Document Email Notifications and Live Templates

For Preferred Search Vendors we now have the ability to take additional actions automatically when the search comes into TrackerPRO from the Vendor. In addition to automatically storing the document in the File Cabinet and Marking the Document Received, we now have the ability to Automatically Email the document, as well as automatically add it to the Title Report as part of a Live Template.

For example, Health Department Searches which always come in after the Title Report is finished can be automatically emailed to the appropriate parties, and added to the complete Title Report. With the power of these new features, there is a level of configuration to be done in order to utilize this for your organization. This will explain these new features.

When a document comes in from a Preferred Search Vendor we have always and will continue to:

1) Add the document to the File Cabinet for that file
2) Mark the document Received in the Vendor Services Tracking System
3) Notify whomever ordered the Search

Now your organization has the ability to have two new events which you can activate from within TrackerPRO:

4) Email the document to various parties
5) Add the document to the Title Report as part of a Live Template

You can configure the Emailing feature from within Company Setup in the Vendor Services tab by clicking on the Email Notification Rules button. You can configure the Live Templates from the States/Underwriters tab by clicking the Edit Report Templates button.
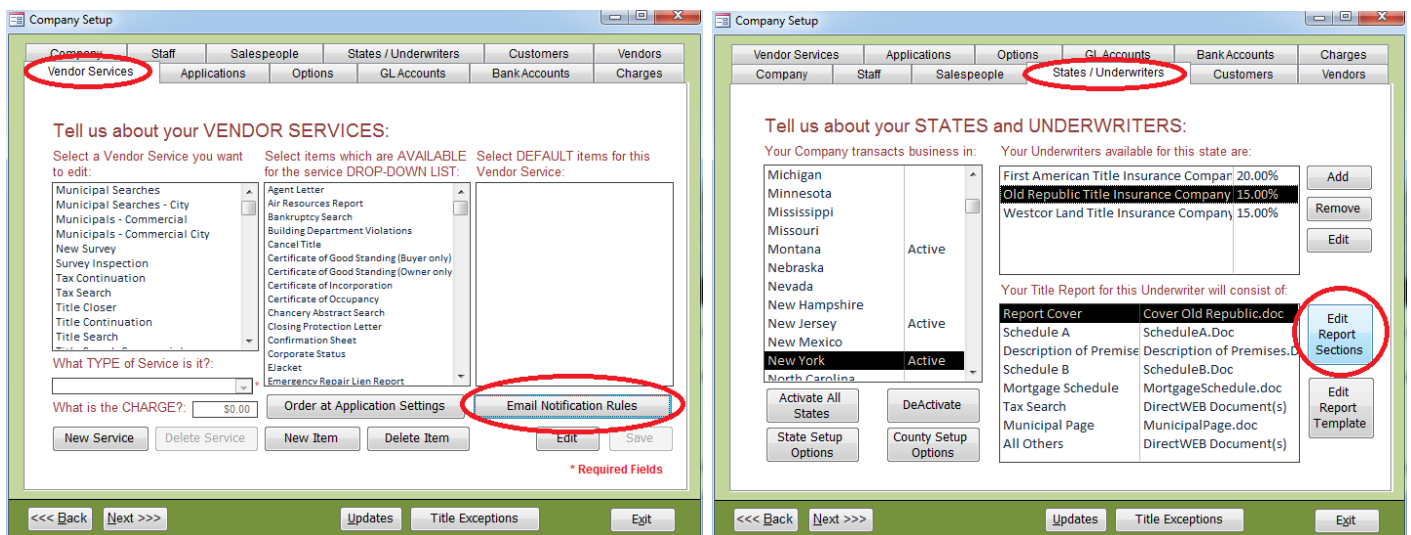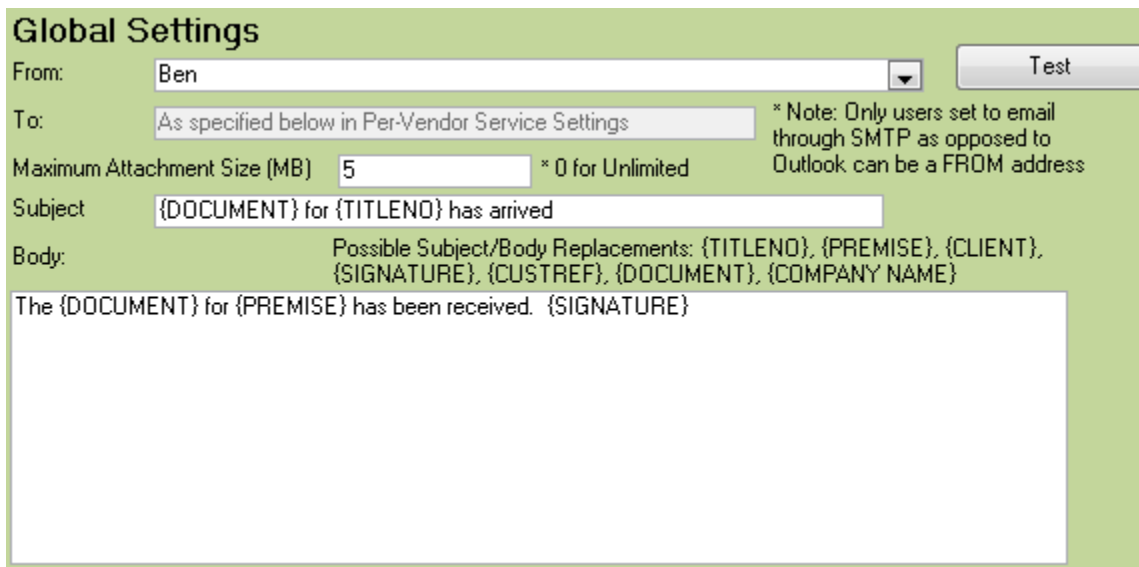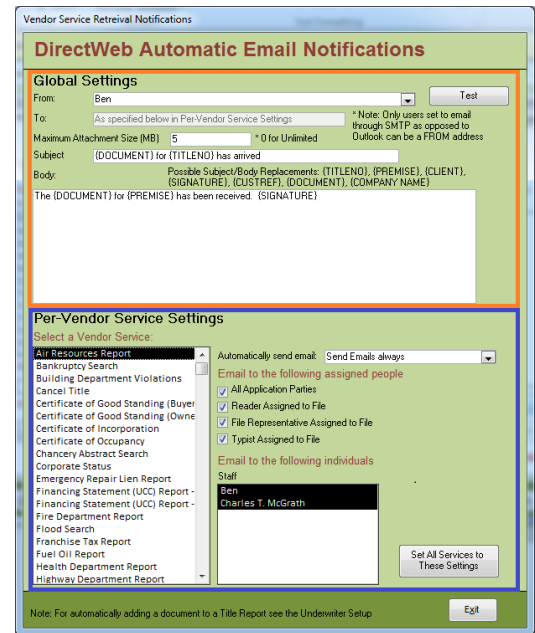
Document Email Notifications

