LIGHTBOX

RIMS®

Release Notes – 8.43.0

November 20, 2025

RIMS®

VERSION

8.43.0

Real Estate Information Management System (RIMS) Version 8.43.0 is a release for all RIMS 8 users.

These Release Notes provide a summary of selected bug fixes and performance improvements for the following noted areas:

NEW FEATURES

RFP

File Sharing for RFPs

We're excited to introduce a new enhancement that makes collaborating with your vendors easier than ever!

You can now securely share RFP (Request for Proposal) files directly with vendors during the bidding process—right from within **RFP Manager** or the **Bid Status Report**. Files must be categorized under the *expected job type* and assigned the **Assignment Info** document type, consistent with the process used when sharing files with an awarded vendor.

What's New

- Share Files Directly with Vendors – RFP Managers can now select which vendors to share documents with during the RFP or bidding phase.
- One Click Access – Easily manage file sharing through new *Share Files* options in RFP Manager and Bid Status Report.
- Secure Collaboration – Files are shared safely with full permission controls.
- Automatic Logging – Every share, unshare, and notice is logged for complete audit tracking.
- Optional Email Notifications – Vendors are automatically notified when files are shared, ensuring transparency and faster responses.

How It Works

Once enabled by your administrator, RFP templates will include a new **"Allow File Sharing on RFP"** option.

When set to **Yes**, you'll see a **Share Files** column that lets you quickly share or revoke access for selected vendors.

The process is intuitive — select vendors, choose files, and click **Share Files**.

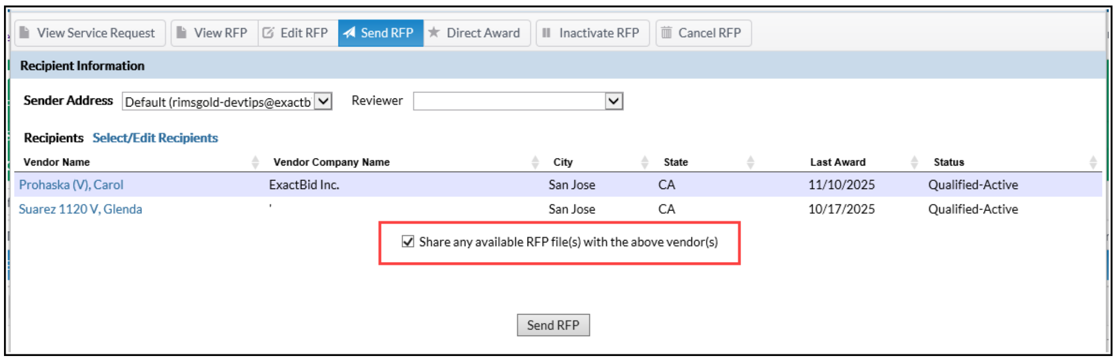
Automatic File Sharing Enhancements

RFP Send

When sending RFPs, users can choose to:

- "Automatically share any available RFP file(s) with these vendors."

This option is checked by default (when eligible), and system logs reflect *"RFP File(s) Shared – notice NOT sent."*



Direct Award

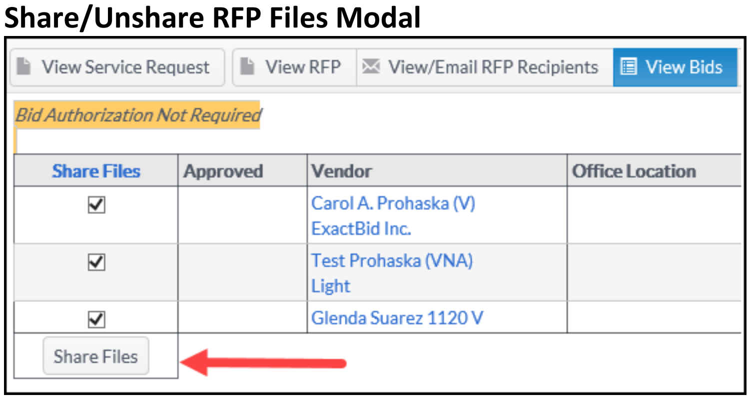
- Auto-share options are also available during **direct awards**.

Rejected Awards

When an award is rejected:

- Shared files remain visible under the **History** tab.
- Download, size, and action options are hidden.

