## **Orders Gateway<sup>®</sup> Product Line**

#### **Release Notes**

July 18, 2014



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### Overview

The latest update to Orders Gateway includes UI updates and defect corrections. This document provides a brief explanation of what has been fixed and an introduction to new features implemented within this release.

Deployment Date: July 18, 2014

## **Features and Functionality**

This section introduces new features and functionality added to Orders Gateway.

#### **New in This Release**

#### **Orders Gateway**

- Now customers can request to remove the ability to upload documents. For more information, refer to <u>Remove Upload Document button based on Customer</u>.
- The order counts have been removed from many of the queues in the **Other** section on the **Orders** tab. For more information, refer to <u>Remove Order Counts from Other Section</u>.
- The list of available products now displays in alphabetical order in the OG Client. For more information, refer to <u>The Product List now Displays in Alphabetical Order.</u>
- File numbers have been added to the beginning of document names that are delivered via FTP. For more information, refer to <u>Using File Numbers to Identify FTP Delivered Documents</u>.
- Now Orders Gateway will automatically request the SureClose UTI from AIM+. For more information, refer to <u>Automatically Retrieving a Unique Transaction Identifier (UTI) from AIM+</u>.

#### **Remove Upload Document button based on Customer**

The ability to hide the **Upload Documents** link and the **Add** link in the **Documents** section has been added. Now customers that want to have more control over the documents that are uploaded to the system can request to have the **Upload Documents** and **Add** links hidden on the **Order Details** page.

orders Ga	teway		File Number	▼ Se	arch	Searc	
Home	Orders	Accounting CRM	1Tools				
Orders Order De	tails						
Return to Orders - Can	<u>cel</u> - <u>Edit</u>						
Transaction Details					pload Document		
Transaction Type:	Resale - Cash	Change Color Customer: Stewart Title of H 12600 North Featherwood, S		분 I 문 년	r <u>int View</u> itle Search Repor <u>t</u> oad AFW Data		
File Number: Assoc. File Number: AIM File #:	1420184490 11012290 1420184490	Contact: Keitha Bell, Karen ( Email: <u>keitha.bell@stewart</u> . karen.cimrhanzel@stewart.	Cimrhanzel com;	<ul> <li> <u>StewartDocs</u> <u>SoftPro/PXT</u> <u> </u> <u> </u></li></ul>			
Order Date:	7/1/2014 12:40:21 PM	Phone: 281-481-3327 RPC: NPS Texas		분 5 문 년	earch Blank andTech		
Need by Date: Closing Date:	7/2/2014 7/7/2014	Email: <u>nancy.dial@stewart.c</u> Phone: 210-477-2623	com	<ul> <li> <u>▲ AIM+ FileData</u> <u>▲ Load Customer AIM+ Data</u> <u>▲</u> <u>▲ Customer AIM+ Data</u> <u></u> <u></u> <u></u></li></ul>			
Last Modified:	7/3/2014 9:12:01 AM In Abstraction			± 1	et Latest Customer AIM+ Data itle Express		
Order Status: Sales Price:	\$10,000.00				<u>isplaySoft</u> losers Choice (XML)		
Created By:	Nishanth MR			₫ ⊆	losers Choice (TXT) IMS/TDI		
		507b26c0-a464-4fa9-9e16-	71b00fe14f39	호 모	oubleTime		
Flags					amQuest		
🔲 In Use 🛛 🗍 On Hold	RUSH St	atus			<u>Closing/PXT</u> esware		
alculate Fees - <u>Docume</u>	nt Production - <u>Title</u>	Search Report - Get SureClose	e UTI	호 <u>H</u>	lome Warranty		
Product:	TX Search - R	esale Abstractor: HOU - Ang		Add	Documents Original.xml		
Price:	\$85.00	Email: <u>ang</u>	ie.deluna@stewart.com		Original		
Order Date:	7/1/2014 12:40:	21 PM		Edit	AIM+ Starter Document Support Documents		
Status:	In Abstraction To (Search Complete				support bottiments		

#### **Remove Order Counts from Other Section**

Previously, the number of orders in a particular Category would display next to the Category name under the **Categories** section on the Orders page. These order counts have been removed from some of the categories under the **Other** section. The order counts for the categories under the **Search**, **Closing**, and **Funding** sections will still be displayed.