The screen to configure the Email Notifications is split into two sections. The following will describe the sections and the fields, since their purpose and operation might not be immediately apparent.

The top portion (In Orange) which including fields like FROM, SUBJECT, BODY are global settings for all of these Email Notifications to determine how to compose the email.

The bottom portion (In Blue) includes fields which apply to each individual Search Type, and control who receives the notification.

Any emails sent out through this system will leave evidence in the Message Log and the Application Notes of the messages sent.

- **From:** The user selected in this list is who the Email Notification will get sent out as. They will get any Reply's sent by the recipient(s), as well as any bounce-back message sent by either the recipient's or the sender's mail system. It is very important that this be a real person who will be checking these messages.

  This dropdown will show a list of all Active users in your copy of TrackerPRO that are configured to send emails using SMTP. Please note that only users who are configured to send emails as SMTP as opposed to Outlook can be a FROM address for this system. This requirement is because the email will be sent as an automated task from your server, which will not be able to use the Outlook on your computer. Your IT department should have no issue providing the needed SMTP connection information.

- **To:** This field is disabled. The recipients of the email are determined by the type of search document received, and the settings for that search. This is configured in the bottom portion.

- **Maximum Attachment Size:** Most mail systems have a limitation on the size of the email that can be sent. This size limit will typically be different on the recipient's mail system as opposed to your system that you use to send. This field will allow you to set this to an appropriate value for your organization, so that you can give the special attention needed to what would be an emails judged to be too large.

- **Subject:** This is what will be used to compose the Subject of the Email Notification. While you could have one subject that is always used, we have various Replacements which you can use to compose the subject.

  In the example above the subject was entered as: *{DOCUMENT} for {TITLENO} has arrived*

  The system would automatically replace {DOCUMENT} and {TITLENO}, and would instead send out something like: *Air Resource Report for ISS-1234-NY has arrived*

- **Body:** This is what will be used to compose the Body of the Email Notification. This supports the same Replacements as the Subject.

