Displayed on Manual Notification Handler Screen

Select a Message Using the Archive Manager Screen

To select a message to modify using the Archive Manager screen:

1. <u>Perform a search</u> on the Archive Manager screen to populate the <u>Archive Manager</u> list view.

Selec	tion Crite	ria						
○ None ○ Date Start ▼ End ▼ @ Account 0 ○ Template ID								
Archive ID	Account Number	Time Sent	Template ID	Template Description	Template Type	Effective Date	Has Errors	Email
6	0	8/14/2013 3:26:24 PM	1113	Consumer Application Saved	HTML Email	05/30/2013		jamesf@goldpointsystems.com
5	0	6/5/2013 3:55:31 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com
4	0	6/5/2013 3:51:26 PM	1113	Consumer Application Saved	HTML Email	05/30/2013		jamesr@goldpointsystems.com
3	0	6/5/2013 11:21:59 AM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com
2	0	6/4/2013 3:13:33 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com
1	0	6/4/2013 3:03:28 PM	1112	Consumer Application Submitted	HTML Email	05/30/2013		jamesr@goldpointsystems.com

Archive Manager List View

2. Select an archived message in the Archive Manager list view.

Rea	ad 🛛	Previous	Nex	t									
 Select Nor 	ion Criter ie 🔘 Da	ite Start		•	End	▼ © Ac	count		🔘 Tem	plate ID			
Archive ID	Account Number	Time Sent		Template ID	Template Descr	iption	Template Type	Effective Date	Has Errors	E	Email		
6	0	8/14/2013 3:26:2	24 PM	1113	Consumer Application 9	Saved	HTML Email	05/30/2013		jamesf@goldpo	pintsystems.com		
5	0	6/5/2013 3:55:31	1 PM	1112	Consumer Application	Submitted	HTML Email	05/30/2013		jamesr@goldpo	pintsystems, c o m		
4	0	6/5/2013 3:51:28	5 PM	1113	Consumer Application 9	Saved	HTML Email	05/30/2013	1	jamesr@goldpo	pintsystems.com		
3	0	6/5/2013 11:21:5	59 AM	1112	Consumer Application	Submitted	HTML Email	05/30/2013		jamesr@goldpo	ointsystems.com		
2	0	6/4/2013 3:13:33	3 PM	1112	Consumer Application	Submitted	HTML Email	05/30/2013		jamesr@goldpo	ointsystems.com		
1	0	6/4/2013 3:03:28	3 PM	1112	Consumer Application	Submitted	HTML Email	05/30/2013		jamesr@goldpo	pintsystems.com		
Account	Number 0)	Ter	nplate ID 1	112	emplate Ty	pe HTML Emai	1	Ef	fective Date 0	5/30/2013		
Destinatio	on Address	10.0.0.5			Destination	Port 2	5						
					Errors							*	
Subject		Application Su	ubmitte	ed									
Message		#000000" L _:_I		080								Ŧ	
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				٨t	r>							-	
									Γ.	iew Message	Edit/Besend Me	essage	

Archived Message Selected to Edit and/or Resend

3. Click <Edit/Resend Message> to open the message on the Notification > <u>Manual Notification Handler</u> <u>screen</u>. Once the message is on the Manual Notification Handler screen, you can <u>add to, change, and</u> <u>re-queue</u> the message.

Recipient	jamesr@goldpointsystems.com	Template	1112 Consumer Ap	oplication Submitted H	HTML Email 05/30/2	2013 🗸
Override Subject*	Application Submitted	Wrapper				¥
Account Number	0		Parameter	Value		
Priority	1000					
Release Date	×					
Release Time	12:00:00 AM 😩					
*Optional Fi	eld					
Override Message /	An overriden message will be ren	dered "AS-IS" a	nd not by the cu	rrent cached temp	Add/Chan	nge Delete
Override Message /	An overriden message will be ren 000000" height="100%" width="100%"> <table a<="" as-is"="" b="" style="width:99%;marg</td><td>dered "> gin:8px;border:1px</table>	nd not by the cu #ddd solid;backgro	rrent cached temp	plate Add/Char	nge Delete	
Override Message /	An overriden message will be ren 00000" height="100%" width="100%">	dered "AS-IS" a gin:8px;border:1px	nd not by the cu #ddd solid;backgro	ment cached temp	blate Add/Char border-radius:10px;"	nge Delete

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Select a Message Using the Queue Error Manager Screen

To select a message to modify using the <u>Queue Error Manager</u> screen:

1. <u>Perform a search</u> on the Queue Error Manager screen to populate the <u>Queue Error Manager</u> list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	8011231233	12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%	~
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	

Queue Error Manager List View

2. Select a message in the **Queue Error Manager** list view.

Selection	Criteria				_				
Start Date	Accour	t T	emplate Id		Wrap	oper Id			
End Date	Recipie	ent			Template	e Type	0) Any	~	
Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template De	scription
0	8011231233	12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%	
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 1
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 1
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 2
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 4
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 1
Error Code Subject G	22 Er ps. where d you go?	ror Description Cannot T party did connecte	ransmit Me not proper d host has	essage To ly respon failed to	o Server Exc ad after a pe respond	ception: riod of t	A connec ime, or es	tion attempt failed becau tablished connection fail	use the connected , led because
Error Code Subject Gp Message	22 Er ps, where d you go?	ror Description Cannot T party did connecte	ransmit Me not proper d host has	ssage To ly respon failed to	o Server Exo ad after a pe respond	ception: riod of t	A connec ime, or es	tion attempt failed becau tablished connection fail	use the connected , led because
Error Code Subject Gp Message DOCTYP<br <html> <head> <title> Wel</title></head></html>	22 Er ps, where'd you go? PE html> b Loan	ror Description Cannot T party did connecte	ransmit Me not proper ad host has	essage To ly respon failed to	o Server Exc Id after a pe o respond	ception: riod of t	A connec ime, or est	tion attempt failed becau lablished connection fail	use the connected declause
Error Code Subject Gp Message DOCTYP<br dntml> dhead> ditle>Wel dody bgc dtable cell	22 Er ps, where'd you go? PE html> b Loan color="#22212" style="marg lpadding="0" border="0" by	ror Description Cannot T party did connecte in: 0; padding: 0;"> gcolor="#f2f2f2" heigh	ransmit Me not proper ad host has t="100%" 1	ssage To ly respon failed to width="1	o Server Exc di after a pe o respond	seption: riod of t	A connectime, or est	tion attempt failed becau lablished connection fail	use the connected declause
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PE html> b Loan color="#121212" style="marg lpadding="0" border="0" by	ror Description Cannot T party did connecte in: 0; padding: 0;"> gcolor="#f2f2f2f2" heigh	ransmit Me not proper d host has d host has	ssage To ly respon failed to width="1	o Server Exc dd after a pe o respond	seption: riod of t	A connectime, or est	tion attempt failed becau lablished connection fail	use the connected led because

Message Selected to Edit and/or Re-queue

 Click <Edit/Requeue Message> to open the message on the Notification > <u>Manual Notification</u> <u>Handler screen</u> with all of the data populated so you can <u>add to, change, and re-queue</u> the message. Note: Once the message is re-queued, the error is flagged as handled.

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Recipient	gold@goldpointsystems.com	Template	8006 Abandon Offer Page Chase Email w/ Link Day 1 HTML Email 09/08/2014						
Override Subject*	Gps, where'd you go?	Wrapper	10222 *TEST* AWL Origin	nation Wrapper HTML	Email 12/24/2014	~			
Account Number Priority	Account Number 0 Priority 1 Release Date 04/03/2017 V Release Time 12:00:00 AM 🚖		Parameter FIRST_NAME	Value ME Gps					
Release Date Release Time			OFFER_URL RECIPIENTID	https://test-loan.webloan.com/offer?Source=2&L) 265841502					
*Optional Fi	eld		FIRST_NAME	Gps					
Override Message	An overriden message will be n	endered "AS-IS"	and not by the current	cached template	Add/Char	nge Delete			
html <html> <head> <title>Web Loan </title></head></html>	iitle>					^			
<body bgcolor="#f2</th><th>2f2f2" style="margin: 0; padding: 0;"></body>									
<pre> </pre>	"0" border="0" bgcolor="#2222" hei > argin: auto;" width="580">	ight="100%" width="	100%">			~			
			Find/Replace	e Render Override	Preview Message	Requeue Message			

Selected Message on the Manual Notification Handler Screen

Back to Top

See also:

Queue or Re-queue a Message Manual Notification Handler Screen Manual Notification Handler Screen Details Archive Manager Screen Queue Error Manager Screen

View Rendered Messages

You can view a rendered message using the Manual Notification Handler screen. This is useful if you want send a notification again. Using the render tool, you can view the notification to ensure that it is the correct notification that you want sent again. You can also see if any changes need to be made before it is sent. The render tool can also be used to see how messages will be displayed to customers when they are sent as notifications.

To view a rendered message using the Manual Notification Handler screen:

1. <u>Select a message</u> to render. This can be done using the Manual Notification Handler screen, the <u>Archive Manager</u> screen, or the <u>Queue Error Manager</u> screen.

Recipient	clarkkent@goldpointsystems.com	Template	1112 Consumer Ap	oplication Submitted HTML	Email 05/30/201:	3 🗸
Override Subject*	Submitted Application Received	Wrapper	1 Basic Wrapper H	ITML Email 05/17/2016		~
Account Number	123456789		Parameter	Value		
Priority	100					
Release Date	12/17/2013 🗸					
Release Time	12:00:00 AM 🚖					
*Optional Fi	eld					
Override Message /	An overriden message will be rend	lered "AS-IS" a	nd not by the cu	ment cached template	Add/Change	Delete
	00000" height="100%" width="100%">					^
	<table style="width:99%;marg</td><td>jin:8px;border:1px</td><td>: #ddd solid;backgro</td><td>und:#fff;padding:8px;borde</td><td>r-radius:10px;"></table>					
	> Your submitted onl	ine application ha	s been received. Yo	ou may review your applical	ion by clicking on	the button
			Find/Replace	Render Override Previ	w Message	

Message Selected on the Manual Notification Handler Screen

Click the <u><View Message> button</u> to render the notification in a new window. Note: The <View Message> button works only if a message is selected on the Manual Notification Handler screen. Otherwise, you will receive an error if you click the <View Message> button.



See also:

Queue or Re-queue a Message Select Message to Modify Manual Notification Handler Screen Manual Notification Handler Screen Details Archive Manager Screen Queue Error Manager Screen Back to Top

Queue Error Manager Screen

Use the Queue Error Manager screen to search for and display all queue error messages and queued messages that have errors. Queue errors are for messages that the Notification Processor failed to transmit. **Note:** Unless it is handled, the message could have been transmitted if it was reattempted.

This screen displays a maximum of 100 messages with errors at a time. When a message is selected, the message details are displayed on the lower portion of the screen. You can select more than one message and right-click to reattempt all of the selected messages. **Note:** You cannot re-queue more than one message because the Manual Notification Handler can only handle one message at a time.

How To Items

This screen allows you to

- Edit and re-queue messages
- Export and print reports
- <u>Reattempt a message</u>
- <u>Render a message</u>
- <u>Re-size the Queue Error Manager list view</u>
- Search for queue error messages and queued messages that have errors
- Search the results displayed in the Queue Error Manager list view
- View the details of a message

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Notification Queue</u> <u>Error Manager Screen Details</u> section.

This screen is accessed by going to Notification > Queue Error Manager in the CIM GOLD tree view.

Selection (Criteria				-	-						
Start Date	¥	Account	T	emplate Id		Wrap	oper Id					
End Date	~	Recipier	t			Template	e Type	0) Any	-	•		
Account Number	Recipient		Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled		Template D	escription	1
	8011231233		12/02/2015 12:57:17 PM	8143	1	Text			Recovery	SMS 20%		_
	gold@goldpointsyst	ems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon (Offer Page Chas	se Email w/ Link Day 1	
	gold@goldpointsyst	ems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon C)ffer Page Chas	se Email w/ Link Day 1	
	nay_wah@goldpoint	i.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon (Offer Page Chas	se Email w/ Link Day 2	
	gpstest@goldpoint.c	om	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon (offer Page Chas	se Email w/ Link Day 4	
	1@noldpoint.com		12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon (offer Page Chas	se Email w/ Link Day 1	
ccount Nun	mber 0 22	Ten Emo	plate ID 8006 or Description Cannot T party did	Tem Transmit Me not proper	plate Type essage To ty respon	HTML Ema o Server Exc ad after a pe	ail ception: riod of t	A connect	tion attem	pt failed beca	ause the connected	
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incount Nun iror Code ubject Gp lessage !DOCTYP html> head> title> Web /head>	nber 0 22 28, where 'd you go 26 html>	Ten Em	plate ID 8006 or Description Cannot T party did connecte	Tem Transmit Me not proper ad host has	plate Type essage To ty respon s failed to	HTML Ema o Server Exc ad after a pe o respond	ail seption: riod of t	A connect	tion attem ablished	pt failed beca connection fa	ause the connected ailed because	
ccount Nun nor Code : ubject Gp essage !DOCTYP html> head> title> Wet /head> body bgca	nber 0 22 25, where d you go 26 html> 5 Loan olor="##21212" sty	Ten Env >? le="margin	n; 0; padding: 0;">	Tem Transmit Me not proper	- plate Type essage To ty respon- s failed to	HTML Ema o Server Exc d after a pe respond	ail ception: riod of t	A connect ime, or est	tion attem	pt failed beca	ause the connected ailed because	
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iccount Nun iror Code iboct Gp itDOCTYP html> head> title> Wet /head> body bgcd table cell	nber 0 22 os, where'd you go PE html> o Loan olor="#f2f2f2" sty padding="0" bord	Ten Em >? le="margii er="0" bg	n: 0; padding: 0;">	Term Transmit Me not proper ad host has tat="100%"	plate Type essage To ty respon s failed to width="1	HTML Ema o Server Exc of after a pe o respond	ail ception: riod of t	A connect ime, or est	tion attem ablished (pt failed becconnection fa	ause the connected iled because	

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See also:

Notification Queue Error Manager Screen Details Manual Notification Handler Screen Notification System

Queue Error Manager Screen Details

Use the Queue Error Manager screen to search for and display all queue error messages and queued messages that have errors. Queue errors are for messages that the Notification Processor failed to transmit. **Note:** Unless it is handled, the message could have been transmitted if it was reattempted.

This screen displays a maximum of 100 messages with errors at a time. When a message is selected, the message details are displayed on the lower portion of the screen. You can select more than one message and right-click to reattempt all of the selected messages. **Note:** You cannot re-queue more than one message because the Manual Notification Handler can only handle one message at a time.

Selection	Criteria				2	_			
Start Date	e v	Account	t T	emplate Id		Wrap	per Id		
End Date	• •	Recipie	nt			Template	e Type	0) Any	¥
Account Number	Recipient		Time Last Attempted	Template	Wrapper ID	Template Type	Handled Date	Handled By	Template Description
	8011231233		12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%
	gold@goldpointsyst	ems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1
	gold@goldpointsyst	ems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1
	nay_wah@goldpoint	t.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2
	gpstest@goldpoint.c	om	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4
	1@goldpoint.com		12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1
ccount Nu rror Code ubiect Gr	umber 0 22 ps. where d you go	Ter En	mplate ID 8006 ror Description Cannot T party did	Tem ransmit Me not proper	plate Type essage To ty respon	HTML Ema Server Exc d after a per	ail ception: riod of ti	A connec ime, or es	tion attempt failed because the connected tablished connection failed because
account Nu inor Code iubject Gr lessage !DOCTYP fntml>	umber 0 22 ps, where d you go PE html>	Ter En	mplate ID 8006 ror Description Cannot T party did connecte	Tem Transmit Me not proper ad host has	plate Type essage To ty respon s failed to	HTML Ema o Server Exc d after a per respond	ail eption: riod of ti	A connec ime, or est	tion attempt failed because the connected ablished connection failed because
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ccount Nu ror Code ubject Gr essage !DOCTYF html> head> title> Wel /head> body bgc iable cell	umber 0 22 ps, where'd you go PE html> eb Loan color="##21212" sty llpadding="0" bord	Ter En o? Ie="margi er="0" bç	mplate ID 8006 for Description Cannot T party did connecte in: 0; padding: 0;"> gcolor="##212f2" heigh	Tem Transmit Ma not proper d host has the st has t = "100%"	plate Type essage Te ty respon failed to width="1	HTML Ema o Server Exc d after a per respond	ail ception: riod of ti	A connectime, or est	tion attempt failed because the connected tablished connection failed because

See the following example of this screen followed by field and button descriptions.

Notification Queue Error Manager Screen

Field Descriptions

Field	Description
Start Date	Enter a beginning date to use for your search parameter. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.

Field	Description
End Date	Select an ending date to use for your search parameter. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.
Account	Enter an account number in this field to search the Queue Error database and display messages with the account number entered in this field.
Recipient	Enter a phone number or email address for a recipient in this field to search the Queue Error database and display messages with the recipient entered in this field.
Template ID	Enter a template ID number in this field to search the Queue Error database and display messages with the template ID number entered in this field.
Wrapper ID	Enter a wrapper ID number in this field to search the Queue Error database and display messages with the wrapper ID number entered in this field.
Template Type	Select a template type from this drop-down field to search the Queue Error database and display messages with the selected template type.
Queue Error Manager List View	This list view displays all the queue error messages and queued messages that have errors. Queue errors are for messages that the Notification Processor failed to transmit.
	The following columns appear in this list view and can be used to sort:
	 Account Number: This displays the account number that the message is tied to.
	 Recipient: This displays the intended recipient of the message. Time Last Attempted: This displays the last time the message was attempted. Template ID: This displays the identification number of the template. Wrapper ID: This displays the identification number of the wrapper. Template Type: This displays the type of template used to create the message. Handled Date: The displays the date the message was handled in MM/DD/YYYY format. Handled By: This displays the name of the person who handled the message.

Field	Description
	 Template Description: This displays the description of the template.
Account Number	This field displays the account number that the message is tied to.
Error Code	This field displays the error code tied to the message.
Subject	This field displays the subject line of the message.
Message	This field displays the body of the message.
Template ID Display	This field displays the identification number of the template.
Error Description	This field displays a description of the error that occurred.
Template Type Display	This field displays the type of template used to create the message.

Button Descriptions

Button	Description
<read></read>	Click this button to read the Notification Processor and display all the queue error messages and queued messages with errors that fit the parameters entered in the <u>Start Date</u> and <u>End Date</u> fields. See the <u>Search for Messages with Errors</u> section for more details.
<reattempt message=""></reattempt>	Click this button to reattempt the message. This forces the notification queue Web service to increase the maximum number of attempts on the main message and flag the error as handled. You can select more than one error and right-click to reattempt all of the selected messages. Note: Reattempted messages are rendered using the currently cached template.
<view message=""></view>	Click this button to display the message as it would render (display in an HTML renderer) if the processor uses the current effective template. See the <u>Render a Message</u> section for more details.
<edit message="" requeue=""></edit>	Click this button to open the error message in the <u>Manual Notification</u> <u>Handler</u> screen with all of the data populated so the message can be altered and re-queued. Once the message is re-queued, the error is flagged as handled. See the <u>Edit And Requeue Messages</u> section for more details.

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See also:

Search for Messages with Errors Edit and Re-queue Messages Reattempt a Message Notification Queue Error Manager Screen Manual Notification Handler Screen
Edit And Re-queue Messages

To select a message to edit and/or re-queue using the Queue Error Manager screen:

- 1. <u>Perform a search</u> to populate the <u>Queue Error Manager</u> list view.
- 2. Select a message in the Queue Error Manager list view.

Selection (Criteria				-	_					
Start Date	• •	Account	тт	emplate Id		Wrap	oper Id				
End Date	•	Recipier	nt			Template	е Туре	0) Any	~		
Account Number	Recipient		Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template De	escription	ſ
	8011231233		12/02/2015 12:57:17 PM	8143	1	Text	(Recovery SMS 20%		1
	gold@goldpointsyst	ems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chas	e Email w/ Lin <mark>k Day 1</mark>	
	gold@goldpointsyst	ems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chas	e Email w/ Link Day 1	
	nay_wah@goldpoint	t.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chas	e Email w/Link Day 2	
	gpstest@goldpoint.c	com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chas	e Email w/ Link Day 4	
	1@goldpoint.com		12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chas	e Email w/ Link Day 1	Ξ.
Account Nun	mber 0 22	Ter Err	nplate ID 8006 or Description Cannot T party did	Tem ransmit Me not proper	plate Type essage To ty respon	HTML Ema Server Exc ad after a pe	ail ception: riod of ti	A connect me, or est	tion attempt failed beca ablished connection fai	use the connected iled because	
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Account Nun Error Code Subject Gp Message DOCTYP<br dntml> dread> dritle> Wet dread> dritle> Wet 	mber 0 22 ps, where 'd you go PE html> b Loan xolor="#f2f2f2" sty padding="0" bord	Ter En o? Ie="margi er="0" bg	nplate ID 8006 or Description Cannot T party did connecte n: 0; padding: 0;">	Tem ransmit Mu not proper d host has t="100%"	plate Type essage Tr ty response failed to width="1	HTML Ema o Server Exc di after a pe o respond	ail ception: riod of ti	A connect me, or est	tion attempt failed beca ablished connection fai	use the connected iled because	

Message Selected to Edit and/or Re-queue

- 3. Click <Edit/Requeue Message> to open the message on the Notification > <u>Manual Notification</u> <u>Handler</u> screen with all of the data populated so you can add to, edit, and re-queue the message.
- 4. Once you have made any changes that you want to make, click <Requeue Message> on the Manual Notification screen to re-queue the message to be sent on the selected date and time. **Note:** Once the message is re-queued, the error is flagged as handled.

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Recipient	gold@goldpointsystems.com	Template	8006 Abandon Offer Page Chase Email w/ Link Day 1 HTML Email 09/08/2014 10222 *TEST* AWL Origination Wrapper HTML Email 12/24/2014							
Override Subject*	Gps, where'd you go?	Wrapper								
Account Number Priority Release Date Release Time	0 1 04/03/2017 v 12:00:00 AM		Parameter FIRST_NAME OFFER_URL RECIPIENTID	Value Gps https://test-loan.t 265841502	n.webloan.com/offer?Source=2&L					
*Optional Fi Override Message	eld An overriden message will be r	endered "AS-IS"	FIRST_NAME	Gps cached template	Add/Char	nge Delete				
html <html> <head> <title>Web Loan</title></head></html>	itle>					^				
 <body bgcolor="#f2
 dt >

<br</th><th>ቻ 272" style="margin: 0; padding: 0;"> "0" border="0" bgcolor="#2/2/2" he > argin: auto;" width="580"></br></body>	ight="100%" width="	'100%">			v					
			Find/Replac	e Render Override	Preview Message	Requeue Message				

Selected Message on the Manual Notification Handler Screen

Back to Top

See also:

Search for Messages with Errors Reattempt a Message Notification Queue Error Manager Screen Notification Queue Error Manager Screen Details Manual Notification Handler Screen

Export or Print a Report

You can create a report of all queue error messages and queued messages that have errors in the <u>Queue Error</u> <u>Manager</u> list view using the Queue Error Manager screen.

This screen allows you to:

- Export a report of all the messages with errors
- Print a report of all the messages with errors

Export a Queue Error Manager Report

There are three different ways to export the Queue Error Manager Report:

- 1. Export to Report Manager
- 2. Export Selection to Tab Delimited Text File
- 3. Export All to Tab Delimited Text

Export to Report Manager

To export a report of the messages with errors in the <u>Queue Error Manager</u> list view to Report Manager:

1. Right-click on the **Queue Error Manager** list view.

E 10			
Edit			
Printing	•		
Export	•	Export to Report Manager	•
Auto Resize	•	Export Selection to Tab Delimited Text File	15
Find		Export All To Tab Delimited Text	

Right-click Menu with Export to Report Manager Selected

2. Select Export > Export to Report Manager to open the Save As dialog.

🕅 Save As					×
COO - 🚺 🕨 Lib	raries	 Documents My HelpAndManual Project 	s 🕨 🔻 🍫 Search	My HelpAndManu	al Pr 🔎
Organize 🔻 New	w folde	ïf			0
🚖 Favorites 📃 Desktop	^	Documents library My HelpAndManual Projects		Arrange by: Fold	er 🔻
🐌 Downloads		Name	Date modified	Туре	Size
🚟 Recent Places		퉬 Examples	4/12/2013 11:52 AM	File folder	
🚍 Libraries		📄 ArchiveManagerReport	11/27/2013 6:46 AM	Text Document	2 KB
Documents		📄 ArchiveManagerReportAll	11/27/2013 6:53 AM	Text Document	1 KB
J Music		ArchiveManagerReportSelection	11/27/2013 8:17 AM	Text Document	1 KB
🚼 Videos	-	•			•
File name:	Queu	eErrorManagerReport			•
Save as type:	Text F	iles (*.bxt)			•
) Hide Folders			Sav	e Can	cel

Save As Dialog

- 3. Enter the name of the report in the File name: field and click <Save>.
- 4. The report is saved and automatically opens in Report Manager.

🖙 Report Manager - [QueueErrorManagerReport]			[
💭 File Edit Processing Options View Wine	dow Help			_ 8 ×
	L F 🚳 ?			
Account Recipient Time Last Attempted Number	Template Template ID Type	Handled Handled Date By	Template Description	_
0 06/04/2013 14:50:23 PM	1112 HTML Email		Consumer Application	Submitted 📕
•				►
For Help, press F1				

Queue Error Manager Report in Report Manager

Export Selection to Tab Delimited Text File

To export a report of a single message with an error from the <u>Queue Error Manager</u> list view to a tab delimited text file:

- 1. Select a message in the **Queue Error Manager** list view.
- 2. Right-click on the selected message to open the Right-click menu.

06/0	04/2013 14:50:23 PM 111	2	HTML Email	Consumer
	Edit	•		
	Printing	•		
	Export	•	Export to Report Manager	
	Auto Resize	•	Export Selection to Tab Delimited	Text File
	Find		Export All To Tab Delimited Text	
	Reattempt Message(s)			

Right-click Menu with Export Selection to Tab Delimited Text File Selected

3. Select Export > Export Selection to Tab Delimited Text File to open the Save As dialog.

🕅 Save As					×
COO - 📕 🕨 Lib	raries	 Documents My HelpAndManual Project: 	s 🕨 🔻 🍫 Search .	My HelpAndManu	al Pr 🔎
Organize 🔻 New	w folde	r			0
🚖 Favorites 📃 Desktop		Documents library My HelpAndManual Projects		Arrange by: Fold	er 🔻
〕 Downloads	H	Name	Date modified	Туре	Size
🔛 Recent Places		퉬 Examples	4/12/2013 11:52 AM	File folder	
🚍 Libraries		📄 ArchiveManagerReport	11/27/2013 6:46 AM	Text Document	2 KB
Documents		📄 ArchiveManagerReportAll	11/27/2013 6:53 AM	Text Document	1 KB
J Music		ArchiveManagerReportSelection	11/27/2013 8:17 AM	Text Document	1 KB
🔚 Videos	-	٠			•
File name:	Queue	ErrorManagerReportSelection.txt			•
Save as type:	Text Fi	les (*.bxt)			-
) Hide Folders			Sav	e Can	i cel

Save As Dialog

- 4. Enter the name of the report in the **File name:** field and click <Save>.
- 5. The report is saved.

<u> </u>	ueueEr	rorManag	gerRepo	tSelection - N	otepa	ıd				[×
File	Edit	Format	View	Help								
0		06/04	/2013	14:50:23	PM	1112	HTML	Email	Consumer	Application	Submitted	* k
												Ŧ
								III			Þ	t
								_				

Queue Error Manager Selection Report in Tab Delimited Text File

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Export All to Tab Delimited Text File

To export a report of all the messages with errors in the <u>Queue Error Manager</u> list view to a tab delimited text file:

1. Right-click on the Queue Error Manager list view.

Edit	•	
Printing	•	
Export	•	Export to Report Manager
Auto Resize	•	Export Selection to Tab Delimited Text File
Find		Export All To Tab Delimited Text

Right-click Menu with Export All to Tab Delimited Text Selected

2. Select Export > Export All to Tab Delimited Text to open the Save As dialog.

🕅 Save As					×
COO - 📕 🕨 Lit	oraries	 Documents My HelpAndManual Projects 	► ▼ 4 Search	My HelpAndManu	al Pr 🔎
Organize 🔻 Ne	w folde	r		!≡ ▼	0
ጵ Favorites 📃 🗮		Documents library My HelpAndManual Projects		Arrange by: Folde	er 🔻
Downloads	=	Name	Date modified	Туре	Size
🔤 Recent Places		鷆 Examples	4/12/2013 11:52 AM	File folder	
🚍 Libraries		📄 ArchiveManagerReport	11/27/2013 6:46 AM	Text Document	2 KB
Documents		📄 ArchiveManagerReportAll	11/27/2013 6:53 AM	Text Document	1 KB
J Music		ArchiveManagerReportSelection	11/27/2013 8:17 AM	Text Document	1 KB
🚼 Videos	-	٠ III			•
File name:	Queue	ErrorManagerReportAll			•
Save as type:	Text Fi	les (*.txt)			-
) Hide Folders			Sav	e Can	icel

Save As Dialog

- 3. Enter the name of the report in the File name: field and click <Save>.
- 4. The report is saved.

<u> </u>	lueueEr	rorManag	JerRepoi	rtAll - Notepa	ł							x	3
File	Edit	Format	View	Help									
0		06/04	/2013	14:50:23	PM	1112	HTML	Email	Consumer	Application	Submitt	ed	*
4												F.	- T.
												÷.	-11

Queue Error Manager Report in Tab Delimited Text File

Print a Queue Error Manager Report

To print a report of the messages with errors in the <u>Queue Error Manager</u> list view:

1. Right-click on the **Queue Error Manager** list view.

Edit	×	
Printing	•	Print Ctrl+P
Export	•	Printer Settings
Auto Resize	→	Print Preview
Find		Page Setup

Right-click Menu with Printing Selected

2. Select Printing > Page Setup to open the Page Setup dialog.

Page Setup				—X —
	Constraints of the second seco	یفتی داند. پنجره ۱۵۲۰ می وست بر پنجره ۱۵۲۰ می وست بر		
Paper				
Size:	Letter			•
Source:	Automatically S	elect		•
Orientation	Margins (inches)		
O Portrait	Left:	0.5	Right:	0.5
Landscape	Top:	0.5	Bottom:	0.5
			ок	Cancel

Page Setup Dialog

- 3. The Queue Error Manager Report is a wide report, so you will want to change the orientation to **Landscape** and narrow the margins to 0.5 to fit the report on the page.
- 4. Click <OK> to apply the new settings.
- 5. Right-click on the **Queue Error Manager** list view again.

Edit	•	
Printing	•	Print Ctrl+P
Export	•	Printer Settings
Auto Resize	•	Print Preview
Find		Page Setup

Right-click Menu with Printing Selected

- 6. Select Printing > Print to print the Queue Error Manager Report. **Note:** You can select Printing > Print Preview to preview the report before actually printing it. You can also change the printer that you are using and the printer's settings by selecting Printing > Printer Settings.
- 7. The Queue Error Manager Report is printed using the printer set up in Printing > Printer Settings.

Account Number	Recipient	Time Last Attempted	Template ID	Template Type	Handled Date	Handled By	Template Description
0		06/04/2013 14:50:23 PM	1112	HTML Email			Consumer Application Submitted
					1		L
12/10/2013 9:15:14 AM	м						Page 1 of 1

Queue Error Manager Report Example

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See also:

Search for Messages with Errors Edit and Re-queue Messages Reattempt a Message Notification Queue Error Manager Screen Notification Queue Error Manager Screen Details

Reattempt a Message

The Queue Error Manager screen allows you to attempt to resend queue error messages and queued messages that have errors. When you attempt to send a message again, it forces the notification queue Web service to increase the maximum number of attempts on the main message and flag the error as handled. **Note:** Reattempted messages are rendered using the currently cached template.

This screen allows you to:

- Reattempt a message
- <u>Reattempt multiple messages at once</u>

Reattempt a Message

To attempt to resend a message using the Queue Error Manager screen:

- 1. <u>Perform a search</u> to populate the <u>Queue Error Manager</u> list view.
- 2. Select a message in the Queue Error Manager list view.

Read									
Selection (Criteria								
Start Date	¥	Account	Т	emplate Id		Wrap	oper Id		
End Date	~	Recipier	nt			Template	e Type	0) Any	~
Account Number	Recipient		Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description
	8011231233		12/02/2015 12:57:17 PM	8143	1	Text	(Recovery SMS 20%
	gold@goldpointsyste	ms.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1
	gold@goldpointsyste	ems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1
	nay_wah@goldpoint.	com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2
	gpstest@goldpoint.co	om	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4
	1@goldpoint.com		12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1
Subject Gp Message	s, where d you go	?	connecte	not proper	s failed to	o respond		ime, or es	addished connection railed because
DOCTYP<br <html> <head> <title>Web </title></head></html>	E html> > Loan								
<body bgcd<="" td=""><td>olor="#121212" styl</td><td>e="margi</td><td>n: 0; padding: 0;"></td><td></td><td></td><td></td><td></td><td></td><td></td></body>	olor="#121212" styl	e="margi	n: 0; padding: 0;">						
⊲table cell p	padding="0" borde	er="0" bg	color="#f2f2f2" heigh	nt="100%"	width="1	00%">			
⊲table cellp	padding="0" borde	er="0" bg	color="#f2f2f2f2" heigh	ıt="100%"	width="1	00%">	Reatt	remoted me	ssares will be rendered by current cached template

Queue Error Message Selected to Attempt to Resend

- 3. Click <Reattempt Message> to attempt to resend the message. **Note:** Reattempted messages are rendered using the currently cached template.
- 4. The message is sent and the Information Message dialog is displayed. Click <OK> to close the dialog.



Information Message Dialog

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Reattempt Multiple Messages at Once

To attempt to resend more than one message at once using the Queue Error Manager screen:

- 1. <u>Perform a search</u> to populate the <u>Queue Error Manager</u> list view.
- 2. Select the messages you want to attempt to resend in the **Queue Error Manager** list view.

-											
Selection Start Dat	n Criteria te v	Account	Ter	nplate Id		Wrappe	er Id				
End Dat	e 🗸 🗸	Recipient				Template T	ype ()) Any	*		
Account Number	Recipient	t	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handle Date	d Handled By	Template De	escription	ſ
	8011231233		12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%		
	gold@goldpointsyste	ms.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chas	e Email w/ Link Day 1	
	gold@goldpointsyste	ms.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chas	e Email w/ Link Day 1	
	nay_wah@goldpoint.	com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase	e Email w/Link Day 2	
	gpstest@goldpoint.co	om	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chas	e Email w/ Link Day 4	
	1@goldpoint.com		12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 1	
Account Nu Error Code	umber 0 22	Templ Error	late ID 8006 Description Cannot Tra party did no	Templa nsmit Mess ot property	ate Type I sage To S respond	HTML Email Server Excep after a perio	ntion: A	connectio	n attempt failed becaus blished connection failer	e the connected d because	
interior Code interior Code interior G interior G interior G interior G interior G interior State interior Stat	umber 0 22 àps.where'd you go 17PE html>	Templ Error	late ID 8006 Description Cannot Tra party did ne connected	Templa nsmit Mess ot properly host has f	ate Type I sage To S respond ailed to re	HTML Email Server Excep after a perio espond	otion: A d of tim	connectio ne, or estab	n attempt failed becaus Nished connection failed	e the connected d because	
Account Nu Error Code Subject G Vessage DOCTY<br thtml> thead> ditle> We (/head> tody bg table ce	umber 0 22 Sips. where d you go "PE html> eb Loan color="# <i>12f2f2</i> " styl slipadding="0" borde	Tempi Error ? le="margin: er="0" bgco	late ID 8006 Description Cannot Tra party did no connected : 0; padding: 0;"> olor="#121212" height=	Templa nsmit Mess t properly host has f	tte Type I sage To S respond ailed to re dth="100	HTML Email Server Excep after a perio espond	otion: A d of tim	. connectio	n attempt failed becaus lished connection faile	e the connected d because	
Account Nu Error Code Subject G (IDOCTY Antml> Anead> ditle> Wa (Anead> ditle> Wa (Anead> ditle> Chead> ditle> Chead> ditle> Chead>	umber 0 22 Sips, where d you go "PE html> eb Loan color="#f2f2f2" styl slipadding="0" borde	Tempi Error ? le="margin: er="0" bgcd	late ID 8006 Description Cannot Tra party did no connected : 0; padding: 0;"> olor="#121212" height=	Templa nsmit Mess st properly host has f	te Type I sage To S respond ailed to re dth="100	HTML Email Server Excep after a perio espond	otion: A d of tim	n connectione, or estab	n attempt failed becaus vlished connection failed ges will be rendered by curre	e the connected d because	

Multiple Messages Selected in Queue Error Manager List View

3. Right-click to bring up the Right-click dialog.



- 4. Select "Reattempt Message(s)" to attempt to resend all of the selected messages. **Note:** Reattempted messages are rendered using the currently cached template.
- 5. The messages are sent and the Information Message dialog is displayed. Click <OK> to close the dialog.



See also:

Search for Messages with Errors Edit and Re-queue Messages Notification Queue Error Manager Screen Notification Queue Error Manager Screen Details

Render A Message

You can display the message as it would render if the processor uses the current effective template using the Queue Error Manager screen. This is useful if you want send a notification again. Using the render tool, you can view the notification to ensure that it is the correct notification that you want sent again. You can also see if any changes need to be made before it is sent. The render tool can also be used to see how messages will look looked to customers when they receive notifications.

To render a message using the Queue Error Manager screen:

- 1. <u>Perform a search</u> to populate the <u>Queue Error Manager</u> list view.
- 2. Select a message in the **Queue Error Manager** list view.

Read										
Selection	Criteria									
Start Date	e 🗸 🗸 🖌	count	Т	emplate Id		Wrap	oper Id			
End Date	e v Ra	ecipien	t			Template	e Type	0) Any	~	
Account Number	Recipient		Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	Π
0	8011231233	1	2/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%	^
0	gold@goldpointsystems	.com 1	2/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gold@goldpointsystems	.com 1	2/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	n 1	2/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	
0	gpstest@goldpoint.com	1	2/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	1	2/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
Subject G Message DOCTYP<br <html></html>	ps, where 'd you go? PE html>		party dia connecte	not proper	s failed to	id after a pe prespond	nod of t	ime, or esi	adiished connection failed decause	> <
<head> <title>We </title></head>	b Loan									
<body bgd<="" td=""><td>color="#121212" style=" lpadding="0" border='</td><td>"margin "O" bgc</td><td>:: 0; padding: 0;"> :olor="#f2f2f2" heigh</td><td>ıt="100%"</td><td>width="1</td><td>00%"></td><td></td><td></td><td></td><td>~</td></body>	color="#121212" style=" lpadding="0" border='	"margin "O" bgc	:: 0; padding: 0;"> :olor="#f2f2f2" heigh	ıt="100%"	width="1	00%">				~
<body bgd<="" td=""><td>color="#121212" style=" padding="0" border='</td><td>"margin "0" bgc</td><td>:: 0; padding: 0;"> ::olor="#f2f2f2" heigh</td><td>ıt="100%"</td><td>width="1</td><td>00%"></td><td>Reatt</td><td>empted mes</td><td>sages will be rendered by current cached template</td><td>~</td></body>	color="#121212" style=" padding="0" border='	"margin "0" bgc	:: 0; padding: 0;"> ::olor="#f2f2f2" heigh	ıt="100%"	width="1	00%">	Reatt	empted mes	sages will be rendered by current cached template	~

Queue Error Manager List View and <View Message> Button

Click the <u><View Message> button</u> to render a notification in a new window. Note: The <View Message> button is enabled only if a message is selected in the Queue Error Manager list view.



Rendered Message

4. Click <OK> to close the rendered message window.

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See also:

Search for Messages with Errors Edit and Re-queue Messages Reattempt a Message Notification Queue Error Manager Screen Notification Queue Error Manager Screen Details

Re-size Queue Error Manager List View

The Queue Error Manager screen gives you the ability to manipulate and re-size the <u>Queue Error Manager</u> list view.

- Re-size the width of the Queue Error Manager list view columns
- <u>Re-size the height of the Queue Error Manager list view heading row</u>
- Manipulate the Queue Error Manager list view to view data that has been cut off

Re-size Column Width

To re-size the width of the columns in the Queue Error Manager list view:

1. Hover between the column headings of the list view to bring up the double-arrow icon.

Template ID+	+Template Type				
1112	HTML Email				
Queue Error Manager List					
View with	Double-arrow				
I	con				

2. Press and hold down the left-click button and drag to the right or left to increase or decrease the column width. In the following example the width of the Template ID column has been decreased.

l emplate	🕂 Template Type
1112	HTML Email
Queue	Error Manager
List Viev	w with Column

Width Decreased

Back to Top

Re-size Heading Row Height

To re-size the height of the heading row of the Queue Error Manager list view:

1. Hover on the bottom border of the heading row in the list view to bring up the double-arrow icon.

I emplate	Template Type				
1112 *	HTML Email				
Queue Error Manager					
List	View with				
Double	-arrow Icon				

2. Press and hold down the left-click button and drag down or up to increase or decrease the heading row height.

Template	Template Type
1112 +	HTML Email
Queue E List View	rror Manager with Heading

Row Height Increased

Back to Top

Manipulate the Queue Error Manager List View to See Data that has been Cut Off To view text that has been cut off:

1. Hover between the column headings of the list view to bring up the double-arrow icon.

Time Last Attempted	Template ID
06/04/2013 14:50:23	1112
Queue Error Manage	· List View

with Text Cut Off

2. Press and hold down the left-click button and drag to the right to increase the column width. In the following example the width of the Time Last Attempted column has been increased to display the entire date and time.

Time Last Attempted +	Template ID
06/04/2013 14:50:23 PM	1112

Column Width Increased in Queue Error Manager List View

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See also:

Search for Messages with Errors Edit and Re-queue Messages Reattempt a Message Notification Queue Error Manager Screen Notification Queue Error Manager Screen Details

Search for Messages with Errors

You can search for queue error messages and queued messages that have errors using the Queue Error Manager screen.

This screen allows you to:

- Search by date •
- Search by account number •
- Search by template identification number •
- Search by wrapper identification number ٠
- Search by recipient •
- Search by template type ٠
- Search using multiple search criteria •
- Search for all messages with errors •

Read						
Selection Criteria						
Start Date	¥	Account	Template Id	Wrapper Id		
End Date	~	Recipient		Template Type	0) Any	~

Search Parameters

Search by Date

To search for queue error messages and queued messages that have errors by the date they were last attempted:

- 1. Enter a beginning date to use for your search parameter in the Start Date field. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.
- 2. Enter an ending date to use for your search parameter in the End Date field. Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.

