RIMS®

Release Notes (revisions in red text/yellow highlight) – 8.41.0

May 29, 2025

RIMS®

VERSION

8.41.0

Real Estate Information Management System (RIMS) Version 8.41.0 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

Encompass LOS

Encompass Loan Origination System Integrated with RIMS

Exciting Integration: RIMS Now Partnered with Encompass LOS API

We're pleased to announce that **RIMS is now integrated with the Encompass Loan Origination System (LOS) API**. This partnership enhances connectivity and streamlines workflows between RIMS and the Encompass platform.

With this integration, users can expect:

- **Improved efficiency** in loan processing
- **Reduced manual entry**, minimizing errors

This collaboration represents another step forward in our commitment to improving operational speed, accuracy, and user experience.

Stay tuned for further updates as we continue to expand system capabilities through strategic partnerships like this.

Third-party Service Provider

eval.

RIMS Introduces New Evaluation Service Provider

RIMS has partnered with a new third-party provider, **Eval**, to offer real estate evaluation services. Eval delivers high-quality evaluations across all 50 states, serving both rural and metropolitan areas.

These evaluations are suitable for a variety of property types—including commercial, agricultural, and residential—provided the properties qualify as **low-risk transactions**. Similar to appraisals, evaluations determine a property's value using market comparables. However, unlike appraisals, evaluations do **not** require a licensed or certified appraiser, making them more **cost-effective** and ensuring a **faster turnaround**.

Eval's services are fully compliant with the **2010 Interagency Appraisal and Evaluation Guidelines**. All reports are prepared by in-house analysts—without automation or generic content—and each evaluation is thoroughly reviewed and validated by an on-staff appraiser to ensure quality and accuracy.

QUALITY & USABILITY IMPROVEMENTS

Batch Invoice

UPDATED

Enhanced Batch Invoice Download Options – PDF and ZIP

The **Batch Invoice Download** feature has been enhanced to support multiple download formats with a new configurable option via the **BatchInvoiceDownloadOptions** configuration.

New Functionality Includes:

- **Dropdown Menu for Download Options** on the **Committed Batches** page:
  - Options: CSV, ZIP, and PDF (controlled via configuration settings).
  - To enable additional options, update the BatchInvoiceDownloadOptions configuration.
- **PDF Download Option:**
  - Merges all attached ~~Invoices and~~ **Vendor Invoices** (PDFs only) from associated tasks into a **single PDF file**.
  - If **no PDFs** are available, no file is downloaded and a **user-facing warning** appears.
- **ZIP Download Option:**
  - Includes all vendor invoice attachments (PDFs and other formats) from associated tasks **plus the batch CSV file**.
  - If no attachments exist, only the **CSV file** will be zipped and downloaded.
- **User Experience Enhancements:**
  - Frontend UI updated to dynamically display available download options based on configuration.
  - **Download lockout** added to prevent repeated downloads within a **30-second timeout** window.

  This enhancement significantly reduces manual effort and improves document accessibility for batch invoice processing.

Change Log-Property

Corrected Display Format for Old Parcel Number

Updated the display of the old parcel number to remove unnecessary formatting. Previously, the value appeared with parentheses and a colon (e.g., (12345): 12345). It now correctly displays just the old value (e.g., 12345), as intended.

Change Log-User

Improvements to User Change Log for Base Billing and Hourly Rate Fields

The **User Change Log** previously showed inconsistent or blank values for the **Base Billing** field, even when it was set to *not visible* in the Customization Framework. This caused confusion, especially when the field appeared to be included in the log unexpectedly or with missing data.

- The system now properly logs changes to the **Base Billing** field when toggled between *visible* and *not visible*. Transitions between 0 and blank values are now accurately reflected in the **User Change Log**, including both the *Old Value* and *New Value*.
- Both **Base Billing** and **Hourly Rate** fields will now display **two decimal places** in the change log, even for whole numbers (e.g., 12 will show as 12.00). *Note:* This formatting applies only to **new log entries** and does **not reflect** decimal settings defined in the Customization Framework (e.g., values like 12.000 will still appear as 12.00).

Comment Fields-Job & Job Status

Improved Comment Viewing Window in PJT Console and Job Status Modals

Enhanced the **Job Comments** and **Job Status Comments** modals across the **PJT Console** and **AO My Jobs** pages to improve readability. Previously, the comment window displayed only a few lines at a time, requiring excessive scrolling even when ample space was available. Increased the size of the comment display window to show longer entries without scrolling.

Dashboard

Intermittent Pie Chart Disappearance on Dashboard

An intermittent issue was observed where the **Dashboard pie chart** would disappear under certain conditions. The issue was tied to longer loading times on the dashboard. If the data request took several seconds, the chart became unstable when filters were clicked. A fix has been implemented to reload the chart when interacting with the status filters, preventing it from disappearing even under slow load conditions.

Engagement Letter and Invoice Management

Enhanced Filtering on Engagement Letter and Invoice Management Templates Page

New **drop-down filters** have been added to the **Engagement Letter and Invoice Templates** page for the following columns:

- **Template Name**
- **Description**
- **Portfolio**
- **Active**

These enhancements improve usability and streamline template management.