Share/Unshare RFP Files Modal

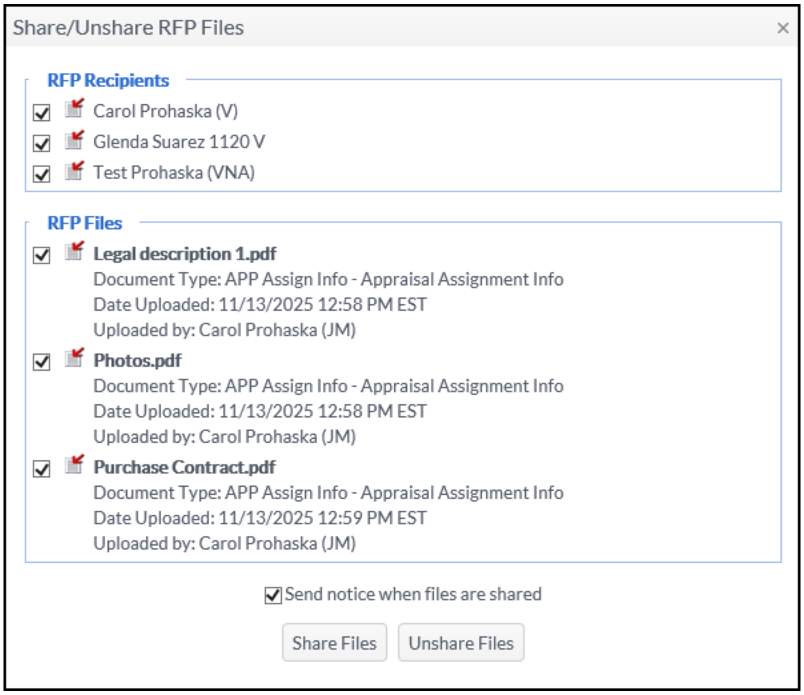


If No Files Are Available

Displays:

- "No Available Files."

- “Please upload the necessary file(s) in Task Attachments.”



RFP Recipients Section

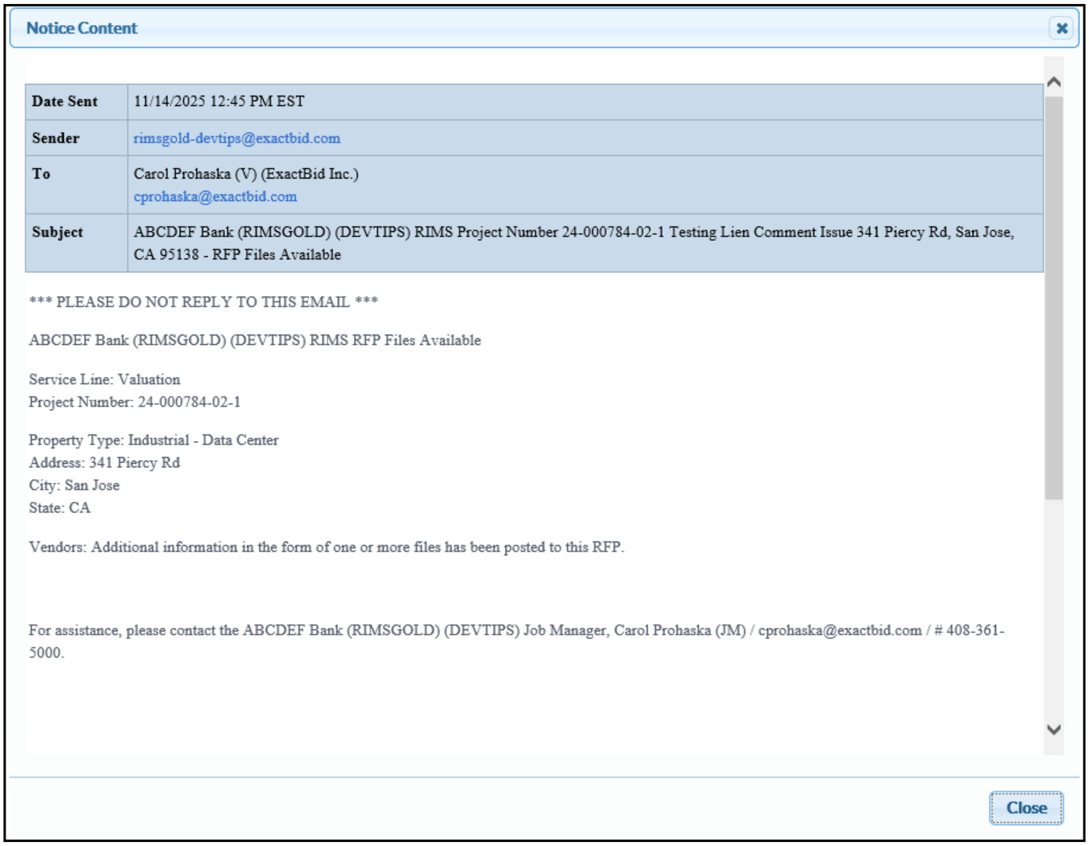
- Shows selected vendors with checkboxes (all selected by default).
- “RFP Recipients” header acts as a Select/Unselect All link.
- Each vendor has an Unshare icon to revoke shared access.

