RIMS®

Release Notes – 8.19.0

November 26th, 2019

RIMS®

VERSION

8.19.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.19.0 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 & ENHANCEMENTS

Third Party Services

First American Products

Four new First American products have been made available:

- Land Commercial Evaluation Report
- Land Commercial Evaluation Report + Comparable Sales Images
- Replacement Cost Report
- Commercial Evaluation Report + Remaining Economic Life

To enable these products, please contact RIMS Support at 866-319-7467 or support@exactbid.com.

QUALITY & USABILITY IMPROVEMENTS

Bid Workflow

RFP Status

Previously, the Task/Job Statuses erroneously remained *RFP (Bids)* after a new Bid was received or an existing Bid was updated and re-sent to the Account Officer for authorization. This has been fixed; the Task/Job Statuses are now reflected accurately.

Cloning

Required Account Officer and Requester

When adding a Service that would trigger Tier 2 Cloning, and R*equire Update* for the Account Officer and Requester was checked on the SRF Template, the Account Officer and Requester were removed and the new Service was missing required fields. This has been fixed; when Request Update is checked, the Account Officer and Requester information is blank, requiring the user to select an Account Officer and Requester.

Holds

On Hold Comments

Closing a Task with an On Hold comment caused the comment to be overwritten with "Task completed." This has been fixed; the On Hold comment remains intact when the Task is closed.

Notifications

Portfolio Request for Review Notification

The text of the Portfolio *Request for RFP Review* notification erroneously stated that it was a bidding opportunity. This has been fixed with a new default version of 5.039.0. The old default version of 2.039.0 has the incorrect body text. If this notification is active, a Content Administrator should disable version 2.039.0 and enable version 5.039.0.

Invoice Notification

Previously, the text of the notification sent to Account Officers when an invoice was created directed them to retrieve a copy of the invoice by navigating to My Jobs and then Details. This location does not allow an Account Officer to retrieve an invoice created by another user. This has been fixed with a new default version of 5.010.0. The old default version of 1.010.0 has the incorrect body text. If this notification is active, a Content Administrator should disable version 1.010.0, enable version 5.010.0, and add the appropriate recipients to the new version 5.010.0.

Project Console Page

Cancel and Amend Award Buttons

Previously, the Cancel and Amend Award buttons were available to Content Administrator users on external Tasks marked as *Complete*. This has been fixed.

Reporting

Report Upload Date

The Report Upload Date column of the Detailed Performance Report erroneously displayed the date of engagement letter generation, rather than the report upload date. This has been fixed.

Bid Status Report

The RFP Manager and Bid Status Report did not accurately reflect the Pre-Engagement Authorization when adding a Task through the Project Console. This was because the Pre-Engagement Authorization field can only be set at the Service level when the Account Officer submits the SRF. This has been fixed; if a Task is created through the Project Console, no Pre-Engagement Authorization message will be displayed at all on the Bid Status Report.

Vendor Service Area Report

When running the Vendor Service Area report with one or more Property Type filters applied, only Vendors with a Special Programs indicator were returned in the results. Additionally, deleted Vendors whose Vendor Service Area was not removed prior to deletion appeared in the report results. This has been fixed; when running the report with a Property Type filter applied, all appropriate records are returned, regardless of Special Programs status. A deleted Vendor with a Vendor Service Area will appear in the results if all other filter criteria are met; their row text will be red and italicized.

RIMSCentral

Upload Invoice

In some cases, when an Award was accepted on behalf of a Vendor, the Vendor was unable to upload an invoice upon completion of the job. The Browse button would be unavailable for the invoice in RIMSCentral, with a message stating that an invoice could not be uploaded until value conclusions were input. This message persisted after value conclusions were input. This has been fixed.

Upload Portfolio Invoice

When attempting to upload an invoice for a Portfolio Project which required the Executive Summary be filled out, a validation message would state “Click here to input value conclusions.” Upon clicking the link, an error message would state “Nothing to setup (no fields found. Please check your code.” This has been fixed; when attempting to upload an invoice on a Portfolio project for which Executive Summary data is required, a message will state “Close this window and input value conclusions for each property.” Value Conclusions input fields will be visible on each Property in the Portfolio.

History

In some cases, when an awarded assignment moved to the History tab of RIMSCentral, it disappeared. This has been fixed; awarded assignments remain in the History tab for 30 days after the lender has closed them. For RIMSCentral Professional subscribers, awarded assignments remain in History for 13 months after the lender has closed them.

Synchronize Relationship

When a Vendor attempted to synchronize a relationship in RIMSCentral with a bank that had deleted that Vendor’s account in RIMS Core, they would encounter a blank page and be unable to complete the synchronization. This has been fixed; the Vendor will be able to complete the synchronization. If the bank restores the Vendor on the RIMS Core site, any updated information the Vendor provided in the synchronization will become available to the bank.

Subscription

Previously, when a RIMSCentral Listing or Professional account was deleted or merged at the request of the subscriber, the subscriber would continue to be billed for that subscription. This has been fixed; when a subscriber's RIMSCentral account is deleted, their billing subscription is automatically deleted.

SRF Batch Import

Loan Amount Field

Previously, when a user created a Service Request using the SRF Batch Import Tool, the *Loan Amount* field populated with a zero. This has been fixed; the *Loan Amount* is now populated with the correct information from the SRF Batch Import Template.

Task Hold Types

Task Hold Details

Previously, changes made to the Detail field of a Task Hold Type were not retained upon saving. This has been fixed.

Third-Party Services

Company Number Field

Previously, when a user placed a third-party services order, only three characters in the Company Number field were passed to the service provider. This has been fixed; all characters are now passed appropriately.

Job Change Log

In some cases, the Job Change Log did not record status changes for third-party service orders. This has been fixed.

Owner/Borrower Name

On third-party service orders, the Account Officer's information was sent as the Property Owner/Borrower. This has been fixed; the Property Owner named in the third-party service provider's report is now populated from the Property Contact with people types/affiliations of either Property Owner, Site Owner or Borrower (with the same priority order). If none of these people types/affiliations is set as a Property Contact, the Property Owner passed to the third-party service provider will be the SRF Transaction Information Borrower.