Review Fee Schedule

Enhancement to Fee Schedule Management

Fee Schedule has been renamed **Review Fee Schedule** and moved from **RIMS Content** section to **System Maintenance & Configuration** section. Previously, deleting a row on the **Fee Schedule** page resulted in a *hard delete* permanently removing the record. Records are now soft deleted using a Deleted flag, allowing them to be restored if needed. The Fee Schedule page now follows the updated design pattern used by the **Task Codes - RFP** page. Instead of deleting, users can now disable entries. Disabled items are excluded from fee calculations. Users can view and restore deleted entries via a new **Show Deleted** toggle. The Fee Schedule system is now safer, more auditable, and aligned with best practices for managing system-critical data.

Loan Amount	Job Type	Task Type	Task Code	Internal Fee	Apply When Created (SRF)	Apply When Created (Job)	Apply When Linked	Apply When Awarded	Allow No Ext Fee	Override Fee	Require Link	Apply To Review Task		Disabled
From $1.00 up	Valuation	External	APR_RES-Residential Appraisal (Order)	$220.00	No	No	No	Yes	No	No	No	No		☐
From $120.00 up	Valuation	External	FULL_AUTO-Task Code For Full Automation	$3.00	No	No	No	Yes	No	No	No	No		☐
From $1.00 up	Valuation	External	APR_ORD-Appraisal Order	$200.00	Yes	Yes	No	No	Yes	Yes	No	No		☐
From $1.00 up	Valuation	External	APR-Appraisal Order	$200.00	Yes	No	No	No	Yes	No	No	No		☐
$0.00 - $0.00	Valuation	External	APR-Appraisal Order	$100.00	No	No	No	Yes	No	No	No	No		☐
From $1.00 up	Valuation	External	ALEX NEW TASK CODE-TEST	20.00% of Ext. Fee $1.00 - $200.00	Yes	Yes	No	No	Yes	Yes	No	No		☐
From $1.00 up	Valuation	External	Task A-Test	$200.00	Yes	No	No	No	Yes	No	No	No		☐
$0.00 - $0.00	Valuation	External	Task A-Test	$100.00	Yes	Yes	No	No	Yes	No	No	No		☐
From $0.00 up		External	Task A-Test	$1.00	Yes	Yes	No	No	Yes	No	No	No		☐
From $1.00 up	Valuation	External	Task B-Test	$10.00	Yes	No	No	No	Yes	No	No	No		☐
From $0.00 up	Valuation	External	Task C-Test	$100.00	Yes	Yes	No	No	Yes	No	No	No		☐
From $0.00 up		External	Task AA-test	$1.00	Yes	Yes	No	No	Yes	No	No	No		☐
From $0.00 up	Valuation	External	Task AA-test	$1.00	Yes	Yes	No	No	Yes	No	No	No		☐
From $0.00 up	Valuation	External	Task CC-Test	$1.00	Yes	Yes	No	No	Yes	No	No	No		☐
From $1.00 up		External		$10.00	Yes	No	No	No	Yes	No	No	No		☐
From $0.00 up	Valuation	External	Task D-Test	$200.00	Yes	No	No	No	Yes	No	No	No		☑

Groups-Location/Users

Export to Excel Option Added for User and Location Groups

Previously, there was no way to print or export the list of selected users or locations within **User Groups** and **Location Groups**, making it difficult for users to review or share group membership details. The export functionality has been implemented as follows:

- An **Export to Excel** button is now available next to the user and location grids, allowing users to export the **last saved version** of each list.
- If records are moved between grids (e.g., users added or removed), the export option will **temporarily disappear** until the changes are either **saved or canceled**, ensuring only consistent, saved data is exported.

Job Manager Availability Calendar

Vendor Job Managers Now Included in Job Manager Availability Calendar

Vendor Job Managers now correctly display on the **Job Manager Availability** page, ensuring full visibility and scheduling functionality for all assigned Job Managers.

Removed Delegation Dates Persisting in Job Manager Availability Calendar

When a **delegation record** was removed from a **Job Manager (JM) profile**, the associated **availability dates** were not cleared from the **JM Availability Calendar**. As a result, the JM could not be reassigned as a delegate within those previously assigned dates, even though the delegation was deleted.

- Fixed logic to **automatically remove JM calendar entries** that match the removed delegation data (Start Date, End Date, Reason).
- Corrected **User Change Logs** to reflect accurate updates — removing the delegated user no longer shows 0 as the new value.
- Delegation removals now fully clear associated date blocks, allowing immediate reassignment of the JM.

Loan Range Field

Special Characters “<” “>” in Loan Range Field on Project Save

When editing **Project Information**, any changes—regardless of section—were causing the **“<” (less than)** and **“>” (greater than)** symbols in the **Loan Range** field to be automatically removed upon saving. This issue impacted the accuracy of the field's display and functionality.

- Fixed logic that was inadvertently stripping **“<” and “>”** characters from the **Loan Range** field during project saves.
- Characters are now preserved as long as the content exists in the **Loan Amount Ranges** content table.