RFP Files Section

- Lists available files with details:
  File Name, Description, Attached To (portfolio only), Document Type, Date Uploaded, Uploaded By.
- “RFP Files” header also acts as a Select/Unselect All link.
- Each file includes an Unshare icon to revoke sharing.
- File list filters by PortfolioID where applicable.

Send Notice Option

- The “Send notice when files are shared” checkbox sends email/fax notifications to selected vendors.
- Corresponding logs are automatically created whether a notice is sent or not.



Notice Content

Date Sent	11/14/2025 12:45 PM EST
Sender	rimsgold-devtips@exactbid.com
To	Carol Prohaska (V) (ExactBid Inc.) cprohaska@exactbid.com
Subject	ABCDEF Bank (RIMSGOLD) (DEVTIPS) RIMS Project Number 24-000784-02-1 Testing Lien Comment Issue 341 Piercy Rd, San Jose, CA 95138 - RFP Files Available

*** PLEASE DO NOT REPLY TO THIS EMAIL ***

ABCDEF Bank (RIMSGOLD) (DEVTIPS) RIMS RFP Files Available

Service Line: Valuation
Project Number: 24-000784-02-1

Property Type: Industrial - Data Center
Address: 341 Piercy Rd
City: San Jose
State: CA

Vendors: Additional information in the form of one or more files has been posted to this RFP.

For assistance, please contact the ABCDEF Bank (RIMSGOLD) (DEVTIPS) Job Manager, Carol Prohaska (JM) / cprohaska@exactbid.com / # 408-361-5000.

Close

Logging and History
Portfolio-Level Logs

- *Portfolio RFP File(s) Shared – notice sent*
- *Portfolio RFP File(s) Shared – notice NOT sent*
- *Portfolio RFP File(s) Unshared*

Job-Level Logs

- *RFP File(s) Shared – notice sent*
- *RFP File(s) Shared – notice NOT sent*
- *RFP File(s) Unshared*

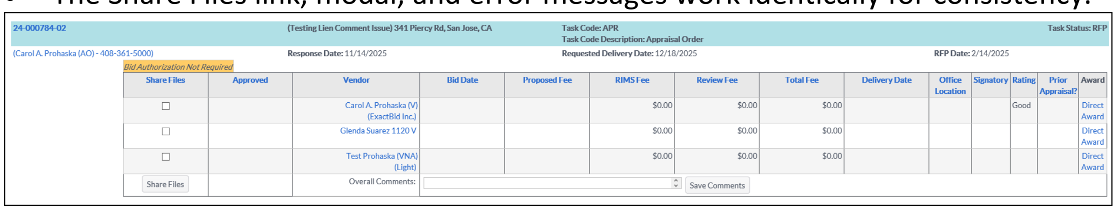
Logs include vendor names, automatically triggered for share, unshare, create, cancel, or award actions.

File Logs

- Added detailed "RFP File Share" entries showing vendor names before and after each change.
- Logs will list vendor names only.
- Vendors will not receive duplicate notices for files already shared.
- Only vendors with email or fax notification methods will show as "notice sent."
- Modal resizing and UI improvements for better usability.
- Files from templates without file sharing enabled will be excluded from the modal.

Bid Status Report Enhancements

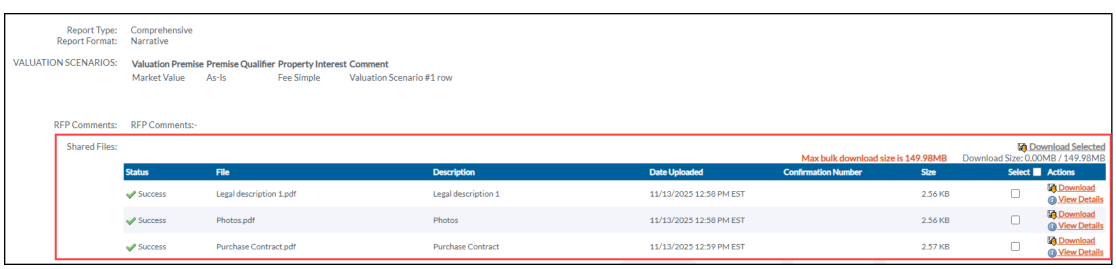
- Behavior mirrors RFP Manager functionality.
- The Share Files link, modal, and error messages work identically for consistency.



