Events and Checklists

Events and Event Checklists

Remembering whether a particular action has been completed in a file can be problematic, especially during the busier times of the year. E-Closing offers our users two features to assist in keeping track. These features are Events and Checklists. This article will explore these features and explain their functions as well as useful tips and suggestions to make them a more valuable tool for your business.

Events

So, what is an Event? Simply put, an Event is something you want to keep track of in a file. An Event is infinitely customizable, in that you can make anything an Event. Trying to remember if you've sent that Title Search? Make it an Event. Looking for a way to remind yourself to generate a commitment? Make it an Event. Want a notification that a file is a month overdue and won't be closing? Yes, you guessed it; make it an Event!

Creating an Event

In order to use an Event, you have to first create one. To do so you'll need to go to your Whiteboard > Back Office > Events Menu > Manage Events List. This will bring up a list of the Events that have already been created in your system. There will also be a link at the top of the list labeled Add a New Event to Schedule. Clicking on this will start the process of creating a new Event.

Once you have clicked on the link, a new screen will open. This screen is where you will enter the information relevant to the Event you wish to create. It is important to properly complete the information on this screen so that your new event functions the way you intend it to.

First is the **Event Code**. We suggest using a shortened version of the Event Name. The Event Code can contain only letters and numbers, no spaces or special characters of any kind, and can be a maximum of ten characters. The Event Code is primarily for internal use on the programming side so that we can pull information from them to the correct locations in the system. "TSEARCH" would be a good example.

Next is the **Event Name**. This is how the Event will appear on the Whiteboard and File Summary screens. We suggest labeling it in a manner that is clear and easy to understand. Continuing the example from above, "Title Search." This field can have a maximum of 50 characters in it, though extremely long names may have issues

squeezing in on the Whiteboard. Again, this field can contain only alpha-numeric characters, no special characters of any kind. Unlike the Event Code, this field can accept spaces.

The **Sort Order** field will dictate the place this particular Event will hold in the list of Events on the Checklist that is assigned to. We highly recommend using an interval of at least ten between each Event. This way, if you add a new Event, you can add it to the Checklist without having to completely re-order it. For example, let's say you want your Title Search event to be the second on the Checklist. Currently you have Title Search Received (sort order 1) and Commitment Completed (sort order 10) as your first and second Events. By adding your Title Search Event as sort order 5, you can insert it into the list of Events without any additional work.

E-Mail Notify will send a notification to the email entered if you wish to be notified when the event is created, completed, or edited. This is a great way to keep track of the most important Events for a given file. Bear in mind that the system will not send a notification if the recipient is not entered in Send Notification Email To further down the screen. If you need to send the email to multiple recipients, you can enter multiple emails so long as they are separated by a semicolon.

Schedule Color allows you to customize the color block that appears on the Whiteboard indicating this Event is present. We recommend using different colors for different Events so that you have an additional visual aid to differentiate between multiple Events. Alternatively, you can also group the events by colors to separate tasks for certain times of the Event. For instance, Post Closing tasks can all be in green, Title tasks can all be blue, etc.

Show Status will determine if the Event is visible on the status legend and event status on your Whiteboard.

Mark as Overdue will place a marker on the Whiteboard if a file contains an overdue Event. It's hard to miss this marker since it will turn the entire line a bright red. If you do not wish this Event to be overdue at all, simply leave it set to Do Not Include on Over Due Screen. No marker will appear in connection with this Event if you do so.

The **Checklist Eligible** field will determine whether this Event is eligible to appear on a Checklist. If you set this to No, this Event will not be available to select when creating a Checklist. It will still be available to assign to the file, just not as part of a checklist. This

setting is best used when you have a task you do often, but not necessarily as part of every file that you process.

The fields listed above are all either required for your Event to function properly, or strongly recommended for ease of use. The fields listed below are primarily associated with the calendar integration. Since that is not the focus of this article we will not go into great detail about them, however we will touch upon each of them briefly for the sake of completeness.

The **Show on Complete Event Page** option is a screen available under Maintain File (Deprecated). If set to yes, this allows the Event to be shown on the File Summary screen.

Block End Date Only blocks the due date of the event for calendar purposes, essentially only showing it on its scheduled end date.

Exclude from Calendar will exclude the event from the calendar if set to No.

Automatically Schedule will automatically assign the selected business types associated with the file, which is used in the calendar feature.

Data Item Panel, **Display Panel**, **Sort Item Panel**, and **Sort Panel** dictate how the Event will appear on the Events Whiteboard, similar to how the Whiteboard Setup functions.

Time Length is the default time length of the Event for calendar purposes. It is expressed in minutes. For example, 60 for one hour, 90 for an hour and a half, etc.

The **Delete Event** field will, of course, delete the Event. Be very careful when using this as there is no way to recover an Event once it has been deleted.