Location Groups

Nation Filter in State Areas Setup

In **System Settings > Location Groups** (where GroupType = State Areas), the **Nation filter** was missing. As a result, users could only select U.S. states, limiting the ability to create State Area groups for other countries. When setting up a **State Areas** location group:

- Users should first select a **Nation**, defaulting to **United States**.
- The **State/Province** dropdown should then populate based on the selected nation.

Added a Nation filter to the **Location Groups** interface for GroupType = State Areas. The State/Province list now dynamically updates according to the selected Nation.
NOTE: Not all non-US nations have their State/Province, etc. set up by default. Contact Support if you need assistance.

My Jobs-AO Page

Issue with "Open in New Window" on Project Number from My Jobs Page

Resolved a bug where right-clicking a project number and selecting **"Open in New Window"** from the My Jobs page opened the entire My Jobs page again, instead of the expected project-specific content. The correct behavior has been restored: the **Services** page of the SRF for the selected project now opens in a new window, as intended.

Removed Mail Code from Account Officer Display on My Jobs and All Current Jobs Pages

Resolved an issue where the **Mail Code** from an Account Officer's profile was incorrectly displayed alongside their name in the **Account Officer** column on the **My Jobs** page. This behavior has now been corrected, and only the Account Officer’s name is shown. The same correction has been applied to the **All Current Jobs** page to ensure consistency across job views.

Notice Management

RIMSCentral Invitation
Corrected the display of 'RIMSCentral' in Notice Management to ensure consistent branding (previously shown as 'RIMS Central').

Add Recipient Type Options
Removed the 'User By Type' search filter from the Add Recipient modal. This filter was previously displayed in error and served no functional purpose.

Add 'Suffix' SmartField
Added "Current User Suffix" SmartField in notice management templates.

Online Review Document

'Obligor' SmartField
Added "Obligor" SmartField to online review document.

'Total Credit Exposure' SmartField
Fixed the **Total Credit Exposure** SmartField to correctly calculate and display the value from TotalCreditExposure on the SRF.

Pay Invoice/Pay VJM Invoice

Improved Handling of Duplicate Invoice Payment Entries
Users reported encountering duplicate payment entries on the *Pay Invoice/Pay VJM Invoice* page across multiple jobs. When attempting to remove these duplicates, the *Save and Close* button would disappear after clicking the delete icon, preventing successful deletion of the entry.

This issue has been resolved. Users can now successfully remove duplicate payment entries, regardless of whether the associated invoice is fully paid or partially paid. The *Save and Close* functionality remains available after deletion, ensuring a smoother and more intuitive user experience.

Portfolio Disposition Handling

Improved Disposition Handling for Portfolio Tasks to Prevent Award Blockage
Cancelling a single task within a **portfolio award** inadvertently triggered the cancellation of the entire award, even while other tasks remained active. This resulted in a **blocked state** where no further updates, cancellations, or actions could be performed on the remaining tasks or the award itself.

Resolution & Enhancements:

- **Removed cancel-type disposition options** when:

  - A **portfolio award exists**,
  - The task is **not Contract Pending**,
  - And **other portfolio tasks remain open**.
  - Tooltip message added:
    "Cancel-type options have been removed because an active portfolio award is present."
- **Improved messaging** on the Disposition modal:
  - Hid **"RFPs on this portfolio will also be canceled"** unless:
    - The portfolio has an **RFP but no award**, in which case, the RFP **will** be canceled.
- **Fixed bug** where **"Select Yes to update all tasks"** only updated one task instead of all related tasks in the portfolio.
- When a task is **Contract Pending**, the **Disposition Type** and **Complete Date** fields are now **read-only**.
  - Tooltip message added:
    "Task may not be completed/cancelled because there is an active portfolio award that is awaiting a vendor's response."

This update prevents unintended cancellation of portfolio awards and ensures a consistent, user-friendly experience when managing task disposition statuses within portfolios.

Portfolio Engagement Letter

Correct Property Contact Association in Portfolio Engagement Letters

The script responsible for retrieving **portfolio data** for the EL template has been corrected.

- Property contacts are now retrieved **per property**, not for the entire portfolio.
- This fix applies to **newly generated ELs**; existing letters will not be retroactively corrected.

Project Console

Project Summary

Credit Administrator and Loan Administrator Names Added to Project Summary.

- **Credit Administrator** and **Loan Administrator** names are now displayed in the **Project Summary** section of the **PJT page**.
- These fields are configurable through the **Customization Framework** under the **ProjectSummary** settings.

This update improves visibility of key project contacts directly within the summary view.

Property Subtype

New Property Subtype Added – Build to Rent 1-4 SFR

A new **Property Subtype** has been added under the **Multi-Family** major type.

- **Subtype:** Build to Rent 1–4 SFR

- **PropertyTypeDetail:** *These communities are built as single-family residential units, or 2–4 plexes.*

Default Settings in Property Types Lookup Table (LUT):

- **Improvement Size – Primary Measure Unit:** Units
- **Improvement Size – Secondary Measure Unit:** SF
- **Land Size Measure Unit:** Acres

Reference Document/File Attachment Management

Display of Property and Location Type in Market Data Reference Documents

Fixed an issue in the *File Attachment Management > Market Data Reference Documents* section where the selected **Property Type** and **Location Type** were not accurately reflected after uploading a new document. Previously, the system would display incorrect values—such as *Urban*, *Suburban*, or *Small Town*—regardless of user input. The display now correctly reflects the Property and Location Types selected from the dropdown menus during upload. Information now displays in two columns.

