



Product Release Notes January 18, 2023

Order Management Updates

Enhancement Overview:

Jira ID	Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
OM-4372	Translate Title ACK/NACK to <i>Order Accepted</i> or <i>Order Declined</i>	X		X	
OM-4373	Create and Receive New Status Message of <i>Order Declined</i> from Title Provider			X	
OM-3719	Update <i>Title Order status</i> to <i>Order Accepted</i> when an <i>OrderAccept</i> message is received	X			
OM-4027	eSigning Indicator - API			X	
OM-4669	eSigning Indicator - Title Order Screen	X			
OM-4707	eSigning Indicator Order Detail	X			
OM-4706	eSigning Indicator Signing Detail	X			
OM-4846	Title Default to Equity when Encompass Loan Purpose Equals <i>Other</i> and <i>EQUITY</i>	X	X		
OM-4981	Client Dashboard Enhancements – Title	X			
OM-4982	Client Dashboard Enhancements – Broker	X			
OM-4983	Client Dashboard Enhancements – AMC	X			

CoreLogic

Jira ID	Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
OM-4869	Add Notes to the Lender Admin Screen in Order Management	X			
OM-3504	Title Wire Amount Encompass Mapping	X	X		
OM-4737	Revision Handling MISMO Title Data (UTDS)	X			
OM-4705	Add Logging for Planet Home Encompass Proxy to Assist with Root Cause Analysis for OM-4763	X			
OM-3333	Kind Lending - Update Appraisal Payment Request Email Template	X			
OM-4739	Updating Order Management to Read the Default Value of the Fees Mapping Question	X			
OM-4006	New Appraisal – Update Screen Behavior for missing values	X			
OM-3323	Lakeview - Add Title Property Detail XML to SoftPro Integration			X	
OM-2327	Fees Screen – Enhancement to Remove 500 Error Message	X			
OM-4975	Standard Title Provider API - Get Requests			X	
OM-4838	New Day Integration Order Request			X	
OM-3683	First Citizen's Encompass Field – Writing Defect		X		
OM-3110	PennyMac - Sending Multiple <i>Completed Status</i> Change Messages to ServiceLink	X			
OM-5097	Short-Term Fix - Defect AMC Name Sent to Encompass with LLC at the Front	X			
OM-4738	Penny Mac - Solidifi Cancel Order Gets to AMC Cancelled Status	X			

Enhancement Detail:

<p>OM-4372 Epic: OM-4282</p>	<p>Translate Title ACK/NACK to <i>Order Accepted</i> or <i>Order Declined</i> This feature translates an ACK from the Provider’s system to <i>Order Accepted</i> and a NACK from the Provider’s system to <i>Order Declined</i>. Order Declined means the Title Order failed to process or is not accepted by the Provider.</p>	<p>Internal/External</p>
<p>OM-4373 Epic: OM-4282</p>	<p>Create and Receive New Status Message of Order Declined from Title Provider This feature allows a Title Provider to return an <i>Order Declined</i> API message, which will update the Order Status and communicate to the Lender that the order will not be completed.</p>	<p>Internal/External</p>
<p>OM-3719 Epic: OM-4282</p>	<p>Update Title Order Status to Order Accepted When an <i>OrderAccept</i> Message is Received This feature allows a Title Provider to return an <i>Order Accepted</i> message on a Title Order, which will update the Order Status and communicate to the Lender that the order is accepted.</p>	<p>Internal</p>
	<p>Order Management has created a new workflow to allow Title Providers to accept or decline orders via the ACK/NACK or via a standalone <i>OrderDecline</i> API. To take advantage of this new workflow, please reach out to your Client Success Manager.</p>	<p>External</p>
<p>OM-4027 Epic: OM-4670</p>	<p>eSigning Indicator - API An eSigning value has been added to the <i>Title Order Request</i> and <i>Schedule Signing</i> API so Lenders are able to communicate when a transaction is eligible for eSigning.</p>	<p>Internal/External</p>
<p>OM-4669 Epic: OM-4670</p>	<p>eSigning Indicator Title Order Screen An eSigning value has been added to the Title Order Request screen so Lenders are able to communicate when a transaction is eligible for eSigning.</p>	<p>Internal/External</p>
<p>OM-4707 Epic: OM-4670</p>	<p>Closing Information Order Detail This feature will add a new Closing Information section to the Order Management Order Details screen so that Scheduled Closing Date, Scheduled Closing Time, and eSigning Digital Closing (Yes or No) are visible after a Title Order has been created.</p>	<p>Internal/External</p>
<p>OM-4706 Epic: OM-4670</p>	<p>eSigning Indicator Signing Detail This feature adds an eSigning (Yes/No) to the Signing Detail screen and is sent to Title Providers in the <i>Schedule Signing</i> API. This information will also be sent in the <i>Order Notes</i>.</p>	<p>Internal/External</p>