Shared Files Visibility

When file sharing is enabled and files are shared:

- Vendors can view shared files under the RFP Information section.
- Layout matches the *Job Attachments* section on Award Information.
- If a shared file's document type changes to one not supported in LP DocTypeAssignmentInfo, it is automatically removed from the shared list.



Emails

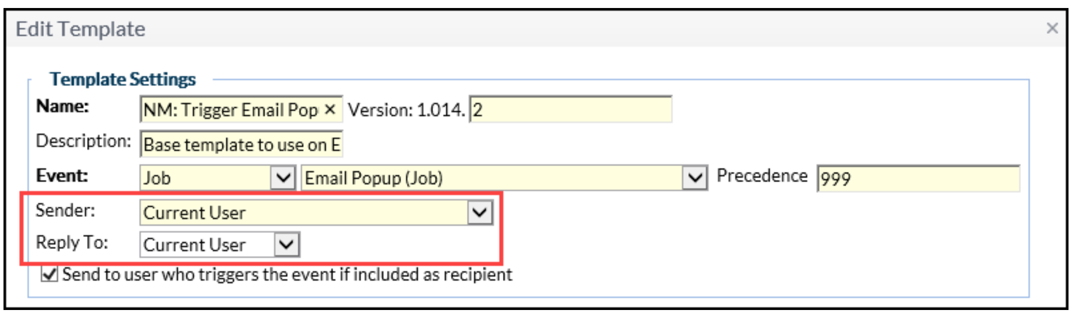
Improved Email Delivery From RIMS

To ensure faster and more reliable email delivery, all outgoing emails from RIMS will now be sent from bankAppEmail LP defined email. This is the same email that is used for sending other notices safely.

Emails will appear as being sent **"on behalf of"** the specified sender, displaying both the **ExactBid domain** and the **user's name** in the notice. This change removes the need for customers to complete separate DKIM/SPF email setup processes, which often required IT assistance.

What's Changed

- All emails will now have a consistent From address using @exactbid.com.
- The **"on behalf of"** sender will be defined by the notice type in Notice Management.
- The **Reply-To** email will continue to use the address defined in the notice configuration.



Notices Affected

- Email Popup (Project)
- Email Popup (Job)
- Group Messaging
- RFP Recipients Email

Benefit

This enhancement simplifies setup, improves deliverability, and ensures recipients consistently recognize and trust emails coming from RIMS.

Emails

Email Tracking and Reply Logging in RIMS

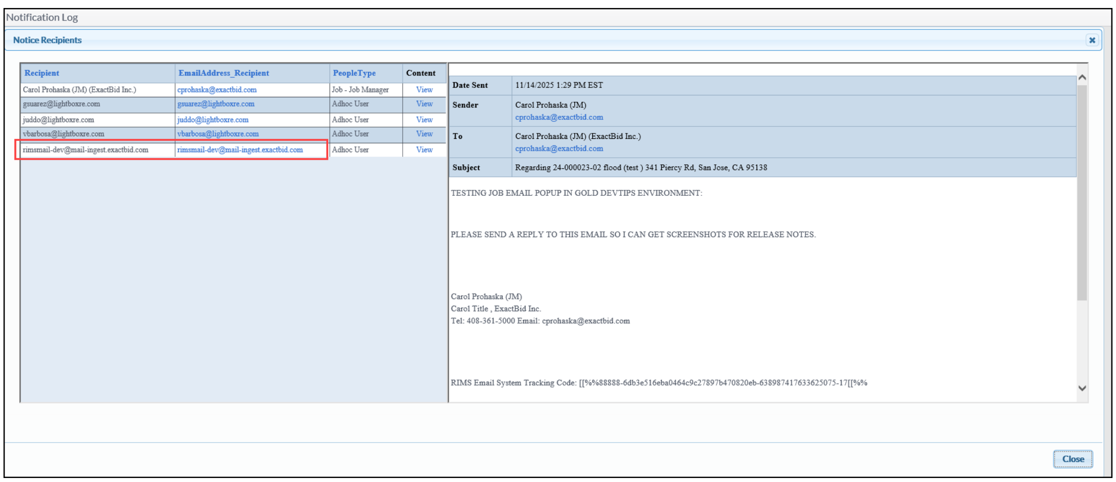
We've enhanced how RIMS tracks and logs emails to make communication history more complete and easier to follow.

