



Product Release Notes August 12, 2021:

Order Management Updates:

Enhancement Overview:

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Fees: Fee Approval Workflow – Update application with new status messages	X		X	
Fees: Fee Approval Workflow – Update UI	X		X	
User Interface: Update Invoice Lender Provider Functionality – UI Changes	X			
Appraisal: Invoice Functionality – Section Detail – Header	X			
Appraisal: Invoice Functionality – Section Detail – Charges	X			
Appraisal: Invoice Functionality – Section Detail – Payments	X			
Appraisal: Invoice Functionality – Section Detail – Other Adjustments	X			

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Appraisal: Update PDF version of Appraisal Invoice	X			
User Interface: Update Invoice Borrower View Functionality – UI Changes	X			
Appraisal: Add new values to Order Request API – Appraisal	X		X	
Fees: Update API – Notify Invoice Amount Updated	X		X	
Fees: Update API – Refund an Invoice	X		X	
Appraisal: Add New Product Code Enumerations – Appraisal	X		X	
Appraisal: Add new Status Message – Appraiser Assignment Confirmed	X		X	
Fees: Add New Message – Fee Approved/Not Approved	X		X	
User Interface: Update Paid by Pop Up Box	X			
Workflow: Update workflow for centralized credit card process				

<p>Update application with new status messages in the Fee Approval workflow New status messages notify the Appraisal Management Company whether Fee approved, or Fee not approved was selected on the Order Management invoice, so lender provider partners know it's either:</p> <ul style="list-style-type: none"> • OK with the fee update and they can proceed with the appraisal workflow process. • Not OK with the fee update and they should stop the appraisal workflow. 	OM-1149
<p>Update the screen in the Fee Approval workflow A new Fee Update Requests section displays at the bottom of the Invoice tab.</p>	OM-1150

<p>Add a Lender Provider view of the Appraisal Invoice Lenders and AMC providers are now able to view an invoice, so they can make updates to appraisal fee charges, payments, and other adjustments in one comprehensive view.</p>	OM-1318
<p>Update all information in the Appraisal Invoice header section The Appraisal Invoice Header section has been updated to contain all the following information:</p> <ul style="list-style-type: none"> • Current provider • Bill to – Lender name • Order detail • Invoice date • Invoice number • Balance due • Borrower payment • Invoice lender 	OM-1378
<p>Capture information within the Appraisal Invoice Charges section Order Management now captures information related to the Charges section of the Appraisal Invoice whenever any of the following activity occurs:</p> <ul style="list-style-type: none"> • Description of charge • Order date • Appraisal fee • AMC name • Product + add-ons selected 	OM-1379
<p>Capture information within the Appraisal Invoice Payments section Order Management now captures information contained within the Payments section of the Appraisal Invoice.</p>	OM-1380
<p>Capture information within the Appraisal Invoice Other Adjustments section Order Management now captures information contained within the Other Adjustments section of the Appraisal Invoice.</p>	OM-1381
<p>Update PDF Version of Appraisal Invoice A PDF version of the Appraisal Invoice is generated when the system creates a PDF version and submits it to Encompass, and on the Invoice screen, there is a Print feature that generates a PDF version of the invoice.</p>	OM-1393
<p>Update Invoice with Borrower View A Borrower view of the Appraisal Invoice is now available with the following differences:</p> <ul style="list-style-type: none"> • It does not have an Other Adjustments section. • The borrower will not have editing permissions. • The Process Payment button will be visible. 	OM-1409
<p>Add new values to Appraisal Order Request Order Management added new elements to inbound and outbound Appraisal Order Requests.</p>	OM-1420
<p>Notify of Invoice Amount Updated Order Management now notifies the lender and updates the invoice when a fee amount change has been received from the AMC provider.</p>	OM-1422
<p>Refund an Invoice Order Management now processes API messages submitted by standard integrated providers to initiate credit card refund requests.</p>	OM-1423

<p>Add New Appraisal Product Code The Order Request API message through a standard integration now supports Lenders selecting a 1004 Investment (w/1007), 1073 Investment (w/1007), or 1004C Investment (w/1007) appraisal product.</p>	OM-1424
<p>Add new Status Message – Appraiser Assignment Confirmed Order Management now generates a status message that was submitted by the provider through a standard integration, so they can inform the lender when the appraiser assignment has been confirmed.</p>	OM-1425
<p>Add New Fee Approved/Not Approved Message Order Management now generates an API message to the standard integrated providers to inform them of the Fee Approval decision, so they are made aware of the specific line item and status of Fee Approved or Fee Not Approved of the invoice update request.</p>	OM-1426
<p>Update Paid by Pop-Up Box Updates to the Pop-up screen were made because the Pop-up title was missing on the pop-up box and was causing confusion with users as to what was being asked.</p>	OM-1456
<p>Update workflow for centralized credit card process Order Management has two credit card workflows:</p> <ol style="list-style-type: none"> 1. Centralized (configured on Lender account) 2. Delegated to AMC Providers <p>When the system processes a credit card payment for workflow option 2, it generates the Auth.Net message to the AMC provider but does not generate the message when workflow option 1 is configured.</p>	OM-1475

To take advantage of this feature, contact Support@Closing.com or designated Account Manager.