<p>OM-4846 Epic: OM-4861</p>	<p>Title Default to Equity when Encompass Loan Purpose Equals <i>Other</i> and Completed <i>EQUITY</i> This feature adds logic to differentiate, based on data received from Encompass, whether the Loan Purpose on a Title Order should be Equity or HELOC. NOTE: This functionality will be in Production on February 9.</p>	<p>Internal</p>
<p>OM-4981 Epic: OM-3560</p>	<p>Client Dashboard Enhancements – Title This feature adds columns to the Title Provider Detail screen. New columns are:</p> <ul style="list-style-type: none"> • (Integration) Type • Provider ID • State Names Count (How many aliases they are using) • Branches Count • Clients (List of client codes) 	<p>Internal</p>
<p>OM-4982 Epic: OM-3560</p>	<p>Client Dashboard Enhancements – Broker This feature adds columns to the Broker Detail screen. New columns are:</p> <ul style="list-style-type: none"> • Broker ID (Order Management) • Lookup ID (Lender’s Broker ID) • Address • City • State • Zip Code • Phone • Number of Users on Broker Account 	<p>Internal/External</p>
<p>OM-4983 Epic: OM-3560</p>	<p>Client Dashboard Enhancements – AMC This feature adds columns to the AMC Detail screen. New columns are:</p> <ul style="list-style-type: none"> • (Integration) Type • AMC ID • URL • Auth Type • Data Format • Card Processor Type • Login (username) • Clients 	<p>Internal</p>
<p>OM-4869</p>	<p>Add Notes to the Lender Admin Screen in Order Management Add a notepad for Internal Notes on the Admin/Client Detail/General Tab. Creating the ability to Add, Save, Edit, and Delete notes. Record a Date Timestamp, Author, Subject, Description for each note saved.</p>	<p>Internal</p>

OM-3504	<p>Title Wire Amount Encompass Mapping in Order Management Admin</p> <p>This feature gives Lenders the option to have <i>Title Wire Received Amount</i> sent to Encompass.</p>	Internal/External
OM-4737	<p>Revision Handling MISMO Title Data (UTDS)</p> <p>This feature updates the order status and All Docs screen to reflect when a Provider uploads the Universal Title Data Set (UTDS) multiple times so our clients can differentiate the original from subsequent MISMO uploads by adding the word "Revised" after the upload name.</p>	Internal

Fixed Issues:

OM-4705	<p>Add Logging for Planet Home Encompass Proxy to Assist with Root Cause Analysis for OM-4763</p> <p>Adding logging to gather information to assist with identifying the root cause for OM-4763: Planet Home-Issue with duplicate folders when the appraisal is ordered and received.</p>	Internal
OM-3333	<p>Kind Lending - Update Appraisal Payment Request Email Template</p> <p>Updating the Appraisal Payment Request email template for Kind Lending to remove the text referencing a specific employee's contact information.</p>	Internal
OM-4739	<p>Updating Order Management to Read the Default Value of the Fees Mapping Question</p> <p>Updating functionality to ensure the fee response is returned from SmartFees by using the default values when the question map is not configured.</p> <p>Prior to this fix, the system was not identifying the default value for the questions, resulting in no fee response being returned from SmartFees.</p>	Internal
	<p>Updating functionality to ensure the fee response is returned from SmartFees by using the default values when the question map is not configured.</p>	External