Read							
Selection (Criteria	_					
Start Date	12/02/2015	~ /	Account	Template Id	Wrapper Id		
End Date	12/04/2015	× 1	Recipient		Template Type	0) Any	Ý

arch Parameters with Dates Selected

- Read). The system searches for any message that has a time last Click the <Read> button (3. attempted date within the range specified in the Start Date and End Date fields.
- 4. The results are displayed in the Queue Error Manager list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	8011231233	12/02/2015 12:57:17 PM	8143	1	Text	1		Recovery SMS 20%	~
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	-
		-		-					

Search Results Displayed in the Queue Error Manager List View

Search by Account Number

To search for queue error messages and queued messages that have errors by account number:

1. Enter the account number that you want to search for in the <u>Account</u> field. **Note:** Entering partial account numbers searches for any messages that include the partial numbers entered.

Read						
Selection Criteria						
Start Date	~	Account 0	Template Id	Wrapper Id		
End Date	¥	Recipient		Template Type	0) Any	~

Account Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any message that has an account number that matches the number entered in the **Account** field.
- 3. The results are displayed in the <u>Queue Error Manager</u> list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	Γ
0	8011231233	12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%	~
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	

Search by Account Results Displayed in the Queue Error Manager List View

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Search by Template Identification Number

To search for queue error messages and queued messages that have errors by template identification (ID) number:

1. Enter the template ID number that you want to search for in the <u>Template ID</u> field. **Note:** You must enter the complete ID number. Partial numbers cannot be used to search.

Read						
Selection Criteria		•	Template Id 8006	Weapoor Id		
	~	Account				
End Date	¥	Recipient		Template Type	0) Any	

Template ID Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any message that has a template ID number that matches the number entered in the **Template ID** field.
- 3. The results are displayed in the <u>Queue Error Manager</u> list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	^
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/05/2015 15:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
-				-		-			

Search by Template ID Results Displayed in the Queue Error Manager List View

Search by Wrapper Identification Number

To search for queue error messages and queued messages that have errors by wrapper identification (ID) number:

1. Enter the wrapper ID number that you want to search for in the <u>Wrapper ID</u> field. **Note:** You must enter the complete ID number. Partial numbers cannot be used to search.

Read						
Selection Criteria						
Start Date	Ý	Account	Template Id	Wrapper Id	1	
End Date	~	Recipient		Template Type	0) Any	~
					Laurante	

Wrapper ID Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any message that has a wrapper ID number that matches the number entered in the **Wrapper ID** field.
- 3. The results are displayed in the <u>Queue Error Manager</u> list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	Γ
0	8011231233	12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%	~
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	8011211113	12/04/2015 18:46:10 PM	8143	1	Text			Recovery SMS 20%	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	

Search by Wrapper ID Results Displayed in the Queue Error Manager List View

Search by Recipient

To search for queue error messages and queued messages that have errors by the intended recipient's email address or phone number:

1. Enter the email address or phone number that you want to search for in the <u>Recipient</u> field. **Note:** You can enter a partial email address or phone number.

Read						
Selection Criteria						
Start Date	~	Account	Template Id	Wrapper Id		
End Date	¥	Recipient gold@go	oldpointsystems.com	Template Type	0) Any	~

Recipient Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any message that has an email address or phone number that matches what was entered in the **Recipient** field.
- 3. The results are displayed in the <u>Queue Error Manager</u> list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	^
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
									~

Search by Recipient Results Displayed in the Queue Error Manager List View

Back to Top

Search by Template Type

To search for queue error messages and queued messages that have errors by template type:

1. Select the template type that you want to search for from the <u>Template Type</u> drop-down list.

Read						
Selection Criteria						
Start Date	~	Account	Template Id	Wrapper Id		
End Date	~	Recipient		Template Type	2) HTML Email	~

Template Type Field in the Search Criteria

- 2. Click the <Read> button (<u>Read</u>). The system searches for any message that has a template type that matches the type selected from the **Template Type** drop-down list.
- 3. The results are displayed in the <u>Queue Error Manager</u> list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	^
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	~

Search by Template Type Results Displayed in the Queue Error Manager List View

Search Using Multiple Search Criteria

To search for queue error messages and queued messages that have errors using multiple search criteria:

 Enter all of the search criteria that you want to use to narrow your search in the Selection Criteria fields. In our example, we entered information in the <u>Start</u> and <u>End Date</u> fields, the <u>Account</u> field, and the <u>Template Type</u> field.

Read Selection Criteria					
Start Date 12/02/2015 v	Account 0	Template Id	Wrapper Id		
End Date 12/05/2015 v	Recipient		Template Type	2) HTML Email	~

Multiple Fields Used in the Search Criteria

- 4. Click the <Read> button (<u>Read</u>). The system searches for any message that matches *all* of the search criteria entered.
- 5. The results are displayed in the <u>Queue Error Manager</u> list view. In our example the messages that appear in the results were sent within the time frame specified by the **Start** and **End Date** fields, the account number matches the one entered in the **Account** field, and the template type is "HTML Email" which was specified using the **Template Type** field.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	~
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	Č.
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	

Search by Multiple Search Criteria Results Displayed in the Queue Error Manager List View

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Search for all Messages with Errors

To search for all queue error messages and queued messages that have errors:

1. Make sure all of the Selection Criteria fields are blank and "0) Any" is selected in the <u>Template Type</u> field.

Selection Criteria						
Start Date	¥	Account	Template Id	Wrapper Id		
End Date	~	Recipient		Template Type	0) Any	~

- 2. Click the <Read> button (Read). The system searches for all queue error messages and queued messages that have errors.
- 3. The results are displayed in the <u>Queue Error Manager</u> list view. **Note:** If there are a lot of results, the system takes longer to populate the **Queue Error Manager** list view. To achieve quicker processing speeds, perform a search using one or more of the Selection Criteria fields to narrow the results.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	8011231233	12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%	~
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	

Search Results Displayed in the Queue Error Manager List View

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See also:

Edit and Re-queue Messages Reattempt a Message Search the Results Export or Print a Report Notification Queue Error Manager Screen Notification Queue Error Manager Screen Details

Search the Results

To search the results in the <u>Queue Error Manager</u> list view using the Queue Error Manager screen:

1. <u>Perform a search</u> to populate the **Queue Error Manager** list view.

Account Number	Recipient	Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template Description	
0	8011231233	12/02/2015 12:57:17 PM	8143	1	Text			Recovery SMS 20%	^
0	gold@goldpointsystems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	gold@goldpointsystems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
0	nay_wah@goldpoint.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 2	
0	gpstest@goldpoint.com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 4	
0	1@goldpoint.com	12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase Email w/ Link Day 1	
						-			- *

Queue Error Manager List View

2. Right-click inside the **Queue Error Manager** list view to bring up the Right-click Menu.

Right-click Menu	
Mark as Handled	
Reattempt Message(s)	12
Find	
Auto Resize	•
Export	•
Printing	•
Edit	•

3. Select "Find" from the menu to open the Find dialog.

🖳 Find			×
			Find
Row Number	Column Name	Field	



4. Enter the text to search for in the **Search** field. In the following example, we will search for the text, "Submitted."

Submitted	Find	

Enter text in the Search Field

 Click <Find> to populate the Find list view with the results from the search. In our example we found all the messages that involved a "submitted" application. Note: To narrow the results, enter more detailed or specific text in the Search field.

2	Find			—
	Submitted			Find
	Row Number	Column Name	Field	
	1	Template Description	CONSUMER AP	PLICATION SUBMITTED

Find List View Populated with the Results of the Search

The **Find** list view displays all of the items that include the text entered in the **Search** field. It also lists what row number they are on in the **Queue Error Manager** list view, the name of the column that the search text was found in, and the field that contained the search text.

Double-clicking on an item in the **Find** list view closes the Find dialog and displays the **Queue Error Manager** list view with that item automatically selected.

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See also: <u>Search for Messages with Errors</u> <u>Edit and Re-queue Messages</u> <u>Reattempt a Message</u> <u>Notification Queue Error Manager Screen</u> <u>Notification Queue Error Manager Screen Details</u>

View Message Details

To view the details of a message using the Queue Error Manager screen:

- 1. <u>Perform a search</u> to populate the <u>Queue Error Manager</u> list view.
- 2. Select a message in the **Queue Error Manager** list view to display the details of the message in the fields below the **Queue Error Manager** list view.

Selection	Criteria				-					
Start Date	• •	Account	t 1	emplate Id	-	Wrap	oper Id			
End Date	• •	Recipie	nt			Template	е Туре	0) Any	~	
Account Number	Recipient		Time Last Attempted	Template ID	Wrapper ID	Template Type	Handled Date	Handled By	Template De	scription
	8011231233		12/02/2015 12:57:17 PM	8143	1	Text	(Recovery SMS 20%	
	gold@goldpointsyste	ems.com	12/04/2015 10:47:00 AM	8006	1	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 1
	gold@goldpointsyste	ems.com	12/04/2015 12:01:37 PM	8006	1	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 1
	nay_wah@goldpoint	t.com	12/04/2015 18:46:10 PM	8007	3	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 2
	gpstest@goldpoint.c	com	12/04/2015 18:46:52 PM	8009	3	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 4
	1@goldpoint.com		12/04/2015 18:48:16 PM	8006	3	HTML Email			Abandon Offer Page Chase	e Email w/ Link Day 1
Account Nur Error Code Subiect Gr	mber 0 22 ps. where d vou go	Ter Ел	nplate ID 8006 or Description Cannot T party did	Tem ransmit Me not proper	state Type ssage To ly respon	HTML Ema o Server Exc ad after a pe	ail ception: riod of t	A connec ime, or es	tion attempt failed becau tablished connection fail	use the connected led because
Account Nur Error Code Subject Gr Message < 1DOCTYP	mber 0 22 ps. where d you go PE html>	Ter En	nplate ID 8006 or Description Cannot T party did connecte	Tem ransmit Me not proper ed host has	olate Type ssage To ly respon failed to	HTML Ema o Server Exc d after a pe o respond	ail xeption: riod of ti	A connec ime, or es	tion attempt failed becau tablished connection fail	use the connected led because
Account Nur Error Code Subject Gp Message DOCTYP<br <html> <head> <title> Wel </title></head></html>	mber 0 22 ps, where 'd you go PE html> b Loan	Ter En	nplate ID 8006 or Description Cannot T party did connecte	Tem Transmit Me not proper ad host has	olate Type ssage To ly respon failed to	HTML Ema o Server Exc did after a pe o respond	ail xeption: riod of ti	A connec ime, or es	tion attempt failed becan lablished connection fail	use the connected led because
Account Nur Error Code Subject Gr Message DOCTYP<br <html> <head> <title> Wel </title></head> <body bgc<="" td=""><td>mber 0 22 ps, where d you go PE html> b Loan xolor="#1/21/21/21" sty</td><td>Ter Err 5?</td><td>nplate ID 8006 or Description Cannot T party did connecte in: 0; padding: 0;"></td><td>Tem, iransmit Me not proper ed host has</td><td>olate Type ssage Tr ly respon failed to</td><td>HTML Ema o Server Exc d after a pe respond</td><td>ail xeption: riod of ti</td><td>A connec ime, or es</td><td>tion attempt failed becau tablished connection fai</td><td>use the connected led because</td></body></html>	mber 0 22 ps, where d you go PE html> b Loan xolor="#1/21/21/21" sty	Ter Err 5?	nplate ID 8006 or Description Cannot T party did connecte in: 0; padding: 0;">	Tem, iransmit Me not proper ed host has	olate Type ssage Tr ly respon failed to	HTML Ema o Server Exc d after a pe respond	ail xeption: riod of ti	A connec ime, or es	tion attempt failed becau tablished connection fai	use the connected led because
Account Nur Error Code Subject Gp Message DOCTYF<br dntml> dnead> ditle> Wel dody bgc dable cell	mber 0 22 ps, where'd you go PE html> b Loan color="#f2f2f2" sty lpadding="0" borde	Ter En 5? de="margi er="0" bg	nplate ID 8006 or Description Cannot T party did connecte in: 0; padding: 0;"> gcolor="#{2f2f2f2" heigh	Tem ransmit Me not proper d host has t="100%" ⁻	olate Type ssage To y respon failed to width="1	HTML Ema o Server Exc d after a pe o respond	ail æption: riod of ti	A connec	tion attempt failed becan tablished connection fail	use the connected led because
Account Nur Error Code Subject Gp Message <1DOCTYF dhtml> dhead> ditle> Wel dody bgc dable cell	mber 0 22 ps, where'd you go PE html> b Loan color="#f2f2f2" sty lpadding="0" bord	Ter En o? de="margi er="0" bg	nplate ID 8006 or Description Cannot T party did connecte in: 0; padding: 0;"> gcolor="#{2f2f2" heigh	Tem ransmit Me not proper d host has	olate Type ssage To y respon failed to width="1	HTML Ema o Server Exc d after a pe o respond	ail ception: riod of ti	A connect ime, or est	tion attempt failed becan tablished connection fail	use the connected led because

Details of Message Displayed

The details displayed include the account number, template ID, template type, error code and description, subject line of the message, and the body of the message.

In addition to viewing the details of a message, you can also <u>attempt to send the message again</u>, <u>render the</u> <u>message</u> or <u>send the message</u> to the <u>Manual Notification Handler</u> screen to edit and/or re-queue the message.

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See also:

Search for Messages with Errors Edit and Re-queue Messages Reattempt a Message Render a Message Notification Queue Error Manager Screen Notification Queue Error Manager Screen Details

Relocation Tool Screen

Use the Relocation Tool screen to <u>export</u> and <u>import</u> notification templates and wrappers. This tool makes it easy to export notification templates and wrappers that you were testing on your Beta machine and import them onto your Production machine so that you don't have to re-enter any data. You simply select the the notification templates and wrappers that you want from one machine (e.g., your Beta machine), save them as a file on your computer, and then import that file into another machine (e.g., your Production machine).

The Relocation Tool screen also enables you to save a backup file of all your notification templates and wrappers on your computer.

See each of the following tabs for a description of the fields and buttons that appear on that tab:

- Export Tab
- Import Tab

How To Items

This screen allows you to:

- Export Templates and Wrappers
- Import Templates and Wrappers
- Preview a File to Export
- Preview a File to Import

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Relocation Tool</u> <u>Screen Details</u> section.

This screen is accessed by going to Notification > Relocation Tool in the CIM GOLD tree view.

< ~	ID	Туре	De	scription	Effective Date	Last Changed Date	Changed By
	1	3 - Text Messa	ge Free Form Respons	e Text Template	5/27/2016 12:00 AM	7/20/2016 09:10 AM	TUTTUT
	2	3 - Text Messag	ge Notice 1		5/31/2016 12:00 AM	5/31/2016 12:55 PM	COCO
	3	2 - HTML Emai	I User Logged In		11/12/2014 12:00 AM	8/17/2016 12:47 PM	TUTTUT
	3	3 - Text Messag	ge Notice 2		5/31/2016 12:00 AM	5/31/2016 11:03 AM	0000
	4	2 - HTML Emai	Access has been Re	estricted	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
	4	3 - Text Messag	ge Notice 3		5/31/2016 12:00 AM	5/31/2016 11:05 AM	COCO
~	5	2 - HTML Emai	Account Restricted I	nvalid Password Attempts	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
	E.	9 T M.	M.C. 4		E/01/0010 10:00 AM	E01/0010 11:00 AM	COREVI
ppers	ID) Type	Description	n Effective Date	Last Changed Da	te Changed By	
		1 2-HTMLE	mail Basic Wrapper	5/17/2016 12:00 /	AM 8/29/2016 01:15 P	PM TUTTUT	
	100	01 3 - Text Me	ssage Test Text Wrapp	er 5/19/2016 12:00 A	AM 10/03/2016 11:58 /	AM OSHOSH	

Relocation Tool Screen

See also:

Relocation Tool Screen Details Export Tab Import Tab Notification System

Relocation Tool Screen Details

Use the Relocation Tool screen to <u>export</u> and <u>import</u> notification templates and wrappers. This tool makes it easy to export notification templates and wrappers that you were testing on your Beta machine and import them onto your Production machine so that you don't have to re-enter any data. You simply select the the notification templates and wrappers that you want from one machine (e.g., your Beta machine), save them as a file on your computer, and then import that file into another machine (e.g., your Production machine).

The following tabs are on this screen:

- <u>Export Tab</u>: Use the Export tab to <u>export templates and wrappers</u>. You can also <u>preview files</u> to export. See the help for this tab for an example of this screen and definitions of each of the fields on this screen.
- <u>Import Tab</u>: Use the Import tab to <u>import templates or wrappers</u>, <u>preview imported files</u>, and <u>read files</u>. See the help for this tab for an example of this screen and definitions of each of the fields on this screen.

××	ID	Туре	Descript	ion	Effective Date	Last Changed Date	Changed By
	1	3 - Text Message	Free Form Response Tex	t Template	5/27/2016 12:00 AM	7/20/2016 09:10 AM	TUTTUT
	2	3 - Text Message	Notice 1		5/31/2016 12:00 AM	5/31/2016 12:55 PM	COCO
	3	2 - HTML Email	User Logged In		11/12/2014 12:00 AM	8/17/2016 12:47 PM	TUTTUT
	3	3 - Text Message	Notice 2		5/31/2016 12:00 AM	5/31/2016 11:03 AM	COCO
	4	2 - HTML Email	Access has been Restrict	ed	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
	4	3 - Text Message	Notice 3		5/31/2016 12:00 AM	5/31/2016 11:05 AM	COCO
~	5	2 - HTML Email	Account Restricted Invalid	Password Attempts	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
	E	3 T M.	M-11-11-1		E01/0010 10.00 MM	E010010 11 00 AM	CODEVI
	ID) Type	Description	Effective Date	Last Changed Date	e Changed By	
		1 2 - HTML Ema	il Basic Wrapper	5/17/2016 12:00 AM	4 8/29/2016 01:15 P	м титтит	
	100	01 3 - Text Messa	ige Test Text Wrapper	5/19/2016 12:00 AM	M 10/03/2016 11:58 A	M OSHOSH	
	100	Type 1 2 - HTML Ema 01 3 - Text Messa	Description il Basic Wrapper age Test Text Wrapper	Effective Date 5/17/2016 12:00 AM 5/19/2016 12:00 AM	Last Changed Date 4 8/29/2016 01:15 P 4 10/03/2016 11:58 A	e Changed By M TUTTUT M OSHOSH	

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See also:

Export Tab Import Tab Relocation Tool Screen Notification System

Export Tab

Use the Export tab to export templates and wrappers. You can also preview files to export.

See the following example of this tab followed by <u>field</u> and <u>button</u> descriptions.

3-	Text Message	Free Form Response Text	Template	E/27/2016 12:00 AM	700000400040	1
2 3-			on proto	3/2/12018 12:00 AM	//20/2016 09:10 AM	TUTTUT
	Text Message	Notice 1		5/31/2016 12:00 AM	5/31/2016 12:55 PM	0000
2 -	HTML Email	User Logged In		11/12/2014 12:00 AM	8/17/2016 12:47 PM	TUTTUT
3-	Text Message	Notice 2		5/31/2016 12:00 AM	5/31/2016 11:03 AM	0000
2-	HTML Email	Access has been Restricte	ed	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
3-	Text Message	Notice 3		5/31/2016 12:00 AM	5/31/2016 11:05 AM	0000
5 2-	HTML Email	Account Restricted Invalid	Password Attempts	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
	T M.	M.C., 4		E-01-0010-10-00 AM	E01001011100 AM	COREVI
ID	Туре	Description	Effective Date	Last Changed Dat	e Changed By	
1	2 - HTML Emai	il Basic Wrapper	5/17/2016 12:00 A	M 8/29/2016 01:15 F	титтит м	
0001	3 - Text Messa	ge Test Text Wrapper	5/19/2016 12:00 Å	M 10/03/2016 11:58 4	M OSHOSH	
	2 - 3 - 2 - 2 - 2 - 2 - 1	2 - HTML Email 3 - Text Message 2 - HTML Email 3 - Text Message 2 - HTML Email D Type 1 2 - HTML Email 001 2 Text Messa	2 - HTML Email Oser Logged in 3 - Text Message Notice 2 2 - HTML Email Access has been Restricte 3 - Text Message Notice 3 2 - HTML Email Account Restricted Invalid D Type Description 1 2 - HTML Email Basic Wrapper 001 2 - Text Message Text Notice 2	2 - HTML Email Oser Logged in 3 - Text Message Notice 2 2 - HTML Email Access has been Restricted 3 - Text Message Notice 3 2 - HTML Email Account Restricted Invalid Password Attempts 2 - HTML Email Account Restricted Invalid Password Attempts 2 - Text Message Notice 4 D Type D Text Message 1 2 - HTML Email Basic Wrapper 5/17/2016 12:00 A 001 3 Text Message Text Message	2 - HTML Email Oser Logged III HTM22014 12:00 AM 3 - Text Message Notice 2 5/31/2016 12:00 AM 2 - HTML Email Access has been Restricted 11/12/2014 12:00 AM 3 - Text Message Notice 3 5/31/2016 12:00 AM 2 - HTML Email Account Restricted Invalid Password Attempts 11/12/2014 12:00 AM 2 - HTML Email Account Restricted Invalid Password Attempts 11/12/2014 12:00 AM 2 - Text Message Notice 3 5/31/2016 12:00 AM 2 - HTML Email Account Restricted Invalid Password Attempts 11/12/2014 12:00 AM 2 - Text Message Notice 4 Effective Date Last Changed Dat 1 - 2 - HTML Email Basic Wrapper 5/17/2016 12:00 AM 8/29/2016 01:15 F 001 - 3 - Text Message Text Message Fil9/2015 12:00 AM 10/02/2016 11:5 F	2 - HTML Email Oser Logged III HT/12/2014 12.00 AM ST/12/2016 12.47 PM 3 - Text Message Notice 2 5/31/2016 12:00 AM 5/31/2016 11:03 AM 2 - HTML Email Access has been Restricted 11/12/2014 12:00 AM 5/31/2016 10:03 AM 3 - Text Message Notice 3 5/31/2016 12:00 AM 5/31/2016 11:05 AM 2 - HTML Email Account Restricted Invalid Password Attempts 11/12/2014 12:00 AM 5/11/2016 09:33 AM 2 - HTML Email Account Restricted Invalid Password Attempts 11/12/2014 12:00 AM 5/11/2016 09:33 AM 2 - Text Message Notice 4 Effective Date Last Changed Date Changed By 1 2 - HTML Email Basic Wrapper 5/17/2016 12:00 AM 8/29/2016 01:15 PM TUTUT 001 3 Text Message Text Message 5/17/2016 12:00 AM 8/29/2016 01:15 PM 05HOSH

Export Tab

Field Descriptions

Field	Description
Export Templates List View	The Export Templates list view displays all of the notification templates set up for your institution. Double-click on a template in this list view to <u>preview</u> the selected template. You can also use this list view to <u>export templates</u> .
	 The following columns display information in the Export Templates list view: Checkbox: Check this field to select a template. You can also use the column header of this column to automatically select all of the templates, all of the active templates, all of the inactive templates, or to select none of the templates. ID: Displays the identification (ID) number of the template. Type: Displays the template type. Description: Displays a description of the template.

Field	Description
	 Effective Date: Displays the date the template became effective. Last Changed Date: Displays the date the template was most recently updated. Changed By: Displays the name of the person who most recently updated the template.
Export Wrappers List View	The Export Wrappers list view displays all of the notification wrappers set up for your institution. Double-click on a wrapper in this list view to <u>preview</u> the selected wrapper. You can also use this list view to <u>export wrappers</u> . The following columns display information in the Export Wrappers list view:
	 Checkbox: Check this field to select a wrapper. You can also use the column header of this column to automatically select all of the wrappers, all of the active wrappers, all of the inactive wrappers, or to select none of the wrappers. ID: Displays the identification (ID) number of the wrapper. Type: Displays the wrapper type. Description: Displays a description of the wrapper. Effective Date: Displays the date the wrapper became effective. Last Changed Date: Displays the date the wrapper was most recently updated. Changed By: Displays the name of the person who most recently updated the wrapper.

Button Descriptions

Button	Description
<preview></preview>	Select, or highlight, a file in the <u>Export Templates list view</u> or the <u>Export Wrappers list view</u> and click this button to <u>preview the template</u> <u>or wrapper</u> .
<export></export>	Check the boxes next to the templates and wrappers that you want to export in the Export Templates or the Export Wrappers list views and click this button to export the files.

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See also:

Preview a File to Export Export Templates and Wrappers Export Tab Import Tab Relocation Tool Screen Details Relocation Tool Screen Notification System

Import Tab

Use the Import tab to import templates or wrappers, preview imported files, and read files.

See the following example of this tab followed by field and button descriptions.

emp	olates						
ID	Туре	Description		Effective Date	Last Changed Date	Changed By	
3 3 - Text Message Notice 2		Notice 2		5/31/2016 12:00 AM	5/31/2016 11:03 AM	COCO	
4	4 2 - HTML Email Access has been Restricted		11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT		
4	3 - Text Message	Notice 3		5/31/2016 12:00 AM	5/31/2016 11:05 AM	COCO	
5	2 - HTML Email Account Restricted Invalid Password Attempts		11/12/2014 12:00 AM	11/12/2014 12:00 AM 5/11/2016 09:33 AM TUTTUT			
Vran	pers						
Vrap	pers						
11							
n	D Type	Description	Effective Date	Last Changed Da	te Changed By		
100	D Type 001 3 - Text Mess	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	AM OSHOSH		
100	D Type D01 3 - Text Mess	age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	AM OSHOSH		
100	D Type 001 3 - Text Mess	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	AM OSHOSH		
100	D Type D01 3 - Text Mess	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da	te Changed By		
100 rans	D Type D01 3 - Text Mess smission Servers	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da	ite Changed By AM OSHOSH Available S	ervers	
100 rans 1) 1	D Type D01 3 - Text Mess smission Servers 10.0.0.5 : 10	Description age Test Text Wrapper Import File Servers	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	ite Changed By AM OSHOSH Available S	ervers	v
100 rans 1) 1 2) /	D Type D01 3 - Text Mess smission Servers 10.0.0.5 : 10 Address=net.tcp://G	Description age Test Text Wrapper Import File Servers	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58 1) 10.0.0.5 : 10 c; 2) Address=net.1	te Changed By AM OSHOSH Available S tcp://GPSBeta3.dhiapp	ervers onet.com/GPSTexting	v v/Service.r v
100 irans 1) 1 2) /	D Type D01 3 - Text Mess smission Servers 10.0.0.5 : 10 Address=net.tcp://G	Description age Test Text Wrapper Import File Servers SPSBeta3.dhiappnet.com/GPS	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58 1) 10.0.0.5 : 10 c; 2) Address=net.1	AM OSHOSH AM OSHOSH Available S tcp://GPSBeta3.dhiapp	ervers onet.com/GPSTexting	v v/Service.r v

Import Tab

Field Descriptions

Field	Description
Import Templates List View	The Import Templates list view displays all of the notification templates that you have recently imported. Double-click on a template in this list view to <u>preview</u> the selected template. Note: You must <u>import templates</u> to populate this list view.
	 The following columns display information in the Import Templates list view: ID: Displays the identification (ID) number of the template. Type: Displays the template type. Description: Displays a description of the template. Effective Date: Displays the date the template became effective. Last Changed Date: Displays the date the template was most recently updated.

Field	Description
	Changed By: Displays the name of the person who most recently updated the template.
Import Wrappers List View	The Import Wrappers list view displays all of the notification wrappers that you have recently imported. Double-click on a wrapper in this list view to <u>preview</u> the selected wrapper. Note: You must <u>import wrappers</u> to populate this list view.
	 The following columns display information in the Import Wrappers list view: ID: Displays the identification (ID) number of the wrapper. Type: Displays the wrapper type. Description: Displays a description of the wrapper. Effective Date: Displays the date the wrapper became effective. Last Changed Date: Displays the date the wrapper was most recently updated. Changed By: Displays the name of the person who most recently updated the wrapper.
Transmission Servers List View	Note: This list view is visible only to GOLDPoint Systems Editor Users.
	The Transmission Servers list view displays all of the transmission servers that you have recently imported. Transmission servers are the systems that are used to actually deliver the notifications. Each type of notification (e.g., text and email) is sent using a different transmission server. And these servers can send only that one type of notification. Note: You must <u>import a file server</u> to populate this list view.
	 The following columns display information in the Transmission Servers list view: Import File Servers: Displays the file servers that have been imported. Available Servers: Displays the available transmission servers on the current machine. You can use the drop-down field in this column to select a file server from those available. This allows you to easily change templates and wrappers using the transmission server from a previous machine (e.g., Alpha, Beta, etc.) to the transmission server used on the current machine (e.g., Beta, Production, etc.).
Search	Enter the name of the file that you want to import in this field and click the <u><read file=""> button</read></u> to display the file's contents on the Import tab.

Field	Description
	You can also use the <browse> button to search your computer for a <u>file to import</u>.</browse>

Button Descriptions

Button	Description
<browse></browse>	Click this button to search for a file to import.
<read file=""></read>	Enter the name of a file in the Search field and click this button to <u>read the file</u> and display its contents on the Import tab. Note: If the <read file=""> button isn't enabled after you enter the file name, it is because the program can't find the file on your computer. Double check the file name or path that you entered.</read>
<preview></preview>	Select, or highlight, a file in the Import Templates list view or the Import Wrappers list view and click this button to <u>preview the</u> <u>template or wrapper</u> .
<import></import>	Click this button to import the file in the Search field.

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See also:

Preview a File to Import Import Templates and Wrappers Relocation Tool Screen Details Relocation Tool Screen Notification System
Export Templates and Wrappers

Using the Export tab on the Relocation Tool screen, you can export templates and wrappers.

To export templates and wrappers, complete the following steps:

 Select, or highlight, the templates and wrappers that you want to export from the <u>Export Templates</u> list view and the <u>Export Wrappers</u> list view. In our example, we selected all of the templates and all of the wrappers by selecting "All" from the drop-down **Checkbox** column headers to easily select all of the templates and wrappers. **Note:** You may want to <u>preview a template or wrapper</u> before you export it to make sure that it is the file that you want to export.

V ~	ID	Туре	Descript	tion	Effective Date	Last Changed Date	Changed By
~	1	3 - Text Message	Free Form Response Tex	t Template	5/27/2016 12:00 AM	7/20/2016 09:10 AM	TUTTUT
~	2	3 - Text Message	Notice 1		5/31/2016 12:00 AM	5/31/2016 12:55 PM	COCO
~	3	2 - HTML Email	User Logged In		11/12/2014 12:00 AM	8/17/2016 12:47 PM	TUTTUT
~	3	3 - Text Message	Notice 2		5/31/2016 12:00 AM	5/31/2016 11:03 AM	0000
~	4	2 - HTML Email	Access has been Restrict	ted	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
~	4	3 - Text Message	Notice 3		5/31/2016 12:00 AM	5/31/2016 11:05 AM	COCO
~	5	2 - HTML Email	Account Restricted Invalid	d Password Attempts	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
-	E	9 T. 184	Mattan A		E01001010000	E01001011100 AM	COREVI
ppers	8						
V ~	ID) Type	Description	Effective Date	Last Changed Date	Changed By	
~		1 2 - HTML Ema	ail Basic Wrapper	5/17/2016 12:00 Al	M 8/29/2016 01:15 Pl	Μ Τυττυτ	
✓	100	01 3 - Text Messa	age Test Text Wrapper	5/19/2016 12:00 AI	M 10/03/2016 11:58 A	M OSHOSH	

- 2. Click <Export> to open the Export File dialog.
- 3. Select the folder where you want to save the file.
- 4. Enter the name of the file in the File name: field and click <Save>.



Select Folder to Save the XML File In

- 5. This brings up the Save Successful dialog.
- 6. Click <OK>.

	Save Succ	essful
File Exported_	Wrappers&Templates	1.xml successfully saved.
		ОК

Saved the File

The XML file containing the templates and wrappers is now saved on your computer.



See also:

Preview a File to Export Import Templates and Wrappers Export Tab Relocation Tool Screen Details Relocation Tool Screen Notification System

Import Templates and Wrappers

Using the <u>Import tab</u> on the <u>Relocation Tool screen</u>, you can import templates and wrappers. You can import templates and wrappers using two methods:

- 1. <u>Use the <Browse...> Button to Find the File</u>
- 2. Use the <Read File> Button to Find the File

Use the <Browse...> Button to Find the File

To import templates and wrappers using the <u><Browse...> button</u>, complete the following steps:

1. Click the <Browse...> button to search your computer for a file to import.

ID Type	Description	Effective Date Last (Changed Date	Changed By		
/rappers						
D Type	Description	Effective Date Last C	Changed Date	Changed By)	
ID Type	Description	Effective Date Last C	Changed Date	Changed By		
ID Type	Description Servers Import File S	Effective Date Last C	Changed Date	Changed By Available	Servers	
ID Type	Description Servers Import File S	Effective Date Last C	Changed Date	Changed By Available	Servers	

- 2. Navigate to the folder where the file that you want to import is located.
- 3. Select the file and click <Open>.

см́	Impor	t File		×
🕞 🏵 🕆 👔 🕨 Thi	is PC → Documents	~ C	Search Documents	Q
Organize 👻 New folde	r			
☆ Favorites	Name		Date modified	Туре
🐌 CMF Release Me	📕 Custom Office Templ	ates	2/2/2017 11:13 AM	File fold
Desktop	📴 My Data Sources		2/12/2014 10:24 AM	File fold
🚺 Downloads	鷆 My HelpAndManual P	rojects	2/27/2015 7:14 AM	File fold
🖳 Recent places	🍌 Outlook Files		2/7/2017 3:30 PM	File fold
	PCIS		2/3/2017 10:28 AM	File fold
🖳 This PC	Wrensoft		7/14/2014 9:43 AM	File fold
📔 Desktop	Exported_Wrappers&1	Femplates_0.xml	2/6/2017 10:52 AM	XML File
📔 Documents 🗸 🗸	<			>
File na	me: Exported_Wrappers&T	emplates_0.xr ∨	Xml documents (*.xml)	¥
			Open C	ancel

XML File to Import in a File on the Computer

- The contents of the file are now loaded onto the Import tab. You can now see all of the templates and wrappers that you can import. Note: The <u>Transmission Servers</u> list view is visible only to GOLDPoint Systems Editor Users.
- 5. Click <Import> to import the file. **Note:** You may want to <u>preview the files</u> before you import them to ensure they are the templates and wrappers that you want to import.

	Туре	Description	Effective Date	Last Changed Date	Changed By
3	3 - Text Message	Notice 2	5/31/2016 12:00 AM	5/31/2016 11:03 AM	COCO
4	2 - HTML Email	Access has been Restricted	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
4	3 - Text Message	Notice 3	5/31/2016 12:00 AM	5/31/2016 11:05 AM	0000
5	2 - HTML Email	Account Restricted Invalid Password Attempts	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTUT
rap	pers				
1	D Type	Description Effective Date	 Last Changed Da 	te Changed By	
10	01 3 - Text Mess	age Test Text Wrapper 5/19/2016 12:00	AM 10/03/2016 11:58 /	AM OSHOSH	
rans	mission Servers				
rans	mission Servers	Import File Servers		Available S	ervers
ran: 1)	emission Servers	Import File Servers	1) 10.0.0.5 : 10	Available S	ervers

File Loaded Onto the Import Tab

- 6. Confirm that you want to import the file. **WARNING:** The templates and wrappers that you import will replace existing templates and wrappers.
- 7. Once you have confirmed that you want to import the templates and wrappers from the file, click <Yes> to import the file.



Confirm Import Dialog

- 8. The file is imported into CIM GOLD and existing templates and wrappers are overwritten with the templates and wrappers from the file.
- 9. Click <OK>.



File Successfully Imported

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Use the <Read File> Button to Find the File

To import templates and wrappers using the <Read File> button to find the file, complete the following steps:

1. Enter the name of the file that you want to import in the <u>Search</u> field.

	Description	Effective Date Last Cl	anned Date	Changed By		
Туре	Description	Cliective Date Last Cl	langed Date	Changed by		
/rappers						
			1			
ID Type	Description	Effective Date Last Cl	hanged Date	Changed By		
ID Type	Description	Effective Date Last Cl	hanged Date	Changed By		
ID Type	Description Servers Import File S	Effective Date Last C	hanged Date	Changed By Available S	òervers	
ID Type	Description Servers Import File S	Effective Date Last C	hanged Date	Changed By Available S	èervers	
ID Type	Description Servers Import File S	Effective Date Last C	hanged Date	Changed By Available S	èervers	

Click <<u>Read File></u> to search for the file on your computer and load it onto the <u>Import tab</u>. Note: If the <Read File> button isn't enabled after you enter the file name, it is because the program can't find the file on your computer. Double check the file name or path that you entered.

D Type	Description	Effective Date	Last Changed Date	Changed By		
rappers						
D Type	Description	Effective Date I	Last Changed Date	Changed By		
D Type	Description	Effective Date	Last Changed Date	Changed By		
DType	Description	Effective Date	Last Changed Date	Changed By		
D Type	Description Servers	Effective Date	Last Changed Date	Changed By		
D Type	Description Servers Import File S	Effective Date	Last Changed Date	Changed By Available	Servers	
D Type	Description Servers Import File S	Effective Date	Last Changed Date	Changed By Available	Servers	

XML File Name Entered in Search Field and the <Read File> Button

- The contents of the file are now loaded onto the Import tab. You can now see all of the templates and wrappers that you can import. Note: The <u>Transmission Servers</u> list view is visible only to GOLDPoint Systems Editor Users.
- 4. Click <Import> to import the file. **Note:** You may want to <u>preview the files</u> before you import them to ensure they are the templates and wrappers that you want to import.

	Туре	Description	126	Effective Date	Last Change	d Date	Changed By	y	
3	3 - Text Message	Notice 2		5/31/2016 12:00 AM	5/31/2016 11	03 AM	COCO		
4	2 - HTML Email	Access has been Restricted		11/12/2014 12:00 AM	5/11/2016 09	33 AM	TUTTUT		
4	3 - Text Message	Notice 3		5/31/2016 12:00 AM	5/31/2016 11	05 AM	COCO		
5	2 - HTML Email	Account Restricted Invalid Passw	ord Attempts	11/12/2014 12:00 AM	5/11/2016 09	33 AM	TUTTUT		
100	D Type 001 3 - Text Mess	Description age Test Text Wrapper 5/1	Effective Date 9/2016 12:00 A	Last Changed Da AM 10/03/2016 11:58	AM OSHOSH	By I			
100 ans	D Type 001 3 - Text Mess smission Servers	Description 4 age Test Text Wrapper 5/1 Import File Servers	Effective Date 9/2016 12:00 A	Last Changed Da	te Changed AM OSHOSH	By I ilable S	ervers		
100 ans	D Type D01 3 - Text Mess smission Servers 10.0.0.5 : 10	Description 5/1: age Test Text Wrapper 5/1: Import File Servers	Effective Date 9/2016 12:00 A	Last Changed Da M 10/03/2016 11:58	AM OSHOSH	By I ilable S	ervers		

File Loaded Onto the Import Tab

- 5. Confirm that you want to import the file. **WARNING:** The templates and wrappers that you import will replace existing templates and wrappers.
- 6. Once you have confirmed that you want to import the templates and wrappers from the file, click <Yes> to import the file.



Confirm Import Dialog

- 7. The file is imported into CIM GOLD and existing templates and wrappers are overwritten with the templates and wrappers from the file.
- 8. Click <OK>.



File Successfully Imported

See also:

Preview a File to Import Export Tab Relocation Tool Screen Details Relocation Tool Screen Notification System

Preview a File to Export

Using the <u>Export tab</u> on the <u>Relocation Tool screen</u>, you can preview a file that you might want to export. This allows you to make sure that the template or wrapper that you are about to <u>export</u> is the right file.

To preview a file to export, complete the following steps:

1. Select, or highlight, a template or wrapper to preview from the <u>Export Templates</u> list view or the <u>Export</u> <u>Wrappers</u> list view. In our example, we selected a template.

	×	ID	Туре	Descript	tion	Effective Date	Last Changed Date	Changed By
		1 ;	3 - Text Message	Free Form Response Tex	d Template	5/27/2016 12:00 AM	7/20/2016 09:10 AM	NOAHS
		2 :	3 - Text Message	Notice 1		5/31/2016 12:00 AM	5/31/2016 12:55 PM	BRENTE
		3 3	2 - HTML Email	User Logged In		11/12/2014 12:00 AM	8/17/2016 12:47 PM	TUTTLE
		3 3	3 - Text Message	Notice 2		5/31/2016 12:00 AM	5/31/2016 11:03 AM	COREYJ
		4 3	2 - HTML Email	Access has been Restrict	ted	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTLE
		4 ;	3 - Text Message	Notice 3		5/31/2016 12:00 AM	5/31/2016 11:05 AM	COREYJ
		5 3	2 - HTML Email	Account Restricted Invalid	d Password Attempts	11/12/2014 12:00 AM	5/11/2016 09:33 AM	TUTTLE
-				11 e 1		E010010 10 00 11	FI04 0040 44 00 111	00000
	~	ID	Туре	Description	Effective Date	E Last Changed D	ate Changed By	
			1 2 - HTML Em	ail Basic Wrapper	5/17/2016 12:00	AM 8/29/2016 01:15	PM TUTTLE	
		100	01 3 - Text Mess	sage Test Text Wrapper	5/19/2016 12:00	AM 10/03/2016 11:58	AM JOSHUAJ	

Template to Preview Highlighted

2. Double-click on the selected file or click the <Preview> button to preview it in a separate dialog.



Preview of Selected File

3. Once you have finished previewing the template or wrapper, close the Preview dialog.

For information on what to do after previewing a file, see how to Export Templates and Wrappers.

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See also:

Export Templates and Wrappers Export Tab Relocation Tool Screen Details Relocation Tool Screen Notification System

Preview a File to Import

Using the <u>Import tab</u> on the <u>Relocation Tool screen</u>, you can preview a file that you might want to import. This allows you to make sure that the template or wrapper that you are about to <u>import</u> is the right file.

To preview a file to import, complete the following steps:

1. Select, or highlight, a template or wrapper to preview from the <u>Import Templates</u> list view or the <u>Import</u> <u>Wrappers</u> list view. In our example, we selected a template.