Orders Gat	civity				File Number 🔻	Search			Search
Home	Orders	Accounti	ing	CRM	Tools				
Orders <u>Quotes</u>	<u>Order Deli</u>	<u>veries</u> <u>Quer</u>	ies <u>Re</u> j	ports			Tit	leMax	<u>Orders</u>
Orders	R	ecent Orde	rs		Upload Orders	- Upload SoftPre	<u>o Order</u> - <u>C</u>	reate a	new orde
ategories	Customer				▼ Color Category	Flag 🔻			
oday's Activity asks (1321)		Texas	Cou	nty 🔻	File # Search by File	e #, Loan #, Str	Sear	rch	Clear
unding		File #	Status	Ordered	Customer	Address	City	State	County
earch Search Rejected (90)		A 1420184490	Search Rejected	07/01/14	Stewart Title of Houston - Gulf Freeway	6342 Ouail Meadow Drive	Houston	тх	Harris
In Abstraction (18003) Abstraction Rejected (38)		A 01402-6400	In Abstraction	07/03/14	Stewart Title Border Division - Carrizo Springs	802 High St.	Carrizo Springs	тх	Dimmit
Abstraction Complete (9) In Keying (919)		A 01416-3271	Search Rejected	07/01/14	Central Texas Title - Granbury Parent	6710 Forest Oak Court	Granbury	тх	Hood
Keying Rejected (2) Ready for Review (1864) In Review (939)		A 01128- 13338	In Abstraction	07/03/14	STC - ST North Texas - 15950 N, Dallas - Stewart Tile Company - Title Only	664 Cattlemans Way	Fort Worth	тх	Tarrant
Closing Rejected (67)		A 01402-6396	In Abstraction	07/03/14	Stewart Title Border Division - Carrizo Springs	5 acres HWY 83	Asherton	тх	Dimmit
In Closing (16) Closing Initiated (4978)		A 1424536803	In Abstraction	07/03/14	Stewart Title of Houston - Beaumont	2112 Avenue M	Nederland	тх	Jefferson
unding Funding Approved (3)		A 1447333940	In Abstraction	07/03/14	Stewart Title of Houston - Atascocita	29440 Paint Lane	Waller	ТХ	Waller
Other Order Complete		A 01402-6475	In Abstraction	07/02/14	Stewart Title Border Division - Alice	1413 Consuelo St.	Alice	ТХ	Jim Well
Partially Complete Incomplete		A 1420184200	In Abstraction	07/03/14	Stewart Title of Houston - Atascocita	842 Oak Valley Drive	Houston	тх	Harris
<u>Commitment Created</u> <u>Un Assigned</u>		A 1416743252	In Abstraction	07/03/14	Stewart Title of Houston - Texas City	356 Ling	Bayou Vista	тх	Galvestor
<u>Update Required</u> Revision Requested		A 01021-4236	In Abstraction	07/03/14	ST Corpus Christi - Commercial	6133 Oakhill Circle	Sandia	тх	Nueces
<u>Copies Requested</u> <u>Discarded</u>		A 01128- 13373	In Abstraction	07/02/14	STC - ST North Texas - 1717 Mn St, Dallas	35001-35	Denton	тх	Denton
<u>Cancelled</u> <u>Archived</u>		A 01021-4234	In Abstraction	07/03/14	ST Corpus Christi - 5102 Holly, Corpus	2017 Beckworth	Corpus Christi	ТХ	Nueces
dvanced Search		A 00100-1875	In Abstraction	07/03/14	ST Corpus Christi - Michael J Shelly - Fee Atty - Northwest	4042 Puget Sound	Corpus Christi	ТХ	Nueces

#### The Product List now Displays in Alphabetical Order

When submitting an order to OG from AIM+, the list of available products now displays in alphabetical order. This improvement should help to easily locate and identify the product needed for the order.

