

Preliminary Product Release Notes February 22, 2023

11 Order Management Updates

Enhancement Overview:

Jira ID	Enhancement Name	Order Management Website & Application	Encompass	Integration API XML	Other
OM-4951	New Bundled Title/Closing Products - Config	X		X	
OM-5112	Add Lien Position Field to Fee Request	X			
OM-5142	Support Title 'Product Select' Logic	X			
OM-5188	Add Cash Out Indicator to Title Order Notes	X			
OM-5280	Add Account Name to Wire XML	X	X	X	
OM-2305	Include Number of Units in Title and Appraisal Orders	X		X	
OM-5246	Update Allocation Functionality - Capture Order Date for Rule	X			
OM-5247	Update Allocation Functionality - Remove State from Rule Logic	X			
OM-5249	Update Borrower and Co-Borrower Phone Number Mapping	X		X	
OM-5271	Pass Borrower and Co-Borrower Suffix in New Order XML	X		X	
OM-5273	TX AMC Fee Mapping	X			

Enhancement Detail (5):

OM-4951	<p>New Bundled Title/Closing Products Configuration</p> <p>This enhancement supports the new bundled Title and Closing products to be ordered via the Title Order Screen and Title Order API including:</p> <ul style="list-style-type: none"> • Property Report & Closing • Title & Closing (Legacy Product) <p>The product dropdown selections available will be based on those configured by each Lender and Provider.</p>
OM-5112	<p>Add Lien Position Field to Fee Request</p> <p>This feature enables the Lien Position element (First or Subordinate) and specific Position (1, 2, 3 or 4) to be sent to the Title Provider on a <i>Fee Request</i> ensuring accurate fees are calculated and returned to the Lender.</p>
OM-5142	<p>Support Title 'Product Select' Logic</p> <p>This feature provides the ability for Lenders to set up product selection rules based upon a combination of loan purpose, loan type, loan program code, lien position and loan amount so users are not responsible for selecting the appropriate Title product for each order.</p>
OM-5188	<p>Add Cash Out Indicator to Title Order Notes</p> <p>This feature adds the Refinance Type to the Title Order Notes so Providers that do not support the element in their integration are still notified of one of the four types:</p> <ul style="list-style-type: none"> • Refinance Type Cash Out • Refinance Type Limited Cash Out • Refinance Type No Cash Out • Refinance Type Unknown <p>Also, an Add-On Cash Out indicator (true/false) will be added to the Title</p>
OM-5280	<p>Add Account Name to Wire XML</p> <p>This feature allows Title Providers to return the Account Name in the Wire Instructions data, send to standard integrated Providers and if requested map the values to Encompass.</p>

Fixed Issues (6):

OM-2305	<p>Include Number of Units in Title and Appraisal Orders</p> <p>Updating functionality to ensure that the system is pulling the number of units from Encompass for Appraisal and Title Orders. And, if the number of units is present, it will be forwarded to the Providers.</p>
OM-5246 OM-5247	<p>Update Allocation Functionality</p> <p>Updating to enhance order allocations functionality to ensure proper performance of allocation rules.</p>
OM-5249	<p>Update Borrower and Co-Borrower Phone Number Mapping</p> <p>Updating functionalities for all standard integrations to ensure that the Borrower/Co-Borrower work phone number populates within the daytime phone node within the NewOrder XML.</p>
OM-5271	<p>Pass Borrower and Co-Borrower Suffix in New Order XML</p> <p>Updating functionality to ensure the Borrower/Co-Borrower suffix, when present, is passed within the New Order XML (Title) to standard integrated Providers.</p>
OM-5273	<p>TX AMC Fee Mapping</p> <p>Updating functionality to ensure that when desired, the TX AMC fee can be separated out from the overall Appraisal fee.</p>