-		Туре	Descripti	on	Effective Date	Last Chang	ed Date	Changed By	
3	3-1	Text Message	Notice 2		5/31/2016 12:00 AM	5/31/2016 1	1:03 AM	COREYJ	
4	2-1	HTML Email	Access has been Restricte	ed	11/12/2014 12:00 AM	5/11/2016 0	9:33 AM	TUTTLE	
4	3 - T	Text Message	Notice 3		5/31/2016 12:00 AM	5/31/2016 1	1:05 AM	COREYJ	
5	2-1	HTML Email	Account Restricted Invalid	Password Attempts	11/12/2014 12:00 AM	5/11/2016 0	9:33 AM	TUTTLE	
100	D 001	Type 3 - Text Mess	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	ate Change AM JOSHU	d By IAJ		
100	D 001	3 - Text Mess	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	ate Change AM JOSHU	d By JAJ		
II 100	D D001 smiss	3 - Text Mess 3 - Text Mess sion Servers	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	ate Change AM JOSHU	d By IAJ		
II 100	D D001 smiss	3 - Text Mess	Description age Test Text Wrapper	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	AM JOSHU	d By IAJ vailable S	ervers	
100 ans	D D Smiss	3 - Text Mess sion Servers	Description age Test Text Wrapper Import File Servers	Effective Date 5/19/2016 12:00	Last Changed Da AM 10/03/2016 11:58	ate Change AM JOSHU A	d By IAJ vailable S	ervers	

Template to Preview Highlighted

2. Double-click on the selected file or click the <Preview> button to preview it in a separate dialog.



Preview of Selected File

3. Once you have finished previewing the template or wrapper, close the Preview dialog.

For information on what to do after previewing a file, see how to Import Templates and Wrappers.

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See also:

Import Templates and Wrappers Import Tab Relocation Tool Screen Details Relocation Tool Screen Notification System

Solutions by Text History Screen

Use the Solutions by Text History screen to retrieve archived text messages and view the details of those messages. Archived text messages include any text message that has been created.

Note: This screen is used only for third-party texting. To use the Solutions by Text Mapping screen, you must have the proper security set up for your institution and employees (see Security below).

How To Items

This screen allows you to:

- Export search results
- Perform a search

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Notification Solutions</u> by <u>Text History Screen Details</u> section.

This screen is accessed by going to Notification > Solutions by Text History in the CIM GOLD tree view.

Security

In order to use this screen, your institution must:

- Be set up to use the Solutions by Text Institution Option (USBT). An account manager must set this option up for your institution.
- Subscribe to it on the Security > <u>Subscribe To Mini-Applications</u> screen by checking the Notification > Solutions by Text History box and clicking <Save Changes>. The screen will then appear in the left tree-view navigation of CIM GOLD if the user has security.
- Set up employees and/or profiles with either **Inquire** (read-only) or **Maintain** (edit) security for it on the <u>CIM GOLD</u> tab of the Security > Setup screen.

Searc	h Parame	ters						-				
Start	Date	04/3	30/2018	~	Br	and ID	1 V	Export				
End D	ate	08/0)3/2018	~	Ac	count ID						
Templ	ate ID				_	la Poply						
Desire	and Dhan					Is neply						
necip	ent rhor											
Keywo	ord	_								0.500	13	
Results							Search	Previous	N	ext		
Archive ID	Account ID	Date Sent		Template ID	Brand ID	Recipient Phone	Message	Succeeded	ls Reply	Result Code	Status	5
375	1644258	8/3/2018 11:4	6:04 (0	1	18016442586	Subscription created for Account			1411	1411	-
374	1644258	8/3/2018 11:4	5:53 (0	1	18016442586	Unsubscribe requested for Account	 Image: A start of the start of		1016	1016	
373	1644258	8/3/2018 10:44	4:58 (D	1	18016442586	Subscription created for Account	~		1411	1411	
372	1644258	8/3/2018 10:44	4:36 (0	1	18016442586	Unsubscribe requested for Account	 Image: A set of the set of the		1016	1016	
371	1644258	8/3/2018 10:44	4:27 (0	1	18016442586	Subscription created for Account	~		1411	1411	Ī
370	1255232	8/3/2018 10:43	3:50 (0	1	18012552329	Subscription created for Account & Market	~		1411	1411	
356	1960237	8/2/2018 3:10:	39 (D	1	18019602376	Subscription created for Account	~		1411	1411	
316	1960237	8/1/2018 1:21:	59 (0	1	18019602376	Unsubscribe requested for Account & Mar	~		1016	1016	
313	1960237	8/1/2018 1:04:	27 (0	1	18019602376	Subscription created for Account	~		1411	1411	
280	1960237	7/31/2018 10:4	42:47 (0	1	18019602376	Unsubscribe requested for Account & Mar	 Image: A start of the start of		1016	1016	
279	1960237	7/31/2018 10:4	42:43 (D	1	18019602376	Subscription created for Account	~		1411	1411	
278	1960237	7/31/2018 10:2	25:51 (0	1	18019602376	Unsubscribe requested for Account & Mar	~		1016	1016	
277	1960237	7/31/2018 10:3	25:33 (D	1	18019602376	Subscription created for Account	~		1411	1411	
276	1960237	7/31/2018 10:3	24:14 (D	1	18019602376	Unsubscribe requested for Account & Mar	 Image: A start of the start of		1016	1016	
275	1960237	7/31/2018 10:	24:10 (D	1	18019602376	Subscription created for Account	~		1411	1411	
274	1960237	7/31/2018 10:	21:12 (0	1	18019602376	Unsubscribe requested for Account	~		1016	1016	
273	1960237	7/31/2018 10:	18:50 (0	1	18019602376	Subscription created for Account	~		1411	1411	
272	1960237	7/31/2018 10:	17:41 (0	1	18019602376	Unsubscribe requested for Account & Mar	 Image: A start of the start of		1016	1016	
271	1960237	7/31/2018 10:	17:39 (n	1	18019602376	Subscription created for Account			1411	1411	~

Solutions by Text History Screen

See also:

Solutions by Text History Screen Details Perform a Search Export Search Results Notification System

Solutions by Text History Screen Details

Use the Solutions by Text History screen to retrieve archived text messages and view the details of those messages. Archived text messages include any text message that has been created. This screen also allows you to narrow your search of text messages using a variety of search parameters. When an archived text message is selected, the details of the message are displayed in a pop-up dialog. You can also export your data.

Note: This screen is used only for third-party texting and for those institutions with Institution Option USBT set up.

Searc	h Parame	ters							1			
Start	Date		04/30/201	18 ~	Br	and ID	1 V	ch Export				
End D	ate		08/03/201	18 ~	Ac	count ID			Next Is Result Image: Code 1411 Image: Code 1016 Image: Code 1411 Image: Code 1411 Image: Code 1411 Image: Code 1411 Image: Code 1016			
Templ	plate ID				Ē	le Reniv						
Recipi	inient Phone					із періу						
necip								Clear Search Export Search Previous Next Succeeded Is Reply Result Code tion created for Account Image: 1411 1411 tribe requested for Account Image: 1411 1016 tion created for Account Image: 1411 1016 tribe requested for Account Image: 1411 1016 trion created for Account Image: 1411 1016 trion created for Account Image: 1411 1411 tribe requested for Account <				
Keywo	ord										6	
Results							Search	Previous	N	ext		
Archive ID	Account ID	Date Se	ent	Template ID	Brand ID	Recipient Phone	Message	Succeede	ls Reply	Result Code	Status S	
375	1644258	8/3/2018	3 11:46:04	0	1	18016442586	Subscription created for Account			1411	1411 🔨	ľ
374	1644258	8/3/2018	3 11:45:53	0	1	18016442586	Unsubscribe requested for Account	~		1016	1016	
373	1644258	8/3/2018	3 10:44:58	0	1	18016442586	Subscription created for Account	~		1411	1411	
372	1644258	8/3/2018	3 10:44:36	0	1	18016442586	Unsubscribe requested for Account	 Image: A set of the set of the		1016	1016	
371	1644258	8/3/2018	3 10:44:27	0	1	18016442586	Subscription created for Account	~		1411	1411	
370	1255232	8/3/2018	3 10:43:50	0	1	18012552329	Subscription created for Account & M	larket 🗸		1411	1411	
356	1960237	8/2/2018	3:10:39	0	1	18019602376	Subscription created for Account	~		1411	1411	
316	1960237	8/1/2018	3 1:21:59	0	1	18019602376	Unsubscribe requested for Account &	Mar 🔽		1016	1016	
313	1960237	8/1/2018	3 1:04:27	0	1	18019602376	Subscription created for Account	~		1411	1411	
280	1960237	7/31/201	8 10:42:47	0	1	18019602376	Unsubscribe requested for Account &	Mar		1016	1016	
279	1960237	7/31/201	8 10:42:43	0	1	18019602376	Subscription created for Account	~		1411	1411	
278	1960237	7/31/201	8 10:25:51	0	1	18019602376	Unsubscribe requested for Account 8	Mar 🗸		1016	1016	
277	1960237	7/31/201	8 10:25:33	0	1	18019602376	Subscription created for Account	~		1411	1411	
276	1960237	7/31/201	8 10:24:14	0	1	18019602376	Unsubscribe requested for Account &	Mar 🗸		1016	1016	
275	1960237	7/31/201	8 10:24:10	0	1	18019602376	Subscription created for Account	~		1411	1411	
274	1960237	7/31/201	8 10:21:12	0	1	18019602376	Unsubscribe requested for Account	~		1016	1016	
273	1960237	7/31/201	8 10:18:50	0	1	18019602376	Subscription created for Account	 Image: A start of the start of		1411	1411	
272	1960237	7/31/201	8 10:17:41	0	1	18019602376	Unsubscribe requested for Account &	Mar		1016	1016	
271 《	1960237	7/31/201	8 10:17:39	n	1	18019602376	Subscription created for Account			1411	1411 ¥	

See the following examples of this screen followed by field and button descriptions.

Solutions by Text History Screen

Field Descriptions

Field	Description
Start Date	Use the Calendar icon to select a beginning date for the date range. The text message(s) that occurred during the selected date range (between the Start Date and the <u>End Date</u>) will appear in the <u>Results</u> <u>list view</u> .
End Date	Use the Calendar icon to select an ending date for the date range. The text message(s) that occurred during the selected date range (between the <u>Start Date</u> and the End Date) will appear in the <u>Results</u> <u>list view</u> .
Template ID	Enter a template identification number in this field to search only for text messages sent using a specific template.
Recipient Phone	Enter the phone number for the customer who received the text message to search for text messages sent to a particular individual. You can enter a partial number that will return all results that contain the partial number. For example, if you enter "801" in the search, the results will return all numbers with an 801 area code and all numbers that contain "801" anywhere in the number (e.g., 1-459-377-8011). Note: The most effective way to search for a specific number is to enter the entire number in the following format: 1aaaeeedddd, where aaa is the area code, eee is the prefix, and dddd is the suffix.
Keyword	Enter text from the subject or message body of the archived text message(s) that you are searching for in this field. Entering upper- or lower-case letters does not affect the search results. For example, entering "test" in this field brings up messages that contain the words "test," "Test," "TEST," "testing," "Testing," "TESTING," etc. You can also enter partial words. The text must be entered in the order in which it appears in the message body. For example, if you enter "Just a reminder," text messages with "Just a friendly reminder" will <i>not</i> appear in the results because the word friendly does not match the text entered in the search parameter. This field also supports wild-card characters. You can input an asterisk (*) to indicate that there are zero to more unknown characters or you can input a question mark (?) to indicate that there is exactly one unknown character. For example, if you enter "L*N," the search retrieves all results that include any combination of "L" and "N" with unknown characters in between, such as LOAN, LENDER, LEND, LENDING, LEPRECHAUN, etc. However, if you enter "L?N," the search retrieves only results that include a combination of "L" and "N"

Field	Description
	with only a single unknown character in between, such as LENDER, LEND, LENDING, etc.
Brand ID	Select a brand from this drop-down list to filter your search by brand ID (identification number of the subsidiary organization within your principal organization). All messages that were sent using the brand are displayed in the <u>Results list view</u> .
Account ID	Enter an account identification number in this field to search only for text messages sent using a specific account. The account number is the primary identifier for ownership of an account.
Is Reply	Check this field to display messages that were sent as a reply in the <u>Results list view</u> . Replies are when a customer uses their phone to reply to a message that your institution sends to them.
	A message that is neither a response or a reply is a message that is automatically generated by the system.
Results List View	The Results list view displays all of the archived text messages that match the entered search parameters. These messages are sorted according to the date and time they were added (<u>Start Date</u>). Double- click on a text message in this list view to open the Text Message Details dialog and view all of the details for the selected text message. You can move the columns in this list view into any order that you want by clicking and holding on a column heading while you move it left or right. Note: When data is <u>exported to a file</u> , the columns are sent in the original order and do not reflect any changes that you have made to the column order on the screen.
	 Archive ID: Displays the unique identification number assigned to the text message in the text history archives. Account ID: Displays the account identification number associated with the text message. The account number is the primary identifier for ownership of an account. Date Sent: Displays the date and time when the text message was sent. Template ID: Displays the unique identification number assigned to the template the text message used. Brand ID: Displays the unique identification number assigned to the text message used. Recipient Phone: Displays the phone number for the recipient. Message: Displays the body of the text message.

Field	Description
	 Succeeded: Displays whether or not the text message was successfully sent (Y/N). Is Reply: Displays whether or not the text message was a reply (Y/N). Result Code: Displays the code for the type of result. Status: Displays the status of the text message. Sender Program: Displays the program used to send the text message. Account Type: Displays the account type associated with the text message. Transaction Ticket: Displays the transaction ticket number associated with the text message. Keyword: Displays the keyword associated with the text message. Is Marketing: Displays whether or not the type of text message sent was marketing (Y/N). Unique ID: Displays the unique identification number assigned to the text message.

Button Descriptions

Button	Description
<clear search=""></clear>	Click this button to clear all of the data entered in the Search Parameters fields.
<export></export>	Click this button to export the data in the Results list view.
<search></search>	Click this button to <u>search the text messages archive</u> for the text messages that match the search parameters entered.
<previous></previous>	Click this button to view the previous text message.
<next></next>	Click this button to view the next text message.

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See also:

Solutions by Text History Screen Perform a Search Export Search Results Notification System

Export Search Results

To save the information displayed in the <u>Results</u> list view into a text or other file using the <u>Solutions by Text</u> <u>History</u> screen:

- 1. <u>Perform a search</u>.
- 2. Once you have the data that you want displayed in the **Results** list view, highlight or select the data that you want to export. You can select as many lines of data as are displayed in the **Results** list view.

You can select multiple, sequential lines by clicking on the first item and then pressing and holding down <Shift> as you click on the last item. You can also select multiple lines by pressing and holding down <Ctrl> as you click on each of the lines that you want to select. You must continue to hold down <Ctrl> the entire time you are selecting lines or you will lose your selections. **Note:** If no items are selected, all items are exported.

3. After you have selected all of the data you want to save, click < Export>.

Search Parameters						
Start Date	04/30/2018 ~	Brand ID	1	~	Clear Search	Export
End Date	08/03/2018 ~	Account ID				
Template ID		Is Reply				
Recipient Phone						
Keyword						

<Export> Button on the Solutions by Text History Screen

- 4. Clicking the <Export> button brings up the Save As dialog. Browse to the location where you want to save the file and enter the name of the file in the **File name:** field.
- 5. Click <Save>.

йм		Save /	As				
🔄 🏵 🔻 🕇 🚺) ▶ Thi	s PC → Documents	Ŷ	Ç	Search Documents	J	ρ
Organize 🔻 Ne	w folde	r			1		0
😭 Favorites	^	Name			Date modified	Туре	'
CMF Release I	Mei	📕 Custom Office Templates			2/2/2017 11:13 AM	File folder	
Desktop		🔄 My Data Sources			2/12/2014 10:24 AM	File folder	
🚺 Downloads		🌗 My HelpAndManual Proje	ects		2/27/2015 7:14 AM	File folder	8
📃 Recent places		🌗 My Palettes			6/16/2017 7:43 AM	File folder	
		📕 My Profiles			6/16/2017 7:48 AM	File folder	
🖳 This PC		🐌 My Projects			8/29/2017 12:31 PM	File folder	
📔 Desktop	~	< T					>
File name:	Solutio	onsByTestHistoryFile					
Save as type:	Text Fi	les (*.txt)					-
) Hide Folders					Save	Cancel	
		Savo As D	Vialog				

6. The file is saved onto your computer or network. To open the file, either double-click on it or right-click on it and select "Open" from the right-click menu. The saved file contains all of the text history line items you selected.

📔 🔂 🚺 = I	Documents	5	- 🗆 🗙
File Home Share V	iew		^ 🔞
Copy Paste Copy path	Move Copy to v Copy	New Older	Select all Select none
	Organize	New Open	Select
(→ → ↑) → This PC	Documents	~	C Search Do P
	^ Name	Date modified	Type S
CMF Release Meeting Scan	s Custom Office Templates	2/2/2017 11·13 AM	File folder
Desktop	My Data Sources	2/12/2014 10:24 AM	1 File folder
Downloads	My HelpAndManual Project	2/27/2015 7:14 AM	File folder
🖳 Recent places	My Palettes	6/16/2017 7:43 AM	File folder
	My Profiles	6/16/2017 7:48 AM	File folder
🜉 This PC	My Projects	8/29/2017 12:31 PM	File folder
📔 Desktop	Uutlook Files	7/18/2017 1:07 PM	File folder
Documents	PCIS	10/2/2017 9:19 AM	File folder
Downloads	Wrensoft	7/14/2014 9:43 AM	File folder
🜗 Music	SolutionsByTestHistoryFile.t	bxt 10/5/2017 12:34 PM	Text Document
E Pictures	× «		
10 items 1 item selected 195 h	ter .		

File Saved on Computer or Network

See also:

Solutions by Text History Screen Solutions by Text History Screen Details Perform a Search Notification System

Perform a Search

To perform a search using the Solutions by Text History screen:

- Use the Solutions by Text History fields to enter your search parameters. You can search by <u>phone</u> <u>number</u>, <u>keyword</u>, <u>date</u>, etc. The more search parameters that you enter, the more specific your search results will be. Clicking on the <Clear Search> button clears the fields. In our example, we selected a <u>Start Date</u> and an <u>End Date</u> and selected a <u>Brand ID</u> to search for all text messages that were sent using the brand ID "1" from the end of April to August 3rd.
- 2. Once you have entered all of your search parameters, click the <Search> button.

Search P	arameters		_						r i	
Start Dat	e	04/30/2018	∼ Br	and ID	1	~	Clear Search	Export		
End Date		08/03/2018	~ Ac	count ID						
Template	: ID			Is Reply						
Recipient	t Phone									
Keyword										
Results							Search	Previous	Next	
Archive ID	Account ID	Date Sent	Template ID	Brand ID	Recipient Phone	Message			Succeeded	ls Re
-										2

Solutions by Text History Screen - <Search> Button

3. The search results that match the parameters entered are displayed in the <u>Results</u> list view. For our example, all text messages that were sent using Brand ID 1 from April to August were displayed in the search results.

Search	n Parame	ters						ŝ	
Start [Date	04/30/20)18 🗸	B	and ID	1 V	Export		
End D	08/03/2018 ~)18 🗸	Δ.	count ID				
T						J			
Iempi	ate ID				Is Reply				
Recipi	ent Phon	e							
Keywo	rd								
Results						Search	Previous	Next	
Archive ID	Account ID	Date Sent	Template ID	Brand ID	Recipient Phone	Message	Succeeded	Is Result Reply Code	Status §
375	1644258	8/3/2018 11:46:04.	. 0	1	18016442586	Subscription created for Account		1411	1411 🔺
374	1644258	8/3/2018 11:45:53.	. 0	1	18016442586	Unsubscribe requested for Account	~	1016	1016
373	1644258	8/3/2018 10:44:58.	. 0	1	18016442586	Subscription created for Account	~	1411	1411
372	1644258	8/3/2018 10:44:36.	. 0	1	18016442586	Unsubscribe requested for Account	~	1016	1016
371	1644258	8/3/2018 10:44:27.	. 0	1	18016442586	Subscription created for Account	~	1411	1411
370	1255232	8/3/2018 10:43:50.	. 0	1	18012552329	Subscription created for Account & Market	 Image: A start of the start of	1411	1411
356	1960237	8/2/2018 3:10:39	0	1	18019602376	Subscription created for Account	~	1411	1411
316	1960237	8/1/2018 1:21:59	0	1	18019602376	Unsubscribe requested for Account & Mar	~	1016	1016
313	1960237	8/1/2018 1:04:27	0	1	18019602376	Subscription created for Account	~	1411	1411
280	1960237	7/31/2018 10:42:47	7 0	1	18019602376	Unsubscribe requested for Account & Mar	~	1016	1016
279	1960237	7/31/2018 10:42:43	3 0	1	18019602376	Subscription created for Account	~	1411	1411
278	1960237	7/31/2018 10:25:5	0	1	18019602376	Unsubscribe requested for Account & Mar	~	1016	1016
277	1960237	7/31/2018 10:25:33	3 0	1	18019602376	Subscription created for Account	~	1411	1411
276	1960237	7/31/2018 10:24:14	0	1	18019602376	Unsubscribe requested for Account & Mar	~	1016	1016
275	1960237	7/31/2018 10:24:10	0	1	18019602376	Subscription created for Account	~	1411	1411
274	1960237	7/31/2018 10:21:12	2 0	1	18019602376	Unsubscribe requested for Account	~	1016	1016
273	1960237	7/31/2018 10:18:50	0	1	18019602376	Subscription created for Account	~	1411	1411
272	1960237	7/31/2018 10:17:4	0	1	18019602376	Unsubscribe requested for Account & Mar	~	1016	1016
271 《	1960237	7/31/2018 10:17:39	0	1	18019602376	Subscription created for Account		1411	1411 ♥ ≫

Solutions by Text History Screen with Search Results

4. After receiving the results of your search, you can perform a new search with more search parameters to narrow your results, view the details of specific text messages, <u>export your search results</u>, or exit the screen.

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See also:

Solutions by Text History Screen Solutions by Text History Screen Details Export Search Results Notification System

Solutions by Text Mapping Screen

Use the Solutions by Text Mapping screen to select a Solutions by Text template and map it to a specific template within the Notification System. You can also create new mapped templates, delete mapped templates no longer used, and modify mapped templates.

The Solutions by Text Mapping screen enables the template numbers within the <u>Notification System</u> to be assigned to Solutions by Text template numbers. The Solutions by Text Mapping screen reads every template, not just active ones. We have also added measures to ensure that if you try to delete a mapped template that has a template tied to it, the system won't allow you to delete the mapped template until it has been removed from the template. Also, if a new mapping is created with a duplicate mapping ID, the description and the row with the duplicate stay the same.

Note: This screen is used only for third-party texting. To use the Solutions by Text Mapping screen, you must have the proper security set up for your institution and employees (see Security below).

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Solutions by Text</u> <u>Mapping Screen Details</u> section.

This screen is accessed by going to Notification > Solutions by Text Mapping in the CIM GOLD tree view.

Security

In order to use this screen, your institution must:

- Be set up to use the Solutions by Text Institution Option (USBT). An account manager must set this option up for your institution.
- Subscribe to it on the Security > <u>Subscribe To Mini-Applications</u> screen by checking the Notification > Solutions by Text Mapping box and clicking <Save Changes>. The screen will then appear in the left tree-view navigation of CIM GOLD if the user has security.
- Set up employees and/or profiles with either **Inquire** (read-only) or **Maintain** (edit) security for it on the <u>CIM GOLD</u> tab of the Security > Setup screen.

Description Mapped Brand ID Description Description	
Welcome I - 54 - MC 6 1 9101 Loan Approval No Fees	^
Past Due: 10-Days - 55 - MC 7 1 9110 Loan Paid Off	
Past Due: 17-Days - 56 - MC 48 1 9120 Oral ACH	
Past Due: 24-Days - 57 - MC 29 1 9130 Payment Date Change	
Past Due: 55-Days - 58 - MC 31 1 9140 Payment Receipt	
Welcome I - 59 - MC 6 2 1983 test 8	
Past Due: 10-Days - 60 - MC 7 2 1876 test 6	
Past Due: 17-Days - 61 - MC 48 2 1 Stuff	
Past Due: 24-Days - 62 - MC 29 2 1976 The 200 year anniversar	
Past Due: 55-Days - 63 - MC 31 2 29 24 days past due	
Welcome I - 64 - MC 6 3 7 10 Days past due	
Past Due: 10-Days - 65 - MC 7 3 1258 New Test	
Past Due: 17-Days - 66 - MC 48 3 47 Password Reminder with	Company Info
Past Due: 24-Days - 67 - MC 29 3 48 Past due	~
Past Due: 55-Days - 68 - MC 31 3	
Mapped ID	
In the second line of the second	
miprate ID Mapped ID Brand ID Description	
test 8	
e to GOLDPoint Mobile Alerts! You'll now get messages a. Questions? Call 801-801-8010. Msg&Data rates may To opt out reply STOP	
New Mapped Template Delete Ma	ped Template Save Mapped Templa

Solutions by Text Mapping Screen

See also:

Solutions by Text Mapping Screen Details Notification System

Solutions by Text Mapping Screen Details

Use the Solutions by Text Mapping screen to select a Solutions by Text template and map it to a specific template within the Notification System. You can also create new mapped templates, delete mapped templates no longer used, and modify mapped templates.

Note: This screen is used only for third-party texting and for those institutions with the Solutions by Text Institution Option (USBT) set up.

		Templates	Mapped				tes	Templat
		Description	Mapped ID	Brand ID	Mapped ID		Description	SBT ID
^	al No Fees	Loan Approva	9101	1	6	54 - MC	Welcome I - 5	10054
	f	Loan Paid Of	9110	1	7	-Days - 55 - MC	Past Due: 10-	10055
		Oral ACH	9120	1	48	-Days - 56 - MC	Past Due: 17-	10056
	e Change	Payment Date	9130	1	29	-Days - 57 - MC	Past Due: 24-	10057
	 eipt	Payment Rec	9140	1	31	-Days - 58 - MC	Past Due: 55-	10058
		test 8	1983	2	6	59 - MC	Welcome I - 5	10059
		test 6	1876	2	7	-Days - 60 - MC	Past Due: 10-	10060
		Stuff	1	2	48	-Days - 61 - MC	Past Due: 17-	10061
	anniversary.	The 200 year	1976	2	29	-Days - 62 - MC	Past Due: 24-	10062
	due	24 days past	29	2	31	-Days - 63 - MC	Past Due: 55-	10063
	due	10 Days past	7	3	6	64 - MC	Welcome I - 6	10064
		New Test	1258	3	7	-Days - 65 - MC	Past Due: 10-	10065
	minder with Company Info	Password Re	47	3	48	-Days - 66 - MC	Past Due: 17-	10066
~		Past due	48	3	29	-Days - 67 - MC	Past Due: 24-	10067
				3	31	-Days - 68 - MC	Past Due: 55-	10068
		ID	Mapped				n :	
			1983				te Preview	emplat
		ion	Descript		Bran	Mapped ID	mplate ID	SBI Tel
			test 8		3	6		10064
							le	Messag
				messages ates may	u'll now get Msg&Data ra	: Mobile Alerts! Yoi all 801-801-8010. I STOP	e to GOLDPoint . Questions? Ca o opt out reply S	Welcome from us. apply. To

See the following examples of this screen followed by field and button descriptions.

Solutions by Text Mapping Screen

Field Descriptions

Field	Description
Templates List View	The Templates list view displays all of the Solutions by Text

Field	Description
	templates that have been set up for your institution via the third party Solutions by Text. Clicking on a template displays the details of the template in the Template Preview fields and enables you to update the mapping for that template.
	Note: You can move the columns in this list view into any order that you want by clicking and holding on a column heading while you move it left or right.
	The following columns display information in the Templates list view:
	 SBT ID: Displays the unique Solutions by Text identification number assigned to the template. Description: Displays a description of the template. Mapped ID: Displays the unique identification number of the GOLDPoint Systems template that the Solutions by Text template is mapped to. Brand ID: Displays the Brand ID (identification number of the subsidiary organization within your principal organization) that the template is tied to.
SBT Template ID	This field displays the Solutions by Text template identification number of the template selected in the <u>Templates list view</u> .
Templates Mapped ID	Enter the identification number of the GOLDPoint Systems template that you want the Solutions by Text template selected in the <u>Templates list view</u> mapped to in this field. Then click <update Mapping> to tie those templates together.</update
Brand ID	This field displays the Brand ID (identification number of the subsidiary organization within your principal organization) that the template selected in the <u>Templates list view</u> is tied to.
Message	This field displays the body of the text message for the Solutions by Text template selected in the <u>Templates list view</u> .
Mapped Templates List View	The Mapped Templates list view displays all of the GOLDPoint Systems templates that have been set up for your institution via the Notification System. These templates can be mapped to Solutions By Text templates so that the templates in the Notification System will work seamlessly with Solutions by Text. Clicking on a template displays the details of the template in the fields below and enables you to update that template.

Field	Description
	Note: You can move the columns in this list view into any order that you want by clicking and holding on a column heading while you move it left or right.
	 The following columns display information in the Mapped Templates list view: Mapped ID: Displays the unique identification number of the GOLDPoint Systems template that a Solutions by Text template can be mapped to. Description: Displays a description of the template.
Mapped ID	This field displays the identification number of the GOLDPoint Systems template selected in the <u>Mapped Templates list view</u> . The Mapped ID is used to map a Solutions by Text template to a GOLDPoint Systems template using the <u>Templates Mapped ID</u> field.
Description	Enter or update the description for the template selected in the <u>Mapped Templates list view</u> . Make sure the description is unique and accurately describes the function of the template.

Button Descriptions

Button	Description
<delete mapping=""></delete>	Click this button to delete the mapping for the template selected in the <u>Templates list view</u> . This will delete the mapped ID for the selected template and the Solutions by Text template will no longer be mapped to the GOLDPoint Systems template specified in the <u>Templates</u> <u>Mapped ID</u> field.
<update mapping=""></update>	Click this button to update the mapping for the template selected in the <u>Templates list view</u> . This will update the mapped ID for the selected template and the Solutions by Text template will now be mapped to the GOLDPoint Systems template specified in the <u>Templates Mapped ID</u> field.
<new mapped="" template=""></new>	Click this button to create a new GOLDPoint Systems template that the Solutions by Text templates can be mapped to. Clicking this button enables both the <u>Mapped ID</u> and <u>Description</u> fields. Once you have entered information in both those fields, click the <save mapped<br="">Template> to save the newly created template. The new template will then appear in the <u>Mapped Templates list view</u>.</save>

Button	Description
<delete mapped="" template=""></delete>	Click this button to delete the template selected in the <u>Mapped</u> <u>Templates list view</u> .
<save mapped="" template=""></save>	Click this button to save any changes made to the template selected in the <u>Mapped Templates list view</u> . You also need to click this button to save a newly created mapped template.

See also:

Solutions by Text Mapping Screen Notification System

Templates Screen

Use the Notification Templates screen to search for, create, modify, or delete notification templates. You can also use this screen to view the notification templates set up for your institution, delete notification templates, activate inactive notification templates, and to render a test notification to ensure that the body, subject, etc. of a notification have been set up correctly.

How To Items

This screen allows you to:

- Access a template on the Detail tab from the Summary tab
- Activate an inactive template
- Copy a template to create a new template
- Create a new template
- Delete notification templates
- Inactivate a notification template
- Modify or view an existing template
- <u>Render a test template</u>
- Search for templates on the Summary tab

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Notification</u> <u>Templates Screen Details</u> section.

This screen is accessed by going to Notification > Templates in the CIM GOLD tree view.

ID			Des	cription		✓ Show only	Active and Future Template	s
Туре			~	Text			Search	
Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified	
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM	^
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM	
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM	
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM	
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM	
~	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM	
~	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM	
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message	Transaction	MRKTING	02/04/2015 20:32:14 PM	
~	20	2 - HTML Email	09/15/2014	Password Reminder (CIM)	Transaction	MRKTING	06/21/2016 08:21:29 AM	
~	32	2 - HTML Email	10/14/2014	Email Change	Transaction	MRKTING	02/04/2015 20:32:36 PM	
~	47	2 - HTML Email	09/05/2014	Password Reminder	Transaction	MRKTING	02/12/2015 15:48:19 PM	
~	48	2 - HTML Email	09/05/2014	Login Name Reminder	Transaction	MRKTING	02/04/2015 20:33:44 PM	
~	59	2 - HTML Email	10/08/2014	Phone Change Request	Transaction	MRKTING	02/04/2015 20:33:53 PM	-
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Notification Templates Screen > Summary Tab

Previous	Next								
Template ID	9 Template Type HTML Email V	Effective Date	09/05/2014	4 🗸	Template (Category	Transaction		
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	tors		Change	History		
Description	Email Updated		Use	Originato		Change By	ed Date Changed	Time Changed	
Send As	customercare@goldpointsystems.com		님	Loan Originatio	n ^	JONA	09/05/2014	14:54:34	1
Reply To	customercare@goldpointsvstems.com	✓ Is Active	H	Internet Origina	tion	JONA	09/05/2014	15:13:26	
Subject				Collections	~	JONA	09/08/2014	09:09:40	~
Subject						Lirvera	10001120011	41-111-0	
<pre>v H</pre>	br /> lello [parm:FIRST_NAME], pr />								1
<pre><pre><pre><pre><pre><pre><pre><pre></pre></pre></pre></pre></pre></pre></pre></pre>	br /> lello [parm:FIRST_NAME], br /> br /> br /> our new email is: [parm:EMAIL_ADDRESS] br /> br /> ovu did not initiate this change, please log in to your account an ccess of your account. or />	AME] account has b d change your passy	een updated word immedia	l. stely, then call us	at [parm:#PH	HONE] to inf	form us of this una	uthorized	
 < H < A < A	br /> lello [pam:FIRST_NAME], br /> t your request, your email address for your [pam:#COMPANY_N, br /> our new email is: [pam:EMAIL_ADDRESS] br /> you did not initiate this change, please log in to your account an ccess of your account. or /> or /> hank you, or />	AME] account has b d change your passv	een updated word immedia	l. stely, then call us	at [parm:#PF	łONE] to ini	form us of this una	uthorized	

Notification Templates Screen > Detail Tab

See also:

Notification Templates Screen Details Notification System

Notification Templates Screen Details

Use the Notification Templates screen to <u>search for</u>, <u>create</u>, <u>modify</u>, or <u>delete</u> notifications. You can also use this screen to <u>view the notification templates</u> set up for your institution, <u>delete notification templates</u>, <u>activate</u> <u>inactive notification templates</u>, and to <u>render a test notification</u> to ensure that the body, subject, etc. of a notification have been set up correctly.

To learn more about the fields and buttons available on the Notification Templates screen, see the following tabs:

- <u>Summary Tab:</u> Use the Summary tab to <u>search for</u> and <u>view the notification templates</u> set up for your institution. You can also use this tab to <u>delete notification templates</u>, <u>activate inactive notification</u> <u>templates</u>, and to <u>access templates</u> on the <u>Detail tab</u>.
- <u>Detail Tab:</u> Use the Detail tab to <u>create</u>, <u>modify</u>, or <u>delete</u> notifications. You can also use this tab to <u>render a test notification</u> to ensure that the body, subject, etc. of a notification have been set up correctly.

ID			Des	cription		 Show only 	Active and Future Template	es
Туре			~	Text			Search	
Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified	Γ
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM	1
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM	
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM	
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM	
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM	
~	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM	
~	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM	
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message	Transaction	MRKTING	02/04/2015 20:32:14 PM	
~	20	2 - HTML Email	09/15/2014	Password Reminder (CIM)	Transaction	MRKTING	06/21/2016 08:21:29 AM	
~	32	2 - HTML Email	10/14/2014	Email Change	Transaction	MRKTING	02/04/2015 20:32:36 PM	
~	47	2 - HTML Email	09/05/2014	Password Reminder	Transaction	MRKTING	02/12/2015 15:48:19 PM	
~	48	2 - HTML Email	09/05/2014	Login Name Reminder	Transaction	MRKTING	02/04/2015 20:33:44 PM	
~	59	2 - HTML Email	10/08/2014	Phone Change Request	Transaction	MRKTING	02/04/2015 20:33:53 PM	Ϊ.
	00	а т .	11000014	AL 1 OF D O	+ c	LADEANIZ		

Notification Templates Screen > Summary Tab

Template ID	9 Template Type HTML Email V	Effective Date 09	/05/201	4 🗸 1	emplate	Category	Transaction		
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	ators		Change	History		
Description	Email Updated		Use	Originator		Change	d Date	Time	Γ
end As	customercare@noldpointsystems.com			Loan Origination	^	JONA	09/05/2014	14:54:34	,
anh. Ta		In Antina	H	Loan Servicing		JONA	09/05/2014	15:13:26	
tepiy 10	customercare@goldpointsystems.com		H	Collections		JONA	09/08/2014	09:09:40	
	Maxim In a set W 7 1641 0 6 M 610 641 1 a set of set of a set of set of a								
oubject }ody + 	br /> lello [parm:FIRST_NAME], br />	Uses Wrapper				LONA	1001430044	10.00.00	
Jubject ody 	tour (parm:#COMPANY_NAME) email address has been upd; br /> lello (parm:FIRST_NAME), br /> t your request, your email address for your (parm:#COMPANY_NA br /> br /> four new email is: (parm:EMAIL_ADDRESS) br /> br /> you did not initiate this change, please log in to your account and ccess of your account. br />	ME] account has been	updated I immedia	d. ately, then call us at [pam:#Pf	HONE] to inf	form us of this una	uthorized	

Notification Templates Screen > Detail Tab

See also:

Notification Templates Screen Notification System

Summary Tab

Use the Summary tab to <u>search for</u> and <u>view the notification templates</u> set up for your institution. You can also use this tab to <u>delete notification templates</u>, <u>activate inactive notification templates</u>, and to <u>access templates</u> on the <u>Detail tab</u>.

See the following example of this screen followed by <u>field</u> and <u>button</u> descriptions.

ID			Des	cription		 Show only 	Active and Future Template	es
Туре			~	Text			Search	
Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified	Г
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM	^
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM	
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM	
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM	
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM	
~	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM	
~	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM	
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message	Transaction	MRKTING	02/04/2015 20:32:14 PM	
~	20	2 - HTML Email	09/15/2014	Password Reminder (CIM)	Transaction	MRKTING	06/21/2016 08:21:29 AM	
~	32	2 - HTML Email	10/14/2014	Email Change	Transaction	MRKTING	02/04/2015 20:32:36 PM	
~	47	2 - HTML Email	09/05/2014	Password Reminder	Transaction	MRKTING	02/12/2015 15:48:19 PM	
~	48	2 - HTML Email	09/05/2014	Login Name Reminder	Transaction	MRKTING	02/04/2015 20:33:44 PM	
~	59	2 - HTML Email	10/08/2014	Phone Change Request	Transaction	MRKTING	02/04/2015 20:33:53 PM	
	-	а т .	11000014	AL 1 OK D CL	+ c	LADEANIZ		- 1

Notification Templates Screen > Summary Tab

Field Descriptions

Field	Description
ID	Enter the identification number of the notification template to display that template in the <u>Templates Summary</u> list view. Entering a partial identification number displays all templates that have those same numbers.
Туре	Select the format type (Email (HTML or text) or Text (SMS)) of the notification to display all notifications that match the selected format type in the <u>Templates Summary</u> list view.
Field	Description
--	--
	Note: If you want to be set up to be able to sent notifications via text (SMS), please contact your GOLDPoint Systems client solutions specialist.
Description	Enter a partial or full description of the notification to display all notifications that contain that description in the <u>Templates Summary</u> list view.
Text	Enter any text that you want to search for in this field. All notifications that contain that text will be displayed in the <u>Templates Summary</u> list view.
Show Only Active and Future Templates	Check this field to display only currently active templates and the templates that will activate in the future in the <u>Templates Summary</u> list view. If this field is left blank, all templates are displayed.
Templates Summary list view	The Templates Summary list view displays the notification templates set up for your institution. If you check the <u>Show Only</u> <u>Active and Future Templates</u> field, only the currently active templates and the templates that will activate in the future are displayed. If the Show Only Active and Future Templates field is left blank, all templates are displayed. You can enter values in the search parameter fields and <u>perform a</u> <u>search</u> to specify what notification templates are displayed in the
	 The following columns display information in the Templates Summary list view and can be used to sort: Active: Displays whether or not the notification template is active and can be used. ID: Displays the identification number of the notification template. Type: Displays the format type of the notification (Email (HTML or text) or Text (SMS)). Effective Date: Displays the date when the notification became effective or will become effective (start being sent). Description: Displays a description of the notification. Template Category: Displays the category of the template (transaction, marketing, etc.). Changed By: Displays the name of the user who last modified the notification. Date/Time Modified: Displays the date (in MMDDYYYY format) and time (in HHMMSS format in a 24-hour clock format) when the user in the Changed By column modified the notification.

Button Descriptions

Button	Description
<search></search>	Enter values in the search parameter fields and click this button to <u>perform a search</u> to specify what notification templates are displayed in the <u>Templates Summary</u> list view.
<test></test>	Click this button to <u>render a test notification</u> on the <u>Detail tab</u> to ensure that the body, subject, etc. of a notification have been set up correctly.
<Сору>	Click this button to <u>copy</u> the format of the current template to create a new template.
<delete></delete>	Click this button to <u>delete</u> the notification currently selected in the <u>Templates Summary</u> list view.
<create new=""></create>	Click this button to load a blank template on the Detail tab.
<save changes=""></save>	Click this button to save any change made to the Notification Templates screen.

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See also: <u>Notification Templates Screen</u> <u>Notification System</u>

Detail Tab

Use the Detail tab to <u>create</u>, <u>modify</u>, or <u>delete</u> notifications. You can also use this tab to <u>render a test</u> <u>notification</u> to ensure that the body, subject, etc. of a notification have been set up correctly.

See the following example of this screen followed by field and button descriptions.

emplate ID	9	Template Type	HTML Email	Effective Date	09/05/201	4 ∨ T	emplate (Category Tr	ansaction		
Server ID	2) Address=	net.tcp://GPSTexti	na/Service		Origina	ators		Change Hi	istory		
	Email Undate	d			Use	Originator		Changed	Date	Time	Γ
/cachption						Loan Origination	^	By	Changed	LAEA.24	
iend As	customercare	@goldpointsystems	\$.com			Loan Servicing		JONA	00/05/2014	15.10.00	1
Reply To	customercare	@goldpointsystems	s.com	✓ Is Active		Internet Origination		JONA	09/09/2014	15:13:26	1
hiect	Your foam th	OMPANY NAME	lemail address bas been und			Collections	4	JONA	09/08/2014	09:09:40	
< < Y	.br /> .br /> Your new email is .dbr />	s: [parm:EMAIL_A[DDRESS]	-							

Notification Templates Screen > Detail Tab

Field Descriptions

Field	Description
Template ID	Enter the identification number for the notification template in this field. If you selected a template on the <u>Summary tab</u> , this field displays the identification number for the selected notification template. Note: When creating custom templates, the template ID must be within the range of 10000–11999.
	You can <u>load a specific notification template</u> onto this screen by searching for that template on the Summary tab and double-clicking on the template in the <u>Templates Summary</u> list view.
Template Type	Select the format type of the notification to be sent (Email (HTML or text) or Text (SMS)) from this drop-down list. Note: If you want to be set up to be able to sent notifications via text (SMS), please contact your GOLDPoint Systems client solutions specialist.

