



Product Release Notes August 19, 2021:

Order Management Updates:

Enhancement Overview:

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Title/Appraisal: Add Loan Officer Assistant and Processor Assistant Roles for Email Notifications – UI Updates	X		X	
Title/Appraisal: Add Loan Officer Assistant and Processor Assistant roles for email notifications – Receipt of notifications				X
Title: Add Loan Officer Assistant and Processor Assistant Roles – Selectable and Viewable on UI				X
Title: RamQuest Closing Market integration update – Order Request – Part 2			X	
Appraisal: Fee Increase Approval Work Queue	X			
Appraisal: Update Appraisal Reassignment Workflow – Duplicate Order	X			
Appraisal: Create Update Appraisal Reassignment - Account Configuration	X			

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Appraisal: Update Appraisal Reassignment Workflow Credit Card Transfer	X			
Appraisal: Refund Pending Work Queue	X			
Workflow: Enhance usability of Paid by Process	X			

<p>Add Loan Officer Assistant and Processor Assistant Roles for Email Notifications</p> <p>Added the Loan Officer Assistant and Processor Assistant checkboxes on the Notifications tab in Client Detail, allowing these roles to be assigned email notifications.</p>	OM-947
<p>Assign Email Notifications to Loan Officer Assistant and Processor Assistant Roles</p> <p>Lenders can now assign specific notifications to the Loan Officer Assistant and Processor Assistant roles, allowing them to receive emails specific to their role.</p>	OM-1361
<p>Assign the Loan Officer Assistant/Processor Assistant to an Order</p> <p>Lenders can now assign Loan Officer Assistant and/or Processor Assistant to an order, allowing them to easily see in Order Management the orders they are assigned to.</p>	OM-1362
<p>Title Branch ID Allows for Accurate Title Order Routing</p> <p>When a title order is created, the title branch ID XML is included in the order request, allowing lenders to accurately route orders to large title/settlement providers with multiple branches, and ensuring the orders get to the right branch for fulfillment.</p>	OM-1384
<p>Fee Increase Approval Work Queue</p> <p>Lenders now have access to a new queue to help them manage appraisal orders with proposed appraisal fee increases from the Appraisal Management Company, and are pending action, based upon the new Fee Approval Workflow.</p>	OM-1399
<p>Refund Pending Work Queue</p> <p>A new queue of loans requiring a fee refund, because of an AMC sending an “invoice Update” message reducing the appraisal fee amount, was added to help lenders manage appraisal fee change requests in a timely matter.</p>	OM-1449

<p>Update Appraisal Reassignment Workflow Implemented a new appraisal reassignment workflow that provides a better security model, ensuring messages/access are managed correctly and manages the separate invoices for each provider, if both providers had incurred expenses associated with the partial fulfillment or complete fulfillment of the order.</p>	OM-1415
<p>Create Account Configuration for Appraisal Reassignment Created a new account configuration to identify whether the lender uses the new reassignment workflow or the legacy reassignment workflow.</p>	OM-1447
<p>Update Appraisal Reassignment Workflow Credit Card Transfer Created a new status message, Credit Card Transferred, which leverages the new Invoice API Message, so lenders can understand and track activities of the appraisal billing process.</p>	OM-1448
<p>Enhance Usability of Paid By process Improved the usability of the Paid By workflow by requiring that users select one of the Paid By options, so the correct information is collected with each individual payment action</p>	OM-1521

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