  The following is a full list of the replacements available:
  {TITLENO} – The Title Number of this File
  {PREMISE} – The Premise Display
  {CLIENT} – The Client/Applicant's Name
  {SIGNATURE} – The Signature of the individual set as the From
  {CUSTREF} – Your Client's Customer Reference
  {DOCUMENT} – The Name of the Document Received
  {COMPANY NAME} – The Name of your Organization

- **Test:** This button will notify the automated task running on your server to send a test email to the From address to confirm proper functioning of the SMTP settings on the From field, as well as the operation of the automated task on your server. When activated the email will typically take five to ten minutes to send out.

Per-Vendor Service Settings
Select a Vendor Service:

Air Resources Report
Bankruptcy Search
Building Department Violations
Cancel Title
Certificate of Good Standing (Buyer
Certificate of Good Standing (Owne
Certificate of Incorporation
Certificate of Occupancy
Chancery Abstract Search
Corporate Status
Emergency Repair Lien Report
Financing Statement (UCC) Report -
Financing Statement (UCC) Report -
Fire Department Report
Flood Search
Franchise Tax Report
Fuel Oil Report
Health Department Report
Highway Department Report

Automatically send email: Send Emails always
Email to the following assigned people
☑ All Application Parties
☑ Reader Assigned to File
☑ File Representative Assigned to File
☑ Typist Assigned to File
Email to the following individuals
Staff
Ben
Charles T. McGrath

Set All Services to These Settings

- **Vendor Service:** This system allows you to individually configure the rules for who receives a Notification for a given Search Type. You can configure each Search Type individually or you can use the button in the lower-right to Set All Services to These Settings. It would most likely be easiest to configure all of the services with the most common settings, and then customize certain searches.
- **Automatically Send Email:** Controls when an email will be permitted to go out for the selected Search Type. The options are:
  - Don't send any emails
  - Send Emails always
  - Send Emails only if Title Report was sent – This option uses the Reported Date in the Application to determine if a Title Report was sent
- **Email to the following Assigned People:** Includes recipients to the Email Notification based upon their role on the File. The options are:
  - All Application Parties – This includes the Customer/Applicant, and all Reports To/Attorneys
  - Reader Assigned to File
  - File Representative Assigned to File
  - Typist Assigned to File
- **Email to the following individuals:** Includes certain staff members as recipients to the Email Notification for this Search Type regardless of whether or not they are assigned to the given File Number.

A Few Notes on Bounce Back Messages and other Failed Emails:

Email is extremely complicated, which is hidden by the fact that most of the time it works without much thought on the part of the operator. A vast number of issues could arise either before the email gets sent, or while it is passing through the mail server(s) you use to send, or while it is being received by the mail servers of the recipients. The following is a key selection of some of the scenarios you should be aware of

- **A recipient does not have an Email Address** – Obviously if there is not email address for a given party then we cannot send out the email. Instead a Bounce Back notification will go to the From address indicating which recipient(s) were unsuccessful.

  We will also leave an appropriate message in the Application Notes for the file flagged for Follow Up. Since you may rely upon this system to deliver notifications to your clients/staff, we feel it is important that you use TrackerPRO's Follow Up Notes feature to acknowledge when a given notification was not attempted.

- **Attachment is too Large** – If you have a Maximum Attachment Size set in the Global Settings and the given attachment is too large, than we will send a Bounce Back notification to the From address indicating that all of the recipient(s) were unsuccessful. A Follow Up Note for municipals will also be open just like with a missing Email Address.

- **Email Address is invalid** – If a recipient's email address is invalid, TrackerPRO will itself have no way of knowing, and the message will be sent out from TrackerPRO successfully, but will be unable to arrive at the recipient. In this situation a Bounce Back message is typically generated by one of the mail servers involved, and delivered to the From address. Since as far as TrackerPRO is concerned the message was able to be sent out, we will not know to open a Follow Up Note.

- **Email gets Quarantined or put in a Junk Folder –** Due to the prevalence of spam messages, many organizations rely upon various solutions to reduce the amount received by their staff members. These solutions will often classify a message as spam without any notification to the From or the Recipient which leaves your organization with no notice that the notification was not received until you hear from the recipient. The correct answer is usually to have the recipient add the From address to a white-list.

  Since anti-spam systems are primarily focused on reducing automated emails, and this is an automated email, this is an issue you should be aware of.

Live Templates

An option on the Underwriter's Report Sections is available now for DirectWeb Document. This allows documents coming in from your Preferred Search Vendors to be automatically added to your Title Report.

In this example anytime a Tax Search arrives it will be automatically added to the Title Report right after the Mortgage Schedule. All other documents that arrive will be added to the end of the Title Report.

While it is possible to specify the location of each different Vendor Service, we find it is useful to place most of the documents together by using the All Other option. This option shows an Exceptions button which allows you to exclude certain search types. In this example the Title Searches are set to be excluded from automatically adding to the report.