RIMS®

exactbid

Release Notes – 8.12.0

Jan 26, 2018

ExactBid's Real Estate Information Management System (RIMS) Version 8.12.0 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:

RIMS exactbid

VERSION

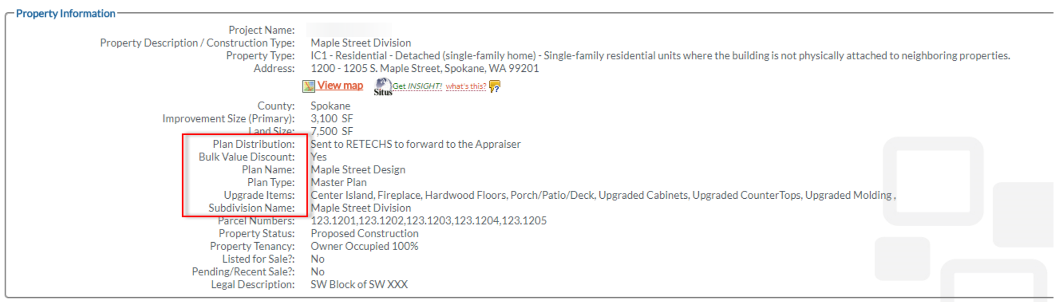
8.12.0

NEW FEATURES & ENHANCEMENTS

Service Request Form

Builders Line of Credit

RIMS users can use BLOC (Builders Line of Credit) fields in the Property Details section of a Service Request. Those fields and their values are now visible to Vendors in RIMSCentral, as well.



Please contact the Support Team to enable these fields.

Cloning by Lending Group

The RIMS Cloning feature can now be configured at the Lending Group level. Previously, a single configuration was available for all Service Requests.

Please contact the Support Team for assistance in updating this configuration.

Loan Amount Range

The system can be configured to auto-select a Loan Amount Range based on the Loan Amount value entered in the Service Request Form. Customers can expose this loan range to the Job Managers instead of showing them the exact Loan Amount.

Please contact the Support Team for assistance in configuring the loan range field.

Project Console Page

Project Comments Button

The Comments button in the Project Section of the Project Console now includes a counter indicating the number of Project Comments. The button label has also been changed from “Comments” to “Project Comments.”

Ad Hoc Reporting

Ad Hoc Reporting Vendor View

Fields for Account Created Date and Last Status Change Date have been added to the Vendor View.

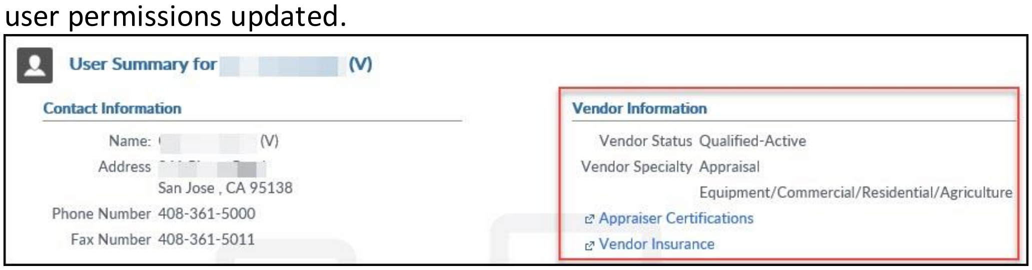
Ad Hoc Reporting Properties View

For multiple parcels, parcels are now listed as comma-separated values eliminating the appearance that rows are duplicate records.

Contact Search

Vendor Information

Vendor Status, Specialty, Certification and Insurance information are now available to be displayed in search results to non-Content Administrator users with access to Contact/Vendor Search. Please contact the Support Team to have the appropriate user permissions updated.



QUALITY AND USABILITY IMPROVEMENTS

User Management

Password Settings

Some Users were not required to reset their password at the interval specified by their institution. This issue has been addressed.

Advanced Search Filters

While logged in as an Account Officer or Job Manager User type, the Advanced Search sometimes returned results that should have been filtered out, such as Projects that didn't meet the zip code filter value. This inconsistency has been fixed.

Job Manager Group Permissions

Some users encountered errors when setting permissions for the Job Manager Group and when Viewing JM Groups. These issues have been addressed.

Bid Status Report

Bid Status Report

Previously, Job Managers with permission to view the Bid Status Report were unable to view the Report for other Job Managers. This permission has been corrected.

All Current Assignments

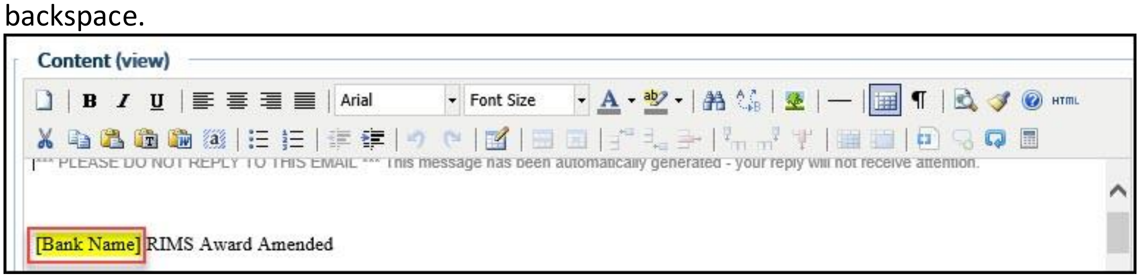
Duplication of Auto-Awarded Tasks in All Current Assignments and My Assignments

Some automated Tasks were appearing more than once in All Current Assignments and My Assignments. These Tasks were not actually duplicated within the Project. This bug has been fixed.