Misaligned Document Information

When editing or adding files under the following categories in **File Attachment Management**, entering values into certain fields caused the document information to become **visually misaligned**:

- **Categories Affected:**
  - *Market Data Reference Documents (Internal Only)*
  - *Market Data Reference Documents*
  - *Residential Management Companies / Additional Information Documents*
- **Fields Causing Misalignment:**
  - Property Type
  - Location Type
  - City
  - State
  - Nation

Fixed the visual alignment issue in the **document information display**. Design is now consistent when creating or editing files, even when optional fields are populated.

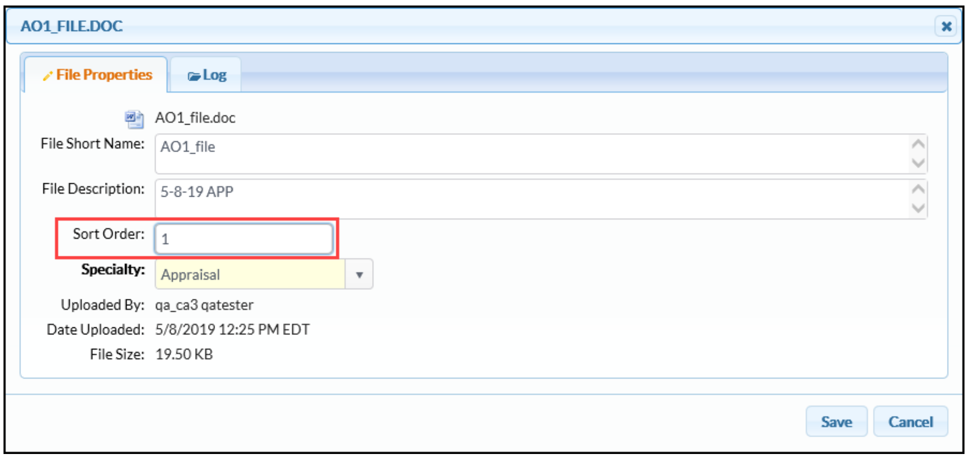
Custom Sort Order for Reference Documents

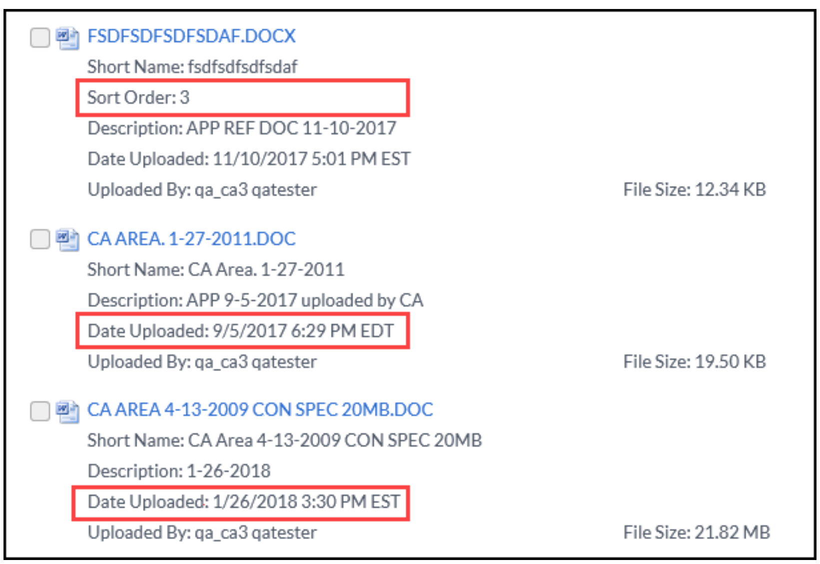
Added the ability to control the **display order of reference documents** within the **File Attachment Management** interface. Specifically, they wanted the option to display the **newest uploads at the top**.

- Added a **sort order** property during **add/edit** actions in File Attachment Management for reference documents.
- Sort order is also recorded in **document logs** for auditing purposes.

- The **Reference Document List** is now displayed based on the defined sort order, allowing users to prioritize and organize attachments as needed.
- If reference documents have the same assigned sort order, they will appear in assigned sort order and then date uploaded order.
- If a reference document does not have an assigned sort order, the documents will appear in date uploaded order.
- Assigned sort order reference documents will appear first and then date uploaded order reference documents.
- **Note:** A sort order value of **0** will prioritize the item at the top of the list. When this value is used, the *Sort Order* row will not be displayed in the *Reference Documents* or *File Attachment Management* sections.

This enhancement improves usability and ensures important or recent files are more easily accessible.





Bulk Download Fixes for Reference Documents

Added checkbox in front of reference document files to be selected/deselected.
Fixed the **Download Selected** functionality to prevent issues caused by missing files. If a file is missing, a message will appear showing the files that could not be found. Alert to deselect those files and try bulk download again.