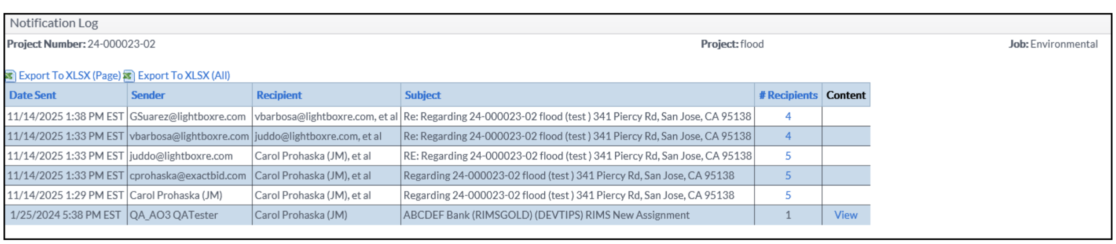
What's New

All emails sent from RIMS are now sent **on behalf of the user** and include a **hidden tracking code** that enables reply logging. When recipients reply to these tracked messages, RIMS automatically captures and logs those replies in the system in the Notification Log—keeping your project communication in one place.

How It Works

- Emails are sent **"on behalf of"** the user and automatically CC the **RIMS mail account (rimsmail@mail-ingest.exactbid.com)**.
- Each email includes a **unique hidden tracking code**, beginning with the **Lender ID**, that links replies back to the correct RIMS instance.
- When a recipient clicks **Reply All**, the response is routed through an automated service to a secure S3 repository, then logged in the RIMS database.
- Replies are displayed in the **Notifications Log**, at the same level as the original notice (Project or Job).
- The entire **conversation history** is captured—not just the last reply.
- If a user removes the RIMS CC address, that reply will not be logged.





Date Sent	Sender	Recipient	Subject	# Recipients	Content
11/14/2025 1:38 PM EST	GSuarez@lightboxre.com	vbarbosa@lightboxre.com, et al	Re: Regarding 24-000023-02 flood (test) 341 Piercy Rd, San Jose, CA 95138	4	
11/14/2025 1:33 PM EST	vbarbosa@lightboxre.com	juddo@lightboxre.com, et al	Re: Regarding 24-000023-02 flood (test) 341 Piercy Rd, San Jose, CA 95138	4	
11/14/2025 1:33 PM EST	juddo@lightboxre.com	Carol Prohaska (JM), et al	RE: Regarding 24-000023-02 flood (test) 341 Piercy Rd, San Jose, CA 95138	5	
11/14/2025 1:33 PM EST	cprohaska@exactbid.com	Carol Prohaska (JM), et al	Regarding 24-000023-02 flood (test) 341 Piercy Rd, San Jose, CA 95138	5	
11/14/2025 1:29 PM EST	Carol Prohaska (JM)	Carol Prohaska (JM), et al	Regarding 24-000023-02 flood (test) 341 Piercy Rd, San Jose, CA 95138	5	
1/25/2024 5:38 PM EST	QA_AO3 QATester	Carol Prohaska (JM)	ABCDEF Bank (RIMSGOLD) (DEVTIPS) RIMS New Assignment	1	View

Applies To

- Email Popup (SRF Project → Email)
- Email Popup (SRF Project → Job → Email)
- Document Notices (SRF Project/Job/Task → Send Docs)

Benefits

- Complete visibility into email communications and responses
- Automatic tracking for faster collaboration and audit consistency
- Centralized message history tied directly to your project records

NOTE: This currently only applies to RIMS. We are working on this improvement in RIMSCentral.

Security Enhancement

Antivirus Scanning for File Uploads

To strengthen data security and protect users, **antivirus scanning** has been added to the file upload process in **RIMS Core** and **RIMSCentral**.

What's New

All files uploaded through RIMS are now automatically scanned for viruses.

- If the file is **clean**, the upload continues normally.
- If the antivirus service is temporarily unavailable, uploads proceed as usual (no impact).
- If a **virus is detected**, the file is immediately removed from the system to prevent exposure.

How It Works

- In **RIMSCentral**, any infected file will remain in a pending status.
- In **RIMS Core**, the database record remains for audit purposes, but the file itself will be unavailable for download and will return a **"404 – File Not Found"** error.
- All virus detection events are securely **logged in Grafana** for monitoring.

Benefit

This enhancement provides an additional layer of protection, ensuring that files shared and stored through RIMS are safe and secure for all users.

QUALITY & USABILITY IMPROVEMENTS

API-RIMS & Encompass

"Submitted By" Information on SRF Printable for Encompass and RIMS API Orders

We've improved how Service Request Forms (SRFs) display submission information when created through the RIMS/Encompass integration.