🔜 PropertyInfo OrdersGateway Client - 1.6.0.7				- IX
Products & Services Select the products to place with this order.				
Image: Title Evidence Products         Image: Commercial (\$0.00)         Image: LCP Continuation End. (\$0.00)         Image: LCP Step Policy (\$0.00) <td< th=""><th></th><th></th><th></th><th></th></td<>				
	< Back	Next >	Cancel	Help

#### Using File Numbers to Identify FTP Delivered Documents

Now customers that are configured to receive documents using File Transfer Protocol (FTP) can quickly identify which documents are associated with a particular file.

When a document is delivered using FTP, the document is renamed and the file number associated with that document is added to the beginning of document name.



# Automatically Retrieving a Unique Transaction Identifier (UTI) from AIM+

The ability to automatically retrieve a UTI from AIM+ has been added.

Previously, when an order was submitted from AIM+ to Orders Gateway, if that file has not been set up in SureClose, users would have to click **Get SureClose UTI** in Orders Gateway in order to associate the SureClose identifier with the OG file.

Now Orders Gateway will automatically initiate the request for the SureClose UTI and if it is available, the UTI will display in the **Comments** section. If no UTI is available in AIM+, a **UTI Exception** will display in the **Comments** section stating, **UTI not returned by AIM+ File Service**.

can co oracio	<u>el</u> - <u>Edit</u>			
Transaction Details Transaction Type: File Number: Assoc. File Number:	Acquisition and Dev Loan 01128- 13933 11031671	<u>Change Color</u> Customer: STC - ST North Texas - 15950 N, Dallas - Tollway - Res - Schneider 15950 North Dallas Parkway, Tollway Plaza I, Suite 100 Dallas TX Contact: Marvin Schneider Email: <u>mschneid@stewart.com</u>	부 Tit 문 Tit 문 Lo 문 Sc 문 Ou 문 Sc 문 Ou 문 Sc	oload Document int View tle Search Report oad AFW Data wwartDocs oftPro/PXT rder XML earch Blank
AIM File #:	11031671 01128- 13933 7/17/2014	Phone: 972-308-8000 RPC: NPS Texas Email: <u>nancy.dial@stewart.com</u>	± AI	<u>ındTech</u> <u>M+ FileData</u> pad Customer AIM+ Data
Order Date: Need by Date: Closing Date:	7/17/2014 10:16:48 AM 7/17/2014 7/29/2014	Phone: 210-477-2623	문 Tit 문 Di	et Latest Customer AIM+ Dato tle Express splaySoft
Last Modified: Order Status:	7/17/2014 10:31:15 AM In Abstraction		± <u>cl</u>	<u>osers Choice (XML)</u> osers Choice (TXT) MS/TDI
Sales Price: Created By:	\$0.00 Charles		🗄 <u>Ro</u>	<u>oubleTime</u> amQuest Closing/PXT
cicaled by.	Allison Identifier:	993457dd-0b4b-405e-ac80-0555008cdd7a	🗄 <u>Re</u>	<u>esware</u> ome Warranty
Flags			Add	Documents
🗆 In Use 📃 On Hold	RUSH	Status		Title Search Report Support Documents
lculate Fees - <u>Documer</u>	t Production - Ini	tial AIM+ Data - Title Search Report - Get SureClose UTI		Original.xml Original
			Edit	AIM+ Starter Document

## Defects

The following defects were fixed.

- Previously, when sending an order to ATS from Orders Gateway, Orders Gateway would not allow enough time for ATS to respond with a confirmation that the order was received before attempting to resend the order. This caused duplicate orders to be created in ATS. This issue has been resolved.
- Previously, when a user reassigned an order that was originally routed to ATS to a new abstractor who was also configured to route to ATS, the order would be sent to ATS again, causing duplicates. This issue has been resolved.
- Previously, an error message, **Could not load AIM files**, would display on some orders when Florida users would order updates from AIM+. This issue has been corrected.

## **Additional Information**

## Training

Visit the OG Training Center at: <u>http://portal.propertyinfo.com/orders-gateway1</u>. This online library consists of recorded webinars and other useful documentation for you to begin or continue to use Orders Gateway.

#### **Technical Support**

For technical support, contact Customer Care at 1.866-464.8179 or OGSupport@PropertyInfo.com.