Reports

AdHoc Reporting

Including **vwLAdHocInvoiceDetails** in Ad Hoc Reports was causing reports to exceed the SQL timeout threshold of 30 seconds, leading to timeouts and failed report generation. The invoice detail view script used in Ad Hoc Reports has been optimized to significantly improve performance and prevent timeouts.

Standardized Business Day Calculations for Task Date Fields in Ad Hoc Reporting.
The **"Tasks for Job-Complete Date Bus Days"** field was calculating business days **inconsistently** with other pre-calculated fields. Specifically, it did **not** honor the Configuration CalculateGrossTurnDaysInclusively and CalculateHoldDaysInclusively, resulting in discrepancies across reports.

- Example:
  - *Job-Complete Date Bus Days* was calculated **exclusively** (excluding start date).
  - *Hold Bus Days* was calculated **inclusively** (including both start and end dates).
  - This inconsistency led to **reporting inaccuracies**.

Updated the business day calculation logic for the following columns in **Ad Hoc Report views** vw Task Details and vw Task Details (Including Inactive) to **respect the CalculateGrossTurnDaysInclusively configuration**:
If CalculateGrossTurnDaysInclusively is **enabled**, the **start date** is included in the calculation (unless it's a weekend or holiday). If **disabled**, only the days **between** the start and end dates are counted.

Updated Columns:

- **Award Date Bus Days**: Start Date → Awarded Date
- **Award Date Complete Date Bus Days**: Awarded Date → Complete Date
- **Bid Authorization Sent Date Bus Days**: RFP Sent Date → Bid Authorization Sent Date
- **Complete Date Bus Days**: Start Date → Complete Date
- **Complete Date Days Late Bus Days**: Due Date → Complete Date
- **Logout Date Bus Days** *(also on vw Job Details)*: Login Date → Logout Date

- **Request for Authorization to Authorized Bus Days**: Bid Auth Sent Date → Authorized Date
- **RFP Published Date Bus Days**: Start Date → RFP Sent Date
- **RFP Published Date Award Date Bus Days**: RFP Sent Date → Awarded Date

Hold Days Calculation Update:

- **Complete Date Hold Bus Days** = *Complete Date Bus Days* **minus** total business days on hold
- **Hold Days** now follow CalculateHoldDaysInclusively configuration logic:
    - Includes **first On Hold date** only if it is **not a weekend or holiday**
    - Matches the business day calculation model used by the other fields

Areas Affected:

- **Ad Hoc Reports:**
    - vw Task Details
    - vw Task Details (Including Inactive)
    - vw Job Details (Logout Date Bus Days)

Added Disabled and Active Columns to 'vw Vendors' View

- Added **Disabled** and **Active** columns to the **vw Vendors** column list.
- Columns are **center-aligned by default** and follow the same configuration as in **vw User Details**:
    - **Disabled** is an **Integer** column:
        - 0 = Active
        - 1 = Inactive
        - 2 = Locked Out
    - **Active** is a **True/False** column.
- Column behavior and appearance can be customized via **Column Configuration** or using a **Calculated Column**.

Archived Appraisal Indices Report

Required Field Validation Added to Archived Appraisal Indices Report. In the Archived Appraisal Indices Report, if a user attempted to run a search without selecting values for the required fields **"Is Land Only"** and **"Nation"**, the filter section would collapse without showing any validation messages. Validation messages have been implemented. Users are now notified if either the **"Is Land Only"** or **"Nation"** fields are left unselected.

County Column Added to Archived Appraisal Indices Report. **County column** has been added to the report, positioned **after the State column**.

- The new column supports standard **filtering and sorting** functionality, consistent with other report columns.
- The **County** field is also included in the **Excel output**, without removing or altering existing columns.

This enhancement provides users with more granular location data for analysis and reporting.

Bid Status Report

Task Code and Description Added to Blue Banner on Bid Status Report. The **Task Code** and **Task Code Description** have been successfully added to the blue banner section of the **Bid Status Report**, improving visibility of key task details at a glance.

Bid Summary Report

Corrected Display of 'Prior Services Performed' in Bid Summary Report. Updated the **Bid Summary Report** for Environmental, Construction, and Appraisal/Valuation bids to accurately reflect vendor selections for **Prior Services Performed**. Previously, the report defaulted to **"No"** when no selection was made, which could be misleading.

- The **Prior Services Performed** column now only displays **"Yes"** or **"No"** if the vendor explicitly selected a value when submitting their bid.
- If no bid was placed or the vendor did not make a selection, the field will remain **blank** in the report, as expected.

When accessing the **Bid Summary Report** and clicking the **'Select Columns'** link, the modal window appeared **blank**, displaying no column options for customization.

- Resolved an issue where a **corrupt default State value** was being passed from the main page, causing the column list to fail to load.
- The **Select Columns** modal now loads correctly with all expected column options.