The SRF Printable view now more accurately identifies who submitted a service request based on the source of the order:

- When a service is submitted through a RIMS API request, the SRF Printable will display:
  - *"via RIMS API"* next to the user's name
  - If the RIMS API user does not have a name, it will show *"by RIMS API"*

APR1 Service - APR1 [Sent 9/29/2025 3:38 PM EDT by brian costello via RIMS API]

- When a service is submitted through Encompass Partner Connect, the SRF Printable will display:
  - *"via Encompass Partner Connect"* next to the submitting user's name

APR1 Service - APR1 [Sent 9/19/2025 11:46 AM EDT by Carol Prohaska (AO) via Encompass Partner Connect]

Additionally, RIMS now performs an Account Officer (AO) email lookup when processing Encompass orders:

- If the logged-in Encompass user's email matches an existing RIMS AO account, that account will be used to create and send the SRF.
- If no match is found, RIMS will use a dedicated internal Encompass system account to complete the submission.

This enhancement ensures the "Submitted By" field on SRF Printables accurately reflects whether the request came from RIMS, RIMS API, or Encompass Partner Connect—providing greater clarity and audit accuracy for lenders and partners.

Automated Award

Improved Award Fee Matching Logic

When a property address does not match all service area filters, RIMS now automatically returns the **next best matching fee schedule** based on available property data.

For example:

- If no match is found by **ZIP code**, RIMS will look for a match by **county**.
- If no county match is found, it will match by **state**, and so on—progressively finding the most appropriate available fee.

This update ensures that an award fee is always selected from the most relevant available schedule, improving accuracy and reducing manual intervention when property-specific matches aren't found.

Change Log-User

Inconsistent Results

We resolved an issue that caused searches over very large date ranges (5+ years) in the User Change Log to fail. You can now reliably search and view results across extended time periods without errors.

Change Log-Job

VHF Changes Now Logged

We've improved transparency and auditing for vendor fee updates in RIMS.

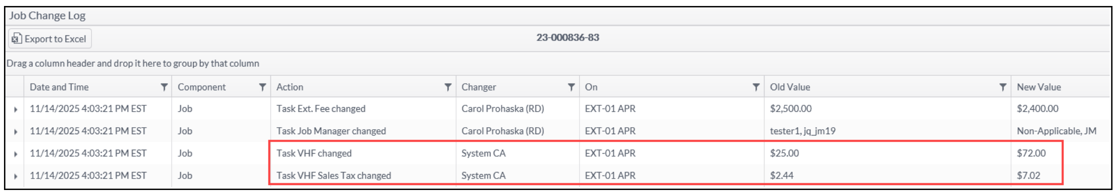
Any time a Vendor Handling Fee (VHF) or VHF Sales Tax is modified—whether through Edit Task or Amend Award—the change is now automatically recorded in the Job Change Log.

The log entry includes:

- The old and new VHF values
- The user who made the change
- The date and time of the update

Log Entry Labels

- Task VHF changed
- Task VHF Sales Tax changed


Job Change Log

Export to Excel — 23-000836-83

Drag a column header and drop it here to group by that column

Date and Time	Component	Action	Changer	On	Old Value	New Value
11/14/2025 4:03:21 PM EST	Job	Task Ext. Fee changed	Carol Prohaska (RD)	EXT-01 APR	$2,500.00	$2,400.00
11/14/2025 4:03:21 PM EST	Job	Task Job Manager changed	Carol Prohaska (RD)	EXT-01 APR	tester1, jq_jm19	Non-Applicable, JM
11/14/2025 4:03:21 PM EST	Job	Task VHF changed	System CA	EXT-01 APR	$25.00	$72.00
11/14/2025 4:03:21 PM EST	Job	Task VHF Sales Tax changed	System CA	EXT-01 APR	$2.44	$7.02

Benefits

- Enables Job Managers (JM) and Content Administrators (CA) to quickly identify fee changes and who made them.
- Assists the Finance team in validating the correct fee based on change timestamps and contract effective dates.
- Improves overall accuracy and auditability of fee tracking.

Encompass

Desired Delivery Date Added to Manual Order Form

We've added a new Desired Delivery Date field to the Manual Order Form to provide better control and accuracy when setting delivery timelines.

- The Desired Delivery Date field must be selected using the calendar picker—manual text entry is not allowed. This ensures all dates stay within the valid range set by the system.
- The date range (minimum and maximum selectable dates) is determined by the SRF template.
    - Example: A *MinValue* of 5 means the date must be at least 5 days from today.
- If the default date falls outside the valid range, the field will automatically appear blank for correction.