Field	Description
Effective Date	Enter the date when the notification should become effective (start being sent). Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.
Template Category	Select from this drop-down field whether the notification will be a transactional or marketing notification. If the notification is set up as a marketing notification, customers who have opted out to receive marketing texts or emails will <i>not</i> receive any texts or emails with marketing templates. For more information, see the help for the Borrower Opt Out table on the <u>CIF</u> tab of the Marketing and Collections screen.
Server ID	Enter the identification number of the server used for notifications in this field.
Description	Enter a description of the notification in this field. Try to be descriptive so that others can easily tell the purpose for this notification when it is listed in the <u>Templates Summary</u> list view on the <u>Summary tab</u> .
Send As	Enter the email address (e.g., CustomerCare@GOLDPointsystems.com) to be used to send notifications in this field. This is the email address that users will see as the sender of the notification.
Reply To	Enter the email address (e.g., CustomerCare@GOLDPointsystems.com) that emails will be sent to when a user replies to the notification in this field.
Subject	Enter the title of the notification that will appear in the subject line in this field.
Body	Enter the code and text to be used in the email or text notification in this field. In this field you can specify the font, style, wording, etc. of the notification.
	The following special characters entered in the text of the body of the notification could interfere with how a message is displayed in an HTML browser: (&), (<), (>), ('), and ("). The program will substitute the specified parameter whenever <parm:####> is entered in the code where ##### is the parameter name.</parm:####>
Is Active	Check this field to activate the notification. If this field is <i>not</i> checked, the notification will <i>not</i> be active and will <i>not</i> appear on the <u>Summary</u> tab if the <u>Show Only Active and Future Templates</u> field is checked.
Uses Wrapper	Check this field to include a wrapper on the notification. Wrappers are the institution branding that is applied to the notifications. Wrappers

Field	Description
	display your institution's logos, advertising, and selected verbiage in the header and footer of the notification. For more information on setting up wrappers, see the <u>Wrappers</u> screen.
Originators grid	The Originators grid displays the originating systems that can be used for the notification template. Check the Use box next to the originating system that you want to use for the template.
	 This can enable you to tie specific templates to loan origination, loan servicing, etc. For example, your institution can use a different template with a different wrapper for origination and loan servicing. The template for origination might include a wrapper with advertising while the template for loan servicing does not. And the system can automatically use the correct template with the correct wrapper depending on the system that is sending the notification. The following columns display information in the Originators grid: Use: Use this checkbox to select the originating system for the notification. Originator: Displays the originating systems that can be tied to the notifications.
Change History list view	 The Change History list view displays who has modified the notification and when they modified it. The following columns display information in the Change History list view and can be used to sort: Changed By: Displays the name of the user who last modified the notification. Date Changed: Displays the date (in MMDDYYYY format) when the user in the Changed By column modified the notification. Time Changed: Displays the time (in HHMMSS format in a 24-hour clock format) when the user in the Changed By column

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Button Descriptions

Button	Description
<test></test>	Click this button to <u>render a test notification</u> on the <u>Detail tab</u> to ensure that the body, subject, etc. of a notification have been set up correctly.

Button	Description
<Сору>	Click this button to <u>copy</u> the format of the current template to create a new template.
<delete></delete>	Click this button to <u>delete</u> the notification currently selected in the <u>Templates Summary</u> list view.
<create new=""></create>	Click this button to load a blank template on the Detail tab.
<save changes=""></save>	Click this button to save any change made to the Notification Templates screen.

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See also: <u>Notification Templates Screen</u> <u>Notification System</u> <u>Wrappers Screen</u>

Access Template on Detail Tab

To access a template on the Detail tab using the Summary tab:

- 1. <u>Perform a search</u> for the template on the Summary tab.
- 2. Select a template from the <u>Templates Summary</u> list view.

			Category	By	Date/Time Modified
3 2 - HTM	L Email 09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
5 2 - HTM	L Email 09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
6 2 - HTM	L Email 09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
7 2 - HTM	L Email 10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
8 2 - HTM	L Email 09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
92-HTM	L Email 09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
11 2 - HTM	L Email 09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
✓ 18 2 - HTM	L Email 10/14/2014	AWL Notify Secure Message Sent	Transaction	MRKTING	02/04/2015 20:32:14 PM

Template Selected in Templates Summary List View

3. Double-click on the template to load the selected template on the Detail tab.

Template ID	9 Template Type HTML Email V	Effective Date 09	9/05/201	I4 ∨ T	emplate	Category	Transaction		
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	ators		Change	History		
Description	Email Updated		Use	Originator		Change By	d Date Changed	Time	
Send As	customercare@noldpointsystems.com		12	Loan Origination	^	JONA	09/05/2014	14:54:34	^
Danki Ta		I la Astina	H	Loan Servicing	_	JONA	09/05/2014	15:13:26	
Reply 10	customercare@goidpointsystems.com		님	Collections	1	JONA	09/08/2014	09:09:40	
Subject	Your [parm:#COMPANY NAME] email address has been upda	✓ Uses Wrapper		CONCLIONS	Y		0014410044	10 00 00	
Body d H d	br /> iello [pam:FIRST_NAME], br />								^
Body H 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전 전	br /> lello [parm:FIRST_NAME]. br /> t your request, your email address for your [parm:#COMPANY_NA br /> four new email is: [parm:EMAIL_ADDRESS] br /> you did not initiate this change, please log in to your account and pr /> you did not initiate this change, please log in to your account and pr />	ME] account has been	n updated	d. ately, then call us at [pam:#Pf	HONE] to inf	om us of this una	uthorized	

Selected Template Loaded on the Detail Tab

4. Once the template is loaded onto the Detail tab, you can <u>modify the template</u>, <u>render a test</u> <u>notification</u>, and ensure that the text, body, subject, etc. of a notification have been set up correctly.

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See also:

Activate Inactive Templates

Inactive templates are older templates that are no longer being used. To activate an inactive template on the Summary tab of the Notification Templates screen:

- 1. Uncheck the <u>Show Only Active and Future Templates</u> field to display all of the templates that are active, set to become active, and inactive.
- 2. <u>Perform a search</u> for the template that you want to activate.
- 3. Select the inactive template from the <u>Templates Summary</u> list view.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
>	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
 Image: A start of the start of	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
 Image: A start of the start of	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message Sent	Transaction	MRKTING	02/04/2015 20:32:14 PM

Template Selected in Templates Summary List View

4. Double-click on the template to load the selected template on the <u>Detail tab</u> of the Notification Templates screen.

Summary	Detail		
Previous	Next		
Template ID	9 Template Type	HTML Email V	Effective Date
Server ID	2) Address=net.tcp://GPSTexti	ng/Service 🗸	
Description	Email Updated		
Send As	customercare@goldpointsystems	s.com	
Reply To	customercare@goldpointsystems	s.com	Is Active
Subject	Your [parm:#COMPANY_NAME]	email address has been upda	Uses Wrapper

- Inactive Template Loaded on Detail Tab
- 5. Check the **Is Active** field to activate the template.

Summary	Detail			
Previous	Next			
Template ID	9 Template Ty	pe HTML Email	V	Effective Date
Server ID	2) Address=net.tcp://GPST	exting/Service	¥	
Description	Email Updated			
Send As	customercare@goldpointsys	tems.com		
Reply To	customercare@goldpointsys	tems.com		✓ Is Active
Subject	Your [parm:#COMPANY_NA	AME] email address has been	upda	Uses Wrapper
	Check t	he Is Active Field		

6. Make any other needed modifications to the template and click <Save Changes> to save the nowactive notification template. **Note:** You can also <u>render a test notification</u> to ensure that the text, body, subject, etc. of the notification have been set up correctly before you save the changes by clicking the <Test> button.

Back to Top

See also:

Copy Templates

To create a new template by copying an existing template on the Notification Templates screen:

1. Click the <Copy> button on the <u>Summary tab</u> or <u>Detail tab</u> to bring up the Copy Template dialog.

ID			Des	cription		 Show only 	Active and Future Template	s	
Гуре [~		~	Text		Search			
Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified		
 Image: A second s	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM	^	
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM		
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM		
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM		
	-	от.	++100/0014	AL 1 OK D OL	- ··	LADEANIZ		~	

The <Copy> Button on the Summary Tab

ID	Туре	Effective Date	Description	Changed By	Date/Time Modified	I
3	2 - HTML Email	09/05/2014	Account Accessed	MRKTING	02/04/2015 19:39:45	1
5	2 - HTML Email	09/05/2014	Access Restricted	MRKTING	02/04/2015 20:30:59	
6	2 - HTML Email	09/05/2014	Access Restored	MRKTING	03/02/2015 12:07:25	
7	2 - HTML Email	10/14/2014	Password Generated	MRKTING	02/04/2015 20:31:17	
8	2 - HTML Email	09/05/2014	Login Name Updated	MRKTING	02/04/2015 20:31:30	
9	2 - HTML Email	09/05/2014	Email Updated	MRKTING	03/11/2015 11:29:26	
11	2 - HTML Email	09/05/2014	Password Updated	MRKTING	02/04/2015 20:31:59	
18	2 - HTML Email	10/14/2014	AWL Notify Secure Message	MRKTING	02/04/2015 20:32:14	
20	2 - HTML Email	09/15/2014	Password Reminder (CIM)	MRKTING	06/21/2016 08:21:29	
32	2 - HTML Email	10/14/2014	Email Change	MRKTING	02/04/2015 20:32:36	
47	2 - HTML Email	09/05/2014	Password Reminder	MRKTING	02/12/2015 15:48:19	

Copy Template Dialog

2. Double-click on the template that you want to copy to load the selected template on the Detail tab.

ID	Туре	Effective Date	Description	Changed By	Date/Time Modified	ſ
3	2 - HTML Email	09/05/2014	Account Accessed	MRKTING	02/04/2015 19:39:45	Î
5	2 - HTML Email	09/05/2014	Access Restricted	MRKTING	02/04/2015 20:30:59	
6	2 - HTML Email	09/05/2014	Access Restored	MRKTING	03/02/2015 12:07:25	1
7	2 - HTML Email	10/14/2014	Password Generated	MRKTING	02/04/2015 20:31:17	1
8	2 - HTML Email	09/05/2014	Login Name Updated	MRKTING	02/04/2015 20:31:30	
9	2 - HTML Email	09/05/2014	Email Updated	MRKTING	03/11/2015 11:29:26	
11	2 - HTML Email	09/05/2014	Password Updated	MRKTING	02/04/2015 20:31:59	
18	2 - HTML Email	10/14/2014	AWL Notify Secure Message	MRKTING	02/04/2015 20:32:14	
20	2 - HTML Email	09/15/2014	Password Reminder (CIM)	MRKTING	06/21/2016 08:21:29	
32	2 - HTML Email	10/14/2014	Email Change	MRKTING	02/04/2015 20:32:36	1
47	2 - HTML Email	09/05/2014	Password Reminder	MRKTING	02/12/2015 15:48:19	

Select Template on Copy Template Dialog

Previous	Next								
Template ID	Template Type HTML Email	Effective Date	09/05/201	4 ∨	Template (Category	Transaction		~
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	ators		Change H	History		
Description	Email Updated		Use	Originator		Change	d Date	Time	Π
Cand As	australian Andre Statistications and			Loan Origination	^	Dy	Changed	Changeo	
Send As	customercare@goidpointsystems.com			Loan Servicing		JONA	09/05/2014	14:54:34	^
Reply To	customercare@goldpointsystems.com			Internet Originati		JONA	09/05/2014	15:13:26	
		Is Active		Internet Origination	on	JONA	09/08/2014	09:09:40	
Subject	Your [parm:#COMPANY_NAME] email address has been upda	✓ Uses Wrapper		Collections	~	IONA	00/11/2014	10.00.00	V
Body									

Copied Template on the Detail Tab

3. You will be required to enter a new identification number in the <u>Template ID</u> field. **Note:** When creating custom templates, the template ID must be within the range of 10000–11999.

Template ID	10001 Template Type HTML Email V	Effective Date 0	9/05/201	14 v 1	emplate (Category	Transaction		
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	ators		Change	History		
Description	Email Updated		Use	Originator		Change	ed Date	Time	ſ
Cand As				Loan Origination	^	JONA	09/05/2014	14:54:34	7
Send As	customercare@goldpointsystems.com			Loan Servicing		JONA	09/05/2014	15:13:26	
Reply To	customercare@goldpointsystems.com	Is Active	님	Internet Origination	1	JONA	09/08/2014	09:09:40	
Cubicat	Your Inam:#COMPANY_NAME] email address has been unda	J Llees Wranner		Collections	~	10114	00/11/2014	10 50 00	- 1
Body F	br /> br /> lello [pam:FIRST_NAME], br /> br /> br />		nundater	4					
3ody 8	br /> br / br	ME] account has been change your passwor	n updated	d. ately, then call us at j	pam:#PF	fONE] to inf	form us of this una	uthorized	
Sody Control Control	br /> br / br	ME] account has been change your passwor	n updated	d, ately, then call us at	pam:#PH	HONE] to inf	form us of this una	uthorized	

Copied Template on the Detail Tab with New Template ID

- 4. You can now make changes to the template by changing any of the information in the file maintainable fields.
- 5. Once the template is set up the way that you want it to be, <u>render a test notification</u> to ensure that the text, body, subject, etc. of the notification have been set up correctly.
- 6. After you have ensured that everything is set up correctly, click <Save Changes> to save your changes and create the new template.
- 7. The new template is now set up and appears in the <u>Templates Summary</u> list view on the <u>Summary</u> <u>tab</u>.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
~	10001	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
~	10011	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
>	10018	2 - HTML Email	10/14/2014	AWL Notify Secure Message	Transaction	MRKTING	02/04/2015 20:32:14 PM

New Template in Templates Summary List View

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See also:

Notification Templates Screen

Notification Templates Screen Details Notification System

Create New Templates

To create a new template on the Notification Templates screen:

1. Click the <Create New> button in the lower, right-hand corner of the <u>Summary tab</u> or <u>Detail tab</u>.

ID			De	scription			 Show only 	Active and Future Temp	ates
Туре			~	Text				Search	
Active	ID	Туре	Effective Date	Descrip	tion	Template Category	Changed By	Date/Time Modified	
~	3	2 - HTML Email	09/05/2014	4 Ac	count Accessed	Transaction	MRKTING	02/04/2015 19:39:45 P	A N
~	5	2 - HTML Email	09/05/2014	4 Ac	cess Restricted	Transaction	MRKTING	02/04/2015 20:30:59 P	N
~	6	2 - HTML Email	09/05/2014	4 Ac	ccess Restored	Transaction	MRKTING	03/02/2015 12:07:25 Pl	N
~	7	2 - HTML Email	10/14/2014	Pas	sword Generated	Transaction	MRKTING	02/04/2015 20:31:17 P	N
~	8	2 - HTML Email	09/05/2014	4 Log	in Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 P	N
	00	<u>ат.</u>	11000001	AL 1	01 0 0	- c	LADEANIZ	10100015 14 40 50 0	. *

<Create New > Button on Summary Tab

10000000000000000000000000000000000000	Detai								
Previous	Next								
Template ID	9 Template Type HTML Email	V Effective Date	09/05/201	4 🗸	Template (Category	Transaction		~
Server ID	2) Address=net.tcp://GPSTexting/Service	~	Origina	ators		Change I	History		
Description	Email Updated	_	Use	Originator		Change	d Date	Time	Π
Sand As	austomercare@goldpointsustems.com	_		Loan Origination	^	JONA	09/05/2014	14:54:34	~
	Customercare@golupointsystems.com			Loan Servicing	_	JONA	09/05/2014	15:13:26	
Reply To	customercare@goldpointsystems.com	Is Active	H	Collections	n	JONA	09/08/2014	09:09:40	
Subject	Your [parm:#COMPANY_NAME] email address has been	upda 🔽 Uses Wrapper		Collections	~	10114	0011110014	10 50 00	*
	 dor /> Hello [parm:FIRST_NAME], dor />								^
į	dor /> Hello [pam:FIRST_NAME], dor /> dor /> At your request, your email address for your [pam:#COMPAN dor /> dor /> Your new email is: [pam:EMAIL_ADDRESS] dor /> dor /> f you did not initiate this change, please log in to your accour access of your account. dor />	Y_NAME] account has b nt and change your passv	een updated	d. ately, then call us at	[pam:#Pf	HONE] to infi	orm us of this una	uthorized	^
2	<pre>dbr /> Hello [pam:FIRST_NAME], dbr /> four new email is: [pam:EMAIL_ADDRESS] dbr /> dbr /> ff vou risk email is: change, please log in to your account access of your account. dbr /> dbr /> ff vou did not initiate this change, please log in to your account access of your account. dbr /> dbr /> Thank you, dbr /></pre>	Y_NAME) account has b nt and change your passv	een updated	d. ately, then call us at	[pam:#Pf	40NE] to infr	orm us of this una	uthorized	< >

<Create New > Button on Detail Tab

2. Clicking the <Create New> button loads a blank template onto the Detail tab.

232 Notification Syste	m
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emplate ID	Template Type	V 🕢 Effective Date		v 🚷	Templ	late Category		
Server ID		v 🚱	Origina	ators		Change Histo	ry	
			Use	Originator		Changed By	Date Changed	Time Change
rescription				Loan Origination	^		Date changed	Time enanged
Send As				Loan Servicing				
Reply To		✓ Is Active		Internet Origination				
ubject		Uses Wrapper		Collections	~			
lody								
								1

Blank Template

- Enter the information for the new notification template into the <u>fields</u> on the Detail tab. The <u>Template ID</u>, <u>Template Type</u>, <u>Effective Date</u>, and <u>Server ID</u> fields are required fields and must have information entered into them in order to save the template or <u>render a test notification</u>. Note: When creating custom templates, the template ID must be within the range of 10000–11999.
- 4. When you have entered information into the required **Template ID**, **Template Type**, and **Effective Date** fields, the <Test> button is enabled which allows you to <u>render a test notification</u>. After you have entered information into the required fields and other fields (e.g., the <u>Description</u> field), the <Save Changes> button is enabled allowing you to save the new template.

Summary	Detail											
Previous	Next											
Template ID	10001	Template Type	HTML Email	\sim	Effective Date	09/05/201	4 🗸	Template	Category T	ransaction		~
Server ID	2) Address=r	net.tcp://GPSText	ing/Service	*		Origina	ators		Change H	listory		
Description	Email Updated	8				Use	Origina	itor	Changed	Date	Time	Π
Send As	customercare	@aoldpointgystem	8 com				Loan Originat	tion ^	JONA	09/05/2014	14:54:34	~
	customercare		5.6011				Loan Servicin	ng	JONA	09/05/2014	15:13:26	
Reply To	customercare	@goldpointsystem:	s.com			님	Collections	nation	JONA	09/08/2014	09:09:40	
Subject	Your [parm:#0	COMPANY_NAME] email address has b	been upda	Uses Wrappe	r L	Collections	×	1011	00/11/20014	10 50 00	•
< A < < Y < H a d ↓	br /> br /> br /> br /> br /> br /> br /> br /> you did not initi ccess of your ac br /> br />	your email address s: [pam:EMAIL_AI ate this change, pl ccount.	for your [parm:#CON DDRESS] lease log in to your a	IPANY_N/	ME] account has b I change your pass	een updateo word immedia	d. ately, then call u	us at [parm:#Pf	HONE] to info	orm us of this una	uthorized	
4	hank you, br />											~
							Test	Сору	Delete	Create New	Save Ch	nange

New Template

- 5. Once you have entered in all of the information for your new template, <u>render a test notification</u> to ensure that the body, subject, etc. of the notification have been set up correctly.
- After you have ensured that everything is set up correctly, click <Save Changes> to activate and save the new template. The new template will be activated on the system and added to the <u>Summary tab</u> of the Notification Templates screen.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
~	10001	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
~	10011	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
~	10018	2 - HTML Email	10/14/2014	AWL Notify Secure Message	Transaction	MRKTING	02/04/2015 20:32:14 PM

New Template Added to Templates Summary List View on the Summary Tab

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See also:

Delete Templates

You can use the Notification Templates screen to easily delete notification templates that are no longer useful. Templates can be deleted using either the Detail tab or the Summary tab of the Notification Templates screen.

- Delete a template using the Detail tab
- Delete a template using the Summary tab

Delete a Template on the Detail Tab

To delete a template on the Detail tab of the Notification Templates screen:

1. Load an existing template onto the Detail tab.

Previous	Next								
Template ID	9 Template Type HTML Email V	Effective Date	09/05/201	14 🔍	Template (Category T	ransaction		v
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	ators		Change H	listory		
Description	Email Updated		Use	Originator		Changed	Date	Time	
Send As	customercara@addpointsustame.com			Loan Origination	^	JONA	09/05/2014	14:54:34	^
	Customercare@golupointsystems.com			Loan Servicing		JONA	09/05/2014	15:13:26	
Reply To	customercare@goldpointsystems.com	✓ Is Active	님	Internet Originati	on	JONA	09/08/2014	09:09:40	
Subject	Your [parm:#COMPANY_NAME] email address has been upda	✓ Uses Wrappe	r 🛄	Collections	~	10114	00/11/20014	10 50 00	~
Q H Q Q H Q Q	br /> lello [parm:FIRST_NAME]. br />								^
< H < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ A < ⇒ ⇒ ⇒ ⇒	br /> lello [parm:FIRST_NAME], br /> br /> t your request, your email address for your [parm:#COMPANY_N/ br /> four new email is: [parm:EMAIL_ADDRESS] br /> br /> you did not initiate this change, please log in to your account and ccess of your account. pr />	AME] account has b d change your pass	been updated word immedi	d. ately, then call us a	t (parm:#PF	HONE] to info	om us of this una	uthorized	~
 マキックタクタイン マキックタクター 学校になっていた。 	br /> lello [parm:FIRST_NAME], br /> t your request, your email address for your [parm:#COMPANY_N/ br /> four new email is: [parm:EMAIL_ADDRESS] br /> br /> you did not initiate this change, please log in to your account and ccess of your account. or /> hank you, or />	AME] account has b d change your pass	veen updated	d. ately, then call us a	t (parm:#Pł	HONE] to info	orm us of this una	uthorized	< >

Template to be Deleted

- 2. Click <Delete> to delete the notification template displayed on the screen. Warning: Once a template is deleted, it cannot be recovered. The template is completely removed from the server.
- 3. This brings up a Question dialog to ensure that you purposefully want to delete the notification template.



Delete Template Question Dialog

4. Click <Yes> to proceed to delete the notification template. An Information Message dialog appears informing you that the template has been deleted.

Information Message	×
Template was succe	ssfully deleted
	ОК

Template Deleted Information Message Dialog

5. Click <OK>. The information for the template has been removed from the Detail tab and the notification template has been removed from the **Templates Summary** list view on the <u>Summary tab</u>.

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Delete a Template on the Summary Tab

To delete a template on the <u>Summary tab</u> of the Notification Templates screen:

- 1. <u>Perform a search</u> for the template on the Summary tab.
- 2. Select a template from the <u>Templates Summary</u> list view.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
~	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
 Image: A start of the start of	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message Sent	Transaction	MRKTING	02/04/2015 20:32:14 PM

Template Selected in Template Summary List View

ID			Des	cription		 Show only 	Active and Future Template	s
Туре			~	Text			Search	
Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified	Γ
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM	^
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM	
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM	
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM	
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM	
~	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM	
~	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM	
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message	Transaction	MRKTING	02/04/2015 20:32:14 PM	
~	20	2 - HTML Email	09/15/2014	Password Reminder (CIM)	Transaction	MRKTING	06/21/2016 08:21:29 AM	
~	32	2 - HTML Email	10/14/2014	Email Change	Transaction	MRKTING	02/04/2015 20:32:36 PM	
~	47	2 - HTML Email	09/05/2014	Password Reminder	Transaction	MRKTING	02/12/2015 15:48:19 PM	
~	48	2 - HTML Email	09/05/2014	Login Name Reminder	Transaction	MRKTING	02/04/2015 20:33:44 PM	
V	59	2 - HTML Email	10/08/2014	Phone Change Request	Transaction	MRKTING	02/04/2015 20:33:53 PM	~

3. Once a template is selected, the <Delete> button becomes active.

<Delete> Button on the Summary Tab

4. Click <Delete> to bring up the Delete Template Question dialog.



Delete Template Question Dialog

 Click <Yes> to delete the selected template and remove it from the Templates Summary list view. Warning: Once a template is deleted, it cannot be recovered. The template is completely removed from the server.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
-	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
 Image: A start of the start of	11	2 - m.		Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message Sent	Transaction	MRKTING	02/04/2015 20:32:14 PM

Template Removed from Templates Summary List View

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See also:

Inactivate Templates

If your institution no longer wishes to use a template, you can inactivate the template so that those types of notifications are no longer sent. To inactivate a template on the <u>Summary tab</u> of the Notification Templates screen:

- 1. <u>Perform a search</u> for the template that you want to make inactive.
- 2. Select the active template from the <u>Templates Summary</u> list view.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
>	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
 Image: A start of the start of	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
~	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
 Image: A start of the start of	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message Sent	Transaction	MRKTING	02/04/2015 20:32:14 PM

Template Selected in Template Summary List View

3. Double-click on the template to load the selected template on the <u>Detail tab</u> of the Notification Templates screen.

Summary	Detail		
Previous	Next		
Template ID	9 Template Type	HTML Email V	Effective Date
Server ID	2) Address=net.tcp://GPSTexti	ng/Service 🗸	
Description	Email Updated		
Send As	customercare@goldpointsystems	s.com	
Reply To	customercare@goldpointsystems	s.com	✓ Is Active
Subject	Your [parm:#COMPANY_NAME]	email address has been upda	Uses Wrapper

Active Template Loaded on the Detail Tab

4. Uncheck the **Is Active** field to make the template inactive.

Summary	Detail		
Previous	Next		
Template ID	9 Template Type	HTML Email V	Effective Date
Server ID	2) Address=net.tcp://GPSTexti	ng/Service 🗸	
Description	Email Updated		
Send As	customercare@goldpointsystems	s.com	
Reply To	customercare@goldpointsystems	s.com	Is Active
Subject	Your [parm:#COMPANY_NAME]	email address has been upda	Uses Wrapper

The Is Active Field is Blank

5. Click <Save Changes> to save your changes and inactivate the template.

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See also:

Modify or View Existing Templates

To modify or view an existing template using the Summary tab of the Notification Templates screen:

- 1. <u>Perform a search</u> for the template on the Summary tab.
- 2. Select a template from the <u>Templates Summary</u> list view.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
~	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
 Image: A start of the start of	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
~	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message Sent	Transaction	MRKTING	02/04/2015 20:32:14 PM
			Templa	ate Selected in Templates Sum	mary List Vi	ew	

3. Double-click on the template to load the selected template on the <u>Detail tab</u> of the Notification Templates screen.

100000000000000000000000000000000000000	Detail												
Previous	Next												
Template ID	9	Template Type	HTML Email	V	Effective Date	09/05/2014	4 🗸	Templa	te Category	Transaction	1		~
Server ID	2) Address	net.tcp://GPSText	ing/Service	~		Origina	itors		Chan	ge History			
Description	Email Updat	ed				Use	Origina	ator	Cha	nged Dat	te aed	Time Changed	
Send As	customercar	e@aaldpointsystem	s com			님	Loan Origina	ation /	JON	A 09/05/	2014	14:54:34	^
Peeks Te	ountemanan	- Ogelde einterntern			In Active	님	Loan Servici	ination	JON	09/05/	2014	15:13:26	
Neply 10	customercar	eegolopointsystem	s.com			H	Collections	induon	JON	A 09/08/	2014	09:09:40	
Subject	Your [parm:#	COMPANY_NAME] email address has	s been upda	Uses Wrapper		Concouche		Loui	00/112	10014	10 50 00	1.5.6
	dor/> Hello [parm:FIR dor/>	ST_NAME].											~
<pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre><pre></pre></pre>	br /> tello [parm:FIR br /> br /> t your request br /> br /> four new email br /> four new email br /> br /> br /> br /> br /> br /> br /> br /> br />	ST_NAME], your email address is: [parm:EMAIL_A tiate this change, p account.	for your [parm:#CC DDRESS] lease log in to your	DMPANY_NA	ME] account has b I change your passy	een updated word immedia	I. ately, then call	us at [parm:	#PHONE]to	inform us of th	nis unau	thorized	~
く 日 く く く く く く く く く く く く く て 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 く く 日 日 の し の し つ 日 の し	br /> Hello [parm:FIR br /> br /> bt /> br /> four new email br /> four new email br /> four new email br /> four did not in ccess of your: br /> br /> hank you, br />	ST_NAME], your email address is: [parm:EMAIL_A tiate this change, p account.	for your [parm:#CC DDRESS] lease log in to your	DMPANY_NA	ME] account has b I change your passy	een updated word immedia	i. ately, then call	us at [parm:	#PHONE] to	inform us of th	nis unau	thorized	< >

Selected Template Loaded on Detail Tab

- 4. Once the template is loaded onto the Detail tab, you can view and modify the existing template.
- 5. Change any of the information in the fields. **Note:** If you change the <u>Template ID</u> or <u>Template Type</u> field, you will no longer be modifying the existing template but will create a new template.

- 6. Once you have made all of the modifications to the existing template, <u>render a test notification</u> to ensure that the text, body, subject, etc. of the notification have been set up correctly.
- 7. After you have ensured that everything is set up correctly, click <Save Changes> to save your changes to the existing template.

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See also: <u>Notification Templates Screen</u> <u>Notification Templates Screen Details</u> <u>Notification System</u>

Render Test Templates

You can use the <u>Detail tab</u> of the Notification Templates screen to render a test notification for a new or existing template.

- Render a test notification for a new template
- <u>Render a test notification for an existing template</u>

Render a Test Notification for a New Template

To render a test notification for a new template on the <u>Detail tab</u> of the Notification Templates screen:

- 1. <u>Create a new template</u>.
- When you have entered information into the required <u>Template ID</u>, <u>Template Type</u>, <u>Effective Date</u>, and <u>Server ID</u> fields for your new template, the <Test> button is enabled which allows you to render a test template.

Template ID	10001 Template Type HTML Email V	Effective Date	09/05/201	4 🗸	Template (Category	Transaction		
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	ators		Change	History		
Description	Email Updated		Use	Originator		Change	ed Date Changed	Time	
Send As	customercare@ooldpointsystems.com			Loan Origination	^	JONA	09/05/2014	14:54:34	^
			H	Loan Servicing	_	JONA	09/05/2014	15:13:26	
Reply To	customercare@goldpointsystems.com	S Active	님	Collections	on	JONA	09/08/2014	09:09:40	
Subject	Your [parm:#COMPANY_NAME] email address has been upda	✓ Uses Wrapper		Collections	Y	10114	0011110014	10 50 00	Y
Body H	br /> lello [parm:FIRST_NAME], br />								^
Body - - - - - - 	br /> lello [parm:FIRST_NAME], br /> br /> t your request, your email address for your [parm:#COMPANY_NA br /> four new email is: [parm:EMAIL_ADDRESS] br /> br /> you did not initiate this change, please log in to your account and ccess of your account. br />	ME] account has be I change your passw	en updated	d. ately, then call us at	[pam:#PF	{ONE] to inf	form us of this una	uthorized	~

New Template Ready to Test

 Once you have entered in all of the information for your new template, click <Test> to render a test template.

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 access of your account.	
Thank you,	~
OK	;

Test Notification

- 4. Ensure that the text, body, subject, etc. of the new notification have been set up correctly.
- 5. After you have ensured that everything is set up correctly, click <Save Changes> to activate and save the new template. The new template will be activated on the system and added to the <u>Summary tab</u>.

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Render a Test Notification for an Existing Template

To render a test notification for an existing template on the Detail tab of the Notification Templates screen:

- 1. <u>Perform a search</u> for the template on the Summary tab.
- 2. Select a template from the <u>Templates Summary</u> list view.

Active	ID	Туре	Effective Date	Description	Template Category	Changed By	Date/Time Modified
~	3	2 - HTML Email	09/05/2014	Account Accessed	Transaction	MRKTING	02/04/2015 19:39:45 PM
~	5	2 - HTML Email	09/05/2014	Access Restricted	Transaction	MRKTING	02/04/2015 20:30:59 PM
~	6	2 - HTML Email	09/05/2014	Access Restored	Transaction	MRKTING	03/02/2015 12:07:25 PM
~	7	2 - HTML Email	10/14/2014	Password Generated	Transaction	MRKTING	02/04/2015 20:31:17 PM
~	8	2 - HTML Email	09/05/2014	Login Name Updated	Transaction	MRKTING	02/04/2015 20:31:30 PM
	9	2 - HTML Email	09/05/2014	Email Updated	Transaction	MRKTING	03/11/2015 11:29:26 AM
 Image: A start of the start of	11	2 - HTML Email	09/05/2014	Password Updated	Transaction	MRKTING	02/04/2015 20:31:59 PM
>	18	2 - HTML Email	10/14/2014	AWL Notify Secure Message Sent	Transaction	MRKTING	02/04/2015 20:32:14 PM

Template Selected in Templates Summary List View

3. Double-click on the template to load the selected template on the Detail tab.

Template ID	9 Template Type HTML Email V	Effective Date (09/05/201	4 ∨	Template (Category	Transaction		4
Server ID	2) Address=net.tcp://GPSTexting/Service		Origina	ators		Change	History		
Description	Email Updated		Use	Originator		Change	d Date	Time	Г
Send As	customercare@ooldpointsystems.com		H	Loan Origination	^	JONA	09/05/2014	14:54:34	1
Peoply To		In Active	H	Loan Servicing	00	JONA	09/05/2014	15:13:26	
teply 10	customercare@golupointsystems.com		H	Collections		JONA	09/08/2014	09:09:40	
ody									
kody ব দ ব ব	or /> ello [parm:FIRST_NAME], or />								
lody ମ କ କ କ କ କ କ କ କ କ କ କ କ କ କ କ କ କ କ	pr /> ello [parm:FIRST_NAME], pr /> t your request, your email address for your [parm:#COMPANY_NA pr /> pr /> pur new email is: [parm:EMAIL_ADDRESS] pr />	ME] account has bee	en updated	d.					
Body 라 러 소 소 소 소 우 소 다 소 다 소 다 다 다 다 다 다 다 다 다 다	br /> ello [parm:FIRST_NAME], pr /> t your request, your email address for your [parm:#COMPANY_NA pr /> our new email is: [parm:EMAIL_ADDRESS] pr /> pr /> you did not initiate this change, please log in to your account and poess of your account.	ME] account has bee	en updated	d. ately, then call us at	t (pam:#PH	IONE] to inf	iom us of this una	uthorized	

Existing Template Ready to Test

- 4. Change any of the information in the fields. **Note:** If you change the <u>Template ID</u> or <u>Template Type</u> field, you will no longer be modifying the existing template but will create a new template.
- 5. Once you have made all of the modifications to the existing template, click <Test> to render a test notification.

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.	1
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 acce of your account.	55
Thank you,	
	ок

Test Notification

- 6. Ensure that the text, body, subject, etc. of the notification have been set up correctly.
- 7. After you have ensured that everything is set up correctly, click <Save Changes> to save your changes to the existing template.

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See also:

Search for Templates

To search for templates using the Summary tab of the Notification Templates screen:

- 1. Check or uncheck the <u>Show Only Active and Future Templates</u> field, depending on whether or not you want to search for inactive templates.
 - Check the **Show Only Active and Future Templates** field to search only templates that are active or set to become active.
 - Uncheck the **Show Only Active and Future Templates** field to search all of the templates, including inactive templates.

Summary De	tail		
ID		Description	Show only Active and Future Templates
Туре	*	Text	Search

Search Parameter Fields on the Summary Tab

- Enter values in the <u>search parameter fields</u> to narrow your search. For example, if you want to search for all of your templates for email updated templates, you would type "Email Updated" in the <u>Description</u> or <u>Text</u> field.
- 3. Click <Search> to search for all templates that match the data entered in the search parameters. In our example, the system will search for all templates that have "Email Updated" in the description.

Summary	Detail				
ID		Description	Email Updated	Show only Activ	re and Future Templates
Туре	¥	Text			Search

Performing a Search

4. After the system performs a search, the results are displayed in the <u>Templates Summary</u> list view. In our example, the one template that is set up for updated emails is displayed in the results.

ID				Descri	ption	Email Update	ed		Show only	Active and F	uture Templates
уре			~		Text						Search
Active	ID	Туре	Effective	e Date	Desc	ription	Template Category	Changed By	Date/Time	Modified	
	9 2	- HTML Email	09/05/2	2014	En	nail Updated	Transaction	MRKTING	03/11/2015 1	1:29:26 AM	

Search Results Displayed in Templates Summary List View

5. To perform more searches, repeat the steps above. To perform other functions, see our other <u>How To</u> <u>Items</u>.

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See also:

Texting History Screen

Use the Texting History screen to retrieve archived text messages and view the details of those messages. Archived text messages include any text message that has been created.

This screen also allows you to narrow your search of text messages using a variety of search parameters. When an archived text message is selected, the <u>details of the message</u> are displayed in a pop-up dialog. You can also <u>save your data to a CSV file</u>.

You can also access the performance metrics for the texting process. Metrics can be used for measurement, comparison, or to track performance or production.

To find out how to send text messages on any screen in CIM GOLD, see the help for the <u>Right-click Menu Pop</u> <u>Up</u> screen.

See each of the following tabs for a description of the fields and buttons that appear on that tab:

- <u>Texting History Tab</u>
- <u>Texting Metrics Tab</u>

How To Items

This screen allows you to:

- Perform a Texting History Search
- <u>Retrieve Texting Metrics</u>
- Save Texting History Data to CSV File
- Save Texting Metrics Data to CSV File
- View Text Message Details

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Texting History</u> <u>Screen Details</u> section.

This screen is accessed by going to Notification > Texting History in the CIM GOLD tree view.

Retrieve	Previou	JS N	lext 💿	Simple 🔘 Advanced				
Recipient Pl Value	none Number	x	Message Boo Value	dy			X	
When Adde Low Wednesday	d [MM/dd/yyyy] July 13	2016	High	lav October 14 201	X			
				101-11 101-11				
Success Value	×	Back-Referen Value	nce Type	X Back-Refer	rence Value	X Back-Refe	erence Source	x
Success Value Reason Sup Low	x pressed +	Back-Referen Value High	x	X Back-Refer Value	Is Response Value	X Back-Refe Value	erence Source	x
Success Value Reason Sup Low Unique Key	x ppressed + - Action Date	Back-Referen Value ligh Recipient Ph	Ince Type	X Back-Refer Value Is Reply X Value v Sender Phone Number	Is Response Value Message	X Back-Refe Value	erence Source	×
Success Value Reason Sup Low Unique Key 4,977	x pressed - Action Date 10/12/20	Back-Referen Value figh Recipient Ph +138533853	Ince Type	X Back-Refer Value Value Is Reply X Value Value Sender Phone Number Not Sent	Is Response Value Message *TEST* Dear JAM	X Back-Refe Value	When Added	×
Success Value Reason Sup Low Unique Key 4,977 4,976	x pressed + - Action Date 10/12/20 10/12/20	Back-Referen Value 4igh Recipient Ph +138533853 +147747704	Ione Number 185 77	X Back-Refer Value Value Is Reply X Value Value Sender Phone Number Not Sent +18018015	Is Response Value Message *TEST* Dear JAM *TEST* Dear COF	X Back-Refe Value	When Added 10/12/2016 12:52:18 . 10/12/2016 11:52:28 .	×
Success Value Reason Sup Low Unique Key 4,977 4,976 4,975	X pressed + - Action Date 10/12/20 10/12/20 10/12/20	Back-Referen Value ligh Recipient Ph +138533853 +147747704 +169169169	Ince Type	X Back-Refer Value Value Is Reply X Value Value Sender Phone Number NotSent +18018015 +18018015	Is Response Value Message *TEST* Dear JAM *TEST* Dear COF Thanks.	X Back-Refe Value	When Added 10/12/2016 12:52:18 . 10/12/2016 11:52:28 . 10/12/2016 9:33:02 Al	×

Texting History Tab

exting History	Texting Metrics				
Billing Information	on				
Billing Date	# Text Messages	Low Date Range	High Date Range		
12/01/2016	1	12/8/2016 12:06:39 PM	12/8/2016 12:06:39 PM		
11/01/2016	98	11/11/2016 2:29:31 PM	11/23/2016 5:02:02 PM		
06/01/2016	8	6/2/2016 10:11:25 AM	6/20/2016 2:28:40 PM		
05/01/2016	682	4/28/2016 6:32:39 AM	5/24/2016 1:35:22 PM		
04/01/2016	2,585	3/28/2016 7:20:22 AM	4/27/2016 3:15:40 PM		
03/01/2016	2,617	2/29/2016 6:21:50 AM	3/25/2016 3:06:16 PM		
02/01/2016	4,235	1/28/2016 6:13:48 AM	2/26/2016 3:33:45 PM		
01/01/2016	2,460	12/28/2015 6:39:41 AM	1/27/2016 6:26:14 PM		
12/01/2015	2,260	11/30/2015 7:05:04 AM	12/24/2015 3:38:18 PM		
				Low Date	High Date
				Saturday , November 28, 2015 🗐 🔫	Wednesday, December 28, 2016
				Retrieve Billing Information	Calculate from Custom Time Frame
Save Selecti	on To CSV				
			Texting M	etrics Tab	

See also:

Texting History Screen Details Texting History Tab Texting Metrics Tab Notification System

Texting History Screen Details

Use the tabs on the Texting History screen to retrieve archived text messages and view the details of those messages. You can also access the performance metrics for the texting process. Metrics can be used for measurement, comparison, or to track performance or production. The following tabs are on this screen:

- <u>Texting History Tab</u>: Use the Texting History screen to retrieve archived text messages and view the details of those messages. Archived text messages include any text message that has been created. This screen also allows you to narrow your search of text messages using a variety of search parameters. When an archived text message is selected, the <u>details of the message</u> are displayed in a pop-up dialog. You can also <u>save your data to a CSV file</u>.
- <u>Texting Metrics Tab</u>: Use this tab to access the performance metrics for the texting process. Metrics can be used for measurement, comparison, or to track performance or production.