Invoice Detail Report

Updated Column Labels and Data Source Alignment in Report. Several improvements were made to enhance clarity and consistency in report labeling and data sourcing:

- **"RIMS"** column relabeled to **"Project Number"**
- **"LoginDate"** and **"StartDate"** columns updated to **"Login Date"** and **"Start Date"** respectively
- **"Risk Factor"** column relabeled to **"Risk Rating"**
- **"Appraisal Type"** now pulls data from the same source as the **AppType** field in **AdHoc Reporting**, ensuring consistent and accurate reporting

Tas Assessment Summary Report

Fixed editability Issue with "Minimum Number of Properties per County" Field. Resolved an issue where the **"Minimum Number of Properties per County"** field remained uneditable after changing the **State** selection. Previously, if a user selected a state and county, then changed the state, the county selection would correctly clear, but the Min Properties field remained locked. The **Min Properties** field is now correctly re-enabled—along with its hover message (Select at least one State) when the State field is changed.

The **Tax Assessment Report** was incorrectly including **deleted internal tasks**, causing outdated or irrelevant data to appear in the results.

- Updated the report script to **exclude** all **deleted** and **cancelled**:
  - Jobs
  - Tasks
  - Properties
  - Projects
  - Valuation Data
- This ensures only **active, valid records** are returned in the Tax Assessment Report.

The report name **"Tax Assessment Report"** was inconsistent with the naming convention used in R7, where it is referred to as **"Tax Assessment Summary Report."** The report name has been updated from **"Tax Assessment Report"** to **"Tax Assessment Summary Report"** for consistency across the platform.

Vendor Handling Fee Report

Vendor Handling Fee Report Now Displays Deleted Lending Groups. Previously, if a **Lending Group** used in a project was deleted (without being replaced), the Vendor Handling Fee Report (VHF) would display a blank value in the **Lending Group** column for affected projects. The Vendor Handling Fee Report now properly displays the name of **deleted Lending Groups** in the **Lending Group** column, ensuring consistency with project data and maintaining historical visibility.

Sales Tax Rounding in Vendor Handling Fee Report. In the **Vendor Handling Fee (VHF) Report**, the **Calculated Sales Tax** field appeared to show amounts rounded to **two decimal places**, as expected per **Customization Framework** settings. However, when the field was examined more closely, it contained values with **four decimal places**, which were being used in the total calculation. This resulted in discrepancies—typically off by **$0.01**—between the sum of individual row values and the reported total.

- Updated the **sales tax computation** logic to **round each per-row value to two decimal places** before summing.
- Corrected existing **sales tax values** in the report output to also reflect **two-decimal precision**.

This update ensures that the **total sales tax** in the VHF Report is consistent with the individual values and matches user expectations for accuracy.

Vendor Service Summary Report

Performance Optimization for Vendor Service Summary Report. The Vendor Service Summary Report was failing to return results when run for time frames longer than one month, particularly for high-volume clients. The underlying query for the Vendor Service Summary Report has been optimized to improve performance and prevent timeouts. Report now completes successfully for larger date ranges, even on sites with high vendor scorecard volumes.

RFP

'Total Addressees' Count in RFP Manager

After adding more users to the addressee row, the **'Total addressees'** count did not update to reflect the actual number of addressees. This issue has been fixed. The **'Total addressees'** count now updates correctly to match the actual number of users added.

'Total # of Hard Copies' Calculation in RFP Manager

The **'Total # of Hard Copies'** should automatically update based on the sum of values entered for each user. The logic has been corrected to ensure that the **'Total # of Hard Copies'** now **accurately reflects the total** entered across all added users in the Report Distribution section.

UI Update and Instructional Text Added for Amend RFP and Cancel & Clone RFP Buttons

To improve clarity and usability in the **RFP Manager**, enhancements were made to the **Amend RFP** and **Cancel & Clone RFP** buttons on tasks with RFP status.
Resolution:

- **Button Layout:**
    - Repositioned the **Amend RFP** and **Cancel & Clone RFP** buttons, now stacked vertically for better visibility.
- **Instructional Text (in red):**
    - **Amend RFP:**
      "Amend RFP will send a notice to current list of recipients that the RFP has been amended. Submitted bids will remain in place for the vendor to update."
    - **Cancel & Clone RFP:**
      "Cancel & Clone RFP will send a notice to current list of recipients that the RFP has been canceled. User will need to select a new list of recipients for the RFP."

These updates help ensure users understand the impact of each action before proceeding.

RIMSCentral

Added New Service Type: "Evaluations" in RIMSCentral

A new service type, **Evaluations**, has been added to RIMSCentral to support vendor selection and search functionality. This update includes:

- **Manager Service Areas (Tools > Manage Service Areas):** "Evaluations" is now available when selecting services during service area setup or edits.
- **Find a Real Estate Professional (RIMSCentral Login Page):** "Evaluations" has been added alphabetically to the service type dropdown for search filtering.

- **Register User Page:** Vendors can now select "Evaluations" as a service offering during registration.

This enhancement ensures that vendors can correctly associate with and be discoverable under the new "Evaluations" service type.

Ampersands Now Allowed in Insurance Company Names

The **Insurance input screen** in RIMSCentral previously blocked entry of company names containing ampersands (&), returning an *"Invalid character"* error. Validation rules have been updated. Users can now enter company names containing ampersands (&) in the Insurance input screen without errors.

Calendar Event Details Popup in RIMSCentral

In the RIMS Events calendar, clicking on a date with events (indicated by a red, underlined number) did not display the expected event details. Instead, users saw only three blinking bars, with no further information shown. A reference to outdated Piwik (Matomo) tracking code was removed. This was interfering with the calendar event popup functionality. The issue is now resolved — clicking a date correctly displays a popup with full event details.