Default Date Behavior

- First order on a loan:
  - The field defaults to the date mapped from Encompass (if available).
  - If no mapping exists, it defaults to 1 week from today.
  - This value sets both the SRF's desired delivery date and the service order date.
- Additional orders on the same loan:
  - The field defaults to the current SRF desired delivery date, which is used to populate the new service order.

Encompass

Added Company Number and Billing Cost Center to Manual Order Form

We've enhanced the EPC Manual Order Form to include Company Number and Billing Cost Center fields for improved accuracy and alignment with Encompass data.

- New Fields Added:
  - Company Number
  - Billing Cost Center
- These fields now use the labels and validation settings (such as minimum/maximum length and format rules) defined in the SRF template linked to the selected Lending Group.
- Field values will default automatically:
  - First from the selected Account Officer (AO) profile
  - If unavailable, from the Loan Parameters (LP) values (*EncompassBillingCostCenter* and *EncompassCompanyNumber*)
- When an AO override is selected, both fields update automatically based on the chosen AO profile.
- These fields are read-only when creating an order for a loan that already has an existing RIMS project.

Lending Group Improvements

- The Lending Group dropdown now displays only groups tied to SRF templates with Encompass mapping data.
- The dropdown will default to the EncompassLendingGroupId but can be changed by the user.
- When the lending group changes, the Company Number and Billing Cost Center field labels and validation update dynamically based on the new template.

Areas Affected

- EPC Manual Order Form
- EPC Transaction Queue

Encompass

Correct Template Display for Encompass-Created SRFs

We've resolved an issue where SRFs created through an Encompass order were always saved with the Base SRF template, regardless of the lending group.

Previously, this did not affect how the *View/Edit Project* page appeared, but it did impact the *View/Edit Property* page — causing the property to display under the Base template instead of the correct lending group's property template.

With this fix, Encompass-created SRFs will now correctly reflect their associated lending group's property template on the View/Edit Property page.

Files

Batch Send Docs Now Supports Long File Names

We've fixed an issue that caused the Batch Send Docs process to fail when attachments had very long file names. Attachments with long file names can now be sent successfully with notices—ensuring smooth delivery without errors.

Areas Affected

- Email Popup
  - Accessible from the PJT page under *Job* or *Project* → *Email*
  - From the My Jobs page by clicking the email icon
- Batch Send Docs

Job Login Date

Display Based on Correct Timezone

We've resolved an issue where Job Login Dates displayed inconsistently across RIMS—particularly when new jobs were created after 6 PM PST. Previously, some pages and reports showed the following day's date due to a timezone offset.

Job Login Dates are now consistently shown in the user's local timezone across the following areas of RIMS. This ensures accurate and consistent date reporting no matter when or where a job is created.

- Batch Update
- PJT Page
- Service Charge Summary
- Site Inspection (tasks defined in *SiteInspectionTaskCodeList LP*, e.g., *INSPECT* task code)
- Reports
  - All Current Assignments
  - All Current PA Assignments
  - Job Manager Service Level Performance
  - General Performance Report
  - Detail Performance Report
  - Invoice Detail Report
  - Data Summary Report
  - Fee Summary Report
  - Environment Indices Reports (original and new)

- Lender Summary Report
- Workflow Task Job Summary Report
- Vendor Service Summary
- Ad Hoc Reports

Notice Management

Award Authorization Notice

We've resolved an issue that caused the "Link to Bid Authorization" smart field in award authorization notices to generate links without the required access key, resulting in an error when users tried to open the page.

Smart field links in Bid Authorization Request notices now automatically include the access key, ensuring that recipients can access the correct page directly—without needing to manually enter or adjust the URL.

This update applies whether or not a "Display Link As" value is set in the notice template.

Notice-RIMSCentral

Bid update Notice

Added Vendor Name to the notice that gets sent out when a bid is updated. This email goes out to the recipients listed in the LP BidUpdateNotify in RIMSCentral based on people type.

Online Review Document (ORD)

Table Rows No Longer Drop Between PDF Pages

We've resolved an issue that caused table rows to be cut off or dropped when exporting templates with many rows to PDF through ORD.

Templates with large tables (typically 50+ rows) will now correctly display all rows across multiple pages during PDF export—ensuring that no data is lost or split incorrectly between pages.

Online Review Document (ORD)

Corrected Permissions for ORD Publishing

We've updated the permission logic for Online Review Document (ORD) V2 to ensure users can publish documents as intended.

Previously, the ability to publish a review document was incorrectly tied to the Delete permission. This has been corrected so that:

- Publish actions now require only Add or Update permissions.
- Delete permissions now control only the Delete button.