Retrieve	Previou	us Ne	ext ()	Simple 🔿 Advanced				
Recipient P Value	hone Number	x	Message Bo Value	dy			X	
When Adde Low Vednesday	d (MM/dd/yyyy) , July 13,	2016 🗐 1	High	lay , October 14, 201	X 6 •			
Success Value	×	Back-Referen Value	се Туре	X Back-Refer Value	ence Value	X Back-Refe Value	erence Source	×
Success Value Reason Sup Low	x v opressed v -	Back-Referen Value High	x	Is Reply X Value	Is Response	X Back-Refe Value	erence Source	×
Success Value Reason Sup Low Jnique Key	x v ppressed - Action Date	Back-Referen Value High Recipient Pho	x	X Back-Refer Value Value Is Reply X Value ✓ Sender Phone Number	Is Response Value Message	X Back-Refe Value	When Added	×
Success Value Reason Sup Low Unique Key 4,977	X ppressed - C Action Date 10/12/20	Back-Referent Value High Recipient Pho +1385338538	x	X Back-Refer Value Value Is Reply X Value Value Sender Phone Number NotSent	Is Response Value Message *TEST* Dear JAMES	X Back-Refe Value	When Added 10/12/2016 12:52:18	×
Success Value Reason Sup Low Jnique Key 4,977 4,976	X ppressed Action Date 10/12/20 10/12/20	Back-Referent Value digh Recipient Pho +1385338538 +1477477047	ce Type	X Back-Refer Value Value Is Reply X Value Value Sender Phone Number NotSent +18018015	Is Response Value Message *TEST* Dear JAMES *TEST* Dear CORE	X Back-Refe Value	When Added 10/12/2016 12:52:18 10/12/2016 11:52:28	×
Success Value Reason Sup Low Jnique Key 1,977 1,976 1,975	X ppressed Action Date 10/12/20 10/12/20 10/12/20	Back-Referent Value High Recipient Phot +1385338538 +1477477047 +1691691691	ce Type	X Back-Refer Value Value Is Reply X Value Value Sender Phone Number NotSent +18018018015 +18018015	Is Response Value Message *TEST* Dear JAMES *TEST* Dear CORE Thanks.	X Back-Refe Value	When Added 10/12/2016 12:52:18 10/12/2016 11:52:28 10/12/2016 9:33:02 AM	×

Texting History Tab

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See also:

Texting History Tab Texting Metrics Tab Texting History Screen Notification System
Texting History Tab

Use the Texting History tab to retrieve archived text messages and view the details of those messages. Archived text messages include any text message that has been created. This tab also allows you to narrow your search of text messages using a variety of search parameters. When an archived text message is selected, the <u>details of the message</u> are displayed in a pop-up dialog. You can also <u>save your data to a CSV file</u>.

Clicking on the (X) button on the search parameters either clears the field or sets the field to the default. **Note:** The **When Added** search parameter's default is from three months before yesterday's date to yesterday's date.

The Texting History tab can be used with the default search parameters or you can click the <u>Advanced</u> radio button to use the screen with the advanced search parameters. See the following examples of this tab followed by <u>field</u> and <u>button</u> descriptions.

Retrieve	9:06:33 AM] R	us N	lext 💿	Simple 🔘 Advanced				
Recipient Ph Value	ione Number	X	Message Bo Value	ody			X	
When Adder Low Wednesday,	d (MM/dd/yyyy) July 13,] 2016 🗐	High	day , October 14,201	X 6 •			
Success Value	×	Back-Refere Value	nce Type	X Back-Refer Value	ence Value	X Back-Refe Value	erence Source]
Success Value Reason Sup Low	pressed	Back-Refere Value High	Ince Type	X Back-Refer Value Value Is Reply X Value ✓	Is Response Value	X Back-Refe	erence Source]
Success Value Reason Sup Low Unique Key	pressed	Back-Refere Value High Recipient Ph	nce Type	X Back-Refer Value Value Is Reply X Value Value	Is Response Value Message	X Back-Refe	erence Source	
Success Value Reason Sup Low Unique Key 4,977	x pressed Action Date 10/12/20	Back-Refere Value High Recipient Ph +138533853	nce Type	Is Reply X Value Value Value Sender Phone Number Not Sent	Is Response Value Message *TEST* Dear JAN	X Back-Refe Value	When Added	
Success Value Reason Sup Low Unique Key 4,977 4,976	x pressed Action Date 10/12/20 10/12/20	Back-Refere Value High Recipient Pt +138533853 +147747704	nce Type	X Back-Refer Value Value Is Reply X Value ✓ Sender Phone Number NotSent +18018018015	Is Response Value Message *TEST* Dear JAN *TEST* Dear CO	X Back-Refe Value	When Added 10/12/2016 12:52:18 10/12/2016 11:52:28	
Success Value Reason Sup Low Unique Key 4,977 4,976 4,975	x pressed Action Date 10/12/20 10/12/20 10/12/20	Back-Refere Value High Recipient Ph +138533853 +147747704 +169169165	nce Type	X Back-Refer Value Value Is Reply X Value Value Sender Phone Number Not Sent +18018018015 +18018015	Is Response Value Message *TEST* Dear JAN *TEST* Dear CO Thanks.	AES, Your Paymen REY, Your Paymen	When Added 10/12/2016 12:52:18 10/12/2016 11:52:28 10/12/2016 9:33:02 AM	

Texting History Tab with Default Search Parameters

(10/13/2016 9:06:33 AM) Retrieved - 100	
Number of Records to read X Number of Records to read X 100 Image: State of the state of	Sender Phone Number X Value V
Message Body Value	x
When Added [MM/dd/yyyy] Low High Wednesday, July 13, 2016 🐨 - Friday , October 14, 2016	X
When Sent [MM/dd/yyyy] Low High Wednesday, July 13, 2016 🐨 - Friday , October 14, 2016	X Allow Empty Values on When Sent X Image: wave state of the st
Number Of Attempts Low High X Success X Value V	Back-Reference Value X Value
Back-Reference Source X Value High	X Is Reply X Value Value
Unique Key Action Date Recipient Phone Number Sender Phone Number	Message When Added When Sent
4,9// 10/12/20 +13853385385 NotSent 4,976 10/12/20 +14774770477 +18018018015 4,975 10/12/20 +16916916919 +18018018015 4,974 10/12/20 +19599591959 +18018018015	TEST* Dear JAMES, Your Paymen 10/12/2016 12:52:18 10/12/2016 12:52:24 TEST* Dear COREY, Your Payme 10/12/2016 11:52:28 10/12/2016 11:52:33 Thanks. 10/12/2016 9:33:02 AM TEST* Trunk works. Sent by GPS 10/12/2016 9:32:31 AM 10/12/2016 9:32:42 AM

Texting History Tab with Advanced Search Parameters

Field Descriptions

Field	Description	
Simple	Select this radio button to display the more simplified search parameters.	
Advanced	Select this radio button to display additional search parameters beyond those used for the <u>Simple</u> search parameters. This is useful when you want to be very specific in your search to really narrow down the results.	
Number of Records to Read	Enter the number of records you want displayed in the <u>Texting History</u> <u>list view</u> . If you enter a "10" in this field, only 10 text messages will be displayed in the Texting History list view. The maximum number of text messages allowed by the program is 500.	

Field	Description
	Note: This search parameter is available only in <u>Advanced</u> mode.
Recipient Phone Number	Enter the recipient's phone number for the text message(s) that you are searching for in this field. Note: The number must be entered in the following format: 1aaaeeedddd, where aaa is the area code, eee is the prefix, and dddd is the suffix.
Sender Phone Number	Select the sender's phone number for the text message(s) that you are searching for from this drop-down list. The drop-down list is automatically populated with the list of all numbers that have been used to send a text message. Note: The drop-down list contains only those numbers that have been used within the past year.
	Note: This search parameter is available only in <u>Advanced</u> mode.
Message Body	Enter text from the message body of the archived text message(s) that you are searching for in this field.
	Entering upper- or lower-case letters does not affect the search results. For example, entering "test" in this field brings up messages that contain the words "test," "Test," "TEST," "testing," "Testing," "TESTING," etc. You can also enter partial words.
	The text must be entered in the order in which it appears in the message body. For example, if you enter "Just a reminder," text messages with "Just a friendly reminder" will <i>not</i> appear in the results because the word friendly does not match the text entered in the search parameter.
	This field also supports wild-card characters. You can input an asterisk (*) to indicate that there are zero to more unknown characters or you can input a question mark (?) to indicate that there is exactly one unknown character. For example, if you enter "L*N," the search retrieves all results that include any combination of "L" and "N" with unknown characters in between, such as LOAN, LENDER, LEND, LENDING, LEPRECHAUN, etc. However, if you enter "L?N," the search retrieves only results that include a combination of "L" and "N" with unknown characters. However, if you enter "L?N," the search retrieves only results that include a combination of "L" and "N" with only a single unknown character in between, such as LENDER, LEND, LENDING, etc.
When Added	Use the Calendar icon to select the date range. The text message(s) that were added to the queue within the Low and High date ranges selected will appear in the <u>Texting History list view</u> . Note: The When Added search parameter's default is from three months before yesterday's date to yesterday's date.

Field	Description
	You can also change the date range by selecting parts of the date and entering in numbers. For example, selecting the month and entering a "1" changes the month to January. Selecting the day and entering "15" changes the day the the 15th of the month. Selecting the year and entering "2016" changes the year to 2016. The weekday changes automatically according to the month, day, and year selected.
When Sent	Use the Calendar icon to select the date range. The text message(s) that were sent within the Low and High date ranges selected will appear in the <u>Texting History list view</u> .
	You can also change the date range by selecting parts of the date and entering in numbers. For example, selecting the month and entering a "1" changes the month to January. Selecting the day and entering "15" changes the day the the 15th of the month. Selecting the year and entering "2016" changes the year to 2016. The weekday changes automatically according to the month, day, and year selected.
	Note: This search parameter is available only in <u>Advanced</u> mode.
Allow Empty Values on When Sent	Check this field to allow the results to display text messages that have an empty value for when they were sent. Text messages that are sent as Replies <i>always</i> have an empty value for when they were sent. So you <i>must</i> check this field to include Replies in the results.
Number of Attempts	Enter a numeric range for the number of times the program attempted to send a text message. You can also enter a value and then change that value using the Up and Down Arrow keys on your keyboard. The text message(s) that were sent within the Low and High numeric range will appear in the <u>Texting History list view</u> . Note: The system does <i>not</i> allow you to set a Low value that is higher than the High value.
	Note: This search parameter is available only in <u>Advanced</u> mode.
Success	Select TRUE or FALSE from this drop-down field. Selecting TRUE displays messages that were sent successfully. Selecting FALSE displays messages that failed to send.
Back-Reference Type	Enter the back-reference type (e.g., Loan, Lender, etc.) for the text message(s) that you are searching for in this field. This is the Account

Field	Description
	Number type and is used to help determine the value of the branch associated with the account. This is useful because lender numbers and account numbers are formatted differently and format the branch number differently.
	This field also supports wild-card characters. You can input an asterisk (*) to indicate that there are zero to more unknown characters or you can input a question mark (?) to indicate that there is exactly one unknown character. For example, if you enter "L*N," the search retrieves all results that include any combination of "L" and "N" with unknown characters in between, such as LOAN and LENDER. However, if you enter "L?N," the search retrieves only results that include a combination of "L" and "N" with only a single unknown character in between, such as LENDER.
Back-Reference Value	Enter the number for the back-reference value for the text message(s) that you are searching for in this field. This is the value of the account number in the system.
	This field also supports wild-card characters. You can input an asterisk (*) to indicate that there are zero to more unknown characters or you can input a question mark (?) to indicate that there is exactly one unknown character. For example, if you enter "L*N," the search retrieves all results that include any combination of "L" and "N" with unknown characters in between, such as LOAN, LENDER, LEND, LENDING, LEPRECHAUN, etc. However, if you enter "L?N," the search retrieves only results that include a combination of "L" and "N" with only a single unknown character in between, such as LENDER, LEND, LENDING, etc.
Back-Reference Source	Enter the back-reference source (e.g., CIM, Afterhours, etc.) for the text message(s) that you are searching for in this field. This is the program or system that generated the message.
	This field also supports wild-card characters. You can input an asterisk (*) to indicate that there are zero to more unknown characters or you can input a question mark (?) to indicate that there is exactly one unknown character. For example, if you enter "L*N," the search retrieves all results that include any combination of "L" and "N" with unknown characters in between, such as LOAN, LENDER, LEND, LENDING, LEPRECHAUN, etc. However, if you enter "L?N," the search retrieves only results that include a combination of "L" and "N" with only a single unknown character in between, such as LENDER, LEND, LENDING, etc.

Field	Description
Reason Suppressed	 Use the drop-down field to select the reason the archived text message(s) that you are searching for was suppressed. You can select one reason or a range of reasons. To select one reason, select the same reason in both the Low and High drop-down fields. To select a range of reasons, select a reason from the Low drop-down field and a different reason from the High drop-down field. All of the reasons that are listed between those two reasons are displayed. Note: To select a range of reasons, you must put the reason with the lower number in the Low drop-down field and the reason with the higher number in the High drop-down field.
Is Reply	Select TRUE or FALSE from this drop-down field. Selecting TRUE displays messages that were sent as a reply. Selecting FALSE displays messages that were <i>not</i> sent as a reply. Replies are when a customer uses their phone to reply to a message that your institution sends to them.
	automatically generated by the system.
Is Foreign	Select TRUE or FALSE from this drop-down field. Selecting TRUE displays messages that were sent outside of the United States. Selecting FALSE displays only messages that were sent within the United States.
	Note: This search parameter is available only in <u>Advanced</u> mode.
Is Response	Select TRUE or FALSE from this drop-down field. Selecting TRUE displays messages that were sent as a response. Selecting FALSE displays messages that were <i>not</i> sent as a response. A response is when your institution responds to a customer. For example, a customer sends a reply back to your institution and then one of your institution's employees sends a response back to that customer, typically using the <u>Client Text Notifications</u> screen.
	A message that is neither a response or a reply is a message that is automatically generated by the system.
Texting History List View	The Texting History list view displays all of the archived text messages that match the entered search parameters. These messages are sorted according to the date and time they were added (<u>When Added</u>). Double-click on a text message in this list view to open the Text Message Details dialog and view all of the details for the selected text message. You can move the columns in this list

 view into any order that you want by clicking and holding on a column heading while you move it left or right. Note: When data is <u>saved to a</u> <u>CSV file</u>, the columns are sent in the original order and do not reflect any changes that you have made to the column order on the screen. The following columns display information in the Texting History list view: Unique Key: Displays the unique identification number assigned to the text message. Action Date: Displays the date the text message was sent, replied to, responded to, tried to be sent, etc. Recipient Phone Number: Displays the phone number of the sender. Sender Phone Number: Displays the phone number of the sender. When Added: Displays the date and time when the text message was sent. When Sent: Displays the date and time when the text message was sent. # Attempts: Displays the number of attempts made to send the text message.
 The following columns display information in the Texting History list view: Unique Key: Displays the unique identification number assigned to the text message. Action Date: Displays the date the text message was sent, replied to, responded to, tried to be sent, etc. Recipient Phone Number: Displays the phone number for the recipient. Sender Phone Number: Displays the phone number of the sender. Message: Displays the body of the text message. When Added: Displays the date and time when the text message was added to the queue. When Sent: Displays the date and time when the text message was sent. # Attempts: Displays the number of attempts made to send the text message.
 Success: Displays whether or not the text message was successfully sent (Y/N). BR Type: Displays the back-reference type. BR Value: Displays the back-reference value. BR Source: Displays the back-reference source. IsReply?: Displays whether or not the text message was a repl (Y/N). IsResponse?: Displays whether or not the text message was a response (Y/N). Reason Suppressed: Displays the reason the text message

Button Descriptions

Button	Description
<retrieve></retrieve>	Click this button to retrieve all of the archived text messages that meet the criteria entered in the search parameters. Note: You can also press <enter> or <return> inside of any of the fields to perform a search.</return></enter>

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Button	Description
<previous></previous>	Click this button to view the previous page of results. This button is useful if your selection criteria retrieves more texts than the maximum number allowed on the screen. As you click <previous>, a new page of results is displayed. For example, if your search retrieves 450 texts from the database, there would be five pages of results that you could search through using the <previous> and <next> buttons. Note: The maximum number of text messages retrieved can be set up</next></previous></previous>
	selecting the <u>Advanced</u> radio button. The maximum number of text messages allowed by the program is 500.
<next></next>	Click this button to view the next page of results. This button is useful if your selection criteria retrieves more texts than the maximum number allowed on the screen. As you click <next>, a new page of results is displayed. For example, if your search retrieves 450 texts from the database, there would be five pages of results that you could search through using the <previous> and <next> buttons.</next></previous></next>
	Note: The maximum number of text messages retrieved can be set up using the <u>Number of Records to Read</u> field on this screen after selecting the <u>Advanced</u> radio button. The maximum number of text messages allowed by the program is 500.
<save csv="" selection="" to=""></save>	Click this button to <u>save the information</u> selected in the Texting History list view into a Comma-Separated Values (CSV) file.

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See also:

Perform a Texting History Search Save Texting History Data to CSV File View Text Message Details Texting History Screen Details Texting History Screen Notification System

Texting Metrics Tab

Use the Texting Metrics tab to access the performance metrics for the texting process. Metrics can be used for measurement, comparison, or to track performance or production.

Billing Periods

When billing information is generated on the Texting Server, it generates the data from the start of the 28th of the previous month to the end of the 27th of the current month. This means that a billing period runs from the 28th of the prior month to the 28th of the current month. For example, if the billing date was February 1, 2017, billing data would be generated for all text messages queued in the Texting Server between January 28, 2017 at 12:00:00.000 AM and January 27, 2017 at 11:59:59.999.

There are many reasons why billing runs from the 28th of the prior month to the 28th of the current month, including:

- February is the shortest month of the year and consists of 28 days.
- Texts can be queued at any time of the day or night.
- Immediately after monthend, servers become heavily strained performing monthend calculations.
- The Host is frequently in offline mode during monthend processing, making it extremely difficult to select a reliable time shortly after the end of the month when writing billing records to the Host would be possible.
- All texts are accounted for and no texts get counted twice during billing periods.
- Makes it easy to account for the variable number of days between different months.

Custom Time Frames

Clicking the <Calculate from Custom Time Frame> button retrieves the total number of text messages queued between the dates entered in the Low Date and the High Date fields. The custom time frame uses data from the start of the Low Date of the previous month to the end of the High Date of the current month. This means that the data is collected from the start of the Low Date to the end of the date just before the High Date. For example, if the Low Date was January 1, 2017 and the High Date was March 31, 2017, data would be generated for all text messages queued in the Texting Server between January 1, 2017 at 12:00:00.000 AM and March 30, 2017 at 11:59:59.999.

See the following example of this tab followed by <u>field</u> and <u>button</u> descriptions.

1	Texting History Texting Metrics					
	Billing Information	on				
	Billing Date	# Text Messages	Low Date Range	High Date Range		
	12/01/2016 11/01/2016 06/01/2016 05/01/2016 03/01/2016 03/01/2016 02/01/2016 01/01/2016 12/01/2015	1 98 8 682 2,585 2,617 4,235 2,460 2,260	12/8/2016 12:06:39 PM 11/11/2016 2:29:31 PM 6/2/2016 10:11:25 AM 4/28/2016 6:32:39 AM 3/28/2016 7:20:22 AM 2/29/2016 6:13:48 AM 1/28/2016 6:13:48 AM 12/28/2015 6:39:41 AM 11/30/2015 7:05:04 AM	12/8/2016 12:06:39 PM 11/23/2016 5:02:02 PM 6/20/2016 2:28:40 PM 5/24/2016 1:35:22 PM 4/27/2016 3:15:40 PM 3/25/2016 3:06:16 PM 2/26/2016 3:33:45 PM 1/27/2016 6:26:14 PM 12/24/2015 3:38:18 PM	Low Date	Hinh Date
					Saturday November 28, 2015	Wednesday, December 28, 2016
					Retrieve Billing Information	Calculate from Custom Time Frame
	Save Selecti	ion To CSV				

Texting Metrics Tab

Field Descriptions

Field	Description
Billing Information List View	 The Billing Information list view displays all of the billing data stored on the Texting Server with a billing date between the dates entered in the Low Date and the High Date fields. The following columns display information in this list view: Billing Date: Displays the month the bill was generated for. If the <calculate custom="" frame="" from="" time=""> button is used, only dashes are displayed in this column since no actually billing period is used.</calculate> # Text Messages: Displays the total number of text messages which were queued during the billing period. This includes incoming texts from customers and outgoing texts from your institution. Low Date Range: Displays the date the first text was queued during the billing period.
Low Date	Enter or select a beginning date to use to retrieve billing information.
High Date	Enter or select an ending date to use to retrieve billing information.

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Button Descriptions

Button	Description
<save csv="" selection="" to=""></save>	Click this button to <u>save the information</u> selected in the <u>Billing</u> <u>Information</u> list view into a Comma-Separated Values (CSV) file.
<retrieve billing="" information=""></retrieve>	Click this button to retrieve any billing data stored on the Texting Server with a billing date between the dates entered in the <u>Low Date</u> and the <u>High Date</u> fields.
<calculate custom="" from="" time<br="">Frame></calculate>	Click this button to retrieve the total number of text messages queued between the dates entered in the <u>Low Date</u> and the <u>High Date</u> fields. This button always displays only one row of data in the <u>Billing</u> <u>Information list view</u> because it doesn't calculate distinct billing periods. This button is useful to retrieve the total number of text messages for a non-standard billing period (e.g., for a quarter, six months, a year, or multiple years).

See also:

Retrieve Texting Metrics Save Texting Metrics Data to CSV File Texting History Screen Details Texting History Screen Notification System

Perform a Texting History Search

To perform a search using the <u>Texting History tab</u> on the Notification Texting History screen:

- Use the Texting History fields to enter your search parameters. You can search by <u>phone number</u>, <u>message</u>, <u>date</u>, etc. The more search parameters that you enter, the more specific your search results will be. Clicking on the (X) button on the search parameters either clears the field or sets the field to the default. To see more search parameters, click the <u>Advanced</u> radio button. In our example, we entered "Test" in the **Message Body** field and used the default dates in the **When Added** fields.
- Click the <Retrieve> button. Note: You can also press <Enter> or <Return> inside of any of the fields to perform a search.

Recipient Phone Number X	Message Body Value Test			X
When Added [MM/dd/yyyy] Low Wednesday, July 13, 2016 [High ■▼ - Friday , Octo	x ober 14, 2016		
Success X Value Value	ence Type X	Back-Reference Value	X Back-Reference Source Value	X
Reason Suppressed Low High	X Is Reply Value	I Is Response Value	×	

Texting History Screen - <Retrieve> Button

3. The search results that match the parameters entered are displayed in the <u>Texting History</u> list view. For our example, all of the messages that contained "Test" in the message body that were added between July 13 and October 14 were displayed in the search results.

Recipient Phone Number X Value Test When Added [MM/dd/yyyy] High Low High Wednesday, July 13, 2016 - Friday October 14, 2016 - Success X Back-Reference Type X Value Back-Reference Value Value Value	Retrieve	Previo	us Next 💿	Simple O Advanced		
When Added [MM/dd/yyyy] High Low High Wednesday. July 13, 2016 Success X Value Back-Reference Type Value Value Value Val	Recipient Ph Value	ione Number	X Message Boo Value Test	dy		X
Wednesday, July 13, 2016 Friday October 14, 2016 Success Back-Reference Type Back-Reference Value Value Value Value Is Reply Value Value Value Is Response Value Value	When Adde Low	d (MM/dd/yyyy] High		X	
Success X Back-Reference Type X Back-Reference Value X Back-Reference Source X Value	Vednesday,	July 13,	2016 🗐 🔻 - Frid	lay , October 14, 201	l6 🔍 🔻	
Low High Value Value Value V - Value Value <th>Success</th> <th>X</th> <th>Back-Reference Type</th> <th>X Back-Refer</th> <th>rence Value X Back-Refe</th> <th>rence Source X</th>	Success	X	Back-Reference Type	X Back-Refer	rence Value X Back-Refe	rence Source X
Unique Key Action Date Recipient Phone Number Sender Phone Number Message When Added 4,977 10/12/20 +13853385385 NotSent *TEST* Dear JAMES, Your Payment 10/12/2016 12:52:18 4,976 10/12/20 +14774770477 +18018018015 *TEST* Dear COREY, Your Payment 10/12/2016 11:52:28 4,974 10/12/20 +16916916919 +18018018015 *TEST* Trunk works. Sent by GPS 10/12/2016 9:33:02 AM 4.972 10/12/20 +15959591959 +10019019015 *TEST* Chapteria Taurk 10/12/2016 9:32:21 AM	Value Reason Sup	pressed		Is Reply	Is Response X	
4,977 10/12/20 +13853385385 NotSent *TEST* Dear JAMES, Your Payment 10/12/2016 12:52:18 4,976 10/12/20 +14774770477 +18018018015 *TEST* Dear COREY, Your Payment 10/12/2016 12:52:18 4,976 10/12/20 +16916916919 +18018018015 *TEST* Dear COREY, Your Payment 10/12/2016 11:52:28 4,974 10/12/20 +16916916919 +18018018015 *TEST* Trunk works. Sent by GPS 10/12/2016 9:33:02 AM 4,972 10/12/20 +16950591959 +18018018015 *TEST* Chapter a Taurk 10/12/2016 9:32:21 AM	Value Reason Sup Low	pressed	High X	Is Reply X Value ×	Is Response X Value	
4,976 10/12/20 +14774770477 +18018018015 *TEST* Dear COREY, Your Payment 10/12/2016 11:52:28 4,974 10/12/20 +16916916919 +18018018015 *TEST* Trunk works. Sent by GPS 10/12/2016 9:33:02 AM 4,972 10/12/20 +15959591959 +18018019015 *TEST* Charlow rks. 10/12/2016 9:33:02 AM	Value Reason Sup Low Jnique Key	pressed	Value High X	Is Reply X Value X Value V Sender Phone Number	Is Response X Value v Message	When Added
4,974 10/12/20 +16916916919 +18018015 *TEST* Trunk works. Sent by GPS 10/12/2016 9:33:02 AM	Value Reason Sup Low Jnique Key 1,977	pressed	High X Recipient Phone Number +13853385385	Is Reply X Value X Value X Sender Phone Number NotSent	Is Response X Value Value Value Value TEST*Dear JAMES, Your Payment	When Added 10/12/2016 12:52:18
10/12/20 10/12/20 1050 10010015 *TEST* Checking Truck 10/12/2016 0:22:21 AM	Value Reason Sup Low Jnique Key 1,977 1,976	v - pressed - Action Date 10/12/20 10/12/20 10/12/20	Value High X Recipient Phone Number +13853385385 +14774770477	Is Reply X Value X Value X Sender Phone Number Not Sent +18018015	Message *TEST* Dear JAMES, Your Payment *TEST* Dear COREY, Your Payment	When Added 10/12/2016 12:52:18 10/12/2016 11:52:28
4,372 10/12/20 +13333531333 +16016016015 TEST CHECKING TURK 10/12/2016 3.32.51 AM	Value Reason Sup Low Unique Key 4,977 4,976 4,974	v - pressed - Action Date 10/12/20 10/12/20 10/12/20	Value High X Recipient Phone Number +13853385385 +14774770477 +16916916919	Is Reply X Value X Value X Sender Phone Number NotSent +18018015 +18018015	Message *TEST* Dear JAMES, Your Payment *TEST* Dear COREY, Your Payment *TEST* Trunk works. Sent by GPS	When Added 10/12/2016 12:52:18 10/12/2016 11:52:28 10/12/2016 9:33:02 AM

Texting History Screen with Search Results

4. After receiving the results of your search, you can perform a new search, <u>view the details of specific</u> <u>text messages</u>, <u>save your search data to a CSV file</u>, or exit the screen.

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See also:

Save Data to CSV File View Text Message Details Texting History Screen Details Texting History Screen Notification System

Retrieve Texting Metrics

Using the <u>Texting Metrics tab</u> on the <u>Texting History screen</u>, you can <u>retrieve billing information</u> and <u>retrieve</u> <u>texting metrics from a custom time frame</u>.

Retrieve Billing Information

When billing information is generated on the Texting Server, it generates the data from the start of the 28th of the previous month to the end of the 27th of the current month. This means that a billing period runs from the 28th of the prior month to the 28th of the current month. For example, if the billing date was February 1, 2017, billing data would be generated for all text messages queued in the Texting Server between January 28, 2017 at 12:00:00.000 AM and January 27, 2017 at 11:59:59.999.

To retrieve billing information, complete the following steps:

Enter or select a beginning and ending date in the <u>Low Date</u> and <u>High Date</u> fields. The system will
retrieve any billing information that occurred between the two dates. For information on why billing runs
from the 28th of the prior month to the 28th of the current month, see the <u>Texting Metrics tab</u>.

٦	exting History	Texting Metrics				
	Billing Information	on				
	Billing Date	# Text Messages	Low Date Range	High Date Range		
					Low Date	High Date
					Saturday , November 28, 2015	Wednesday, December 28, 2016
					Retrieve Billing Information	Calculate from Custom Time Frame
	Save Selecti	on To CSV				
Ľ					,	

Texting Metrics Tab

- 2. Click the <Retrieve Billing Information> button to retrieve any billing data stored on the Texting Server with a billing date between the dates entered in the **Low Date** and the **High Date** fields.
- 3. The billing data is displayed in the <u>Billing Information list view</u>.

	Fexting History	Texting Metrics				
	Billing Information	on				
Ш	Billing Date	# Text Messages	Low Date Range	High Date Range		
Ш	12/01/2016	1	12/8/2016 12:06:39 PM	12/8/2016 12:06:39 PM		
Ш	11/01/2016	98	11/11/2016 2:29:31 PM	11/23/2016 5:02:02 PM		
Ш	06/01/2016	8	6/2/2016 10:11:25 AM	6/20/2016 2:28:40 PM		
Ш	05/01/2016	682	4/28/2016 6:32:39 AM	5/24/2016 1:35:22 PM		
Ш	04/01/2016	2,585	3/28/2016 7:20:22 AM	4/27/2016 3:15:40 PM		
Ш	03/01/2016	2,617	2/29/2016 6:21:50 AM	3/25/2016 3:06:16 PM		
Ш	02/01/2016	4,235	1/28/2016 6:13:48 AM	2/26/2016 3:33:45 PM		
Ш	01/01/2016	2,460	12/28/2015 6:39:41 AM	1/27/2016 6:26:14 PM		
Ш	12/01/2015	2,260	11/30/2015 7:05:04 AM	12/24/2015 3:38:18 PM		
Π					Low Date	High Date
Ш					Saturday , November 28, 2015	Wednesday, December 28, 2016
Ш					Retrieve Billing Information	Calculate from Custom Time Frame
	Save Selecti	on To CSV				

Texting Metrics Tab with Billing Data

Calculate from Custom Time Frame

Clicking the <Calculate from Custom Time Frame> button retrieves the total number of text messages queued between the dates entered in the Low Date and the High Date fields. The custom time frame uses data from the start of the Low Date of the previous month to the end of the High Date of the current month. This means that the data is collected from the start of the Low Date to the end of the date just before the High Date. For example, if the Low Date was January 1, 2017 and the High Date was March 31, 2017, data would be generated for all text messages queued in the Texting Server between January 1, 2017 at 12:00:00.000 AM and March 30, 2017 at 11:59:59.999.

The <Calculate from Custom Time Frame> button always displays only one row of data in the <u>Billing</u> <u>Information list view</u> because it doesn't calculate distinct billing periods. This button is useful to retrieve the total number of text messages for a non-standard billing period (e.g., for a quarter, six months, a year, or multiple years).

To retrieve texting metrics from a custom time frame, complete the following steps:

1. Enter or select a beginning and ending date in the <u>Low Date</u> and <u>High Date</u> fields. The system will retrieve the texting metrics that occurred between the two dates.

Texting History Texti	ing Metrics				
Billing Information					
Billing Date #	Text Messages	Low Date Range	High Date Range		
				Low Date	High Date Wednesday, December 28, 2016
				Betrieve Billing Information	Calculate from Custom Time Frame
Save Selection T	To CSV			riceneve Liming information	

Texting Metrics Tab

- 2. Click the <Calculate from Custom Time Frame> button to retrieve the texting metrics that occurred between the dates entered in the **Low Date** and the **High Date** fields.
- 3. The texting metrics are displayed in the <u>Billing Information list view</u>.

T	exting History	Texting Metrics					
	Billing Informati	ion					
	Billing Date	# Text Messages	Low Date Range	High Date Range			
		14.948	11/30/2015 7:05:04 AM	12/20/2016 11:52:53 AM			
					Low Date		High Date
					Saturday , November 28	3, 2015 🔲 🔻	Wednesday, December 28, 2016
					Retrieve Billing Info	ormation	Calculate from Custom Time Frame
	Save Select	ion To CSV					

Texting Metrics Tab with Custom Texting Metrics

See also:

Texting Metrics Tab Save Texting Metrics Data to CSV File Texting History Screen Details Texting History Screen Notification System

Save Texting History Data To CSV File

A CSV file stores tabular data (numbers and text) in plain text. Each line of the file is a data record and each record consists of one or more fields, separated by commas. To save the information displayed in the <u>Texting</u> <u>History</u> list view into a Comma-Separated Values (CSV) file using the <u>Texting History tab</u> on the Notification Texting History screen:

- 1. <u>Perform a search</u>.
- 2. Once you have the data that you want displayed in the **Texting History** list view, highlight or select the data that you want to export. You can select as many lines of data as are displayed in the **Texting History** list view.

You can select multiple, sequential lines by clicking on the first item and then pressing and holding down <Shift> as you click on the last item. You can also select multiple lines by pressing and holding down <Ctrl> as you click on each of the lines that you want to select. You must continue to hold down <Ctrl> the entire time you are selecting lines or you will lose your selections. **Note:** If no items are selected, all items are exported.

3. After you have selected all of the data you want to save, click <Save Selection to CSV>.

[10/13/2016 9:06:33 AM] Retrieved - 100 Retrieve Previous Next Recipient Phone Number Xalue) Simple () Advanced Body		x
When Added [MM/dd/yyyy] Low High Wednesday, July 13, 2016 • F Success V Back-Reference Type	iday , October 14, 201	6 🗐 🕶	erence Source
Value	Is Reply X Value	Is Response X	
Unique Key Action Date Recipient Phone Numbe	r Sender Phone Number	Message	When Added
4,977 10/12/20 +13853385385 4,976 10/12/20 +14774770477 4,975 10/12/20 +16916916919 4,974 10/12/20 +19599591959	NotSent +18018018015 +18018018015 +18018018015	*TEST* Dear JAMES, Your Paymen *TEST* Dear COREY, Your Payme Thanks. *TEST* Trunk works. Sent by GPS	10/12/2016 12:52:18 10/12/2016 11:52:28 10/12/2016 9:33:02 AM 10/12/2016 9:32:31 AM >
Save Selection to CSV			

<Save Selection to CSV> Button and Data Selected in Texting History List View

- 4. Clicking the <Save Selection to CSV> button brings up the Save As dialog. Browse to the location where you want to save the file, enter the name of the file in the **File name:** field, and make sure that the type is a CSV file.
- 5. Click <Save>.

M		Save As		×
🔄 🏵 🔹 🕇 🚺	▶ This PC ▶ Downloads	~ c	Search Downlo	ads 🔎
Organize 🔻 Ne	w folder			III • 🔞
 ☆ Favorites ▲ CMF Release I ■ Desktop ▲ Downloads ▲ Recent places 	▲ Name	No items ma	Date mo	dified Type
1 This PC				
]퇲 This PC File name:	✓ < TextingHistory			, , ,
p This PC File name: Save as type:	V K TextingHistory CSV files (*.csv)			د ب ب

Save As Dialog

6. The CSV file is saved onto your computer or network. To open the file, either double-click on it or rightclick on it and select "Open" from the right-click menu.



CSV File Saved on Computer or Network

7. The CSV file contains all of the text history line items you selected and displays them with column headers.

XI	5-	⊘ - =				TextingHistory.csv - E	xcel			?	- 🗆 ×
FILI	E HOI	ME INSE	RT PA	GE LAYOUT	FORMU	AS DATA RE	EVIEW VIEW			Ashley J	ensen - 🍳
Paste V	oard 12	Calibri B <i>I <u>U</u> ¬</i>	- 11 - 🖽 - , Font	A [^] A [×] A [×]	≡ ≡ ≡ ≡ ≡ ≡ € € € Å	General Image: Constraint of the second	 E Conditional Format as Ta Cell Styles * Style 	Formatting v able •	The Inse	ert ▼ ∑ ete ▼ ↓ mat ▼ < Is E	· 2· ·
K16		- : X	(🗸 j	fx 1701	0964						~
	A	В	С	D	E	F	G	Н	1	J	K
1	Unique Key	Action Date	Phone	Phone	Message	When Added	When Sent	# Attempts	Success	BR Type	BR Value
2	4,977	10/12/201	1.39E+10	NotSent	*TEST*	10/12/2016 12:52	10/12/2016 12:52	0	Y	Loan	4014158
3	4,976	10/12/201	1.39E+10	1.8E+10	*TEST*	10/12/2016 11:52	10/12/2016 11:52	0	Y	Loan	10008316
4	4,975	10/12/201	1.8E+10	1.8E+10	Thanks.	10/12/2016 9:33		0	N	LOAN	1000001
5	4,974	10/12/201	1.8E+10	1.8E+10	*TEST*	10/12/2016 9:32	10/12/2016 9:32	0	Y	LOAN	1000001
6	4,973	10/12/201	1.8E+10	1.8E+10	Sweet.	10/12/2016 9:31		0	N	LOAN	1000001
7	4,972	10/12/201	1.8E+10	1.8E+10	*TEST* Ch	10/12/2016 9:30	10/12/2016 9:30	0	Y	LOAN	1000001
8	4,971	10/10/201	1.8E+10	1.8E+10	Thanks.	10/10/2016 11:32		0	N	LOAN	1000001
4	•	Texting	History	+			1	-			•
READ	Y								-		— + 100%

CSV File from Texting History Screen

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See also:

Perform a Search Texting History Screen Details Texting History Screen Notification System

Save Texting Metrics Data To CSV File

A CSV file stores tabular data (numbers and text) in plain text. Each line of the file is a data record and each record consists of one or more fields, separated by commas. To save the information displayed in the <u>Billing</u> <u>Information</u> list view into a Comma-Separated Values (CSV) file using the <u>Texting Metrics tab</u> on the Notification Texting History screen:

- 1. <u>Retrieve texting metrics</u>.
- 2. Once you have the data that you want displayed in the **Billing Information** list view, highlight or select the data that you want to export. You can select as many lines of data as are displayed in the **Billing Information** list view.

You can select multiple, sequential lines by clicking on the first item and then pressing and holding down <Shift> as you click on the last item. You can also select multiple lines by pressing and holding down <Ctrl> as you click on each of the lines that you want to select. You must continue to hold down <Ctrl> the entire time you are selecting lines or you will lose your selections. **Note:** If no items are selected, all items are exported.

3. After you have selected all of the data you want to save, click <Save Selection to CSV>.

Texting History	Texting Metrics				
Billing Informat	ion				
Billing Date	# Text Messages	Low Date Range	High Date Range		
	8	11/29/2016 12:56:55 PM	11/29/2016 1:32:16 PM		
					
				Low Date	High Date
				Monday , November 28, 2016	Wednesday, December 28, 2016
<				Retrieve Billing Information	Calculate from Custom Time Frame
Save Select	ion To CSV				

<Save Selection to CSV> Button and Data Selected in Billing Information List View

- 4. Clicking the <Save Selection to CSV> button brings up the Save As dialog. Browse to the location where you want to save the file, enter the name of the file in the **File name:** field, and make sure that the type is a CSV file.
- 5. Click <Save>.

м	Save	e As			×
€ ∋ - ↑ 🚺	▶ This PC ▶ Downloads	~ C	Search Downloads		P
Organize 👻 Ne	w folder			•	0
Favorites CMF Release N Desktop Downloads Recent places This PC Desktop	Alei TextingHistory.cs Tex v	tingHistory2.c	TextingHistory3.c sv		
File name:	TextingMetricsExport.csv				v
Save as type:	CSV files (*.csv)				~
Aide Folders			Save	Cancel	
	Save As	s Dialog			

6. The CSV file is saved onto your computer or network. To open the file, either double-click on it or rightclick on it and select "Open" from the right-click menu.



CSV File Saved on Computer or Network

7. The CSV file contains all of the texting metrics you selected and displays them with column headers.



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See also:

Texting Metrics Tab Retrieve Texting Metrics Save Texting Metrics Data to CSV File Texting History Screen Details Texting History Screen Notification System

View Text Message Details

To view the details of a text message using the <u>Texting History tab</u> on the Notification Texting History screen:

- 1. <u>Perform a search</u>.
- 2. Find the message that you want to see the details of in the <u>Texting History</u> list view.

	Previo	ous Next ()	Simple () Advanced		
Recipient Ph /alue	one Number	X Message Boo Value	dy		x
When Addec .ow Vednesday,	i (MM/dd/yyyy July 1:	/] 3, 2016 , 2016 , 2016 / Frid	ay , October 14,201	X 6 •	
Success /alue	×	Back-Reference Type Value	X Back-Refer	ence Value X Back-F Value	leference Source X
leason Supj ow	pressed	High X	s Reply X Value V	Is Response X Value ¥	
	Action Date	Recipient Phone Number	Sender Phone Number	Message	When Added
Inique Key	10/12/20	+13853385385	NotSent	*TEST* Dear JAMES. Your Paymen	10/12/2016 12:52:18
Inique Key .977	10/12/20	14774770477	+18018018015	*TEST* Dear COREY, Your Payme.	. 10/12/2016 11:52:28
nique Key ,977 ,976	10/12/20	+14//4//04//		Thanks.	10/12/2016 9:33:02 AM
nique Key ,977 ,976 ,975	10/12/20 10/12/20	+16916916919	+18018018015		
Inique Key .977 .976 .975 .974	10/12/20 10/12/20 10/12/20 10/12/20	+14774770477 +16916916919 +19599591959	+18018018015 +18018018015	*TEST* Trunk works. Sent by GPS	10/12/2016 9:32:31 AM

Message Selected in Texting History List View

3. Double-click on the message to bring up the Text Message Details dialog.

Flevious	Selected Index	2 /1	00	Next
Unique Key		Action Date		
4,976		10/12/2016 11:52:33 AM		
Recipient Ph	none Number	Sender Phone Number		
+14774770	477	+18018018015		
When Adde	d	When Sent		
10/12/2016 11:52:28 AM		10/12/2016 11:52:33 AM		
Back Refer	ence Type	Back Reference Value	Back Reference Source	
Ludii		Reason Suppressed		
Is Reply	/? 🗌 Is Respon	se? 0 - Not Suppressed		
20. C	lody			



- The Text Message Details dialog displays all of the information for the text message. You can view the phone numbers used, when the message was added and sent, the entire body of the message, etc.
 Note: The Text Message Details dialog only allows you to view the details of the message. You cannot change or update any of the fields.
- 5. Once you are done viewing the details of the message, you can view other messages using the <Next> and <Previous> buttons, change the number in the Selected Index field, or use the Up and Down Arrow keys on your keyboard within the Selected Index field on the Text Message Details dialog to view the messages currently displayed in the Texting History list view. Or you can close the Text Message Details dialog by clicking on the "X" in the upper, right-hand corner.

See also: <u>Perform a Search</u> <u>Texting History Screen Details</u> <u>Texting History Screen</u> <u>Notification System</u>

Triggers Screen

Use the Triggers screen to build, manage, and test notification triggers. Triggers allow you to automatically send notifications (texts, emails, and HTML emails) at scheduled times to a list of accounts. For example, you can use this screen to send a text to all text-capable borrowers at 9:00 AM their time every time a payment is five days late or you could set up a trigger to send an email to all borrowers every month.

