



Preliminary Release Notes September 23, 2021:

Order Management Updates:

Enhancement Overview:

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Title: Unique email notification for signing confirmed status from the title providers	X			
User Interface: Update appraisal reassignment workflow	X			
Allocations: Enhance batch functionality – add ability to support allocation rules	X			
Appraisal: Add pending appraisal Assignment Confirmed	X			
Title: Prevent data re-pushed to Encompass when new title docs Received	X			
Appraisal: Add appraisal assignment Confirmed Status	X			
API: Update Order Request API add Broker Company/User information			X	
Appraisal: Reassigned order notification	X			

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Appraisal: Update conditions for delivery of appraisal invoice	X			

Signing Confirmed status email notification Adding a Title Signing Confirmed line to the email notification tab, so lenders will be notified of the Title Signing Confirmed status.	OM-949
Appraisal Reassignment Workflow user interface update Adding the ability to access an existing appraisal order on a loan, and if the loan has multiple appraisal orders, Order Management will default the broker's landing page to the most recent active appraisal order. If no active orders exist, the broker's landing page will default to the most recent inactive order.	OM-1453
Enhance Batch Functionality to support allocation rules Adding the ability to upload a batch file when allocations are enabled, with or without a designated provider, for both title and appraisal.	OM-1534
Add pending appraisal assignment confirmed status Updating the Appraisal Order workflow to display Pending Appraiser Assignment Confirmed as the next step in the workflow, once the AMC selects Appraiser Assigned. This will ensure the Lender is aware of the appraisal order status.	OM-1620
Data only pushed to Encompass when new title docs received Order Management now pushes data only when XML data is initially or subsequently received from the Title provider, and not resent every time a document is received, so manually updated data in Encompass is not overwritten with old data.	OM-1625
Add appraisal assignment confirmed status Updating the Appraisal Order workflow to change the status to AMC Appraiser Assignment Confirmed as the next step in the workflow, once the AMC selects the green check mark next to Pending Appraiser Assignment Confirmed. This will ensure the Lender is aware of the appraisal order status.	OM-1685
Update order request API to add Broker Company/user information Updating the Order Request API to add Broker Company and User information.	OM-1701
Reassigned order notification Order Management will notify lenders, in a separate queue, when a cloned appraisal order has been created. This will prevent lenders from spending time searching for cloned orders with new reference IDs.	OM-1712
Update conditions for Appraisal Invoice delivery Order Management will generate a PDF version of the appraisal invoice and include it with the Appraisal Copy letter that is currently delivered to the lender. This will ensure the invoice PDF will be pushed to the Encompass SDK.	OM-1713

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