Notice Management

Notice Management SmartFields

Deleting a SmartField in Notice Management required deleting each character in the field. SmartFields are now controlled as a single field, and can be deleted with a single backspace.



Quick Access File Uploaded Notice

A notification is now sent when a Quick Access user/recipient uploads a file in RIMSCentral.

Vendor Scorecards

Environmental and Construction Scorecards

A bug prevented the Task Job Manager name from appearing in the Scored By field of Environmental and Construction Vendor Scorecards. When the Scorecard is completed by a Task Job Manager, the Task Job Manager's name now appears correctly in the Scored By field.

Reporting

Lender Summary Report Date Range

In some cases, the Lender Summary Report included results outside of the Logout Date range. This has been fixed.

Vendor Upload Date on Data Summary Report

In some cases, fields in the Vendor Upload Date column of the Data Summary Report were left blank when they should have been populated with data. This has been fixed.

Project and Property Search

Search Results

When searching for a specific Property address, a single Job was returned in the search results, regardless of how many Jobs were contained in the associated Project. This has been fixed; when searching a Property address, all associated Jobs are now returned in the search results.

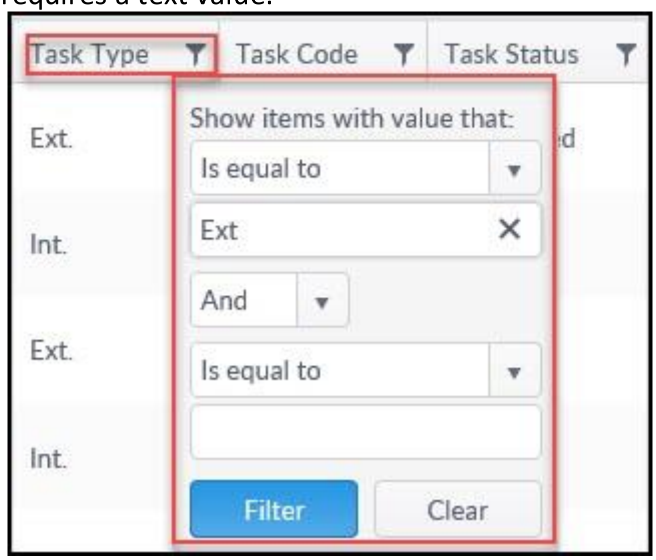
Project Console Page

SRF Printable Property Documents

When a Property Document was deleted from a Service Request, it was removed from the current state of the Service Request Form, as well as previous states accessed via Snapshot View of SRF. This has been changed; deleted Property Documents will now continue to be visible in SRF Snapshot View.

Task Type Column in Batch Update

The Task Type column filter in the Batch Update feature erroneously required a numeric value, rather than a text value. This has been changed; the column now requires a text value.



Ad Hoc Reporting

Ad Hoc Reporting Query

Ad Hoc Reporting has new views that include inactive and deleted records.

Ad Hoc Reporting Scorecard Views

The Ad Hoc Reporting Scorecard views erroneously excluded otherwise valid results if they were lacking a Scorecard Record value. Those results are no longer excluded.

Ad Hoc Reporting Vendor Sub-specialty

The Vendor Sub-specialty field has been added in Ad Hoc Reporting.

Ad Hoc Reporting Request Detail View

Some Ad Hoc Reporting lookup table elements have been updated to properly display the text description instead of the lookup table ID number.

Ad Hoc Reporting Hold Dates

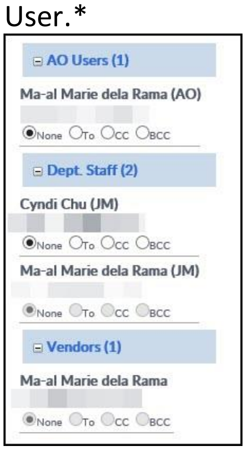
The On Hold and Off Hold dates did not work correctly in Ad Hoc reports. When a Job that had been placed On Hold was taken Off Hold, the On Hold date would disappear and the Off Hold date would never appear. This bug has been resolved and now both the On Hold and Off Hold dates will appear. If there are multiple Hold periods for the same Task, the dates will be presented as a comma-separated list, which will eliminate multiple rows for the same Task. This presentation of multiple Hold periods mirrors the Data Summary Report and was requested by many RIMS users. **Please Note:** Since On Hold Date and Off Hold Date fields may contain a comma-separated list of dates, these fields are defined as text fields and can be sorted and filtered only as text.*

Pay Invoice Special Characters

The Pay Invoice feature can now be configured to allow special characters in the Invoice Number field. Please contact the Support Team for assistance in updating this configuration.*

Email Pop-up Recipients/Notification Log

Some selected email pop-up recipients that had email addresses different than the bank email domain would not display as the intended recipient in the delivered email, though all emails were successfully delivered. Email pop-up recipients will now correctly display in the delivered email. Within the Notification Log, recipients will now correctly display as the People Type associated with the Project, rather than as Ad Hoc User.*



Service Request Form View Permission

Users with Add/Edit permission for the Service Request Form will see the Service Request button on the Project Console page. Users with View permission for the Service Request Form will only see the SRF Printable button. Users with Deny permission for the Service Request Form will not see the Service Request button or the SRF Printable button. Users with the Deny permission will not see the Service Request column in the Project Search results.*