

RIMS®

Release Notes – 8.16.0

March 22nd, 2019

RIMS®

VERSION

8.16.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.16.0 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:

NOTE: Items marked with ** have been revised from the March 8th, 2019 version of this document, distributed prior to the RIMS8 UAT update to version 8.16.0.

NEW FEATURES & ENHANCEMENTS

Engagement Letter

Engagement Letter Performance

To improve performance and error message handling, the Engagement Letter generation code was isolated and moved to a dedicated service.

Project Console

Batch Update

To improve the efficiency of Job Managers in making edits to the Task and Jobs of their assigned Projects, we have enabled Batch Update by default for all Job Managers.

Third-Party Services

Flood Reports

For sites that utilize the CoreLogic Flood Report service, a configuration setting has been added which allows the client to control whether the Loan Number or Project Number is displayed within the Flood Report received from CoreLogic.

To define whether Loan Number or Project Number is used, please contact RIMS Support at support@exactbid.com

QUALITY & USABILITY IMPROVEMENTS

Ad Hoc Reporting

Default Value Selection

The Ad Hoc report builder allows a default value to be preset for reports with picklist filters. It is useful when a particular value is selected from the picklist by report users more frequently than other values, as it saves users extra clicks when running reports. This functionality did not work as designed - while the builder still allowed a user to preset the default for the picklist filters (In List and Not In List), when the report was run the default value was not selected. Instead, the entire picklist was always pre-selected, which forced the user to pick the proper value from the picklist filter. This has been fixed; the default

value for picklist filters is properly pre-selected, saving the user from having to make the selection manually. Please note the picklist values Equal To and Not Equal To were fixed in RIMS update 8.14.0.

Batch Invoice

Batch Invoice Status

If a Task was closed after it was paid in full in Batch Invoice, the Task transitioned to Unpaid rather than Closed. The issue has been resolved and Tasks will properly transition to Closed. **

Job Attachments

Job Attachment Log

Previously, the Job Attachment Log did not return complete results for Jobs with a large number of Job Attachments. This has been fixed.

Document Types in Job Attachments

In Projects with multiple Job Types for a single Property, only Document Types associated with the first Job in the sequence were available in the Job Attachments search. Document Types associated with Jobs other than sequence -01 were not available. This has been fixed.

Portfolio

Portfolio Engagement Letter

When a property included more than one Property Contact, that property appeared multiple times on the Portfolio Engagement Letter. This has been fixed; each property record is only displayed once in the Portfolio Engagement Letter.

Project Console Page

Complete Date on External Task

For some customers, when the final report document type was uploaded to an External Task with a residential property, the Disposition Type would be set to Completed, but the Complete Date would not be populated. This has been fixed; when the External Task Disposition Type is set to Completed, the Complete Date is populated.

Reporting

Data Summary Report

Previously, the Data Summary Report erroneously excluded results where the Valuation Premise, Premise Qualifier, and Property Interest were the same, but the Appraisal Premise Comments were different. This has been fixed; all unique records that meet the filter criteria are now displayed in the results.

All Current Contracted Report

Previously, the All Current Contracted Report returned results that included deleted projects. Deleted projects were listed with the status they had previous to their deletion. This has been fixed; deleted projects no longer appear in the results.

Fee Summary Report

Previously, external fees for External Review Tasks erroneously populated in the Internal Fees column of the Fee Summary report. This has been fixed; external fees for External Review Tasks correctly populate in the External Fees column of the Fee Summary report.

RIMSCentral

Update RIMSCentral Subscription

Some RIMSCentral users encountered an error when attempting to update the payment information for their subscription. When updated payment information was entered and then submitted, the page would reload and the form fields would be blank. This has been fixed.

RIMSCentral Paypal Cancellation

RIMSCentral users who attempted to cancel their RIMSCentral subscription when their Paypal account was in a deactivated state were unable to do so. This has been fixed.

Third-Party Services

First American Report Delivery

Previously, users on sites that utilize the First American third-party service would receive a notification that the First American report they ordered had been received and uploaded to RIMS. However, the report would not be available within RIMS. This has been fixed; First American reports now upload to RIMS as expected.

First American Order Processing

For sites with First American third-party services enabled, some orders would return a message stating, "There was an Exception to this order." The order would not go through to First American. This issue was due to an incorrect mapping of the Property Contact and Requesting Party Contacts in the integration service which has now been resolved.

First American Status Change

On sites that utilize the First American third-party services, the First American Task would transition to a Closed status before the First American Report had been uploaded to RIMS. This has been fixed; the status of the Task, after the order by First American is Complete and the Report Document has been uploaded to RIMS, will now depend on site settings which can be configured to:

- Closed
- Unpaid: The Pay Invoice button will need to be completed by a Job Manager to transition the Task to Closed.
- Received: The Job Manager will be responsible for setting the Complete Date and Disposition to transition the Task to Closed.

Contact RIMS Support at support@exactbid.com for assistance in changing your configuration settings. No changes have been made to current configurations.

User Management

Update Profile Information

After editing user profile information, such as phone number or address, the password-entry prompt did not appear, so changes were not saved. This only occurred when accessing one's own user profile via Contact Search; the problem did not occur when editing the user profile via My Account>Edit Contact Info. This has been fixed; after editing user profile information and then clicking Save, a password-prompt modal appears. Upon successful entry of the password, the user profile changes are saved.