Notification triggers make it so that you no longer have to worry about manually sending notifications, everything is automatic.

This screen also allows you to test notification triggers. You can use the Test tab to see what accounts would have received a notification based on how your trigger is set up if the trigger had been processed in the afterhours the night before.

You can also use the History tab on this screen to view notification trigger history. This allows you to see what trigger was used to send a notification to any client on any day in the past.

Note: The trigger process write a comment on the Customer Comments tab on the Loans > Marketing and Collections screen in CIM GOLD for every account that is sent a notification at the time the notification is sent.

Special Note: An account can get only one triggered notification a day, so please ensure that you set your triggers up with the correct priority order. If an account meets the logic for multiple triggers, it receives only the notification from the trigger with the highest priority.

See each of the following tabs for a description of the fields and buttons that appear on that tab:

- <u>Manage Tab</u>
- <u>Test Tab</u>
- <u>History Tab</u>

How To Items

This screen allows you to:

- <u>Create a New Trigger</u>
- <u>Delete a Trigger</u>
- Export Triggers
- <u>Modify a Trigger</u>
- Perform a History Search
- <u>Test Notification Triggers</u>

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Triggers Screen</u> <u>Details</u> section.

This screen is accessed by going to Notification > Triggers in the CIM GOLD tree view.

ac	count wi	ill only be sent one no	tification per day. This will be the first trigger in	the list th	nat they m	neet the cr	iteria.
ls Active	Trigger ID	Name	Description	Template ID	Wrapper ID	Template Type	Errors
~	7	30 day late text trigger	MRDCAT =3	10008	10001	3	
~	6	first payment default	all accounts that failed to make first payment and are	10010	10001	3	
~	5	Happy Birthday Trigger	Marketing	10090	10001	3	
~	1	test trigger	my first trigger	9040	10001	3	
~	2	New open account	Welcome New account holder text	10001	10001	3	
	3	recreate open	welcome trigger	10001	10001	3	
	8	Test 1	Test 1	9040	10001	3	
	9	test 2	test 2	9040	10001	3	

Triggers Screen > Manage Tab

See also:

Triggers Screen Details Manage Tab Test Tab History Tab Notification System

Triggers Screen Details

Use the tabs on the Triggers screen to build, manage, and test notification triggers. It also allows you to view the history. The following tabs are on this screen:

- <u>Manage Tab</u>: Use the Triggers screen to build and manage notification triggers.
- <u>Test Tab</u>: Use this tab to test notification triggers.
- <u>History Tab</u>: Use this tab to view notification trigger history.

n ac	count wi	ill only be sent one no	tification per day. This will be the first trigger in	the list th	nat they m	eet the cr	iteria.
ls Active	Trigger ID	Name	Description	Template ID	Wrapper ID	Template Type	Errors
~	7	30 day late text trigger	MRDCAT =3	10008	10001	3	
~	6	first payment default	all accounts that failed to make first payment and are	10010	10001	3	
-	5	Happy Birthday Trigger	Marketing	10090	10001	3	
-	1	test trigger	my first trigger	9040	10001	3	
-	2	New open account	Welcome New account holder text	10001	10001	3	
	3	recreate open	welcome trigger	10001	10001	3	
	8	Test 1	Test 1	9040	10001	3	
	9	test 2	test 2	9040	10001	3	

Triggers Screen > Manage Tab

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See also:

Manage Tab Test Tab History Tab Triggers Screen Notification System

Manage Tab

Use the Manage tab to build and manage notification triggers.

See the following examples of this tab followed by <u>field</u> and <u>button</u> descriptions.

n ac	count wi	ill only be sent one no	tification per day. This will be the first trigger in	the list th	nat they m	neet the cr	iteria.
ls Active	Trigger ID	Name	Description	Template ID	Wrapper ID	Template Type	Errors
-	7	30 day late text trigger	MRDCAT =3	10008	10001	3	
~	6	first payment default	all accounts that failed to make first payment and are	10010	10001	3	
~	5	Happy Birthday Trigger	Marketing	10090	10001	3	
~	1	test trigger	my first trigger	9040	10001	3	
~	2	New open account	Welcome New account holder text	10001	10001	3	
	3	recreate open	welcome trigger	10001	10001	3	
	8	Test 1	Test 1	9040	10001	3	
	9	test 2	test 2	9040	10001	3	

Manage Tab

Field Descriptions

Field	Description
Manage Triggers List View	The Manager Triggers list view displays all of the notification triggers set up for your institution. Double-click on a trigger in this list view to open the Trigger Definition Builder dialog and view all of the details for the selected trigger.
	Activate a Trigger To activate a trigger, check the Active field in the Is Active column of the Manage Triggers list view. To inactive a trigger, remove the check from the Active field.
	 The following columns display information in the Manage Triggers list view and can be used to sort: Active: Check this field to activate the trigger. Remove the check from this field to make the trigger inactive. ID: Displays the identification (ID) number of the trigger. Name: Displays the name of the trigger. Description: Displays a description of the trigger. Template ID: Displays the identification (ID) number of the trigger.

Field	Description
	 Wrapper ID: Displays the identification (ID) number of the wrapper used by the trigger. Template Type: Displays the type of template used by the trigger. Errors: Displays the errors with the trigger (if applicable).

Button Descriptions

Button	Description
<refresh></refresh>	Click this button to refresh the Manage Triggers list view.
<Сору>	Select a trigger in the Manage Triggers list view and click this button to copy that trigger's information to create a new trigger.
<edit></edit>	Select a trigger in the <u>Manage Triggers</u> list view and click this button to <u>modify</u> the selected trigger.
<delete></delete>	Select a trigger in the <u>Manage Triggers</u> list view and click this button to <u>delete</u> the selected trigger.
<new></new>	Click this button to create a new trigger.
<save></save>	Click this button to save any changes you've made to the Manage tab. Note: This button must be clicked to save changes, even if you have clicked the <save> button on the Trigger Definition Builder dialog.</save>

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See also:

Manage Tab Test Tab History Tab Triggers Screen Details Triggers Screen Notification System

Test Tab

Use the Test tab to test notification triggers. You can use this tab to see what accounts would have received a notification based on how your trigger is set up if the trigger had been processed in the afterhours the night before.

М	anage	Test	History								
-									-	Test Trigger	rs
	nggers Failed	Triggerld	InsertDate	TransmissionDate	TriggerBunTime	NumOfAccou	ints NumOfNoti	ications	Error		~
F		15	Inscribute	1/29/2017	00:00:00	0	0	loations	End		
		16		1/29/2017	00:00:00	0	0				
Г		17		1/29/2017	00:00:00	2	2				
		18		1/29/2017	00:00:00	0	0				
		19		1/29/2017	00:00:00	0	0				
		22		1/29/2017	00:00:00	3	4				
		23		1/29/2017	00:00:00	1	1				
		24		1/29/2017	00:00:00	6	6				~
A	ccount	t Details									
Ŀ	Trigger	ld Inser	tDate	Transmission Date	Account	Noti	ficationsSent	Errors			^
1	7			1/29/2017	0009010008	1					
1	7			1/29/2017	0009010006	1					
2	2			1/29/2017	0002000009	2					
2	2			1/29/2017	0002000007	1					
2	2			1/29/2017	0002000002	1					
2	3			1/29/2017	0002000003	1					
2	4			1/29/2017	0002000004	1					
2	4			1/29/2017	0002000001	1					¥
								Export T	riggers	Export A	I

See the following example of this tab followed by <u>field</u> and <u>button</u> descriptions.

Test Tab

Field Descriptions

Field	Description
Test Triggers List View	The Test Triggers list view displays all of the triggers that were tested. These are triggers that would have been processed in the afterhours the night before based on how the triggers are set up. The following columns display information in this list view and can be used to sort:

Field	Description
	 Failed: Check this field if the trigger failed. Trigger ID: Displays the identification (ID) number of the trigger. Insert Date: Displays the date the test was started. Transmission Date: Displays the date the transmission was run. Trigger Run Time: Displays how long it took the trigger to run. Num of Accounts: Displays the number of accounts. Num of Notifications: Displays the number of notifications sent. Error: Displays the error with the trigger (if applicable).
Test Account Details List View	The Test Account Details list view displays all of the accounts for the test triggers.
	The following columns display information in this list view and can be used to sort:
	 Trigger ID: Displays the identification (ID) number of the trigger. Insert Date: Displays the date the test was started. Transmission Date: Displays the date the transmission was run.
	 Account: Displays the account number. Notifications Sent: Displays the notifications that would have been sent. Errors: Displays the errors with the trigger (if applicable).

Button Descriptions

Button	Description
<test triggers=""></test>	Click this button to test the triggers that you currently have set up.
<export triggers=""></export>	Click this button to export the selected triggers.
<export all=""></export>	Click this button to export all of the triggers.

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See also:

Test Notification Triggers Export Triggers Triggers Screen Details Triggers Screen Notification System

History Tab

Use the History tab to view notification trigger history. This allows you to see what trigger was used to send a notification to any client on any day in the past.

Thursday	y , January	19, 2017	Get H	istory						
Triggers										
Failed	Triggerld	InsertDate		Transmissio	nDate	TriggerRunTime	NumOfAccounts	NumOfNotifications	Error	^
		1/19/2017 8:4	7 PM	1/19/2017		00:00:00				
	16	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	17	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	18	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	19	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	22	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	10	10		
	23	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	5	5		
	24	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	3	3		~
Account	Details									
Trigger I	ld InsertD	ate	Transmis	sionDate	Accourt	ıt	NotificationsSent	Errors		^
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	0009				
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	0008	1			
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	000.1	1			
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	0007	1			
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	0003	1			
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	3000	1			
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	000.1	1			
22	1/19/20)17 8:47 PM	1/19/201	7	0002000	0002	1			
23	1/19/20)17 8:47 PM	1/19/201	7	0002000	0004	1			~
								Export Tr	iggers Exp	ort All

See the following example of this tab followed by <u>field</u> and <u>button</u> descriptions.

History Tab

Field Descriptions

Field	Description
History Triggers List View	The History Triggers list view displays notification trigger history. This allows you to see what trigger was used to send notifications on any day in the past. Select a date in the <u>Date</u> field and click <get History> to populate this list view.</get
	 The following columns display information in this list view and can be used to sort: Failed: Check this field if the trigger failed. Trigger ID: Displays the identification (ID) number of the trigger.

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Field	Description				
	 Insert Date: Displays the date the trigger was started. Transmission Date: Displays the date the transmission was run. Trigger Run Time: Displays how long it took the trigger to run. Num of Accounts: Displays the number of accounts. Num of Notifications: Displays the number of notifications sent. Error: Displays the error with the trigger (if applicable). 				
History Account Details List View	The History Account Details list view displays all of the accounts for the triggers run on the date in the <u>Date</u> field. This allows you to see what accounts were sent a notification on any day in the past. Select a date in the Date field and click <get history=""> to populate this list view.</get>				
	 The following columns display information in this list view and can be used to sort: Trigger ID: Displays the identification (ID) number of the trigger. Insert Date: Displays the date the test was started. Transmission Date: Displays the date the transmission was run. Account: Displays the account number. Notifications Sent: Displays the notifications that were sent. Errors: Displays the errors with the trigger (if applicable). 				
History Date	Enter or select a date to use to retrieve trigger history information for.				

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Button Descriptions

Button	Description
<get history=""></get>	Click this button to perform a history search for notification triggers.
<export triggers=""></export>	Click this button to export the selected triggers.
<export all=""></export>	Click this button to export all of the triggers.

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See also: <u>Perform a History Search</u> <u>Export Triggers</u> <u>Triggers Screen Details</u>

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Triggers Screen Notification System

Create a New Trigger

Using the Manage tab on the Triggers screen, you can create a new trigger. There are two ways to create a new trigger:

- ٠ Create a New Trigger
- Copy a Current Trigger to Create a New Trigger •

Create a New Trigger

To create a new trigger using the <New> button, complete the following steps:

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

n acc	ers count wi	ill only be sent one notification	n per day. This will be the first trigger in the list that they meel	the criteri	ia.				
Is Trigger Active ID		Name	Description	Template ID	Wrapper ID	Template Type	Errors	Γ	
 Image: A set of the set of the	5	Happy Birthday Trigger	Marketing	10090	10001	3		~	
~	22	Debbie Trigger Test 1 (Saturday)	Trigger Save Test	10101	0	3			
	7	30 day late text trigger	MRDCAT =3	10008	10001	3			
~	6	first payment default	all accounts that failed to make first payment and are 3 days past due	10010	10001	3			
~	1	test trigger	my first trigger	9040	10001	3			
	2	New open account	Welcome New account holder text	10001	10001	3			
	3	recreate open	welcome trigger	10001	10001	3			
	23	late charge trigger	Transaction	10101	10001	3			
~	8	Test 1	Test 1	9040	10001	3			
	9	test 2	test 2	9040	10001	3			
	10	Test 3	Test 3	9040	10001	3			
	11	Test 4	Test 4	9040	10001	3			
	12	Test 5	Test 5	9040	10001	3			
	13	Test 6	Test 6	9040	10001	3			
	14	Test 7	Test 7	9040	10001	3			
	15	Test 8	Test 8	9040	10001	3			
	16	Test 9	Test 9	9040	10001	3			
	17	Test 10	Test 10	9040	10001	3			
	18	Test 11	Test 11	9040	10001	3			
-	10			00.40	10004	-		~	
Refre	sh		Copy Edit	Del	ete	New		Sa	

New >	Button	on	the	Manage	Tab
-------	--------	----	-----	--------	-----

- 2. Enter information for the new trigger, including the Name, Description, Type, Template, etc, in the Trigger Data and Notification Data field groups. Make sure to input information in the required fields. The required fields are marked with an \mathbf{Q} .
- 3. Next, select the Field Selection tab and select fields, account types, etc. for the new trigger. For example, you could select the CFLN - Loan Master record and the CFPO - Loan Payoff. Then you could select the LN1DUE - First Due Date field, etc. Note: The Field Selection tab contains required fields that you must modify. The required fields are marked with an $\mathbf{0}$.
| Ingger Data Notification Data ID: 0 Is Active Name Image: State of the state of t | | | ingger beim | | | | | |
|---|-------------------|-----------------------------|------------------|-------------------|-------------|-----------------|---------|-------------|
| D: 0 Is Active Type Type Type Template Type Template Template Type Template | r Data | | | Notification Data | | | | |
| Name Implate Description Implate Release Time 12:00:00 AM Time Out (Minutes) 3.00 Pelease Time 12:00:00 AM Time Out (Minutes) 3.00 Implate Wrapper Implate Wrapper Pelease Time 12:00:00 AM Time Out (Minutes) 3.00 Implate Implate Wrapper Implate Implate Implate Implate Implate Implate Implate Implate Implate Implate Implate Implate Implate Implate Implate <thimplate< th=""> <thimplate< th=""> <thi< th=""><th>Is Ac</th><th>tive</th><th></th><th>Туре</th><th></th><th></th><th></th><th></th></thi<></thimplate<></thimplate<> | Is Ac | tive | | Туре | | | | |
| Description Wrapper Release Time 12:00:00 AM | | | • | Template | | | | ~ |
| Release Time 12:00:00 AM Time Out (Minutes) 3.00 ield Selection Logic Run Frequency SQL Preview Main Record CFLN Logic Run Frequency SQL Preview Main Record CFLN Logic Run Frequency SQL Preview Main Record CFLN CFLN CFLN CSDT CSDT CSP Personal Property CSPP - Personal Property CSPP - Personal Property CSP - Personal Property CSP - Personal Property CSP - Contact Queue Data Record CSR - Insurance Tracking CSP + Collection History Record CFPAD - Collection History Record CFPAD - Analysis Projection CFPAD - A | | | | | | | | |
| Release Time 12:00:00 AM Time Out (Minutes) 3.00 ield Selection Logic Run Frequency SQL Preview Wain Record CELN CFLT - Loan Master Account Type Loan CFLOP - Loan Payoff Search Record Tree Search Current Record Account # Field Unknown CSPP - Personal Property Search Record Tree Search Current Record Account # Field Unknown CSQD - Contact Queue Data Record GPSRPS_ARCHIVE_DRO Field Description Field Field Displation Tracking | ption | | | Wrapper | | | | ~ |
| Image: Selection Logic Run Frequency SQL Preview Main Record CFLN CFLN Account Type Loan Image: CFLN - Loan Tax And Statistical Record Image: CFLN - Loan Tax And Statistical Record Account Type Loan Image: CFLN - Loan Tax And Statistical Record Image: CFLN - Loan Tax And Statistical Record Image: CFLN - Loan Payoff Account Type Loan Image: CFLN - Loan Origination Tracking Image: CSPP - Personal Property Search Record Tree Search Current Record Account # Field Unknown Image: CSQD - Contact Queue Data Record Image: CSQD - Contact Queue Data Record Image: CSPP - Personal Property Field Description Field Field Display Image: CSQD - Contact Queue Data Record Image: CSPP - Aralysis Projection Image: CSPP - Personal Property Field Description Field Field Display Image: CSQD - Contact Queue Data Record Image: CSPP - CSRE - Insurance Tracking Image: CSPP - Personal Property Image: CSPP - Personal Propert | se Time 12:00:0 | 0 AM 🚖 Time Out (Minutes) | 3.00 ≑ | | | | | |
| eld Selection Logic Run Frequency SQL Preview Alain Record CFLN CFLN - Loan Master CFLT - Loan Tax And Statistical Record Account Type Loan CFPO - Loan Origination Tracking Search Record Tree Search Current Record Account # Field Unknown CSPP - Personal Property GPSRPS_ARCHIVE_D Field Description Fields Displation CSRE - Insurance Tracking GPSRPS_ARCHIVED <t< th=""><th>0</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></t<> | 0 | | | | | | | |
| tain Record CFLN CFLT - Loan Master | | | | | | | | |
| Italin Record CFLN CFLN CFLN - Loan Master Account Type Loan CFPO - Loan Payoff Search Record Tree Search Current Record Account # Field Unknown CSOT - Loan Origination Tracking GPSRPS_ARCHIVE_DRO Field Description Field Field Displation | | Than requercy SQL Fleview | _ | | | | | |
| CFLN - Loan Master CFLN - Loan Tax And Statistical Record CFPO - Loan Payoff CSOT - Loan Origination Tracking CSPP - Personal Property GSPP - Personal Property CSPP - Personal Property GPSRPS_ARCHIVE_DRO GPSRPS_ARCHIVED GPSRPS_ARCHIVED GPSRPS_DATE_ARCHIV GPSRPS_DATE_ARCHIV GPSRPS_DATE_LOADED LN16CL CSO Loan LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16CP PHB - *Account Bankruptcy Info Rec LN16PP Returned Recurring Pay | Record CFLN | | 1 | | | | | |
| CFLT - Loan Tax And Statistical Record CFP0 - Loan Payoff CSOT - Loan Origination Tracking CSPP - Personal Property GSPP - Personal Property GPSRP5_ARCHIVE_DRO GPSRP5_ARCHIVED GPSRP5_ARCHIVED GPSRP5_DATE_ARCHIV GPSRP5_DATE_ARCHIV GPSRP5_DATE_LOADED LN16CL CSO Loan LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16CP PHB5 - *PM5 Billing GPSRP5_MENT LN16CP Search Record Tree Search Current Record Account # Field Unknown FPAA - *Accional Balances LN16CP CSO Payee Number LN16RP Returned Record Record | CFLN - Loan Maste | er 🔨 | | | | Account Type | Loan | v |
| CFPO - Loan Payoff CSQD - Loan Origination Tracking CSQD - Loan Origination Tracking CSQD - Loan Origination Tracking CSQD - Contact Queue Data Record GPSRPS_ARCHIVE_DRO GPSRPS_ARCHIVED GPSRPS_ARCHIVED GPSRPS_DATE_ARCHIV GPSRPS_DATE_LOADED LN16CL CSO Loan LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16GA LN16CP PHAV - Average Balances CFPAV - Average Balances Search Record Tree Search Current Record GPSRPS_CONTE_LOADED LN16CP Option First Payment LN16PP Returned Record Tree Search Current Record Account # Held Unknown Field Displa GPSRPS_ARCHIVED GPSRPS_ARCHIVED GPSRPS_DATE_ARCHIV GPSRPS_DATE_LOADED LN16CL CSO Loan LN16GA Loan Guarantee Amount LN16PP CSO Payee Number | | ax And Statistical Record | | 10 | | | | |
| | | ayoff | Search Record Tr | ee Search Curre | nt Record | Account # Field | Unknown | ~ |
| CSPP - Personal Property CSPP - Personal Property CSPA - Saccount ldentifier Codes Creater Codes Cr | CSOT - Loan C | rigination Tracking | Field | Description | ^ | Fields | | Display Nam |
| CSOD * Omital delete bala neede GPSRPS_AACHIVE_DNO GPSRPS_DATE_ARCHIVE. GPSRPS_DATE_ARCHIV GPSRPS_DATE_ARCHIV GPSRPS_DATE_COADED GPSRPS_DATE_LOADED DEAN ACH Payments LN16CL CSO Loan LN16GA Loan Guarantee Amount DFPAV - Average Balances DNO FPAV - Makes Loan DNO | CSPP - Person | al Property | | | | | | |
| CSRE* instance fracking GPSRFS_ARCHVED GPSRFS_DATE_ARCHVE. GPSRFS_DATE_ARCHVE. GPSRFS_DATE_ARCHVE. GPSRFS_DATE_ARCHVE. GPSRFS_DATE_LOADED LN16CL CSO Loan LN16CA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16P Option First Payment LN16P SPAV- Average Balances LN16P SPAV- Average Balances LN16P SPAV- Solution LN16P SPAV- Solution LN16P Setumed Recurring Pay | | t queue Data Necord | | /E_DRU | | | | |
| GPSRPS_DATE_ARCHIV GPSRPS_DATE_ARCHIV GPSRPS_DATE_LOADED GPSRPS_DATE_LOADED DINIECL CSO Loan LN16CL CSO Loan LN16CA Loan Guarantee Amount DPAV - Average Balances LN16OP Option First Payment DINECL LN16OP Option First Payment LN16PP Returned Recurring Pay | | en Histon Rooord | | ED ADCUNA | | | | |
| GrSRPS_DATE_LOADED GrSRPS_DATE_LOADED GrSRPS_DATE_LOADED GrSRPS_DATE_LOADED GrSRPS_DATE_LOADED GrSRPS_DATE_LOADED LN16CL CSO Loan LN16GA Loan Guarantee Amount DrSPAD - Analysis Projection LN16GA LN16GA LN16C PM16 Pmt Makes Loan I DrSPAD - Analysis Balances DrSPAD - Analysis Projection LN16OP Option First Payment LN16PY CSO Payee Number FPBA - "Account Bankruptcy Info Rec LN16PP Returned Recurring Payment | | n/ Producte | | | | | | |
| Control C | | nt Identifier Codes | GPSRPS_DATE_ | LOADED | | | | |
| FPAS - One Time Loan ACH Payments LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16GA Loan Guarantee Amount LN16GA LN16P PM16 Pmt Makes Loan LN16P Option First Payment LN16P FPB5 - *PM5 Billing LN16P CSO Payee Number FPB4. *Account Bankruptcy Info Rec LN16P Returned Recurring Pay | | s Projection | | LSU Loan | | | | |
| FPAV - Average Balances IN ISMIC PM IS Pmt Makes Loan (LN16MC PM IS Pmt Makes Loan (LN16PT Option First Payment LN16PY CSO Payee Number IN16PY CSO Payee Number | | e Loan ACH Payments | | Loan Guarant | ee Amount | | | |
| FPB5 - *PM5 Billing LN 160P Option First Payment LN 160P Option First Payment LN 160P CSO Payee Number LN 16PP Returned Recurring Pay | | e Balances | | PM 16 Pmt Ma | kes Loan (| | | |
| - FPBA - *Account Bankruptcy Info Rec | | illing | | Option First Pa | ayment | | | |
| Ender State Stat | | nt Bankruptcy Info Rec | | CSU Payee N | umber | | | |
| - PPBK - Bankruptcy Account | | ptcy Account | | Returned Rec | uning Payı | | | |
| FPBR - *Billing/Statement Record | | /Statement Record | | PM16 Loan R | ate | | | |
| FPBU - *Credit Reporting | | Reporting | | First Due Date | | | | |
| FPCF - *Loan Collateral Information Date Of First Rate Roll | EDCE +Land | collateral Information | | Date Of First F | Kate Roll 🗸 | | | |
| FPCM - Account Alert Record | | nt Alert Record | < | 24 In 17 In | > | < | | |

Trigger Definition Builder Dialog: Field Selection Tab

4. Now, select the Logic tab and enter the logic that you would like to use for the new trigger. The system will use the logic entered to determine who to send notifications to and when. 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. The Logic tab also displays a preview of the notification that will be sent. **Note:** The Logic tab is required. You must enter logic on this tab to create a new trigger.

Triage	r Data									Notification	Data	
D: 0	a Data	√ Is	Active							Туре	3) Text Message	
Vame		GPS	Test							Template	10001) Test text template	~
Descri	iption	GPS '	Test							Wrapper	1) Test Text Wrapper	~
Relea	se Time	12:00	D:00 AM 😂		Time Out	t (Min	utes)	3.00 🜲				
Accou Accou Ba	unt Exclus	ions Clo	sed, Released	or Arc	cy SUL chived √ (Charge	ed Off			Row	Notification Preview	
	And/Or	• (Field		Operator	_	Туре	Value)		Thank you for contacting us, please call.	
	None		CFLN.LN1	~	Equal	~	Ro	✓ CurrentDay	~	-	Sent by GPS. Reply stop to cancel.	
				·						Remove		
										(-)		
											Parameter Record	_
											٢	
		_		_								

Trigger Definition Builder Dialog: Logic Tab

5. Next, select the Run Frequency tab and schedule when you want notifications sent for the new trigger. For example, you could schedule the trigger to send notifications at the end of each month.

2	Trigger De	finition Build	er	- 🗆 🗡
Trigger Data		Notification	Data	
Name	GPS Test	Tamplata	3) Text Message V	
Description	GPS Test	Wrappac	1) Test Test Wesses	¥
Release Time	12:00:00 AM 🔹 Time Out (Minutes) 3.00 🔹	таррст	ту теза тела инаррен	• •
Field Selection	Logic Run Frequency SQL Preview			
Run Frequency	/			
O Daily				
O Weekly On	Monday V Rolling Type Dont Run	¥		
Month End				
Quarterly				
O Year End				
01 0	Df Month			
01 +0	Of January 🗸			
O Days Of We	eek			
O Weekdays				
			C	ancel Save



6. 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 for the new trigger.

	Trigger D	efinition Builde	er	- 🗆 🗡
Trigger Data		Notification	Data	
ID: 0	✓ Is Active	Туре	3) Text Message V	
Name	GPS Test	Template	10001) Test text template	~
Description	GPS Test	Wrapper	1) Test Text Wrapper	¥
Release Time	e 12:00:00 AM 🚖 Time Out (Minutes) 3.00 🛓			
Field Selection	Logic Run Frequency SQL Preview address of debuging purposes, and will NOT be included in the final SQL Quite the final SQL qu	ery which is generate	d during a nomal run.	
DECLARE @VA	\L_CurrentDay DATETIME = '2017-06-01 10:12:06.017'	, ,		
	END HEADER			
These parame	ters are created via Parameter Substitution.			
They should be DECLARE @Cu	e automatically filled in during regular Afterhours Processing. irrentDay DATETIME = @VAL_CurrentDay			
SELECT				
[CFLN FROM	I].[LN1DUE]			
CFLN LEFT	JOIN CFPO ON CFPO.PO4NBR = CFLN.LN4NBR			

Trigger Definition Builder Dialog: SQL Preview Tab

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

Frigger Data			Notification	Data					
ID: 0	✓ Is Active		Туре	3) Text Message v					
Name	GPS Test		Template	10001) Test text template					
Description	GPS Test		Wrapper	1) Test Text Wrapp	er		~		
Release Time	E 12:00:00 AM 🚖 Time Out (Minute	es) 3.00 📫							
ield Selection	Logic Run Frequency SQL Preview	1							
Main Record	CFLN	×							
CFLN - L	oan Master	<u>^</u>			Account Type	Loan	~		
CFL CFP	T - Loan Tax And Statistical Record O - Loan Payoff	Search Reco	rd Tree Se	earch Current Record	Account # Field	LN1DUE	~		
	T - Loan Origination Tracking P - Personal Property	Field	De	scription	Fields		Display Name		
E-CSQ	D - Contact Queue Data Record	GPSRPS AR	CHIVE DRO		FIRST DUE D	ATE LNIDUE	CFLN.LN1DU		
CSR	E - Insurance Tracking	GPSRPS_AR	CHIVED						
F2Q	H - Collection History Record	GPSRPS_DA	TE_ARCHIV						
FPA	1 - *Ancillary Products	GPSRPS_DA	TE_LOADED						
FPA	3 - *Account Identifier Codes	LN16CL	CS	0 Loan					
FPA	D - Analysis Projection	LN16GA	Loa	an Guarantee Amount					
FPA	S - One Time Loan ACH Payments	LN16MC	PM	116 Pmt Makes Loan					
FPA	V - Average Balances	LN160P	Op	tion First Payment					
- HPB	5 - PM5 Billing	LN16PY	CS	O Payee Number					
- FPB	A - Account Bankruptcy Into Nec	LN16RP	Re	turned Recurring Payr					
	n - bankrupicy Account	LN16RT	PM	116 Loan Rate					
IL LEB	n - billing/statement necord	LN1DUE	Firs	t Due Date					
	E - *Loan Collateral Information	LN1ROL	Da	te Of First Rate Roll					
FPB			^	14.1 × 14					
FPB FPC	M - Account Alert Record				1 1 M				

<Save> Button on the Trigger Definition Builder Dialog

- 8. The new trigger is created and appears in the Manage Triggers list view.
- 9. Click <Save> to save your changes and the new trigger.

ls	Trigger	Name	Description	Templat	e Wrapper	Template	Errors	٦
ctive				U	ID	Type		~
	1	test trigger	my first trigger	9040	10001	3		
	2	New open account	Welcome New account holder text	10001	10001	3		
	3	recreate open	welcome trigger	10001	10001	3		
	23	late charge trigger	Transaction	10101	10001	3		
1	8	Test 1	Test 1	9040	10001	3		
	9	test 2	test 2	9040	10001	3		
	10	Test 3	Test 3	9040	10001	3		
	11	Test 4	Test 4	9040	10001	3		
	12	Test 5	Test 5	9040	10001	3		
	13	Test 6	Test 6	9040	10001	3		
	14	Test 7	Test 7	9040	10001	3		
	15	Test 8	Test 8	9040	10001	3		
	16	Test 9	Test 9	9040	10001	3		
	17	Test 10	Test 10	9040	10001	3		
Π	18	Test 11	Test 11	9040	10001	3		
	19	Test 12	Test 12	9040	10001	3		
	20	Test 13	Test 13	9040	10001	3		
H	21	Amber Test	Amber Test	9040	10001	3		
	0	CRS Test	GPS Test	10001	1	2		

New Trigger Displayed in the Manage Triggers List View

Back to Top

Copy a Trigger to Create a New Trigger

To copy a current trigger to create a new trigger, complete the following steps:

- 1. Locate the trigger that you want to copy in the Manage Triggers list view.
- 2. Click on the trigger to highlight it.
- 3. Click <Copy> to bring up the Trigger Definition Builder dialog.

	Trigger	Name	Description	Template	Wrapper	Template	Errors	
l	1	test trigger	my first trigger	9040	10001	3		^
1	2	New open account	Welcome New account holder text	10001	10001	3		
, 1	3	recreate open	welcome triager	10001	10001	3		
1	23	late charge trigger	Transaction	10101	10001	3		
1	8	Test 1	Test 1	9040	10001	3		
1	9	test 2	test 2	9040	10001	3		
1	10	Test 3	Test 3	9040	10001	3		
1	11	Test 4	Test 4	9040	10001	3		
]	12	Test 5	Test 5	9040	10001	3		
]	13	Test 6	Test 6	9040	10001	3		
]	14	Test 7	Test 7	9040	10001	3		
]	15	Test 8	Test 8	9040	10001	3		
]	16	Test 9	Test 9	9040	10001	3		
]	17	Test 10	Test 10	9040	10001	3		
]	18	Test 11	Test 11	9040	10001	3		
]	19	Test 12	Test 12	9040	10001	3		
]	20	Test 13	Test 13	9040	10001	3		
]	21	Amber Test	Amber Test	9040	10001	3		
1	0	GPS Test	GPS Test	10001	1	3		

Trigger Selected and <Copy> Button on the Manage Tab

4. The Trigger Definition Builder dialog is automatically populated with Information from the selected trigger.

Trigger Data		Notification	Data				
D: 0 🖌 Is Active		Туре	3) Text Message	į.	*		
Name		Template	10001) Test text	tem	plate		~
Description	0	Wrapper	1) Test Text Wra	ppe	r		~
Release Time 12:00:00 AM 🛓 Time Out (Minutes) 3.00 📫						
ield Selection	1						
⊡-√CFLN - Loan Master					Account Type	Loan	~
CFLT - Loan Tax And Statistical Record 	Search Record Tr	ree Se	earch Current Record		Account # Field	LN1DUE	~
	Field	De	scription	^	Fields		Display Name
	GPSRPS_ARCHIN	/E_DRO			FIRST_DUE_DA	TE_LN1DUE	CFLN.LN1DU
CSRE - Insurance Tracking	GPSRPS_ARCHIN	/ED					
	GPSRPS_DATE_	ARCHIV					
	GPSRPS_DATE_	LOADED					
FPA3 - *Account Identifier Codes	LN16CL	CS	O Loan				
	LN16GA	Loa	an Guarantee Amount				
FPAS - One Time Loan ACH Payments	LN16MC	PM	116 Pmt Makes Loan I				
FPAV - Average Balances	LN160P	Op	tion First Payment				
	LN16PY	CS	O Payee Number				
EPPK - Account Bankruptcy Into Nec	LN16RP	Re	turned Recurring Pay				
EPBR - *Billing /Statement Record	LN16RT	PM	116 Loan Rate				
EPBU - *Credit Benorting	LN1DUE	Firs	t Due Date				
	LN1ROL	Da	te Of First Rate Roll				
FPCF - *Loan Collateral Information		~	In Let in				

Trigger Definition Builder Dialog with Copied Trigger's Information

- 5. Enter information for the new trigger, including the **Name** and **Description** in the Trigger Data field group. You can also make changes to any of the fields automatically populated by the copied trigger. Make sure to input information in the required fields. The required fields are marked with an **Q**.
- 6. Next, select the Field Selection tab and see if you wanted to change any of the fields used for the trigger. If you want to make changes, select fields, account types, etc. for the new trigger. For example, you could select the CFLN Loan Master record and the CFPO Loan Payoff. Then you could select the LN1DUE First Due Date field, etc.

ID:0	✓ Is Active	Туре	3) Text Message	~		
Name	GPS Test Copy	Temp	late 10001) Test text te	mplate		~
Description	GPS Test Copy	Wrap	per 1) Test Text Wrapp	ber		~
Release Time	12:00:00 AM 🔹 Time Out (Minutes)	3.00 ≑				
ield Selection Main Record [⊡-∵ CFLN - L	Logic Run Frequency SQL Preview CFLN coan Master]		Account Type	Loan	~
	T - Loan Tax And Statistical Record	Search Record Tree	Search Current Record	Account # Field	LN1DUE	~
	I - Loan Origination Tracking P - Personal Property D - Contact Queue Data Record E - Insurance Tracking H - Collection History Record 1 - *Ancillary Products 3 - *Account Identifier Codes D - Analysis Projection S - One Time Loan ACH Payments V - Average Balances 5 - *PM5 Billing A - *Account Bankruptcy Info Rec	Field GPSRPS_ARCHIVE_DRO. GPSRPS_ARCHIVED GPSRPS_DATE_ARCHIV. GPSRPS_DATE_LOADED LN16CL LN16GA LN160P LN16PY LN16RP	CSO Loan Loan Guarantee Amount PM16 Pmt Makes Loan Option First Payment CSO Payee Number Returned Recurring Pays	Fields FIRST_DUE_D/	ATE_LN1DUE	Display Name CFLN.LN1DU

Trigger Definition Builder Dialog: Field Selection Tab

7. Now, select the Logic tab and enter the logic that you would like to use for the new trigger. The system will use the logic entered to determine who to send notifications to and when. 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. The Logic tab also displays a preview of the notification that will be sent. Note: The Logic tab is required. You must enter logic on this tab to create a new trigger.

rigger l	Data						Notification	n Data	
D: 0		✓ Is	Active				Туре	3) Text Message V	
ame		GPS 1	Fest Copy				Template	10001) Test text template	¥
escript	tion	GPS 1	Fest Copy				Wrapper	1) Test Text Wrapper	~
elease	e Time	12:00):00 AM 🔶	Time Out	(Minutes)	3.00 📫			
eld Sele Account 7 Bank	ection t Exclusi krupt [ons Clo	sed, Released or	ency SQLI	Preview			Notification Preview	
	And/Or	(Field	Operator	Value Type	Value) Row	Thank you for contacting us, please call.	
١	None		CFLN.LN1	✓ Less	✓ Ro ✓	NextDay 🗸		Sent by GPS for TFS. Reply Stop to cancel	L
•	~	•	1	~	V V				
							hemove		
							(1)		
							(+)		
							(-)		
								Parameter Record	
								<	

Trigger Definition Builder Dialog: Logic Tab

8. Next, select the Run Frequency tab and see if you want to change when you want notifications sent for the new trigger. For example, the copied trigger may have been set up to send notifications at the end of each month but you may want the new trigger to send notifications every quarter.

Trigger Data Notification Da ID: 0 ✓ Is Active Name GPS Test Copy Description GPS Test Copy Release Time 12:00:00 AM Time Out (Minutes) 3.00 Field Selection Logic Run Frequency SQL Preview O Daily Veekly On Wordth End Veekly On	ta Text Message v D01) Test text template v Test Text Wrapper v
Name GPS Test Copy Template 10 Description GPS Test Copy (Minutes) 3.00 * (Mrapper 1) Release Time 12:00:00 AM * Time Out (Minutes) 3.00 * (Mrapper 1) Field Selection Logic Run Frequency SQL Preview (Minutes) (Minutes) (Minutes) (Minutes) © Daily (Monday) V Rolling Type Dont Run V	001) Test text template v Test Text Wrapper v
Description GPS Test Copy Wrapper 1) Release Time 12:00:00 AM Time Out (Minutes) 3.00 Image: Time Out (Minutes) 3.00 Image: Time Out (Minutes) 1mage: Time Out (Minutes) 1mage: Time Out (Minutes) 3.00 Image: Time Out (Minutes) 1mage: Time Out (Minutes) 1mage: Time Out (Minutes) 3.00 Image: Time Out (Minutes) 3.00 Image: Time Out (Minutes) 1mage: Time Out (Minutes) 1mage: Time Out (Minutes) 3.00 Image: Time Out (Minutes) Image: Time Ou	Test Text Wrapper v
Release Time 12:00:00 AM Time Out (Minutes) 3.00 (*) Field Selection Logic Run Frequency SQL Preview Run Frequency SQL Preview Image: SQL Preview SQL Preview Image: SQL Preview <td< th=""><th></th></td<>	
Field Selection Logic Run Frequency SQL Preview Run Frequency Daily Weekly On Monday Worth End Month End	
Quarterly Year End 1 + Of Month 1 + Of January Days Of Week Weekdays	Creat

Trigger Definition Builder Dialog: Run Frequency Tab

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

2	Trigger D	efinition Build	er	- 🗆 ×
Trigger Data		Notification	Data	
ID: 0	Is Active	Туре	3) Text Message V	
Name	GPS Test Copy	Template	10001) Test text template	~
Description	GPS Test Copy	Wrapper	1) Test Text Wrapper	~
Release Time	12:00:00 AM 🔹 Time Out (Minutes) 3.00 🔹			
Field Calcoling	SOI Proving			
Nete: This has	Logic Run Frequency SQL Freview	an a bish is assessed	d during a group law	
DECLARE @VAI	der is for debuging purposes, and will NOT be included in the final SQL Que L_CurrentDay DATETIME = '2017-06-01 10:12:06.017'	ery which is generate	a dunng a nomai run.	
	END HEADER			
- These paramet	ers are created via Parameter Substitution.			
They should be DECLARE @Cur	e automatically filled in during regular Artemours Processing. rentDay DATETIME = @VAL_CurrentDay			
SELECT				
[CFLN]].[LN1DUE]			
CFLN				
LEFT	JOIN CFPO ON CFPO.PO4NBR = CFLN.LN4NBR			
				Cancel Save

Trigger Definition Builder Dialog: SQL Preview Tab

- 11. The new trigger is created and appears in the Manage Triggers list view.
- 12. Click <Save> to save your changes and the new trigger.

aco	as countwi	Il only be sent one notifi	cation per day. This will be the first trigger in the list	that they meet the crite	ria.			
s ive	Trigger ID	Name	Description	Template ID	Wrapper ID	Template Type	Errors	
]	2	New open account	Welcome New account holder text	10001	10001	3	-	^
	3	recreate open	welcome trigger	10001	10001	3		
]	23	late charge trigger	Transaction	10101	10001	3		
•	8	Test 1	Test 1	9040	10001	3		
	9	test 2	test 2	9040	10001	3		
	10	Test 3	Test 3	9040	10001	3		
]	11	Test 4	Test 4	9040	10001	3		
	12	Test 5	Test 5	9040	10001	3		
]	13	Test 6	Test 6	9040	10001	3		
	14	Test 7	Test 7	9040	10001	3		
]	15	Test 8	Test 8	9040	10001	3	-	
1	16	Test 9	Test 9	9040	10001	3		
]	17	Test 10	Test 10	9040	10001	3		
	18	Test 11	Test 11	9040	10001	3		
	19	Test 12	Test 12	9040	10001	3		
	20	Test 13	Test 13	9040	10001	3		
]	21	Amber Test	Amber Test	9040	10001	3		
•	0	GPS Test	GPS Test	10001	1	3		
7	0	GPS Test Conv	GPS Test Copy	10001	1	3		

New Trigger Displayed in the Manage Triggers List View

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See also:

Modify a Trigger Delete a Trigger Test Notification Triggers Manage Tab Triggers Screen Details Triggers Screen Notification System

Delete a Trigger

To delete a trigger using the <u>Manage tab</u> on the <u>Notification Triggers screen</u>:

- 1. Locate the trigger that you want to delete in the Manage Triggers list view.
- 2. Click on the trigger to highlight it.

acc	count wi	ill only be sent one notifi	cation per day. This will be the first trigger in the list that	they meet the criter	ia.			_
s ive	Trigger ID	Name	Description	Template ID	Wrapper ID	Template Type	Errors	
]	2	New open account	Welcome New account holder text	10001	10001	3		^
	3	recreate open	welcome trigger	10001	10001	3		
]	23	late charge trigger	Transaction	10101	10001	3		
]	8	Test 1	Test 1	9040	10001	3		
]	9	test 2	test 2	9040	10001	3		
]	10	Test 3	Test 3	9040	10001	3		
]	11	Test 4	Test 4	9040	10001	3		
]	12	Test 5	Test 5	9040	10001	3		
]	13	Test 6	Test 6	9040	10001	3		
]	14	Test 7	Test 7	9040	10001	3		
]	15	Test 8	Test 8	9040	10001	3		
]	16	Test 9	Test 9	9040	10001	3		
]	17	Test 10	Test 10	9040	10001	3		
]	18	Test 11	Test 11	9040	10001	3		
]	19	Test 12	Test 12	9040	10001	3		
]	20	Test 13	Test 13	9040	10001	3		
]	21	Amber Test	Amber Test	9040	10001	3		
-	0	GPS Test	GPS Test	10001	1	3		
1	0	GPS Test Copy	GPS Test Copy	10001	1	3		

Trigger to be Deleted Selected in the Manage Triggers List View

- 3. Click <Delete> to permanently delete the trigger. **Note:** You can <u>make the trigger inactive</u> instead of deleting it if you want to keep the trigger set up but not use it.
- 4. The trigger is deleted and no longer displayed in the **Manage Triggers** list view.

