



Template Field Trigger

POWERTOOLS OPTIMIZED

Challenge

Loan Templates that set field values, closing costs, document placeholders provide the user with an easy way to update multiple areas of the loan with a single selection. Changes to loan terms or program can require the user to apply a new loan template. This requires the user to manually browse the list of available templates and apply the correct one.

Solution

The Template Field Trigger PowerTool assists the Encompass Administrator to create a Field Trigger rule that will automatically apply the correct template based on changes to the loan. The resulting Trigger can be modified and filtered so that the Template is applied correctly.

Value

By applying the templates automatically when values change in the loan, it eliminates the user having to remember and manually apply a different template. It also ensures that the correct template is selected based on what was changed in the loan.