OM-4006	<p>New Appraisal – Update Screen Behavior for Missing Values Updating Appraisal Order screen functionality to ensure the user can update the screen if required information was missing on the screen prior to hitting Submit.</p> <p>Prior to this fix, when the user failed to input information within a required field and selected Submit, the system returned an error. However, the user was unable to complete the information and submit the order.</p>	Internal
OM-3323	<p>Lakeview - Add Title Property Detail XML to SoftPro Integration the <i>TitlePropertyDetail</i> Updating functionality to ensure XML is included with the SoftPro integration. SoftPro is a custom integration.</p>	Internal
OM-2327	<p>Fees Screen – Enhancement to Remove 500 Error message. Updating functionality on the Fees screen to display an <i>Invalid Zip Code</i> error message when an invalid zip code is entered.</p>	Internal\External
OM-4975	<p>Standard Title Provider API - Get Requests Updating functionality for standard integrated Providers to pull data from Order Management with the following 3 requests:</p> <ul style="list-style-type: none"> • <i>OrderStatusRequest</i> • <i>OrderDocumentsRequest</i> • <i>OrderNotesRequest</i> 	External
	<p>Updating XMLs to ensure standard integrated Providers can pull data from Order Management with the following 3 requests:</p> <ul style="list-style-type: none"> • <i>OrderStatusRequest</i> • <i>OrderDocumentsRequest</i> • <i>OrderNotesRequest</i> <p>The following item will be removed from the iGuide, as it is not needed: <i>OrderTasksRequest</i>.</p>	Internal
OM-4838	<p>New Day Integration Order Request Updating functionality for integrated Lenders using the Title Order Request API to ensure that all documents included in the Order Request are routed to the Provider.</p>	Internal
OM-3683	<p>First Citizen's – Send Information to Encompass Updating functionality to ensure that when received, the following information is sent to Encompass and mapped to the appropriate fields:</p> <ul style="list-style-type: none"> • Vendor Title ID • Title Ordered Date • Clear to Close Date 	Internal

<p>OM-3110</p>	<p>PennyMac - Sending Multiple Completed Status Change Messages to ServiceLink Updating functionality for ServiceLink Provider integration to ensure the <i>Completed StatusChanged</i> message is sent to ServiceLink when the <i>Appraisal Completed</i> event is received. Prior to this release ServiceLink was receiving a Completed Status when each of the following events was received:</p> <ul style="list-style-type: none"> • <i>Appraisal Completed</i> • <i>UCDP Successful</i> • <i>Copy Sent to Borrower</i> • <i>Borrower's Copy Mailed</i> • <i>Borrower's Copy Viewed</i> 	<p>Internal</p>
<p>OM-5097</p>	<p>Short-Term Fix - Defect AMC Name Sent to Encompass with LLC at the Front Updating the database for the Name field that appears on the AMC Detail screen for companies that have a comma within the company name. (Please see the Jira for additional information.) Currently, when a comma is in the AMC name, it can cause the part after the comma to appear first. For example, the Business Name Community Bank Real Estate Solutions, LLC is appearing in the Name field as Llc Community Bank Real Estate Solutions. A spike story has been created to investigate current functionality of where the name is being sent or recorded incorrectly.</p>	<p>Internal</p>
<p>OM-4738</p>	<p>Penny Mac - Solidifi Cancel Order Gets to AMC Cancelled Status Updating functionality specific to the Solidifi Provider integration. When an <i>AMC Cancelled</i> notification is received, the system will verify that the order has been cancelled by the Lender, if it has been, then the system will allow the order to remain cancelled.</p> <p>When the AMC sends an <i>AMC Cancelled</i> status, functionality requires the Lender to acknowledge and cancel the order. However, prior to this fix when the Lender cancelled the order, it triggered an <i>AMC Cancelled</i> response from the AMC, which kept the order active. This resulted in a loop.</p>	<p>Internal</p>