I acc	count w	ill only be sent one notifi	cation per day. This will be the first trigger in the list that th	ey meet the criter	ia.			
ls Active	Trigger ID	Name	Description	Template ID	Wrapper ID	Template Type	Errors	
~	1	test trigger	my first trigger	9040	10001	3		^
	2	New open account	Welcome New account holder text	10001	10001	3		
	3	recreate open	welcome trigger	10001	10001	3		
	23	late charge trigger	Transaction	10101	10001	3		
~	8	Test 1	Test 1	9040	10001	3		
	9	test 2	test 2	9040	10001	3		
	10	Test 3	Test 3	9040	10001	3		
	11	Test 4	Test 4	9040	10001	3		
	12	Test 5	Test 5	9040	10001	3		
	13	Test 6	Test 6	9040	10001	3		
	14	Test 7	Test 7	9040	10001	3		
	15	Test 8	Test 8	9040	10001	3		
	16	Test 9	Test 9	9040	10001	3		
	17	Test 10	Test 10	9040	10001	3		
	18	Test 11	Test 11	9040	10001	3		
	19	Test 12	Test 12	9040	10001	3		
	20	Test 13	Test 13	9040	10001	3		
	21	Amber Test	Amber Test	9040	10001	3		
 Image: A start of the start of	0	GPS Test	GPS Test	10001	1	3	-	

Trigger Removed from the Manage Triggers List View

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See also:

Activate a Trigger Manage Tab Triggers Screen Details Triggers Screen Notification System

Export Triggers

You can use both the <u>Test tab</u> and the <u>History tab</u> to export trigger data. These tabs allow you to save the data from their test or history search to a file on your computer or network. The <Export Triggers> and <Export All> buttons work the same on both tabs. There are two ways to export data from the Test and History tabs:

- Export Selected Triggers
- Export All Triggers

Export Selected Triggers

To export data for selected triggers on the Test or History tab, complete the following steps:

- 1. Perform a history search on the History tab or test the notification triggers on the Test tab.
- 2. Select the Triggers that you want to export the data for in the Triggers list view. In our example, we selected Trigger 15.
- 3. Click the <Export Triggers> button to bring up the Save As dialog.

Failed	Triggerld	Incert Date		Transmissio	Date	TriggerBunTime	NumOfAccounts	NumOfNatifications	Emor	
	15	1/19/2017 8:4	7 PM	1/19/2017	mbate	00:00:00	0	0		
	16	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	17	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	18	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	19	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	22	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	10	10		
	23	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	5	5		_
	24	1/19/2017 8:4	TPM	1/19/2017		00:00:00	3	3		
ccount	Details									
Trigger I	d InsertD	ate	Transmis	sionDate	Accou	nt	NotificationsSent	Errors		
2	1/19/2	017 8:47 PM	1/19/20	7	000200	0009	1			
2	1/19/2	017 8:47 PM	1/19/201	7	000200	0008	1			
2	1/19/2	017 8:47 PM	1/19/201	7	000200	000.1	1			
2	1/19/2	017 8:47 PM	1/19/201	7	000200	0007	1			
2	1/19/2	017 8:47 PM	1/19/201	7	000200	0003	1			
2	1/19/2	017 8:47 PM	1/19/201	7	000200	3000	1			
2	1/19/2	017 8:47 PM	1/19/201	7	000200	000.1	1			
2	1/19/2	017 8:47 PM	1/19/201	7	000200	0002	1			
3	1/19/2	017 8:47 PM	1/19/201	17	000200	0004	1			

<Export Triggers> Button on the History Tab

4. Navigate to the folder that you want to save the file to.

СM		3	Save As		×
ⓒ ⋺ - ↑ 间	► This	s PC → Documents	~ C	Search Documents	Q
Organize 🔻 New	/ folder	t.		E==	- @
🐌 Downloads 🗐 Recent places	^	Name	emplates	Date modified 2/2/2017 11:13 AM 2/12/2014 10:24 AM	Type ^ File fold
P This PC		My HelpAndMar My Projects	nual Projects	2/27/2015 7:14 AM 4/6/2017 11:41 AM	File fold
Documents	•	JOutlook Files		4/4/2017 7:24 AM	File fold 🗸
File name: Save as type:	CSV file	25 (*.CSV)			* *
) Hide Folders				Save	ancel

Save As Dialog

- 5. Enter a name for the file in the **File name:** field.
- 6. Click <Save> to save the file.



<Save> Button on the Save As Dialog

7. The file is saved in the selected folder.

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Export All Triggers

To export data for all of the triggers on the Test or History tab, complete the following steps:

- 1. <u>Perform a history search</u> on the History tab or <u>test the notification triggers</u> on the Test tab.
- 2. Click the <Export All> button to bring up the Save As dialog.

indoers	y , January	19, 2017	Get H	story						
Failed	Triggerld	InsertDate		Transmissio	n Date	TriggerRun Time	NumOfAccounts	NumOfNotifications	Error	
	15	1/19/2017 8:4	17 PM	1/19/2017		00:00:00	0	0		
	16	1/19/2017 8:4	17 PM	1/19/2017		00:00:00	0	0		
	17	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	18	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	19	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	22	1/19/2017 8:4	17 PM	1/19/2017		00:00:00	10	10		
	23	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	5	5		
	24	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	3	3		
count	Details									
rigger l	d InsertD	ate	Transmiss	sionDate	Accour	nt	NotificationsSent	Errors		
	1/19/20	017 8:47 PM	1/19/201		000200	0009				
	1/19/20	017 8:47 PM	1/19/201	7	000200	0008	1			
	1/19/20	017 8:47 PM	1/19/201	7	000200	000.1	1			
	1/19/20	017 8:47 PM	1/19/201	7	000200	0007	1			
	1/19/20	017 8:47 PM	1/19/201	7	000200	0003	1			
	1/19/20	017 8:47 PM	1/19/201	7	000200	3000	1			
	1/19/20	017 8:47 PM	1/19/201	7	000200	000.1	1			
	1/19/20)17 8:47 PM	1/19/201	7	000200	0002	1			
	1/19/20	017 8:47 PM	1/19/201	7	000200	0004	1			

<Export All> Button on the History Tab

3. Navigate to the folder that you want to save the file to.

СM		3	Save As		×
ⓒ ⋺ - ↑ 间	► This	s PC → Documents	~ C	Search Documents	Q
Organize 🔻 New	/ folder	t.		E==	- @
🐌 Downloads 🗐 Recent places	^	Name	emplates	Date modified 2/2/2017 11:13 AM 2/12/2014 10:24 AM	Type ^ File fold
P This PC		My HelpAndMar My Projects	nual Projects	2/27/2015 7:14 AM 4/6/2017 11:41 AM	File fold
Documents	•	JOutlook Files		4/4/2017 7:24 AM	File fold 🗸
File name: Save as type:	CSV file	25 (*.CSV)			* *
) Hide Folders				Save	ancel

Save As Dialog

- 4. Enter a name for the file in the **File name:** field.
- 5. Click <Save> to save the file.



<Save> Button on the Save As Dialog

6. The file is saved in the selected folder.

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Perform a History Search Test Notification Triggers History Tab Test Tab Triggers Screen Details Triggers Screen Notification System

See also:

Modify a Trigger

To modify (edit) a trigger using the Manage tab on the Notification Triggers screen:

- 1. Locate the trigger that you want to modify in the <u>Manage Triggers list view</u>.
- 2. Click on the trigger to highlight it.

1 acc	count w	ill only be sent one notifi	cation per day. This will be the first trigger in the list that	it they meet the cri	teria.			-
ls Active	Trigger ID	Name	Description	Templa ID	ite Wrapper ID	Template Type	Errors	
	2	New open account	Welcome New account holder text	10001	10001	3		^
	3	recreate open	welcome trigger	10001	10001	3		
	23	late charge trigger	Transaction	10101	10001	3		
~	8	Test 1	Test 1	9040	10001	3		
	9	test 2	test 2	9040	10001	3		
	10	Test 3	Test 3	9040	10001	3		
	11	Test 4	Test 4	9040	10001	3		
	12	Test 5	Test 5	9040	10001	3		
	13	Test 6	Test 6	9040	10001	3		
	14	Test 7	Test 7	9040	10001	3		
	15	Test 8	Test 8	9040	10001	3		
	16	Test 9	Test 9	9040	10001	3		
	17	Test 10	Test 10	9040	10001	3		
	18	Test 11	Test 11	9040	10001	3		
	19	Test 12	Test 12	9040	10001	3		
	20	Test 13	Test 13	9040	10001	3		
	21	Amber Test	Amber Test	9040	10001	3		
	0	GPS Test	GPS Test	10001	1	3		
~	0	GPS Test Copy	GPS Test Copy	10001	1	3		

Trigger Selected in the Manage Triggers List View

3. Click <Edit> to open the Trigger Definition Builder dialog with data for the selected trigger loaded.

308	Notification System
-----	---------------------

Frieger Data		N	atification	Data			
D:0 Vala	tiva	T	incation	2) Test Massage			
			ype	3) Text Message	•		
Name GPS Te	st	T	emplate	10001) Test text terr	plate		¥
Description GPS Te	st	v	Vrapper	1) Test Text Wrappe	r		~
Release Time 12:00:0	00 AM ≑ Time Out (Minutes)	3.00					
Main Record CFLN	er]	10.02		Account Type	Loan	~
CFPO - Loan F	Payoff	Search Record Tree	S	earch Current Record	Account # Field	LN1DUE	~
CSPR - Pamor	Drigination Tracking	Field	De	scription	Fields		Display Name
E-CSQD - Conta	ct Queue Data Record	GPSRPS ARCHIVE	BO		FIRST DUE DA	TE LN1DUE	CELN LN1DU
CSRE - Insural	nce Tracking	GPSRPS ARCHIVED				_	
	tion History Record	GPSRPS DATE ARC	HIV				
	ary Products	GPSRPS DATE LOA	DED				
	unt Identifier Codes	LN16CL	CS	O Loan			
	is Projection	LN16GA	Lo	an Guarantee Amount			
FPAS - One Tir	me Loan ACH Payments	LN16MC	PN	116 Pmt Makes Loan			
FPAV - Average	ge Balances	LN160P	Op	tion First Payment			
FPB5 - PM5 E	Silling	LN16PY	CS	O Payee Number			
FPBA - ACCOL	unt Bankruptcy Into Rec	LN16RP	Re	turned Recurring Pays			
FFDR - Darikiu	/Statement Record	LN16RT	PN	116 Loan Rate			
EPPP - *Pilling	Reporting	✓ LN1DUE	Firs	st Due Date			
	rioporting	LN1ROL	Da	te Of First Rate Roll			
FPBR - *Billing FPBU - *Credit FPCE - *Loan (Collateral Information			V			
	Collateral Information Int Alert Record		^		/		

Selected Trigger Loaded on the Trigger Definition Builder Dialog

- 4. Modify any of the fields on the Trigger Definition Builder dialog for the trigger.
- 5. You can add or remove fields on the Field Selection tab. You can add, remove, or edit the logic on the Logic tab. You can change when the trigger is scheduled to run on the Run Frequency tab. And you can preview any of the changes you have made on the SQL Preview tab and in the Preview Notification section of the Logic tab. For our example, we are going to add another Loan Master field, CSOT Loan Origination Tracking, to our trigger by simply checking the field on the Field Selection tab.
- 6. After you have made all of your modifications, click <Save> to save your changes to the selected trigger and return to the Manage tab of the Triggers screen. Note: You must also click <Save> on the Manage tab of the Triggers screen to save the changes that you have made.

Trigger Data				Notification	Data	2					
ID: 0				Туре	oj rezi message v						
Name	GPS Test			Template	10001) Test text template						
Description	GPS Test		Wrappe		1) Test Text Wr	appe	er				
Release Time	e 12:00:00 AM 🚖 Time Out (Minutes) 3.	00 ≑								
Hain Record	N Logic Run Frequency SQL Pr CFLN Loan Master						Account Type	Loan	~		
CFL CFP	T - Loan Tax And Statistical Record O - Loan Payoff		Search Record Tre	ee S	earch Current Record		Account # Field	LN1DUE	~		
CSP	T - Loan Origination Tracking		Field	De	scription	^	Fields		Display Name		
⊕ □ CSQ □ □ CSR □ □ FPA □ □ FPB □ □ FPB	D - Contact Queue Data Record RE - Insurance Tracking H - Collection History Record 1 "Ancillary Products 3 "Acclary Products D - Analysis Projection S - One Time Loan ACH Payments V - Average Balances 5 "PMS Billing A - "Account Bankruptcy Info Rec K - Bankruptcy Account R - "Billing/Statement Record U - "Credit Reporting F - "Loan Collateral Information		GPSRPS_ARCHIV GPSRPS_ARCHIV GPSRPS_DATE_A GPSRPS_DATE_L LN16CL LN16GA LN16MC LN16MC LN16PY LN16PY LN16RP LN16RT LN10LE LN10LE LN10LE	re_DRO FED CS ARCHIV OADED CS Lo PN Op CS Re PN Fin Da	O Loan an Guarantee Amour 116 Pmt Makes Loan tion First Payment O Payee Number tumed Recurring Pay 116 Loan Rate st Due Date te Of First Rate Roll	t i	FIRST_DUE_DA	ITE_LN1DUE	CFLN.LN1DU		
	M Assault Alart Basard	10000									

Changes Made to Trigger

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See also:

Create a New Trigger Test Notification Triggers Manage Tab Triggers Screen Details Triggers Screen Notification System

Perform a History Search

You can use the History tab to view notification trigger history. This allows you to see what trigger was used to send a notification to any client on any day in the past. To perform a history search using the <u>History tab</u> on the <u>Notification Triggers screen</u>:

- 1. Enter or use the Calendar icon to select the date that you want history results for in the <u>History Date</u> field.
- 2. Click the <Get History> button to perform a search of the history for the date entered.

Manage Test Thursday Jan Triggers	History	Get History						
Failed Triggerla	d InsertDate	TransmissionDate	TriggerRunTime	NumOfAccounts	NumOfNotifica	tions Error		
Trigger Id	InsertDate	TransmissionDate	Account	Notifi	icationsSent	Errors		
							Export Triggers	Export All

<Get History> Button on the History Tab

- 3. The results of the search are displayed on the History tab. You can see the triggers that ran for the selected date in the <u>History Triggers list view</u>.
- 4. And you can see the accounts that were sent a notification for the various triggers in the <u>History</u> <u>Account Details list view</u>. **Note:** If you want to save the results from your search, you can <u>export the</u> <u>data</u> from the search.

	, ,,	13, 2017	Get H	story						
riggers Failed	Triggerld	InsertDate		Transmissio	nDate	TriggerRunTime	NumOfAccounts	NumOfNotifications	Error	
	15	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	16	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	17	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	18	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	19	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	0	0		
	22	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	10	10		
	23	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	5	5		
	24	1/19/2017 8:4	7 PM	1/19/2017		00:00:00	3	3		
ccount	Details									
rigger l	ld InsertD	ate	Transmiss	sionDate	Accourt	nt	NotificationsSent	Errors		
2	1/19/20)17 8:47 PM	1/19/201	7	0002000	0009	1			
	1/19/20)17 8:47 PM	1/19/201	7	0002000	8000	1			
	1/19/20)17 8:47 PM	1/19/201	7	0002000	000.1	1			
	1/19/20)17 8:47 PM	1/19/201	7	0002000	0007	1			
	1/19/20)17 8:47 PM	1/19/201	7	0002000	0003	1			
	1/19/20)17 8:47 PM	1/19/201	7	0002000	3006	1			
	1/19/20)17 8:47 PM	1/19/201	7	0002000	000.1	1			
	1/19/20)17 8:47 PM	1/19/201	7	0002000	0002	1			
3	1/19/20)17 8:47 PM	1/19/201	7	0002000	0004	1			

Results of History Search Displayed on History Tab

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See also:

Export Triggers History Tab Triggers Screen Details Triggers Screen Notification System

Test Notification Triggers

You can use the <u>Test tab</u> to see what accounts would have received a notification based on how your triggers are set up if the triggers had been processed in the afterhours the night before. To test all of the triggers currently set up for your institution using the <u>Test tab</u> on the <u>Notification Triggers screen</u>:

- 1. Navigate to the Test Tab.
- 2. Click <Test Triggers> to run the test.

Manage Te : Triggers	st History							Test Triggers
Failed Trigge	rld InsertDate	TransmissionDate	TriggerRun Time	NumOfAccounts	NumOfNotificat	ions Error		
Account Details								
Trigger Id	InsertDate	TransmissionDate	Account	Noti	ficationsSent	Errors		
							Export Triggers	Export All

<Test Triggers> Button on the Test Tab

- 3. The results of the test are displayed on the Test tab. You can see the triggers that ran in the <u>Test</u> <u>Triggers list view</u>.
- 4. And you can see the accounts that would have been sent a notification based on the various triggers in the <u>Test Account Details list view</u>. **Note:** If you want to save the results from the test, you can <u>export the data</u> from the test.

ailed	Triggerld	InsertDate	TransmissionDate	TriggerRunTime	NumOfAccounts	NumOfNoti	fications	Error	
	15		1/29/2017	00:00:00	0	0			
	16		1/29/2017	00:00:00	0	0			
	17		1/29/2017	00:00:00	2	2			
	18		1/29/2017	00:00:00	0	0			
	19		1/29/2017	00:00:00	0	0			
	22		1/29/2017	00:00:00	3	4			
	23		1/29/2017	00:00:00	1	1			
	24		1/29/2017	00:00:00	6	6			
ccoun	t Details								
Trigger	ld Insert	Date	TransmissionDate	Account	Notifica	ationsSent	Errors		
7			1/29/2017	0009010008	1				
7			1/29/2017	0009010006	1				
2			1/29/2017	0002000009	2				
2			1/29/2017	0002000007	1				
2			1/29/2017	0002000002	1				
3			1/29/2017	0002000003	1				
4			1/29/2017	0002000004	1				
4			1/29/2017	0002000001	1				

Tested Triggers Displayed on Test Tab

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See also:

Export Triggers Test Tab Triggers Screen Details Triggers Screen Notification System

Wrappers Screen

Use the Notification Wrappers screen to create, modify, or delete notification wrappers. You can also use this screen to view the notification wrappers set up for your institution, search for a specific wrapper, activate inactive notification wrappers, and to render a test wrapper to ensure that the header, footer, etc. of a wrapper have been set up correctly.

Wrappers are the institution branding that is applied to the notifications. Wrappers display your institution's logos, advertising, and selected wording in the header and footer of the notification.

How To Items

This screen allows you to:

- Access a wrapper on the Detail tab
- Activate an inactive wrapper
- <u>Create a new wrapper</u>
- <u>Copy a wrapper to create a new wrapper</u>
- Delete notification wrappers
- Modify or view an existing wrapper
- <u>Render a test wrapper</u>
- Search for a wrapper
- Upload a wrapper
- Use parameters in a wrapper

Additional Information

For an example of this screen and definitions of each of the fields on this screen, see the <u>Notification</u> <u>Wrappers Screen Details</u> section.

This screen is accessed by going to Notification > Wrappers in the CIM GOLD tree view.

ID [Description				[Show only Active	and Future Wra	pper Template
Active	ID	Туре	Effective Date	Description				Changed By	Date/Time I	earch Modified
 Image: A start of the start of	1	2 - HTML Email	05/17/2016		Basic Wra	pper		TURTLE	08/29/2016 13	:15:00 PM
~	1	3 - Text Message	05/19/2016		Test Text W	rapper		TURTLE	04/13/2017 12	:38:13 PM
10001 3 - Text Message			05/19/2016		Test Text W	rapper		TURTLE	03/08/2017 14	:38:06 PM
						100				
						Test	Copy	Delete	Create New	Save Char

Notification Wrappers Screen, Summary Tab

	INEXT										
Vrapper ID	10002 Wrapper Type	HTML Email	 Effective Date 	05/17/	2016 🗸						
				Origin	ators	_	Change History				
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed		
end As	Team@goldpointsystems.com			4	Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01		
Reply To	Replies@goldpointsystems.co	m		님	Loan Servicing	_					
Smun ID	0		Is Active	H	Collections						
					Concetions						
	Parameter		Header								
#COMPANY_N	NAME	GOLDPoin	html <html></html>								
CUSTOMER,	R_CARE_EMAIL		<head></head>								
CUSTOMER	CARE_EMAIL_LEXT	1.11.11		100	100 1000						
	OUNT_CENTER	https://gold	<body bgcolor="#ededed" style="m</th><td>argin: 0; (</td><th>padding: U;"></body>								
		https:/goldp	<table b<="" border="0" cellpadding="0" th=""><td>ogcolor="</td><th>"#ededed" height="100%" v</th><td>vidth="10</td><td>0%"></td><td></td><td></td></table>	ogcolor="	"#ededed" height="100%" v	vidth="10	0%">				
HIGHE			(dd valign="top")								
			Footer								
			I hank you for choosing decoration:underline">GOLDPoint S		om" style	="color: #1960a;cursor	pointer,text-			
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			GOLDPoint Systems dr/	>							
			 	visiting	<a href="http://www.goldpo</th><td>ointsystem</td><td>s.com" style="color: #</td><td>f960a;cursor:pointer.tex</td><td>t-</td></tr><tr><td></td><td></td><td></td><th>decoration:underline">www.goldpoi	ntsystems	s.com				
<		>									
Add Paramet	ter Delete Parameter										
					_						

Notification Wrappers Screen, Detail Tab

See also:

Detail Tab Summary Tab Notification Wrappers Screen Details Notification System

Notification Wrappers Screen Details

Use the Notification Wrappers screen to <u>create</u>, <u>modify</u>, or <u>delete</u> notification wrappers. You can also use this screen to <u>view the notification wrappers</u> set up for your institution, <u>search for a specific wrapper</u>, <u>activate</u> <u>inactive notification wrappers</u>, and to <u>render a test wrapper</u> to ensure that the header, footer, etc. of a wrapper have been set up correctly. Wrappers are the institution branding that is applied to the notifications. Wrappers display your institution's logos, advertising, and selected wording in the header and footer of the notification.

To learn more about the fields and buttons available on the Notification Wrappers screen, see the following tabs:

- Use the <u>Summary tab</u> of the Notification Wrappers screen to view the notification wrappers set up for your institution. You can also use this screen to <u>delete notification wrappers</u>, <u>activate inactive</u> <u>notification wrappers</u>, and to <u>access wrappers on the Detail tab</u>.
- Use the <u>Detail tab</u> on the Notification Wrappers screen to <u>create</u>, <u>modify</u>, or <u>delete</u> notification wrappers. You can also use this screen to <u>render a test wrapper</u> to ensure that the header, footer, etc. of a wrapper have been set up correctly.

Summai ID [y D	etail	Description		Sh	ow only Active	and Future Wrapper Temp	lates
Туре			~				Search	
Active	ID	Туре	Effective Date	Description		Changed By	Date/Time Modified	
	1	2 - HTML Email	05/17/2016	Basic Wrapper		TURTLE	08/29/2016 13:15:00 PM	
~	1	3 - Text Message	05/19/2016	Test Text Wrapper		TURTLE	04/13/2017 12:38:13 PM	1
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper		TURTLE	03/08/2017 14:38:06 PM	1
			e M					

Notification Wrappers Screen, Summary Tab

Summary L Previous	Next										
Wrapper ID	10002 V	Vrapper Type	HTML Email	 Effective Date 	05/17/	2016 🗸					
					Origina	ators		Change History			
Description	Test Basic Wrap	per			Use	Originator		Changed By	Date Changed	Time Changed	
Send As	Team@goldpoint	systems.com				Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01	
Reply To	Replies@goldpoi	ntsystems.com			Loan Servicing	_					
Group ID	0			In Activo	님	Collections					
aroup ib	U					Collections	•				
	Parameter			leader							
#COMPANY	NAME		GOLDPoin	html <html></html>						^	
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				Footer							
< Add Parame	ter Delete Param	eter	3	<pre> thank you for choosing decoration underline ">GOLDPoint dr />dr />dr /> Kindest Regards, dr /> GOLDPoint Systems.dpr dpr />dr />dr /> Find your local branch b decoration underline ">www.goldpo </br>dt/> <br< th=""><td><a href='
Systems<!--<br-->/> y visiting intsystems</td><th>"http://www.timefinancing.c /a> <a href="" http:="" www.goldpo<br="">s.com</th><td>com" style</td><td>="color: #ff960a;cursor is.com" style="color: #</td><td>rpointertext- ff960a;cursorpointertex</td><td>4-</td></br<></br></br></pre>	 <a href="" http:="" www.goldpo<br="">s.com	com" style	="color: #ff960a;cursor is.com" style="color: #	rpointertext- ff960a;cursorpointertex	4-	
rus rulunc											

Notification Wrappers Screen, Detail Tab

Back to Top

See also:

Notification Wrappers Screen Detail Tab Summary Tab Notification System

Summary Tab

Use the Summary tab of the Notification Wrappers screen to view the notification wrappers set up for your institution. You can also use this screen to <u>delete notification wrappers</u>, <u>activate inactive notification wrappers</u>, and to <u>access wrappers on the Detail tab</u>.

Wrappers are the institution branding that is applied to the notifications. Wrappers display your institution's logos, advertising, and selected wording in the header and footer of the notification.

See the following example of this screen followed by field and button descriptions.

Summar ID	y D	etail	Description		Show only Active	and Future Wrapper Templates
Туре			~			Search
Active	ID	Туре	Effective Date	Description	Changed By	Date/Time Modified
 Image: A start of the start of	1	2 - HTML Email	05/17/2016	Basic Wrapper	TURTLE	08/29/2016 13:15:00 PM
~	1	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM
				Test	opy Delete	Create New Save Change

Notification Wrappers Summary Tab

Field Descriptions

Field	Description
ID	Enter the identification number of the wrapper template to display that template in the <u>Wrappers Summary</u> list view. Entering a partial identification number displays all templates that have those same numbers.
Туре	Select the format type (HTML or text) of the wrapper template to display all wrapper templates that match the selected format type in the <u>Wrappers Summary</u> list view.
Description	Enter a partial or full description of the wrapper template to display all wrapper templates that contain that description in the <u>Wrappers</u> <u>Summary</u> list view.
Show Only Active and Future Wrapper Templates	Check this field to display only currently active wrapper templates and the wrapper templates that will activate in the future in the <u>Wrappers</u> <u>Summary</u> list view. If this field is left blank, all templates are displayed whether they are active or inactive.

Field	Description
Wrappers Summary list view	 The Wrapper Summary list view displays the wrapper templates set up for your institution. If you check the Show Only Active and Future Wrapper Templates field, only the currently active templates and the templates that will activate in the future are displayed. If the Show Only Active and Future Wrapper Templates field is left blank, all templates are displayed. The following columns display information in the Wrapper Summary list view and can be used to sort: Active: Displays whether or not the wrapper template is active. This column contains a check if the wrapper is active. ID: Displays the identification number of the wrapper template. Type: Displays the format type of the wrapper template became effective or will become effective (start being sent). Description: Displays a description of the wrapper. Changed By: Displays the name of the user who last modified the wrapper template.
	format) and time (in HHMMSS format in a 24-hour clock format) when the user in the Changed By column modified the wrapper template.

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Button Descriptions

Button	Description
<test></test>	Click this button to <u>render a test wrapper</u> to ensure that the header, footer, parameters, etc. of a wrapper have been set up correctly.
<Сору>	Click this button to <u>copy</u> the format of the current wrapper template to create a new wrapper.
<delete></delete>	Click this button to <u>delete</u> the wrapper template currently selected in the <u>Wrappers Summary</u> list view.
<create new=""></create>	Click this button to load a blank template on the Detail tab.
<save changes=""></save>	Click this button to save any change made to the <u>Notification</u> <u>Wrappers screen</u> .

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See also:

Notification Wrappers Screen Notification Wrappers Screen Details Notification System

Detail Tab

Use the Detail tab on the Notification Wrappers screen to <u>create</u>, <u>modify</u>, or <u>delete</u> notification wrappers. You can also use this screen to <u>render a test wrapper</u> to ensure that the header, footer, etc. of a wrapper have been set up correctly.

Wrappers are the institution branding that is applied to the notifications. Wrappers display your institution's logos, advertising, and selected wording in the header and footer of the notification.

See the following example of this screen followed by field and button descriptions.

Summary D	etai									
Previous	Next									
Wrapper ID	10002	Wrapper Type	HTML Email	V Effective Date	05/17/	/2016 🗸				
					Origin	ators		Change History		
Description	Test Basic V	Vrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Team@gold	pointsystems.com				Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
Reply To	Replies@go	dpointsvstems.co	m		H	Loan Servicing	_			
Group ID	0			Is Active	H	Collections				
Group to						Concentions				
	Paramete	er		Header						
#COMPANY_I	NAME		GOLDPoin	html <html></html>						^
#CUSTOMER	_CARE_EMAIL			<pre>chead> dates COL DBsist Customs (Atlas)</pre>						
#CUSTOMER	_CARE_EMAIL	TEXT								
#GOLD_ACC	OUNT_CENTE	3	https://gold	<body bgcolor="#ededed" style="m</th><td>argin: 0;</td><th>padding: 0;"></body>						
#GOLD_ACC	OUNT_CENTE	R_TEXT	https:/goldp	<table b<="" border="0" cellpadding="0" th=""><td>gcolor='</td><th>"#ededed" height="100%" v</th><td>width="10</td><td>0%"></td><td></td><td></td></table>	gcolor='	"#ededed" height="100%" v	width="10	0%">		
#PHONE										
				<table <="" style="margi</th><td>n: auto;" td="" width="600"><th>></th><td></td><td></td><td></td><td>~</td></table>	>				~	
				Footer						
				<pre> dbr /> </pre>						^
				Thank you for choosing	<a href="</td"><th>"http://www.timefinancing.c</th><td>com" style</td><td>="color: #ff960a;cursor</td><td>r:pointer;text-</td><td></td>	"http://www.timefinancing.c	com" style	="color: #ff960a;cursor	r:pointer;text-	
				<pre> doctorial doctorial</pre>	yacomak					
				Kindest Regards, GOLDPoint Systems http://www.com/comment/comme	>					
				 dor />dor />				U . I U I 140		
				decoration:underline">www.goldpoir	ntsystem	<a href="http://www.goldp s.com	ointsystem	is.com style= color: #	1960a;cursor:pointer;tex	[-
<			>							*
Add Paramet	er Delete Pa	arameter								
							Test	Сору	Delete Creat	e New Save Changes

Notification Wrappers Detail Tab

Field Descriptions

Field	Description
Wrapper ID	Enter the identification number for the wrapper template in this field. If you selected a template on the <u>Summary tab</u> , this field displays the identification number for the selected notification wrapper template.
	You can <u>load a specific wrapper template</u> onto this screen by searching for that template on the Summary tab and double-clicking on the template in the <u>Wrappers Summary</u> list view.

Field	Description
Wrapper Type	Select the format type of the notification that the wrapper will be attached to (HTML Email or Text Email) from this drop-down list.
Effective Date	Enter the date when the notification wrapper should become effective (start being used). Enter the date using MM/DD/YYYY format, or use the drop-down calendar to select the date.
Description	Enter a description of the wrapper in this field. Try to be descriptive so that others can easily tell the purpose for this wrapper when it is listed in the <u>Wrappers Summary</u> list view on the <u>Summary tab</u> .
Send As	Enter the email address (e.g., Team@GOLDPointsystems.com) to be used to send notifications in this field. This is the email address that users will see as the sender of the notification in their Inbox.
Reply То	Enter the email address (e.g., Replies@GOLDPointsystems.com) that emails will be sent to when a user replies to the notification in this field.
Group ID	Enter the identification number of the group used for wrappers in this field.
Is Active	Check this field to activate the wrapper. If this field is <i>not</i> checked, the wrapper will <i>not</i> be active and will <i>not</i> appear in the <u>Wrappers</u> <u>Summary</u> list view on the <u>Summary tab</u> if the <u>Show Only Active and</u> <u>Future Wrapper Templates</u> field is checked.
Originator list view	The Originators list view displays the originating systems that can be used for the notification wrapper template. Check the Use box next to the originating system that you want to use for the template.
	This can enable you to tie specific templates to loan origination, loan servicing, etc. For example, your institution can use a different template with a different wrapper for origination and loan servicing. The template for origination might include a wrapper with advertising while the template for loan servicing does not. And the system can automatically use the correct template with the correct wrapper depending on the system that is sending the notification.
	 The following columns display information in the Originators list view: Use: Use this checkbox to select the originating system for the notification. Originator: Displays the originating systems that can be tied to the notifications.
Change History list view	The Change History list view displays who has modified the wrapper template and when they modified it.

Field	Description
	 The following columns display information in the Change History list view and can be used to sort: Changed By: Displays the name of the user who last modified the wrapper. Date Changed: Displays the date (in MMDDYYYY format) when the user in the Changed By column modified the wrapper. Time Changed: Displays the time (in HHMMSS format in a 24-hour clock format) when the user in the user in the Changed By column modified the wrapper.
Parameter list view	 The Parameter list view displays the parameters set up for the wrapper. The program substitutes a specified parameter whenever <parm:#parameter> is entered in the code where PARAMETER is the parameter name. Using the Parameter list view you can add new parameters and determine their value. The <<u>Add Parameter></u> and <<u>Delete Parameter></u> buttons are used to modify this list view.</parm:#parameter> The following columns display information in the Parameter list view: Parameter: Displays the name of the parameter. This is the name used when entering a parameter into the code for the wrapper. Value: Displays the value assigned to the parameter.
Header	Enter the code and text to be used in the header of the wrapper in this field. In this field you can specify the font, style, image inclusion, wording, etc. of the wrapper heading. The following special characters entered in the text of the wrapper could interfere with how the wrapper is displayed in an HTML browser: (&), (<), (>), ('), and ("). The program will substitute the specified parameter whenever <parm:#parameter> is entered in the code where PARAMETER is the parameter name.</parm:#parameter>
Footer	Enter the code and text to be used in the footer of the wrapper in this field. In this field you can specify the font, style, image inclusion, wording, etc. of the wrapper footer. The following special characters entered in the text of the wrapper could interfere with how the wrapper is displayed in an HTML browser: (&), (<), (>), ('), and ("). The program will substitute the specified parameter whenever <parm:#parameter> is entered in the code where PARAMETER is the parameter name.</parm:#parameter>

Button Descriptions

Button	Description
<previous></previous>	Click this button to load the previous wrapper. The previous wrapper is the wrapper whose identification number comes right before the currently displayed wrapper's identification number.
<next></next>	Click this button to load the next wrapper. The next wrapper is the wrapper whose identification number comes right after the currently displayed wrapper's identification number.
<add parameter=""></add>	Click this button to add a new parameter to the Parameter list view.
<delete parameter=""></delete>	Select a parameter in the <u>Parameter</u> list view and click this button to <u>delete the parameter</u> .
<test></test>	Click this button to <u>render a test wrapper</u> to ensure that the header, footer, parameters, etc. of a wrapper have been set up correctly.
<Сору>	Click this button to <u>copy</u> the format of the current wrapper template to create a new wrapper.
<delete></delete>	Click this button to <u>delete</u> the wrapper currently displayed on the Detail tab.
<create new=""></create>	Click this button to load a blank wrapper template on the Detail tab.
<save changes=""></save>	Click this button to save any change made to the Notification Wrappers screen.

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See also:

Notification Wrappers Screen Notification Wrappers Screen Details Notification System
Access Wrapper on Detail Tab

To access a wrapper template on the Detail tab using the Summary tab:

- 1. <u>Perform a search</u> for the wrapper template on the Summary tab.
- 2. Select a template from the <u>Wrappers Summary</u> list view.

ID Type	- -		Description		Show only Active	and Future Wrapper Templ
Active	ID	Туре	Effective Date	Description	Changed By	Date/Time Modified
 Image: A start of the start of	12-	HTML Email	05/17/2016	Basic Wrapper	TURTLE	08/29/2016 13:15:00 PM
~	13-	Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
~	10001 3 -	Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM
	10002 2 -	HTML Email	05/17/2016	Test Basic Wrapper	ASHLEYJ	04/21/2017 09:23:26 AM
				Test Copy	Delete	Create New

Template Selected in Wrappers Summary List View

3. Double-click on the wrapper template to load the selected template on the Detail tab.

Summary D Previous Wrapper ID	Next	ner Tune HTMI Formal	Effective Date	05/17/2016				
wapper in	10002 Wiap			Origination		Change History		
Decederation	Test Desis Misses					Change Histoly	Data Channed	Time Channed
Description	Test basic wrapper			Loan Origination		ASHI FYJ	04/21/2017	09:17:01
Send As	Team@goldpointsyst	ems.com		Loan Servicing		ASHLEYJ	04/21/2017	09:23:26
Reply To	Replies@goldpointsy	stems.com		Internet Origination				
Group ID	0		✓ Is Active	Collections	~			
	Property	Value	Header					
#COMPANY		GOL DPoint Systems	html					0
#CUSTOMER		GOLDI UNIL SYSTEMS	<html></html>					
#CUSTOMER	CARE EMAIL TEXT		<title>GOLDPoint Systems</title>					
GOLD ACC	OUNT CENTER	https://goldpoint.secure		nin: (): padding: ():">				
GOLD ACC	OUNT CENTER TEXT	https:/goldpoint.secure						
#PHONE			<table style="margin</th><th>auto;" width="600"></table>					
			Footer					
<		>	dbr />dr /> Thank you for choosing decoration.underline">GOLDPoint Sy dbr />dbr />dbr /> States Kindest Regards, dbr />GOLDPoint Systems dbr/>dbr /> GOLDPoint Systems dbr/>dbr /> GoLDPoint Systems dbr/>dbr /> States GoLDPoint Systems dbr/>dbr /> States GoLDPoint Systems dbr/>dbr/>dbr/> States GoLDPoint Systems dbr/>dbr/ States GoLDPoint Systems dbr/>dbr/ States GoLDPoint Systems dbr/>dbr/ States GoLDPoint Systems dbr/ States GoLDPoint Systems dbr/ States GoLDPoint Systems dbr/ States GoLDPoint Systems dbr/ States	s href="http://www.timefinancing. items visiting <a href="http://www.goldp
systems.com</td><td>.com" style:<br="">pointsystem	="color: #ff960a;curso is.com" style="color: #	r:pointer:text- f960a:cursor:pointer;tex	t-	
Add Paramet	ter Delete Parameter]						
					Test	Сору	Delete Creat	e New Save Chang

326 Notification System

4. Once the wrapper template is loaded onto the Detail tab, you can <u>modify the wrapper</u>, <u>render a test</u> <u>wrapper</u>, and ensure that the header, footer, parameters, etc. of the wrapper have been set up correctly.

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See also:

Activate Inactive Wrapper

Inactive wrapper templates are older templates that are no longer being used. To activate an inactive template on the Notification Wrappers screen:

- 1. Uncheck the <u>Show Only Active and Future Wrapper Templates</u> field on the <u>Summary tab</u> to display all of the wrapper templates that are active, set to become active, and inactive.
- 2. <u>Perform a search</u> for the template that you want to activate.
- 3. Select the inactive template from the <u>Wrappers Summary</u> list view.

ID			Description		Show only Active	and Future Wrapper Templa
Туре			¥			Search
Active	ID	Туре	Effective Date	Description	Changed By	Date/Time Modified
~	1	2 - HTML Email	05/17/2016	Basic Wrapper	TURTLE	08/29/2016 13:15:00 PM
~	1	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM
	10002	2 - HTML Email	05/17/2016	Test Basic Wrapper	ASHLEYJ	04/21/2017 09:23:26 AM
10						

Inactive Wrapper Template Selected in Wrappers Summary List View

4. Double-click on the template to load the selected template on the <u>Wrapper Detail tab</u>.

Previous Wrapper ID	Next 10002 Wrann	er Type HTMI Email	Y Effective Date	05/17/	2016						
				Originators			Change History				
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed		
Send As	Team@noldpointsyster	ms com			Loan Origination	^	ASHLEYJ	04/21/2017 04/21/2017	09:17:01		
Deele Te	Dealine Geoldenisteret				Loan Servicing		ASHLEYJ		09:23:26		
Reply To	Replies@goldpointsyst	tems.com			Internet Origination						
Group ID	0		Is Active		Collections	*					
	Parameter	Value	Header								
#COMPANY_I	NAME	GOLDPoint Systems	html						~		
#CUSTOMER	_CARE_EMAIL		<html> <head></head></html>								
#CUSTOMER	_CARE_EMAIL_TEXT	0	<title>GOLDPoint Systems</title>								
#GOLD_ACC	DUNT_CENTER	https://goldpoint.secure	<body bgcolor="#ededed" style="ma</td><td>argin: 0;</td><td>padding: 0;"></body>								
#GOLD_ACC	DUNT_CENTER_TEXT	https:/goldpoint.secure	table celloadding="Ω" border="Ω" b	acolor='	"#ededed" beight="100%" ı	width="10	0%">				
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			Footer								
4			⟨dr />dr /> Thank you for choosing decoration.underline">GOLDPoint S ⟨dr />dr />dr />dr /> Kindest Regards, ⟨dr /> GOLDPoint Systems dr/ ⟨dr />dr />dr /> Find your local branch by decoration.underline">www.goldpoir ⟨dd>	<a href=' ystems< > visiting itsystem:	"http://www.timefinancing.c /a> <a href="" http:="" www.goldp<br="">s.com	com" style	="color: #ff960a;cursor is.com" style="color: #f	:pointertext- f960a;cursor:pointertext			
Add Paramete	er Delete Parameter					. .					