Hover Text for Amended RFP Indicator in RIMSCentral

On **portfolio projects** in **RIMSCentral**, a **red flag icon** appears beneath each bid fee when an **RFP has been amended**. However, the **hover text** incorrectly included an HTML line break tag (
), displaying as:
*"RFP amended, please
 review and update"*
Removed the unnecessary
 tag from the hover message. The text now displays correctly as a single line:
"RFP amended, please review and update"

Rejected Portfolio in History Tab

Corrected Visibility of 'Return to Active Awards' Button for Rejected Portfolios. On the Award Information page in the History section of RIMSCentral, the "Return to Active Awards" button was incorrectly displayed for rejected portfolios.

- Updated the portfolio award XML data logic to correctly reflect the award status:
  - Sets Rejected = true when the award is rejected.
  - Sets Canceled = true when the award is canceled.
- This ensures that the Return to Active Awards button is not shown for rejected portfolios.

Note: Canceled awards are not currently sent to History. This update specifically addresses rejected awards only.

Vendor Not Seeing Attachments Due to File Name Length Limitation

File attachments were not visible to the contracted vendor in RIMSCentral, despite correct permissions and successful uploads. The root cause was a **truncation error** in a stored procedure. The **FileName** and **ShortName** fields were limited to **128 characters**, causing files with longer names to be excluded from display. The actual schema in the RIMSFiles table allows for **up to 256 characters**, creating a mismatch. Updated the stored procedure by increasing the **FileName** and **ShortName** field lengths from **128 to 256 characters**, aligning with the schema of the RIMSFiles table. This change ensures that files with names up to 256 characters are properly retrieved and displayed in RIMSCentral.

‘Zoning Compliance Reports’ Checkbox Added to Vendor Registration

A new **'Zoning Compliance Reports'** checkbox has been added to the **Register User** page for vendors in **RIMSCentral**, allowing vendors to indicate if they offer this service at the time of registration.

Bulk Download Size Message on RIMSCentral Award Page

When viewing a project in **Contract Pending** status on the **RIMSCentral Award Page**, the **bulk download size message** was displaying incorrectly:

- **Actual Message:**
  Max bulk download size is NaNMB Download Size: 0MB / NaNMB
- **Expected Message:**
  Max bulk download size is 149.98MB Download Size: 0MB / 149.98MB

The **max download size message** is now **disabled** until the award is officially **accepted**, preventing the incorrect "NaNMB" display from appearing during the **Contract Pending** phase.

Improved Terms of Use Experience in RIMSCentral

We’ve updated how vendors review and accept our **Terms of Use** in RIMSCentral, based on guidance from our Legal team.

- **New Users:**
  When registering for a RIMSCentral account, vendors will now see our updated **Terms of Use** and must click **"Agree"** to continue with the registration process.
- **Existing Users:**
  Vendors who haven't accepted the updated Terms of Use will be prompted to review and accept them at login. If the terms are not accepted, the vendor will be returned to the login screen.
- **Simplified Interface:**
  We’ve updated “Terms of Use” links to point to the updated Terms of Use.
- **Behind the Scenes:**
  Once a vendor agrees to the terms, the system securely records the acceptance date and time. This information is available to our support team for reference.

Role Management

Updated Confirmation Prompt for Role Updates

When updating a Role and clicking **Save**, users were prompted with a message asking them to select **'Yes'** to save or **'No'** to make further changes. However, the actual buttons displayed were labeled **'OK'** and **'Cancel'**, causing confusion. The confirmation message text has been updated to match the button labels. The prompt now displays consistent and accurate messaging, and the buttons behave as expected.

Scorecard-Environmental

Auto-Populate "Service Provider" Field in Environmental Scorecard

The **"Service Provider"** field in the Environmental Scorecard now auto-populates with the vendor company name from the **"Scoree"** field, streamlining data entry and improving report accuracy.

Key Functionality:

- Auto-populates when a **Scoree** (vendor) is selected or pre-filled from a linked order task.
- Becomes an **editable text field** after auto-population.
- If **no Scoree** is selected, the field remains editable but will not contribute to vendor score reporting.
- Changing the **Scoree** will update the field; otherwise, manual edits are preserved.
- Once the scorecard is **saved**, the field becomes **locked for editing**.
- To edit again, the user must **close and re-open** the scorecard.
- A message will appear when editing is attempted while locked: *"Field is currently locked from editing. Close scorecard page and re-open to enable editing of this field again."*

This feature improves consistency between vendor data and scorecard reports, while still allowing flexibility for manual input when needed.

Search-Contacts

Contact/Vendor Search

Removed 'Show deleted' checkbox from Non-Content Administrator users.

Search-Project

Advanced Project Search

Support for Multiple Property Subtype Selection in Project Advanced Search. Users accessing **Project Advanced Search** were limited to selecting only one **Property Subtype** after selecting a **Property Type** (e.g., *Industrial*). The filter has been updated to support **multi-select** functionality. Users can now choose multiple **Property Subtypes** as part of their search criteria.