Checklists

Ok, so now we know what an Event is and how to create one. Perhaps you've even gone in and created a few on your own. Now what do you do with them? That's where Checklists come in. A Checklist is a package of Events for a particular loan purpose or lender. Say for example you have a series of tasks (Events) that you complete for every purchase your company handles. Adding those Events to a Checklist will allow you to

assign all of them to a file upon file creation. If you forget to do this or the situation changes, the Checklist can be assigned at a later date as well.

Creating a Checklist

In order for you to assign Events to a Checklist, you must first create the Checklist. Let's say you want to create a Checklist for your purchase files. Go to your Whiteboard > Back Office > Events Menu > Manage Checklist. On this screen, you will see a list of Checklists, if any, that have already been created for your company, as well as a link to Create a New Checklist Name.

Creating a Checklist is much more straightforward than creating an Event, since a Checklist is simply a collection of events with something in common. Clicking on **Create a New Checklist** Name will open a new window. At first it looks pretty barren, with only four options on the page: **Enter a Checklist name, Create a New Checklist Event, Update Checklist Name, and Delete Checklist Name**. Start with giving the Checklist a name. Type it in to the field provided. Now you can select Events to add to your Checklist.

Clicking on **Create a New Checklist Event** will take you to another window. Here you will be able to select the Event you wish to add to the Checklist, as well as when you want it to begin and when you want it to end. Continuing with our earlier example, we'll say that we want to add our Title Search to a Checklist. Click on the field labeled Event and it will provide a drop-down menu with a list of created events. Since we've already created the Event, it will appear on this list. Simply click on it.

Now that the Event has been added to the Checklist, we can schedule it. The **Schedule Basis** field lets you choose whether you want to trigger the event by **File Creation date, Close Date**, or **File Close date**. **File Creation** is the date that the file is created, **Close Date** is the date of closing entered Maintain File > Financial Information, and File Close is the date that the file is marked with the Closed status in Maintain File > Miscellaneous Change. You can also enter an offset if you don't want the Event to trigger on those dates specifically. Let's say you want to send out your Title Search three days after the file has been created. Setting your **Schedule Basis** to **File Creation** and the **Offset Days** to 3 will make the Event visible three days after the file is created.

Completion Basis works the same way. Using the example above, let's say that you want to give yourself three days to order your Title Search. You've already set the

Schedule Basis to **File Creation** with an offset of 3. This means that the event will appear on your Whiteboard three days after the file is created. In this example, you would set your **Completion Basis** to **File Creation** with an **Offset** of 6. Three days after the file is created, the Event would appear on your Whiteboard. You've given yourself a three day period to send the order and you can mark the Event as complete on the File Summary screen at any point in that period with no issue. However, if that third day passes and the Event is not completed, it becomes overdue.

This is all great, but now that you've sent your Title Search you want to make sure that you have received it back in time for the closing. How do you do that? With another Event on the Checklist, of course! Having created an Event for Title Search, simply create another one for Title Search Received, and add it to the same Checklist. If you want to make sure that you receive it back no later than three days before the closing, you could set your **Schedule Basis** to **Close Date** -6 and your **Completion Basis** to **Close Date** -3. This gives you a few days to make sure that you have received the Title Search, as well as a few extra days just in case you need them.

Once you've selected the Event and set up your **Schedule** and **Completion Basis**, clicking **Update Checklist Event** will save the changes you've made and add the Event to the Checklist. Repeat this for as many Events as you wish to add to your Checklist. Once you've assigned all the desired Events, clicking **Update Checklist Name** will save the Checklist and make it available to assign to files.

If you decide that you no longer want a Checklist for some reason, from your Whiteboard go to Back Office > Events Menu > Manage Checklist. Select the Checklist from the list provided then click Delete Checklist Name and click Yes to confirm the choice.

FAQ

"*I forgot to assign a checklist to the file I just created!*"

Open that file and go to Maintain File > Miscellaneous Change. You can select the Checklist you wish to apply to this file from the drop-down menu and hit Update at the bottom of the screen.

"*I just created a new Event for one of my Checklists, but I don't see it in any of my files!*"

-Adding a new Event to an existing Checklist does not automatically insert it into all files that are already using the Checklist. If you do have to modify an existing Checklist, you will have to go into the files that are using that Checklist and modify them. You will need to go to Maintain File > Miscellaneous Change and assign no checklist, delete uncompleted events, and update. Then you can go back in and re-assign that Checklist and the new Event will show as part of it. Doing this does not delete any events that have already been completed in the file. Obviously, this can be a lot of extra work, so we highly recommend that you make sure you have all the Events you are going to need as part of your Checklist before you start assigning the Checklist to files.

"I just completed an overdue event in a file and it's still showing in red on my Whiteboard!"

This will go away on its own. It usually takes overnight for that marker to clear through completely.