Inactive Wrapper Template Loaded on the Detail Tab

5. Check the <u>Is Active</u> field to activate the template.

Wrapper ID	10002 Wrapp	er Type HTML Email	V Effective Date	05/17/2	D16 🗸				
				Originat	ors		Change History		
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Team@goldpointsyste	ms.com		Loan Origination	Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
Reply To	Replies@goldpointsvs	tems com			Loan Servicing	_	ASHLEYJ	04/21/2017	09:23:26
Group ID	0		✓ Is Active		Internet Origination Collections	-			
	Parameter	Value	Header						
#COMPANY_	NAME	GOLDPoint Systems	html						
#CUSTOMER	R_CARE_EMAIL		<head></head>						
#CUSTOMER	R_CARE_EMAIL_TEXT		<title>GOLDPoint Systems</title>						
GOLD_ACC	OLD_ACCOUNT_CENTER https://goldpoint.secure		<pre><body bgcolor="#ededed" style="mailto:</pre></td><td>argin: (); pa</td><td>adding: 0;"></body></pre>						
GOLD_ACC	GOLD_ACCOUNT_CENTER https://goldpoint.secure GOLD_ACCOUNT_CENTER_TEXT https://goldpoint.secure		<table b<="" border="0" cellpadding="0" td=""><td>acolor="#</td><td>ededed" beight="100%" ;</td><td>width="10</td><td>N%"></td><td></td><td></td></table>	acolor="#	ededed" beight="100%" ;	width="10	N%">		
#PHONE				n: auto;">					
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			⟨br />br /> Thank you for choosing decoration.undefine">GOLDPoint S ⟨br />dr />dr /> Kindest Regards, ch /> GOLDPoint Systems dbr/ ⟨dr />dr /> Find your local branch by decoration.undefine">www.goldpoin ⟨db⟩ ⟨dt>	<a href="h
ystems
visiting <a
ntsystems.o</td><td>ttp://www.timefinancing.o
>
a href=" http:="" www.goldp<br="">com	com" style: pintsystem	="color: #ff960a;cursor s.com" style="color: #	:pointertext- 1960a;cursor:pointer;text		
<									

- Make any other needed modifications to the wrapper template and click <Save Changes> to save the now-active wrapper template. **Note:** You can also <u>render a test wrapper</u> to ensure that the header,
- footer, parameters, etc. of the wrapper have been set up correctly before you save the changes by clicking the <Test> button.

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See also: <u>Detail Tab</u> <u>Summary Tab</u> <u>Notification Wrappers Screen Details</u> <u>Notification Wrappers Screen</u> <u>Notification System</u>

6.

Create New Wrapper

To create a new wrapper template on the Notification Wrappers screen:

1. Click the <Create New> button in the lower, right-hand corner of the <u>Summary tab</u> or <u>Detail tab</u>.

ID Type			Description		Show only Active	and Future Wrapper Templa Search
Active	ID	Туре	Effective Date	Description	Changed By	Date/Time Modified
 Image: A start of the start of	1	2 - HTML Email	05/17/2016	Basic Wrapper	TURTLE	08/29/2016 13:15:00 PM
~	1	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
v	10001	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM

<Create New > Button on the Summary Tab

2. Clicking the <Create New> button loads a blank template onto the <u>Detail tab</u>.

Changed Time Changed
Changed Time Changed
1
1

Blank Wrapper Template

- Enter the information for the new wrapper template into the <u>fields</u> on the Detail tab. The <u>Wrapper ID</u>, <u>Wrapper Type</u>, and <u>Effective Date</u> fields are required fields and must have information entered into them in order to save the template or <u>render a test wrapper</u>.
- 4. When you have entered information into the required Wrapper ID, Wrapper Type, and Effective Date fields, the <Test> button is enabled which allows you to render a test wrapper. After you have entered information into the required fields and other fields (e.g., the Description field), the <Save Changes> button is enabled allowing you to save the new wrapper template.

Wrapper ID	10002	Wrapper Type	HTML Email	V Effective Date	05/17/	/2016 🔍					
					Originators			Change History			
Description	Test Basic V	Vrapper			Use	Originator		Changed By	Date Changed	Time Changed	
Send As	Team@gold	pointsystems.com				Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01	
Reply To	Replies@go	ldpointsvstems.com			님	Loan Servicing	_				
Group ID	0			✓ Is Active	H	Collections	-				
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#CUSTOMER	CARE EMAIL	TEXT	-	<pre><head> <title>GOLDPoint Systems</title></head></pre>							
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#GOLD_ACCO	OUNT_CENTE	R_TEXT	https:/goldp		argin. o,	14. J. J. J. 11		08/11-			
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				Footer							
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Add Paramete	er Delete P	arameter									

New Wrapper Template

- 5. Once you have entered in all of the information for your new template, <u>render a test wrapper</u> to ensure that the header, footer, etc. of the wrapper have been set up correctly.
- After you have ensured that everything is set up correctly, click <Save Changes> to activate and save the new wrapper template. The new template will be activated on the system and added to the <u>Summary tab</u>.

ID			Description		Show only Active	and Future Wrapper Templa
	ID	Туре	✓ Fffective Date	Description	Changed By	Search Date/Time Modified
	1	2 - HTML Email	05/17/2016	Basic Wrapper	TURTLE	08/29/2016 13:15:00 PM
~	1	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM
	10002	2 - HTML Email	05/17/2016	Test Basic Wrapper	ASHLEYJ	04/21/2017 09:23:26 AM

New Template Added to Wrappers Summary List View on the Summary Tab

Back to Top

See also: Detail Tab Summary Tab Notification Wrappers Screen Details Notification Wrappers Screen Notification System

Copy Wrapper

To create a new wrapper template by copying an existing template on the Notification Wrappers screen:

1. Click the <Copy> button on the <u>Summary tab</u> or <u>Detail tab</u> to bring up the Copy Wrapper dialog.

Previous	Next												
Wrapper ID	1000.1 V	Vrapper Type	ITML Email	 Effective Date 	05/17/	2016 🗸							
					Origina	ators		Change History					
Description	Test Basic Wrap	per			Use	Originator		Changed By	Date Changed	Time Changed			
Send As						Loan Origination	^	JONA	05/17/2016	12:04:49	^		
Rephy To						Loan Servicing		JONA	05/17/2016	12:50:11			
Reply To						Internet Origination		JONA	05/17/2016	12:54:55			
Group ID	0			✓ Is Active		Collections	~	JONA	05/17/2016	12:56:22	~		
	Parameter			Header									
#COMPANY_	NAME		GOLDPoin	html							^		
#CUSTOMER	R_CARE_EMAIL			<html> <head></head></html>									
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The <Copy> Button on the Detail Tab

2. Double-click on the wrapper that you want to copy to load the selected wrapper on the <u>Detail tab</u>.

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ID	Туре	Effective Date	Description	Changed By	Date/Time Modified
	1 2 - HTML Email	05/17/2016	Basic Wrap	TURTLE	08/29/2016 13:15:00
	1 3 - Text Message	05/19/2016	Test Text W	TURTLE	04/13/2017 12:38:13
10	001 3 - Text Message	05/19/2016	Test Text W	TURTLE	03/08/2017 14:38:06
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Select Wrapper in Copy Wrapper Dialog

Wrapper ID	Wrapper Type	HTML Email	 Effective Date 	05/17/	2016 🗸									
				Originators			Change History							
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed					
Send As	Team@goldpointsystems.com				Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01					
Reply To	Replies@goldpointsystems.cg	m			Loan Servicing	_								
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Copied Wrapper Template on the Detail Tab

3. You will be required to enter a new identification number in the <u>Wrapper ID</u> field.

Wrapper ID	10002	Wrapper Type	HTML Email	Ŷ
Description	Test Basic V	Wrapper		
Send As	Team@gold	pointsystems.com		
Reply To	Replies@go	ldpointsystems.com	1	
Group ID	0			

New Wrapper ID

- 4. You can now make changes to the wrapper template by changing any of the information in the file maintainable fields.
- 5. Once the template is set up the way that you want it to be, <u>render a test wrapper</u> to ensure that the header, footer, type, etc. of the wrapper have been set up correctly. **Note:** You must save the new wrapper before you can add or delete parameters.
- 6. After you have ensured that everything is set up correctly, click <Save Changes> to save your changes and create the new wrapper template.

Wrapper ID	10002	Wrapper Type	HTML Email	✓ Effective Date	05/17/	/2016 🗸				
					Origin	ators		Change History		
Description	Test Basic V	Vrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Team@gold	pointsystems.com				Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
Reply To	Replies@no	Idnointsystems.com				Loan Servicing	_			
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	Paramet	er		Header						
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New Wrapper Template Ready to be Saved

7. The new template is now set up and appears in the <u>Wrappers Summary</u> list view on the <u>Summary tab</u>.

Search
ne Modified
5 13:15:00 PM
7 12:38:13 PM
7 14:38:06 PM
7 09:23:26 AM

New Wrapper Template in Wrappers Summary List View

Back to Top

See also:

Delete Wrappers

You can use both tabs of the Notification Wrappers screen to easily delete wrapper templates that are no longer useful.

- Delete a wrapper using the Summary tab
- Delete a wrapper using the Detail tab

Delete a Wrapper Using the Summary tab

To delete a template using the Summary tab on the Notification Wrappers screen:

- 1. <u>Perform a search</u> for the wrapper template on the <u>Summary tab</u>.
- 2. Select a template from the <u>Wrappers Summary</u> list view.

ID			Description			[Show only Active 	and Future Wrap	oper Template
Туре			¥					Se	earch
Active	ID	Туре	Effective Date	Description			Changed By	Date/Time N	Nodified
~	1	2 - HTML Email	05/17/2016		Basic Wrapper		TURTLE	08/29/2016 13	15:00 PM
~	1	3 - Text Message	05/19/2016		Test Text Wrapper		TURTLE	04/13/2017 12	:38:13 PM
~	10001	3 - Text Message	05/19/2016		Test Text Wrapper		TURTLE	03/08/2017 14	38:06 PM
~	10002	2 - HTML Email	05/17/2016		Test Basic Wrapper		ASHLEYJ	04/21/2017 10	:36:01 AM
					Test	Copy	Delete	Create New	Save Chanc

Template Selected in Wrappers Summary List View

3. Once a wrapper template is selected, the <Delete> button becomes active.

ID			Description		Show only Active	and Future Wrapper Templa
уре			¥			Search
ctive	ID	Туре	Effective Date	Description	Changed By	Date/Time Modified
-	1	2 - HTML Email	05/17/2016	Basic Wrapper	TURTLE	08/29/2016 13:15:00 PM
~	1	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM
	10002	2 - HTML Email	05/17/2016	Test Basic Wrapper	ASHLEYJ	04/21/2017 09:23:26 AM
		1				

<Delete> Button on the Summary Tab

4. Click <Delete> to bring up the Delete Wrapper Template Question dialog.



Delete Wrapper Template Question Dialog

Click <Yes> to delete the selected template and remove it from the Wrappers Summary list view.
 Warning: Once a wrapper template is deleted, it cannot be recovered. The template is completely removed from the server.

Summa ID	עי D	etail	Description				Sho	w only Active	and Future Wra	pper Templates
Туре			~						S	earch
Active	ID	Туре	Effective Date	Description				Changed By	Date/Time I	Modified
~	1	2 - HTML Email	05/17/2016		Basic Wrapper			TURTLE	08/29/2016 13	:15:00 PM
~	1	3 - Text Message	05/19/2016		Test Text Wrapper			TURTLE	04/13/2017 12	2:38:13 PM
~	10001	3 - Text Message	05/19/2016		Test Text Wrapper			TURTLE	03/08/2017 14	:38:06 PM
					Test	Cop	у	Delete	Create New	Save Changes

Template Removed from Wrappers Summary List View

Back to Top

Delete a Wrapper Using the Detail tab

To delete a wrapper template using the Detail tab on the Notification Wrappers screen:

1. <u>Load an existing wrapper template</u> onto the <u>Detail tab</u> of the Wrappers screen.

Previous	Next									
Wrapper ID	10002 Wrapp	er Type HTML Email	 Effective Date 	05/17/	/2016 🗸					
				Origin	ators		Change History			
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Chan	nged Ti	me Changed
Send As	Team@goldpointsyste	ms.com			Loan Origination	^	ASHLEYJ	04/21/20	17	09:17:01
Reply To	Replies@goldpointsys	tems com			Loan Servicing	_	ASHLEYJ	04/21/20	17	09:23:26
Group ID	0		☑ Is Active		Internet Origination Collections	~				
	Parameter	Value	Header							
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Wrapper Template to be Deleted

- 2. Click <Delete> to delete the wrapper template displayed on the screen. Warning: Once a template is deleted, it cannot be recovered. The template is completely removed from the server.
- 3. This brings up the Delete Wrapper Template Question dialog to ensure that you purposefully want to delete the wrapper.



Delete Wrapper Template Question Dialog

 Click <Yes> to proceed to delete the wrapper template. The information for the wrapper template is removed from the Detail tab and the wrapper template no longer appears in the Wrappers Summary list view on the <u>Summary tab</u>.

ID			Description				Show only Active	and Future Wrap	pper Templates
Туре			~					Se	earch
Active	ID	Туре	Effective Date	Description			Changed By	Date/Time I	Modified
-	1	2 - HTML Email	05/17/2016		Basic Wrapper		TURTLE	08/29/2016 13	:15:00 PM
-	1	3 - Text Message	05/19/2016		Test Text Wrapper		TURTLE	04/13/2017 12	:38:13 PM
~	10001	3 - Text Message	05/19/2016		Test Text Wrapper		TURTLE	03/08/2017 14	:38:06 PM
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Wrapper Deleted from Wrappers Summary List View

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See also:

Modify or View Existing Wrappers

To modify or view an existing wrapper template using the Notification Wrappers screen:

1. Load an existing wrapper template onto the Detail tab of the Wrappers screen.

Wrapper ID	10002 Wrapper Type	e HTML Email	 Effective Date 	05/17/2	016 🗸				
				Originat	tors		Change History		
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Team@goldpointsystems.com	л			Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
Reply To	Replies@goldpointsystems.co	om			Loan Servicing	_			
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ystems/> / visiting <a htsystems.</a 	tededed" height="100%" \ http://www.timefinancing.c >> a href="http://www.goldp. com	vidth="10 :om" style	"color: #ff960a;cursor s.com" style="color: #f	pointer,text- 1960a;cursorpointer,tex	đ-

Selected Wrapper Template Loaded on Detail Tab

- 2. Once the wrapper template is loaded onto the Detail tab, you can view the wrapper template and see everything that is set up for it. You can also modify the existing template.
- 3. To modify the template, change any of the information in the fields. In our example, we changed the information in the <u>Send As</u> field. **Note:** If you change the <u>Wrapper ID</u> or <u>Wrapper Type</u> field, you will no longer be modifying the existing template but will create a new template.
- 4. Once you have made all of the modifications to the existing template, <u>render a test wrapper</u> to ensure that the header, footer, parameters, etc. of the wrapper have been set up correctly.
- 5. After you have ensured that everything is set up correctly, click <Save Changes> to save your changes to the existing wrapper template.

Summary D	Detail								
Previous	10002 Wrapper Type	HTML Email	Effective Date	05/17/	2016				
wapper to	Topoz Wapper Type			Origin	ators		Change History		
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Welcome@aoldpointsystems.co	om			Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
Peek Te	Poplice@coldpointsutome.com				Loan Servicing				
neply to	Replies@goldpointsystems.com				Internet Origination				
Group ID	0		✓ Is Active		Collections	~			
	Parameter		Header						
#COMPANY_	NAME	GOLDPoin	html						^
#CUSTOMER	R_CARE_EMAIL		<ntml> <head></head></ntml>						
#CUSTOMER	R_CARE_EMAIL_TEXT		<title>GOLDPoint Systems</title>						
#GOLD_ACC	COUNT_CENTER	https://gold	<body bgcolor="#ededed" style="mi</th><td>argin: 0;</td><td>padding: 0;"><td></td><td></td><td></td><td></td></body>						
#GOLD_ACC	COUNT_CENTER_TEXT	https:/goldp	<table b<="" border="0" cellpadding="0" th=""><td>gcolor='</td><td>#ededed" height="100%" r</td><td>width="10</td><td>0%"></td><td></td><td></td></table>	gcolor='	#ededed" height="100%" r	width="10	0%">		
#PHONE			<pre>dt> dt valign="top"></pre>						
			<table <="" style="marginger" th="" width="600"><td>n: auto;"</td><td>></td><td></td><td></td><td></td><td></td></table>	n: auto;"	>				
			Faster						
			chr /schr /s						
			Thank you for choosing	<a href='</td> <td>"http://www.timefinancing.o</td> <td>com" style</td> <td>="color: #ff960a;curso</td> <td>r:pointer;text-</td> <td>0</td>	"http://www.timefinancing.o	com" style	="color: #ff960a;curso	r:pointer;text-	0
			decoration:underline">GOLDPoint S 	ystems<	/a>				
			Kindest Regards, 						
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			Find your local branch by decoration:underline">www.goldpoir	visiting	<a href="http://www.goldp s.com	ointsysten	ns.com" style="color: #	ff960a;cursor:pointer;tex	d-
<		>	5/02						~
Add Paramet	ter Delete Parameter								
						Teat	Conv	Delete Crost	o New Sava Channe
						rest	Сору	Lieat	Save change

Modified Wrapper Template on Detail Tab

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See also:

Render Test Wrappers

You can use the Notification Wrappers screen to render a test wrapper for a new or existing template.

- Render a test wrapper for a new template
- Render a test wrapper for an existing template

Render a Test Wrapper for a New Template

To render a test wrapper for a new template on the Notification Wrappers screen:

- 1. <u>Create a new wrapper</u>.
- 2. When you have entered information into the required <u>Wrapper ID</u>, <u>Wrapper Type</u>, and <u>Effective Date</u> fields for your new wrapper template, the <Test> button is enabled which allows you to render a test wrapper.

Summary D	Vetail Next									
Wrapper ID	10002	Wrapper Type	HTML Email	 Effective Date 	05/17/	2016 🗸				
					Origin	ators		Change History		
Description	Test Basic V	Vrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Team@gold	pointsystems.com				Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
Reply To	Replies@no	Idpointsystems com				Loan Servicing	_			
Crew ID	nopilot C ge			I have		Internet Origination				
Group ID	U			Is Active		Collections	~			
	Paramet	er		Header						
#COMPANY_	NAME		GOLDPoin	html						^
#CUSTOMER	CARE_EMAIL			<head></head>						
#CUSTOMER	CARE_EMAIL	TEXT		<title>GOLDPoint Systems</title>						
#GOLD_ACC	OUNT_CENTE	R	https://gold	<body bgcolor="#ededed" style="m</th><td>argin: 0;</td><th>padding: 0;"></body>						
#GOLD_ACC	OUNT_CENTE	R_TEXT	https:/goldp	<table border="0" cellpadding="0" th="" <=""><td>acolor="</td><th>"#ededed" height="100%"</th><td>width="10</td><td>0%"></td><td></td><td></td></table>	acolor="	"#ededed" height="100%"	width="10	0%">		
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										*
				Footer						
			_	<pre> Thank you for choosing decoration:underline">GOLDPoint S</pre>	<a href="<br">Systems<	"http://www.timefinancing.o /a>	com" style	="color: #ff960a;cursor	r:pointer;text-	^
				 kindest Regards, GOLDPoint Systems 	\$					
				Hind your local branch b decoration:underline">www.goldpoi	y visiting ntsystem	<a href="http://www.goldp s.com	ointsystem	ns.com" style="color: #	1960a;cursor:pointer;tex	đ-
<			>							~
Add Paramet	ter Delete P	arameter								
							Test	Сору	Delete Creat	e New Save Changes

New Wrapper Template Ready to Test

- 3. Enter all of the information for your new wrapper template into the available fields.
- 4. Click <Test> to render a test wrapper.

_ □	×
	^
GOLDPOINT	
Thank you for choosing GOLDPoint Systems	
Kindest Regards,	
Find your local branch by visiting <u>www.goldpointsystems.com</u>	
GOLDPoint Systems takes identity theft seriously. If you believe someone is using your email address or this email was sent in error, please contact a customer service representative at 1-888-888-8888. GOLDPoint Systems 100 W. 100E. Suite 100	
Provo, UT 84601	*
0	К

Test Wrapper

- 5. Ensure that the header, footer, etc. of the new wrapper have been set up correctly.
- 6. Click <OK> to return to the Wrappers screen.
- After you have ensured that everything is set up correctly, click <Save Changes> to activate and save the new wrapper template. The new wrapper will be activated on the system and added to the <u>Summary tab</u>.

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Render a Test Wrapper for an Existing Template

To render a test wrapper for an existing template on the Notification Wrappers screen:

- 1. <u>Perform a search</u> for the wrapper template on the <u>Summary tab</u> of the Wrappers screen.
- 2. Select a template from the <u>Wrappers Summary</u> list view.

Search
Date/Time Modified
/8/29/2016 13:15:00 PM
4/13/2017 12:38:13 PM
/3/08/2017 14:38:06 PM
4/21/2017 09:23:26 AM

Wrappers Template Selected in Wrapper Summary List View

3. Click <Test> on the Summary tab or double-click on the template to load the selected template on the Detail tab. If you click <Test> on the Summary tab, skip to step 5.

Summary D	etai								
Previous	Next								
Wrapper ID	10002 Wrap	per Type HTML Email	✓ Effective Date	05/17/	2016 🗸				
				Origin	ators		Change History		
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Team@goldpointsyste	ems.com			Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
Reply To	Benlies@goldpointsvs	stems com			Loan Servicing	_	ASHLEYJ	04/21/2017	09:23:26
				님	Internet Origination				
Group ID	0		Is Active		Collections	~			
	Parameter	Value	Header						
#COMPANY_I	NAME	GOLDPoint Systems	html						^
#CUSTOMER	_CARE_EMAIL		<pre><head></head></pre>						
#CUSTOMER	_CARE_EMAIL_TEXT		<title>GOLDPoint Systems</title>						
#GOLD_ACCO	OUNT_CENTER	https://goldpoint.secure	<body bgcolor="#ededed" style="ma</th><td>argin: 0;</td><td>padding: 0;"><td></td><td></td><td></td><td></td></body>						
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			<table <="" style="marginger" th="" width="600"><td>n: auto;"</td><td>></td><td></td><td></td><td></td><td></td></table>	n: auto;"	>				
			Footer						
			dor/>dor/>						^
			Thank you for choosing	<a href="</td"><td>"http://www.timefinancing.</td><td>com" style</td><td>="color: #ff960a;cursor</td><td>r:pointer;text-</td><td></td>	"http://www.timefinancing.	com" style	="color: #ff960a;cursor	r:pointer;text-	
			decoration:undenine >GOLDFoint 3 dbr />dbr />	ystems<	/a>				
			Kindest Regards, dr />						
			dor/>dor/>	5. 	1 5 10 11 11				
			decoration:underline">www.goldpoir	ntsystem	<a nref="nttp://www.goidp<br">s.com	ointsystem	is.com style= color: #	п 960a;cursor:pointer;tex	α-
<		>							~
		1							
Add Paramet	er Delete Parameter								
						Test	Conv	Delete Creat	te New Save Changes
				_			0007		ouro changea

Existing Wrapper Template Ready to Test

- 4. At this point you can change any of the information in the fields or you can leave the wrapper template as it is. **Note:** If you change the <u>Wrapper ID</u> or <u>Wrapper Type</u> field, you will no longer be modifying the existing wrapper template but will create a new template.
- 5. Once the existing template is ready to be tested, click <Test> to render a test wrapper.

	×
	^
GOLDPOINT	
Thank you for choosing GOLDPoint Systems	
Kindest Regards,	
Find your local branch by visiting <u>www.goldpointsystems.com</u>	
GOLDPoint Systems takes identity theft seriously. If you believe someone is using your email address or this email was sent in error, please contact a customer service representative at 1-888-888-8888. GOLDPoint Systems	
100 W. 100E. Suite 100 Provo, UT 84601	~
ок	

Test Wrapper

- 6. Ensure that the header, footer, etc. of the wrapper have been set up correctly.
- 7. Click <OK> to return to the Detail tab.
- 8. After you have ensured that everything is set up correctly, click <Save Changes> to save your changes to the existing template.

Bac	k	to	Т	o	b
Duc	r.	ιU			Μ

See also:

Search for Wrapper

To search for wrapper templates using the Notification Wrappers screen:

- 1. Check or uncheck the <u>Show Only Active and Future Wrapper Templates</u> field on the <u>Summary tab</u>, depending on whether or not you want to search for inactive templates.
 - Check the **Show Only Active and Future Wrapper Templates** field to search only templates that are active or set to become active.
 - Uncheck the **Show Only Active and Future Wrapper Templates** field to search all of the templates, including inactive templates.

ID	[Description	Show only Active and Future Wrapper Templates
Туре	۷		Search

Search Parameter Fields

2. Enter values in the <u>search parameter fields</u> to narrow your search. For example, if you want to search for all of your test templates, you would type "Test" in the <u>Description</u> field.

ID			Description	Test	~	Show only Active	and Future Wrapper Templat
Туре			~				Search
Active	ID	Туре	Effective Date	Description		Changed By	Date/Time Modified
~	1	2 - HTML Email	05/17/2016	Basic Wrapper		TURTLE	08/29/2016 13:15:00 PM
1	1	3 - Text Message	05/19/2016	Test Text Wrapper		TURTLE	04/13/2017 12:38:13 PM
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper		TURTLE	03/08/2017 14:38:06 PM
~	10002	2 - HTML Email	05/17/2016	Test Basic Wrapper		ASHLEYJ	04/21/2017 11:07:40 AM

"Consumer" Entered in the Search Parameter Fields

 Click <Search> to search for all templates that match the data entered in the search parameters. In our example, the system will search for all templates that have "Test" in the description.

Summary Detai]			
ID	Description	Test	Show	only Active and Future Wrapper Templates
Туре	~			Search
		De uf e une luc e e	N = = = =	

Performing a Search

4. After the system performs a search, the results are displayed in the <u>Wrappers Summary</u> list view. In our example, the three test wrapper templates that are set up are displayed in the results.

Туре			Description✓	Test	Show only Activ	ve and Future Wrapper Templa Search
Active	ID	Туре	Effective Date	Description	Changed E	By Date/Time Modified
 Image: A start of the start of	1	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM
~	10002	2 - HTML Email	05/17/2016	Test Basic Wrapper	ASHLEYJ	04/21/2017 11:07:40 AM

Search Results Displayed in Wrappers Summary List View

5. To perform more searches, repeaeat the steps above. To perform other functions, see our other <u>How</u> <u>To Items</u>.

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See also:

Upload a Wrapper

You can use the Notification Wrappers screen to upload a wrapper onto the <u>Detail tab</u> of the Wrappers screen.

- Upload a wrapper using the Detail tab
- Upload a wrapper using the Summary tab

Upload a Wrapper Using the Detail Tab

To upload a wrapper using the Detail tab of the Notification Wrappers screen:

1. Click on the <Previous> or <Next> button on the Detail tab to bring up the wrapper template that you want to load. **Note:** If there isn't a wrapper loaded on the the Detail Tab already, the system brings up the first wrapper when you first click the <Previous> or <Next> button.

			Originators Change History	
Description	Basic Wrapper		Use Originator Changed By Date Changed Time Changed	Г
Send As			Loan Origination A JONA 05/17/2016 12:04:49	^
			Loan Servicing JONA 05/17/2016 12:50:11	
Reply To			Internet Origination JONA 05/17/2016 12:54:55	
iroup ID	0		✓ Is Active Collections ✓ JONA 05/17/2016 12:56:22	~
	Parameter	Value	Header	
COMPANY_	NAME	GOLDPoint Systems	<idoctype html=""></idoctype>	
CUSTOMER	CARE_EMAIL		<pre><nmi></nmi></pre>	
CUSTOMER	CARE_EMAIL_TEXT		<pre><itle>GOLDPoint Systems</itle></pre>	
GOLD_ACC	OUNT_CENTER	https://goldpoint.secure		1
GOLD_ACC	OUNT_CENTER_TEXT	https:/goldpoint.secure	dable calleadding, "0" berder, "0" becaler, "#ededed" beidt, "100%" with, "100%"	
PHONE				
			Footer	
			dbr/>dbr/>	
			Thank you for choosing <a href="http://www.timetinancing.com" style="color: ##1960a;cursor;pointer;text-
decoration:underline">GOLDPoint Systems	
			dor/>dor/>	
			GOLDPoint Systems 	
			dpr/>dpr/>	
			Hind your local branch by visiting http://www.goldpointsystems.com style= color: #π360a;cursor:pointer.text- decoration underline">www.goldpointsystems.com	

Detail Tab - Click <Previous> & <Next> Buttons

2. Click on the <Previous> or <Next> button until the wrapper that you want is loaded onto the Detail tab.

/rapper ID	10002 Wrapp	er Type HTML Email	 Effective Date 	05/17/	2016				
,									
				Origin	ators	_	Change History		
escription	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed
end As	Team@goldpointsyster	ms.com			Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01
eply To	Replies@goldpointsyst	ems.com		님	Loan Servicing	_	ASHLEYJ	04/21/2017	09:23:26
roup ID	0		✓ Is Active	님	Collections				
Pa	irameter	Value	Header						
COMPANY_NAI	ME	GOLDPoint Systems	<html></html>						
CUSTOMER_C	ARE_EMAIL	-	<head> ditle>GOLDPoint_Systems</head>						
COSTOMER_C	ARE_EMAIL_TEXT	Teller Washington and							
GOLD_ACCOU	INT_CENTER TEVT	https://goldpoint.secure	<body bgcolor="#ededed" style="ma</th><td>argin: 0; (</td><th>padding: 0;"></body>						
PHONE	INT_CENTER_TEXT	https:/goidpoint.secure	<table b<="" border="0" cellpadding="0" th=""><td>gcolor="</td><th>#ededed" height="100%" v</th><td>width="10</td><td>0%"></td><td></td><td></td></table>	gcolor="	#ededed" height="100%" v	width="10	0%">		
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			<table <="" style="margir</th><td>n: auto;" td="" width="600"><th>></th><td></td><td></td><td></td><td></td></table>	>					
			Footer						
			dor />dor />						
			decoration:underline">GOLDPoint S	<a href="`<br">vstems<	"http://www.timefinancing.c /a>	com" style	="color: #1960a;curso	r:pointer;text-	
			dor />dor />						
			GOLDPoint Systems dr/	>					
			<pre> dor /> dor /> Find your local branch by</pre>	vieiting	<= bref="bttp://www.goldp.	nintevetam	e com" etile="color: #	F960a cureor pointerter	
			decoration:underline">www.goldpoir	ntsystems	s.com	Jintayatem	a.com alyie- color. H	1300a,cuisoi pointer,tex	-

Wrapper Template Loaded onto Detail Tab

3. Once the template is loaded onto the Detail tab, you can <u>modify the template</u>, <u>render a test wrapper</u>, and ensure that the header, footer, parameters, etc. of the wrapper have been set up correctly. If you make any changes to the wrapper template, remember to click <Save Changes> to save the changes you make.

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Upload a Wrapper Using the Summary Tab

To upload a wrapper template on the Detail tab using the Notification Wrappers screen:

- 1. <u>Perform a search</u> for the wrapper template on the <u>Summary tab</u>.
- 2. Select a template from the <u>Wrappers Summary</u> list view.

ID	_		Description		Show only Active	and Future Wrapper Templa
Гуре			~			Search
Active	ID	Туре	Effective Date	Description	Changed By	Date/Time Modified
~	1	2 - HTML Email	05/17/2016	Basic Wrapper	TURTLE	08/29/2016 13:15:00 PM
~	1	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	04/13/2017 12:38:13 PM
~	10001	3 - Text Message	05/19/2016	Test Text Wrapper	TURTLE	03/08/2017 14:38:06 PM
	10002	2 - HTML Email	05/17/2016	Test Basic Wrapper	ASHLEYJ	04/21/2017 09:23:26 AM

Template Selected in Wrappers Summary List View

3. Double-click on the template to load the selected template on the <u>Detail tab</u>.

Wrapper ID	10002 Wrapp	er Type HTML Email	✓ Effective Date	05/17/2016	5 🗸				
				Originators	-		Change History		
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed
Send As	Team@goldpointsyste	ms.com		Lo	an Origination	^	ASHLEYJ	04/21/2017	09:17:01
Reply To	Replies@goldpointsys	tems.com			an Servicing		ASHLEYJ	04/21/2017	09:23:26
Group ID	0		✓ Is Active		llections	~			
	Parameter	Value	Header						
#COMPANY_	NAME	GOLDPoint Systems	html						
CUSTOMER	R_CARE_EMAIL		<html> <head></head></html>						
CUSTOMER	R_CARE_EMAIL_TEXT	0	<title>GOLDPoint Systems</title>						
GOLD_ACC	COUNT_CENTER	https://goldpoint.secure	c/nead>						
			Cody bycolor = Hededed Style = III	argin: u; padd	ing: u; >				
#GOLD_ACC	COUNT_CENTER_TEXT	https:/goldpoint.secure	<pre>cbody bgcolor #ededed style= in. </pre>	argin: u; padd	ang: v, >	width="10	N%">		
#GOLD_ACC #PHONE	COUNT_CENTER_TEXT	https:/goldpoint.secure	<pre><table b<="" border="0" cellpadding="0" td=""><td>argin: u; padd gcolor="#ede</td><td>eded" height="100%" ·</td><td>width="10</td><td>0%"></td><td></td><td></td></table></pre>	argin: u; padd gcolor="#ede	eded" height="100%" ·	width="10	0%">		
#GOLD_ACC #PHONE	COUNT_CENTER_TEXT	https:/goldpoint.secure	<pre>cbdy bgcdior #deced syle in dable cellpadding="0" border="0" b dr> dt valign="top"> dt valign="top"> dt valign="top"></pre>	gcolor="#ede a: auto;">	ang:u, > eded" height="100%"	width="10	0%">		
#GOLD_ACC #PHONE	COUNT_CENTER_TEXT	https:/goldpoint.secure	tody good = wedded syle= m table cellpadding="0" border="0" b tr> td valign="top"> table width="600" style="marging Footer	irgin: u; padd gcolor="#edi n: auto;">	eded" height="100%" ·	width="10	0%">		

Selected Template Loaded on the Detail Tab

4. Once the template is loaded onto the Detail tab, you can <u>modify the template</u>, <u>render a test wrapper</u>, and ensure that the header, footer, parameters, etc. of the wrapper have been set up correctly. If you make any changes to the wrapper template, remember to click <Save Changes> to save the changes you make.

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See also: Detail Tab

Use Parameters

You can use the Notification Wrappers screen to modify and use parameters on the <u>Detail tab</u> of the Wrappers screen.

- Add a parameter
- <u>Delete a parameter</u>

Using the <u>Parameter</u> list view you can add new parameters and determine their value on the <u>Detail tab</u> of the Notification Wrappers screen. The <u><Add Parameter></u> and <u><Delete Parameter></u> buttons are used to modify the **Parameter** list view. Parameters can be used in wrappers and in the body of emails. The default parameters are displayed in the **Parameter** list view. The program substitutes a specified parameter whenever <parm:#PARAMETER> is entered in the code where PARAMETER is the parameter name.

Parameters are generally your institution's most commonly used fields. These fields may need to be changed at random times. Once a parameter is changed, the changes take affect in all wrappers and emails where the parameter is used the next day. This enables your institution to make changes across the Notification System quickly and seamlessly.

All default parameters must start with a hash tag (#). This differentiates the parameters from regular HTML parameters. If the parameter has multiple words, these words must be divided by an underscore (_). For example, to insert the marketing URL for your institution into the header your wrapper, you would type the following into the Header field:

• [parm:#MARKETING_URL_TEXT]

Note: A work order is required for additional default parameters (strictly for tracking purposes).

		v U	Effective Date		v 🚺				
				Originat	ors		Change History		
escription				Use	Originator		Changed By	Date Changed	Time Changed
					Loan Origination	^			
					Loan Servicing				
eply To					Internet Origination				
roup ID			✓ Is Active		Collections	~			
Parameter	Value	Header							
COMPANY_NAME									
CUSTOMER_CARE_EMAIL									
CUSTOMER_CARE_EMAIL_TEXT									
GOLD_ACCOUNT_CENTER									
GOLD_ACCOUNT_CENTER_TEXT		Footer							
PHONE									
Add Demonster									
Add Parameter Delete Parameter									

Back to Top

Add a Parameter

To add a parameter using the Detail tab of the Notification Wrappers screen:

1. <u>Upload a wrapper</u> onto the Detail tab or <u>create</u> and save a new wrapper.

Wrapper ID 10002 Wrapper Type HTML Email		V Effective Date	✓ Effective Date 05/17/2016 √									
				Origin	ators		Change History					
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed			
Send As	Welcome@goldpoints	ystems.com			Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01	^		
Reply To	Replies@goldpointsvs	tems com			Loan Servicing	_	ASHLEYJ	04/21/2017	09:23:26			
					Internet Origination		ASHLEYJ	04/21/2017	09:39:32	-1		
Group ID	0		Is Active		Collections	~	ASHLEYJ	04/21/201/	10:36:01	Y		
	Parameter	Value	Header									
#COMPANY_	NAME	GOLDPoint Systems	html							^		
#CUSTOMEF	CARE_EMAIL		<head></head>									
#CUSTOMER_CARE_EMAIL_TEXT			<title>GOLDPoint Systems</title>									
#GOLD_ACCOUNT_CENTER https://goldpoint.secure		<body bgcolor="#ededed" style="ma</td><td>rgin: 0; p</td><td>badding: 0;"></body>										
#GOLD_ACC	OUNT_CENTER_TEXT	https:/goldpoint.secure	<table b<="" border="0" cellpadding="0" td=""><td>color="</td><td>#ededed" height="100%" v</td><td>idth="10</td><td>0%"></td><td></td><td></td><td></td></table>	color="	#ededed" height="100%" v	idth="10	0%">					
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			<table ;<="" style="margin</td><td>: auto;" td="" width="600"><td>></td><td></td><td></td><td></td><td></td><td></td></table>	>								
			Footer									
			 	a href=" stems <br visiting tsystems	http://www.timefinancing.c /a> <a href="http://www.goldpc
.com</td><td>om" style<="" td=""><td>="color: #ff960a;cursc s.com" style="color: #</td><td>rpointertext- #f960a.cursor.pointert</td><td>ext-</td><td></td>	="color: #ff960a;cursc s.com" style="color: #	rpointertext- #f960a.cursor.pointert	ext-				
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Wrapper Uploaded onto the Detail Tab

2. Click on the <Add Parameter> button to open up a new line in the <u>Parameter</u> list view.

Para	ameter	Value
#COMPANY_NAM	E	GOLDPoint Systems
#CUSTOMER_CA	RE_EMAIL	-
CUSTOMER_CA	RE_EMAIL_TEXT	-
#GOLD_ACCOUN	IT_CENTER	https://goldpoint.secur
#GOLD_ACCOUN	IT_CENTER_TEXT	https:/goldpoint.secure
#PHONE		
<		>
Add Parameter	Delete Parameter	

3. Enter the new parameter in the Parameter column and the value for that parameter in the Value column. **Note:** Make sure to begin your parameter with a hashtag (#).

Parameter	Value
#COMPANY_NAME	GOLDPoint Systems
#CUSTOMER_CARE_EMAIL	
#CUSTOMER_CARE_EMAIL_TEXT	
#GOLD_ACCOUNT_CENTER	https://goldpoint.secure
#GOLD_ACCOUNT_CENTER_TEXT	https:/goldpoint.secure
#PHONE	
#FAX	1-888-888-8888
<	>
Add Parameter Delete Parameter	

New Parameter Added

4. You can now begin to use the new parameter in your wrapper templates.

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Delete a Parameter

To delete a parameter using the Detail tab of the Notification Wrappers screen:

1. <u>Upload a wrapper</u> onto the Detail tab or <u>create</u> and save a new wrapper.

Wrapper ID	10002 Wrapp	er Type HTML Email	V Effective Date	05/17/	2016 🗸					
				Origina	ators		Change History			
Description	Test Basic Wrapper			Use	Originator		Changed By	Date Changed	Time Changed	Π
Send As	Welcome@goldpoints	vstems.com			Loan Origination	^	ASHLEYJ	04/21/2017	09:17:01	^
Danhi Ta	Paulias Quelde sintered				Loan Servicing		ASHLEYJ	04/21/2017	09:23:26	
Reply To	Replies@goldpointsys	tems.com			Internet Origination		ASHLEYJ	04/21/2017	09:39:32	
Group ID	0		✓ Is Active		Collections	~	ASHLEYJ	04/21/2017	10:36:01	~
	Parameter	Value	Header							
#COMPANY	NAME	GOLDPoint Systems	html							^
#CUSTOMER	R_CARE_EMAIL		<html> <head></head></html>							
#CUSTOMER_CARE_EMAIL_TEXT			<title>GOLDPoint Systems</title>							
#GOLD_ACC	COUNT_CENTER	https://goldpoint.secure	<body bgcolor="#ededed" style="ma</td><td>irgin: 0; p</td><th>adding: 0;"><td></td><th></th><td></td><td></td><td>_</td></body>					_		
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#PHONE			<pre>dt> dt></pre>							
			<to valign="top"> <table style="margin</td><td>: auto;" width="600"></table></to>	>						
										~
			Footer							
			<pre></pre>	a bref="	http://www.timefinancing.c	om" style	="color: #ff960a.curso	r pointertext-		^
			decoration:underline">GOLDPoint Sy	stems </td <th>a></th> <td>oni otylo</td> <th></th> <td>.pointoi,toit</td> <td></td> <td></td>	a>	oni otylo		.pointoi,toit		
			 kindest Regards. 							
			GOLDPoint Systems 	>						
			Find your local branch by	visiting <	a href="http://www.goldpo	intsystem	s.com" style="color: #	ff960a;cursor:pointer;t	ext-	
			decoration:underline">www.goldpoin	tsystems	.com					
<		>								~

Wrapper Uploaded onto the Detail Tab

- 2. Select the parameter that you want to delete in the <u>Parameter</u> list view. **Note:** You *cannot* delete default parameters.
- 3. Click <Delete Parameter>.

Parameter	Value
#COMPANY_NAME	GOLDPoint Systems
#CUSTOMER_CARE_EMAIL	
#CUSTOMER_CARE_EMAIL_TE	TX
#GOLD_ACCOUNT_CENTER	https://goldpoint.secure
#GOLD_ACCOUNT_CENTER_T	EXT https:/goldpoint.secure
#PHONE	
#FAX	1-888-888-8888
<	>
Add Parameter Delete Param	eter
Select Paramet	er to Delete

4. The parameter is deleted and removed from the **Parameter** list view.

Parameter	Value
#COMPANY_NAME	GOLDPoint Systems
#CUSTOMER_CARE_EMAIL	
#CUSTOMER_CARE_EMAIL_TEXT	
#GOLD_ACCOUNT_CENTER	https://goldpoint.secure
#GOLD_ACCOUNT_CENTER_TEXT	https:/goldpoint.secure
#PHONE	
	>

Parameter Deleted

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See also:

