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Auto Print to eFolder

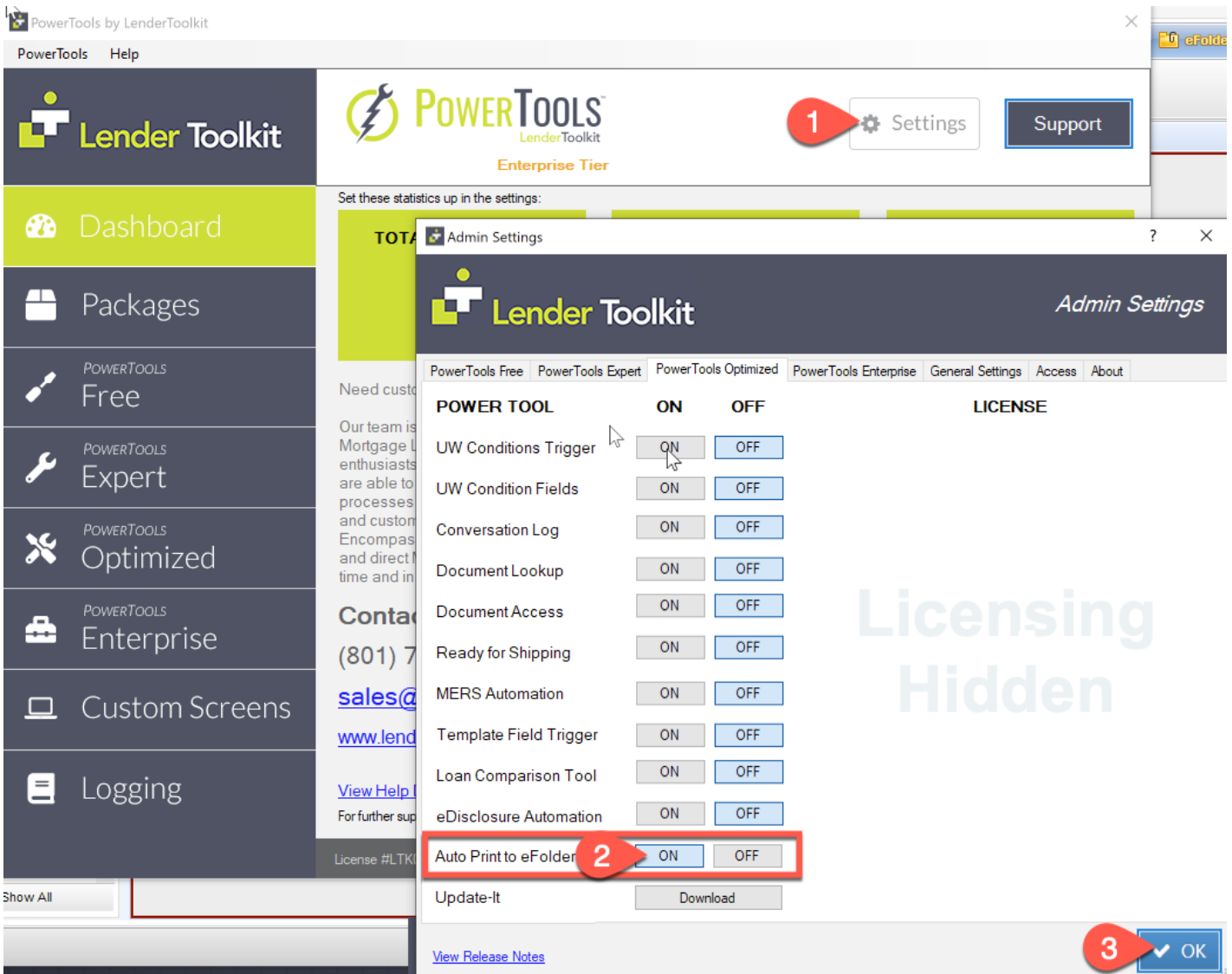
Purpose:

The Auto Print to eFolder plugin lets lenders trigger Encompass print documents (standard or custom) to print automatically using business rules. To configure the plugin, the lender generates the business rule code on the provided input form and copy/paste it to a business rule field trigger.

Activation:

1. Open "LTK PowerTools..." from the Encompass menu and click the "Settings" button on the top right
2. Find the "Auto Print to eFolder" line item and click the "ON" button. A popup will appear asking you if you would like to install the plugin's EMPKG package. Click "Yes" to confirm. Once complete, another popup will appear telling you to restart Encompass. Click the "Ok" button in that popup too.
3. Click the "OK" button on the bottom right to close PowerTools.
4. Restart Encompass for the plugin to take effect.

Screenshot #1:



Instructions for Use

1. For configuring a new auto print rule, login to Encompass as a super admin and open any loan file. Super admin access is needed for configuration because you will need to add and save a new business rule field trigger.
2. Navigate to the "LTK - Auto Print to eFolder" input form and select the name of the form you want to print to the eFolder from the list of forms.
3. Define the eFolder placeholder you want the form to be saved under.
4. Copy the generated code to the clipboard by selecting the code and pressing CTRL+C or Edit->Copy.
5. Open the Encompass settings and open Business Rules->Field Triggers
6. Add or edit a new business rule field trigger.
7. Inside the Add/Edit Field Event popup, input the field ID you want to set as the trigger to automatically print your form.

