



Product Release Notes October 26, 2022

Order Management Updates:

Enhancement Overview:

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
New Title Products - Implementation Allocation Logic	X			
Add New Title Products - Part 2 Web UI Title Order	X			
New Title Products - Inactive / Archive Tab	X			
New Title docs Upload	X			
Loan Program Code Title Order UI & Fee	X			

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Loan Program Code Allocation Title State Table UI	X			
Loan Program Code Allocation Title Logic	X			
Loan Program Code "Copy From" Allocation Title Logic	X			
Loan Program Code - Order Notes	X			
Title - Solar Lien SDK		X		
Document Delivery Handling - PennyMac (PBDI)			X	
Add e-mail for Title Provider	X			
Expand PennyMac Data Dump				X
Old Republic Docs Shipped Status			X	
Update Access Contact for Refinance Loans	X		X	
Update Access Contact for Purchase Loans	X		X	
Add Hover Text/Tool Tip to Provide Clarity for the E-Disclosure Consent Checkbox	X			
Loan Program Code Enhancement – API			X	
Title - Solar Lien PSDK		X		
PennyMac - PennyMac Broker Direct Integrated Standard Integration Order Cancelled status not sent to Penny – PROD	X			

Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
Underwriting Findings not visible after loading the loan information in SIT	X			
Minimum Length Password Incorrect when set to higher value	X			
Purchase Agreement did not upload on order creation Issue – PROD	X			
CLOSINGCORP-Not able to upload a Word Document-Prod and SIT.	X			
PennyMac Receiving Error Messages for IsContactLegacy and Mailing Address Fields Even Though They are Completed	X			

<p>Expanded Title product offerings</p> <p>Order Management can now support the expanded Title products listed below:</p> <ul style="list-style-type: none"> • Title Commitment/Binder • Attorney Opinion Letter • Deed Report • Title Report • Property Report • Alta Jr. • Limited Coverage Product • Title and Closing • Title Only • Closing and Escrow • Notary Closing • Closing Only <p>As a result of the expanded Title products, the following updates have been made to support this offering:</p>	<p>OM-1758</p>
<p>Allocation Updates</p> <p>This enhancement ensures the selected title product created on the API or Web is routed to the correct provider based on the configuration percentages on the allocation screen.</p>	<p>OM-3710</p>

Order entry screen updates

OM-4107

Title Order Entry

Loan Number:*

Property Information

Property Type:

Property Address:*

Zip Code:*

City, State:
County:

Loan Information

Loan Purpose:

Refinance Type:

Loan Type:

Loan Program Code:

Rate Type:

Occupancy Type:

Title Information

Product Type:

Provider:

Loan Amount:*

Orig Loan Amt:

Order Work Queue Updates (Inactive and archive)

OM-3658

This enhancement allows a lender to select when an order should be moved from active to archived status, based on either 45 or 60 days of inactivity defined as:

1. No Status Change
2. No Document uploaded
3. No Note entered

New Title docs Upload

OM-4332

This enhancement adds the green upload arrow on the Order Management Order Status screen currently missing from the following documents:

- Alta Jr.
- Limited Coverage Product
- Title Report
- Title Deed
- Title New Deed

The green arrow allows the user to upload the documents to Encompass from the Order Status screen.

Loan Program Code

Epic OM-4050

Loan Program Code Title Order screen and Fee

OM-3877

This enhancement adds a place to enter a Loan Program Code dropdown on the Title Order Entry and Fees screen for future use.

<p>Loan Program Code Enhancement – API This story adds the capability for a lender to send a Loan Program Code via API to the title provider. This story adds the capability for a lender to send a Loan Program Code via API to the title provider.</p>	OM-4272
<p>Title - Solar Lien This feature enhances the title order request functionality with the ability to pull the solar lien information from Encompass.</p>	OM-2713
<p>Add multiple Email addresses for Title Provider notifications This enhancement provides an explanation for how a user can enter multiple email addresses for Title Provider notifications. Help text is “Add multiple Email addresses separated by a semicolon.”</p>	OM-2485
<p>Update Access Contact for "Purchase" and "Other" Loans Updating functionality to add:</p> <ul style="list-style-type: none"> • <EveningPhone> to the Contact Node for the Purchase Order XML • Order attribute for contact Email • Home Phone field to Access Information section for Purchase and Other loan purposes 	OM-4379
<p>Update Access Contact for Refinance, Reverse and Equity Loans Updated functionality to add:</p> <ul style="list-style-type: none"> • Property Access Contact node to the Refinance Order XML • Order attribute for contact email • Email field to Access Information section for Refinance, Reverse, and Equity loan purposes. 	OM-2878

Fixed Issues:

<p>Underwriting Findings not visible after loading the loan information Updated functionality to ensure the Underwriting Findings field is visible in the Appraisal Order Entry screen.</p>	OM-4330
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To take advantage of this feature, contact Support@Closing.com or designated Account Manager.