Service Request Template (SRF)

Nation Field Added to Account Officer User Types in Service Request Form (SRF)

Some **Account Officers and related users** reside outside the United States, and their **country (Nation)** information needs to be accurately captured in the **Service Request Form (SRF)**. This applies to the following user types within the SRF:

- **Account Officer**
- **Requester**
- **Loan Administrator**

- **Credit Administrator**
- **External Partner** (applicable to select site)

A **Nation field** has been added to all relevant **user type controls** in **SRF templates** and the **SRF form**. **Note:** The Nation field is **not visible by default** and can be enabled as needed through configuration.

Areas Affected:

- **SRF Templates**
- **SRF Form**

This enhancement ensures accurate geographic representation for global users involved in service requests.

Parcel Number Removal When Cloning Projects

When a project was **cloned**, the **parcel number** on the **original order** was being removed. Although not reflected in the change log, SRF printables showed that the parcel was initially present upon submission, indicating unintended data loss during the cloning process.

- Fixed the issue where **property parcel numbers** were being deleted from the **original project** during the cloning process.
- Now, both the **original** and the **cloned** projects retain the same parcel numbers after cloning.

Site Inspection Page

Site Inspection Page Save Error

The **Site Inspection** page was throwing an error when attempting to save, preventing users from submitting inspection details.

- Fixed script and validation issues causing errors on **saving** the **Site Inspection** page.
- Site Inspection entries can now be saved as expected without throwing system errors.

Third-party Service

First American Order Exception

Some users experienced an issue when submitting **First American** orders, specifically for service types like **CPSI**, **ICER**, and **RCR**. These orders were being flagged with an exception due to how additional services ("AddOns") were being processed. We've corrected the issue by updating how AddOns are handled for **First American** orders.

Third-party Order Permission Handling

We have implemented fixes related to third-party permissions and their corresponding access types. The permissions affected include:

- Ascribe Permission
- Boxwood Means Permission
- CoreLogic Flood Permission
- EDR Permission
- Eval Permission

- First American Permission

Access Types and Resolved Issues:

1. **View Access**
   Expected Behavior: Users with view access should be able to see order details related to a task/service.
   Issue Resolved: Users with view access were not able to see order details on the SRF service page. This has now been corrected.
2. **Add Access**
   Expected Behavior: Users should be able to create and save an order before submission.
   Issue Resolved: For third-party services other than EDR/Flood, users without update access were incorrectly presented with the "Create Order" option. The system now correctly shows “View Order” instead when update access is not granted.
3. **Update Access**
   Expected Behavior: Users should be able to submit an order.
   Issue Resolved: The “Place Order” button was appearing for users without update access. This button is now hidden unless update permission is granted.
4. **Delete Access**
   Expected Behavior: Users should be able to cancel an order.
   Issue Resolved: The “Cancel Order” option was incorrectly appearing on the SRF services page and on EDR/Flood order popups from the PJT Task page. This option is now only visible for users with delete access.

User Management

Increased Character Limit for Company Name in User Profile

The maximum character limit for the **Company Name** field in the **User Profile** has been increased from **85 to 255 characters**. This change is now reflected across all areas where the field is used or displayed.

Affected Areas and Tables:

- **Tables:**
  - RFPPeople
  - RIMSUsers
  - ServRequestFrmPeople
  - TaskCodesRFP
  - RIMSUsersVendor
- **Reports & Features:**
  - Data Summary Report
  - Vendor Handling Fee Report
  - Vendor Scorecard Report
  - Vendor Summary Report
  - Lender Summary Report
  - Create Invoice
  - Engagement Letters (EL)

- Review Documents
  - Notices
  - Scorecard
  - RFP Recipient Selections
  - Smartfields
- **RIMSCentral Tables:**
  - User_PaymentInfo
  - Users
  - User_ContactInfo

This update ensures consistent support for longer company names across the platform.

Vendor Job Manager

Job Attachment Log Access

Resolved an issue where users with the VJM role encountered errors accessing job attachment log; access now functions correctly when the appropriate permission is enabled.

Vendor Performance Modal

Task Status Column Added to Vendor Performance Modal

Added visibility into the **Task Status** for completed work shown in the **Vendor Performance** modal, accessed from the user profile or RFP Recipient page.

- A new **Task Status** column has been added between the **Status** and **Job Type** columns on the **Vendor Performance** page.
- **Task Status** will display values only for **completed tasks** where a **disposition** and **complete date** are set.
- Valid statuses shown: **Cancelled** or **Closed**.
- Tasks that are **in progress** or have a status of **Unpaid** will not display any value in the Task Status column.

Vendor Service Area

Lending Group Selection in Vendor Service Area Edit

When editing a Vendor Service Area via System Settings > Vendor Service Area, only **one Lending Group** appeared as selected—even when multiple groups had previously been saved. Additionally, saving changes in other sections (e.g., Job Type) without touching the Lending Group section unintentionally reset the Lending Group selection to just one.

- Corrected the script that retrieves service area details when editing a vendor, which was previously returning only one Lending Group.
- Now, **all previously selected Lending Groups** are correctly retained and displayed.

Multi-select fields now preserve all saved selections when editing, ensuring accurate and consistent vendor service area data.