8. In the "Activation Type" dropdown, choose "Run advanced code" as the action type and paste the code into the textarea. The code output should still be accessible from your clipboard. to a business rule field trigger as advanced code.
9. Click OK to close the business rule. In the popup underneath, click the "Save" button to close the Add/Edit trigger popup. The Encompass settings window should be the only window left open (besides the main Encompass window). Select your business rule and click the Activate button to ensure it is active. The forms will not print unless the business rule is active.
10. To test the form print functionality, check the "CHECK THIS BOX TO RUN" Checkbox.

NOTE: The input form is only for testing the automatic print feature and generating business rule code only. The input form **does not** have to be filled out for the Auto Print to eFolder functionality to work. You **MUST** copy/paste the output business rule code into the "Run advanced code" of a business rule field trigger for this tool to work in production. Once the business rule has been configured, normal users (not just super admins) will have that form automatically printed for them if the trigger field of the business is triggered. The business rule code must be in place and active for the forms to automatically print. You may have more than one business rule printing multiple forms. Please test and validate all business rule code before implementing.

Screenshot #2:

Alerts & Messages Log

ECOA Action Needed 12/18/20

LTK - Auto Print to eFolder

AUTO PRINT TO EFOLDER

1. SELECT A FORM: 2
2. SELECT PLACEHOLDER: 3
3. COPY/PASTE TO BUSINESS RULE FIELD TRIGGER ADVANCED CODE:

*** COPY AND PASTE THIS CODE TO THE ADVANCED CODE OF A BUSINESS RULE FIELD TRIGGER:**

```
IgnoreValidationErrors

* The name of the form you want to print:
[CX.AUTOPRINT.FORMNAME] = "1003 - All Required Pages"

* The name of the placeholder you want the form listed under:
[CX.AUTOPRINT.PLACEHOLDER] = "1003 - URLA"

* Triggers the form to start printing to the eFolder:
* Note: this will reset upon completion:
[CX.AUTOPRINT.START] = "X"
```

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CHECK THIS BOX TO RUN

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LTK-AutoPrinter v21.6.2.0

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INSTRUCTIONS:

1. Select the name of the form you want to print to the eFolder from the list of forms.
2. Define the eFolder placeholder you want the form to be saved under.
3. Copy and paste the generated code to business rule field trigger as advanced code. The trigger field in the business rule should be the field you want the form to be triggered to print off of when it gets populated.
4. To test the form print functionality, check the "CHECK THIS BOX TO RUN" Checkbox.

NOTES: This form is only for testing and generating business rule code only and does not have to be filled out for the LTK AutoPrint functionality to work. Only the business rule code must be in place and active for the forms to automatically print. You may have more than one business rule printing multiple forms. Please test and validate all business rule code before implementing.

Forms Tools Services

- HUD 1003 Addendum
- HUD-56001 Property Improvement
- HUD-928005b Conditional Commitment
- HUD-92900LT FHA Loan Transmittal
- Income Worksheet - LTK
- Jumpstart Version Information
- Loan Estimate Page 1
- Loan Estimate Page 2
- Loan Estimate Page 3
- Loan Submission
- LTK - Audit Log
- LTK - Auto Print to eFolder 2
- LTK - DLL Manager
- LTK - ECOA Action
- LTK - ECOA Action - TESTING
- LTK - FEMA Disaster Search

Show in Alpha Order Show All

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Screenshot #3:

- Settings Overview
- Company/User Setup
- External Company Setup
- Loan Setup
- eFolder Setup
- Docs Setup
- Secondary Setup
- Contact Setup
- Loan Templates
- Tables and Fees
- Business Rules
 - Loan Folder Business Rule
 - Milestone Completion
 - Field Data Entry
 - Field Triggers
 - Automated Conditions
 - Automated Enhanced Condi
 - Persona Access to Fields
 - Persona Access to Loans
 - Role Access to Documents
 - Input Form List
 - Loan Form Printing
 - Print Auto Selection
 - Appraisal Order Managemer
 - LO Compensation Rule
 - Collateral Tracking
- Dynamic Data Management
- System Administration
- Additional Services
- Personal Settings

Field Triggers

Create and manage rules that execute custom actions when the value in a field is changed.

Tri Add/Edit Trigger

1. Create a Trigger Name
Auto Print 1003 When Borrower Name is Set

2. Select all Channels this rule applies to
- No channel selected
 - Banked - Retail
 - Banked - Wholesale
 - Brokered
 - Correspondent

3. Is there a condition for this trigger

No - Always apply this rule
 Yes - Apply this rule only if

_____ is _____

4. Add and apply field events

Type	Activation	Activation Source
Field	Any change in field value	4000 (Borrower First Name)

[Learn more...](#)

Notes/Comments

Add/Edit Field Event

Activation

Activation Type: Field value modified

Trigger Field ID: 4000

Description: Borrower First Name

Criterion: Any change in field value

Action

Action Type: Run advanced code

Advanced Code:
IgnoreValidationErrors
' The name of the form you want to print:
[CX.AUTOPRINT.FORMNAME] = "1003 - All Required Pages"
' The name of the placeholder you want the form listed under:
[CX.AUTOPRINT.PLACEHOLDER] = "1003 - URLA"
Triggers the form to start printing to the eFolder.
' Note: this will reset upon completion:

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