



Product Release Notes September 14, 2022

Order Management Updates:

Enhancement Overview:

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Status & Order Detail Document Mgt. Provider Security	X			
Valustrust "Inspection Only"	X		X	
Solidify "Inspection Only"	X		X	
ServiceLink Update Integration Type to Support SmartFees	X			
Appraisal detail service -- google Buckets				X
Lakeview - update jumbo allocation	X			
SSO Website Security	X			
Default Inspection Only Product - LPA Key	X			

1004DF and 1004DU Routed to Same AMC as Previous 1004	X		X	
Penny Mac - Custom Reports for new Accounts – PROD				X
New Title Products Configuration - Admin Lender UI	X			
New Title Products - Provider/Lender Mapping	X			
Add New Title Products	X			
New Title Product - Title Report - Create New Doc Type	X			
Enable X-Frame-Options CustomHeader – QAFT	X			
Enable X-Frame-Options CustomHeader - QAPRE, Stage, SIT and Prod	X			
Logix/WFG - Changing Product Type is Not Triggering a New Request for Fees	X			
Planet Home-AMC cannot accept the order due the missing nodes-SIT	X		X	

<p>Status & Order Detail Document Mgt. Provider Security Enhancement to Data Security. In this story we are limiting the provider’s view of order details and status to just those orders associated to them. E.g., AMCs will not be able to see information on title orders and vice versa.</p>	OM-2988
<p>"Inspection Only" This story is extended the new Inspection Only product from the standard integration to support the Value Trust Solutions custom integration.</p>	OM-3867
<p>"Inspection Only" This story extended the new Inspection-Only product from the standard integration to support the Solidify custom integration.</p>	OM-3868

<p>Update Integration Type to Support SmartFees Lakeview converted all their Title Providers over to SmartFees from the integrated fees that the providers were currently sending. ServiceLink’s Custom Integration did not support pulling Title Fees from SmartFees to Order Management this enhancement updated ServiceLink’s integration.</p>	OM-3869
<p>Appraisal detail service -- google Buckets This story made any necessary libraries and configurations to use the Google Buckets, and to understand the AppraisalDetailService flow and its usage on the Webportal.</p>	OM-4015
<p>Update jumbo and nonconforming allocation For Broker Users, when loan type = jumbo or nonconforming, when ordering appraisal using the Load by Loan number feature, this initiative ensures that only providers configured under the broker profile (AMC tab) populate within the AMC dropdown, and that the system is not returning providers from the AMC state table.</p>	OM-3445
<p>SSO Website Security This initiative added a “SSO - Block Log-On”, checkbox to the User Detail UI to prevent users from signing onto CCOM (SSO Encompass and SSO Non-Encompass).</p>	OM-3828
<p>Default Inspection Only Product - LPA Key PennyMac requested that CCOM recognize when there is an LPA key (this is a value of the Underwriting ID supporting FNMA’s Hybrid workflow) is entered on an appraisal order the system defaults the product to ‘Inspection Only”. While this was completed on the appraisal order UI in the last sprint, it was missed on the order edit UI, so this story is closing that gap.</p>	OM-4005
<p>1004DF and 1004DU Routed to Same AMC as Previous 1004 This story ensures that when a standard integrated lender places an order for a 1004DU (appraisal update) or a 1004DF (final inspection) after a 1004 Appraisal has been ordered, the 1004DU / 1004DF will be routed to the same AMC that was assigned the 1004 appraisal. The goal is to support product consistency and compliance. Currently this workflow exists for Encompass lenders but not for Standard Integration Lenders.</p>	OM-3821
<p>Custom Reports for new Accounts - PROD PennyMac has several custom reports they access via Closing Corp Order Management, and they added some new production accounts that needed to be included in the reports.</p>	OM-3732

<p>New Title Products Configuration - Admin Lender UI Enhancement to build out admin functionality to allow CCOM to configure for each lender:</p> <ul style="list-style-type: none"> • Which title products will appear in their product dropdowns on the title order, edit and fees UI • Select which document, when received from the provider, will move the order to a completed status • Determine when a title order will be archived (45 or 60 days) due to inactivity or order cancellation. Inactivity is defined as <ol style="list-style-type: none"> 1. No Status Change 2. No Document uploaded 3. No Note entered 	OM-2845
<p>New Title Products - Provider/Lender Mapping Enhancement for each title product to be configured to send the provider determined correct product ID in the title order. Also added the ability to include or exclude clients in the product ID configuration based on client ID.</p>	OM-3695
<p>Add New Title Products Enhancement to a unique product ID and ref ID for each new title product including:</p> <ul style="list-style-type: none"> • Title Commitment/Binder • Attorney Opinion Letter • Deed Report • Title Report • Property Report • Closing and Escrow • Notary Closing • Closing Only 	OM-3294
<p>New Title Product - Title Report - Create New Doc Type Enhancement to create a new document type to support a lender ordering the new title product "Title Report" via the UI or API. This functionality will ensure the Title Report will be among other critical documents, when received, will update the title order status, and can be configured to move the title order to complete.</p>	OM-3999
<p>Enable X-Frame-Options CustomHeader - QAFT Recently DevOps enabled customHeaders. [name='X-Frame-Options',value='SAMEORIGIN']" in all lower environments - QAPRE, QAFT, Staging and SIT servers which caused Iframe logins to fail, and this was resolved by disabling it. This story implemented a proposed code change (CustomXFrame attribute extension), so system successfully authenticates the portal via iframe with the customHeader enabled.</p>	OM-3995

<p>Enable X-Frame-Options CustomHeader - QAPRE, Stage, SIT and Prod Recently DevOps enabled customHeaders. [name='X-Frame-Options',value='SAMEORIGIN']" in all lower environments - QAPRE, QAFT, Staging and SIT servers which caused Iframe logins to fail, and this was resolved by disabling it. This story is to implement a proposed code change (CustomXFrame attribute extension), so that system successfully authenticates the portal via iframe with the customHeader enabled.</p>	OM-4020
<p>Changing Product Type is Not Triggering a New Request for Fees Updating functionality to ensure a new request for fees is triggered when the product request is changed within the quote.</p>	OM-3966
<p>Error in Product for Manufactured Housing Fees – PROD Updating functionality to ensure that when the following property types are selected in Encompass, CCOM will default the property type to Manufactured:</p> <ul style="list-style-type: none"> • MH Select • MH Advantage • Mfd Home/Condo/PUD/Co-op 	OM-3714
<p>Cannot place a second title order via API, when first order is 'Title Cancelled' - SIT, PROD Updating API functionality to ensure:</p> <ul style="list-style-type: none"> • A 2nd title order can be ordered via the API when the first title order has been cancelled. <p>The Order Management system will assign a new Ref ID to the new (2nd) title order.</p>	OM-3558

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