Portfolio RFP

Portfolio RFP Overall Comments Now Save Correctly

We’ve resolved an issue where **overall comments** entered in a **Portfolio RFP** were not being saved, even though a “saved successfully” message was displayed.

The issue was caused by a minor technical reference error in the system. This has been corrected so that:

- Overall comments entered on the **View Bids** tab of a Portfolio RFP now save properly.
- Saved comments remain visible and persist when reopening the Portfolio RFP.

Reports

Vendor Performance Summary Report

Clicking on the project # link now automatically loads the jobs and tasks by default.

RFP

RFP Valuation Scenarios Maintain Correct Order

We’ve resolved an issue where RFP Valuation Scenarios would sometimes change their order after an RFP was updated.

Valuation Scenarios now retain their original order when saving or updating an RFP, ensuring consistency and accuracy in how scenarios are displayed and reviewed.

RIMSCentral Subscriptions

Expiration Date Now Visible for PayPal Users

We’ve fixed an issue where PayPal users were unable to see their subscription expiration date in the Manage Subscription section of RIMSCentral.

The Expiration Date now displays correctly for all PayPal-based subscriptions, ensuring users have clear visibility into their active subscription details.

Scorecard

Centralized Scorecard Configuration Management

We’ve improved how scorecard configurations are managed in RIMS to make them more reliable, easier to maintain, and consistent across job types.

- **Centralized Configuration:**
  Scorecard configurations are now stored in a dedicated database table, ensuring faster access and simpler updates. All configuration files have been removed from RIMS—settings now load directly from this central source.

- **Expanded Scorecard Sections by Default:**
  The *Scoree* and *Scoree2* sections on the scorecard page are now expanded by default. Admins can modify this behavior using the new collapsed setting to choose whether sections load expanded or collapsed.

```
<field name="Scoree" label="Vendor" visible="true" required="true" peopletype="15" collapsed="false">
```

- **Preview Before Saving:**
  A new **Preview** feature lets Support and CSMs view how scorecard changes will appear for a sample project before saving. This provides confidence in updates without affecting live configurations.

Note: Scorecard configuration management remains accessible only to Support and CSMs. Changes take effect only after selecting **Save**. The preview tool does not validate the sample project number but is intended for visual verification.

Scorecard

Default Value Option for Scoree Signatory Field

We've added a new configuration option to make it easier to prefill the **Scoree Signatory** field on scorecards.

A new **defaultval** attribute has been added to scorecard configurations.

- When set to **[[BID]]**, the **Scoree Signatory** field will automatically populate with the **award vendor's bid signatory information** from the linked external task.
- The field remains **editable**, allowing users to adjust the value as needed.
- If the **defaultval** attribute is left blank, the field will not have a default value.
- When the field is marked as **required (required=true)**, the label will appear in **bold** to indicate that input is mandatory.

```
<subfield name="Signatory" label="Signatory" defaultval="[[BID]]" visible="true" required="false"></subfield>
```

NOTE: Scorecard Configurations are controlled by Support or CSM.

Service Request (SRF)

Duplicate Drafts No Longer Appear in Unsent Requests

We've resolved an issue where deleting a property in a draft Service Request Form (SRF)—without adding a new property—caused multiple identical drafts to appear in the Unsent Requests list.

RIMS will now return only active properties when displaying draft projects on the Unsent Requests page. This ensures that each draft appears only once, even if a property is deleted before submission.

Service Request (SRF)

Task Code Display Issue in Service Request Template

We've resolved an issue where certain Task Codes with IDs longer than four digits were not displaying properly when editing Service Types on Service Request Templates.

A correction was made to the underlying SQL function that caused task codes to be missing from view when editing service types.

With this fix, all task codes—regardless of ID length—now display correctly during template edits.

Single Sign-On (SSO)

Consistent Role Order Display for SSO Login

We've improved the login experience for users authenticating through Single Sign-On (SSO) by ensuring the order of available roles remains consistent.

Previously, the list of available roles (such as RD, CA, Manager, PA, JM, VJM, AO) could appear in a different order each time a user logged in, depending on how the customer's Identity Provider (IdP) sent the SAML data.

With this update, RIMS now applies a **fixed sorting logic within the application**, ensuring the roles are always displayed in the following order:
RD → CA → Manager → PA → JM → VJM → AO

Third-party Services

First American-Display of Cancellation Reason and Comments

RIMS now displays Cancellation Reasons and Comments for orders cancelled by third-party providers like First American.
You'll see these details in:

- Order Status (PJT Task Details & View Order pop-up)
- Job Comments
- Job Change Log
- Status Message (in cancellation notices)