FINASTRA

Originate Mortgagebot

Standard Release 23.4

Version 23.4

November 2023

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Overview

This document contains:

- Installation Schedule and Notes
- Enhancements featured
- Finastra Support Information

Installation Schedule & Notes

We will install Standard Release 23.4 into your Originate Mortgagebot UAT environment between 9:00 p.m. and 11:59 p.m. CT on Tuesday, November 21, 2023. The UAT environment will be unavailable during the installation window.

This release is scheduled to be installed in your Originate Mortgagebot Production environment between 2:00 a.m. and 5:00 a.m. CT on Thursday, December 7, 2023. The Production environment will be unavailable during the installation window.

Removal of Search Mortgage

With the 23.3 release of Originate Mortgagebot, the Mortgage Pipeline was released to replace Search Mortgage with a faster and more streamlined way to find and track applications. There are some minor differences in the way that each work. To ensure limited disruption to your workflow and to aid in the transition we decided to leave the Search Mortgage page available in addition to the new Mortgage Pipeline for a couple of months.

As clients have started using the Mortgage Pipeline page, we have received very positive feedback on the new page and with the 23.4 release we will be removing the Search Mortgage page from the system. We encourage you to start using the new Mortgage Pipeline page as soon as possible as it will bring you great benefits and covers all the same items as Search Mortgage.

For additional details on the new Mortgage Pipeline, please review the PowerManager Rewrite: Pipeline section of the Originate Mortgagebot 23.3 Release Notes on Support Center.

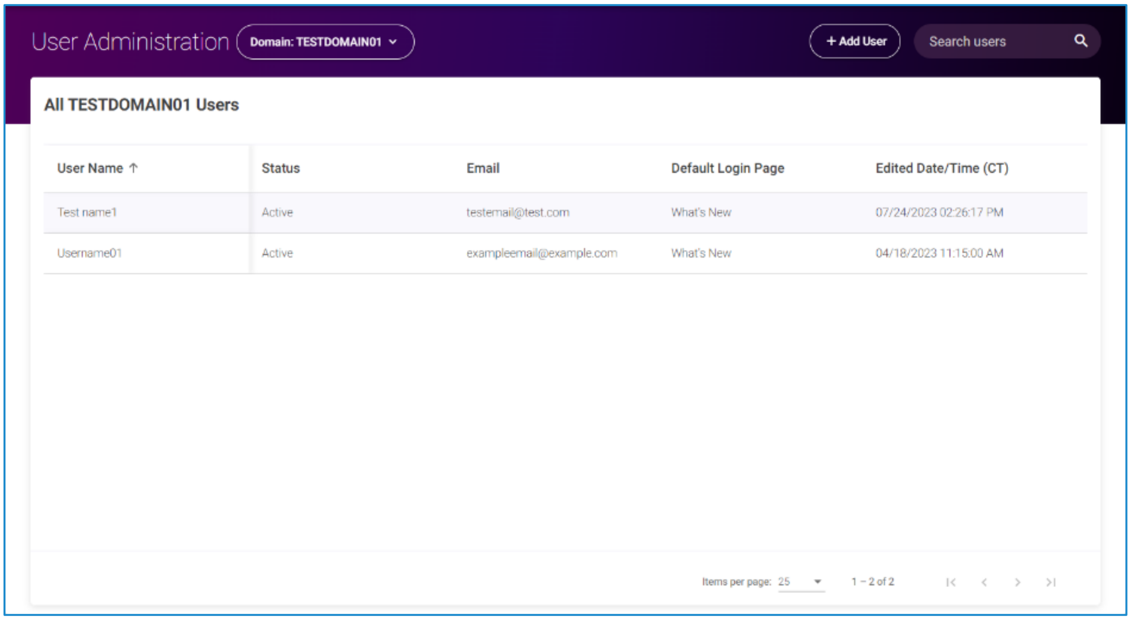
PowerManager Rewrite: User Administration

As part of the continued rewrite of PowerManager to enhance the user experience of the system the User Administration page is updated. This new experience allows for easily and efficiently performing the maintenance of users within the system from a tablet or desktop with the responsive design of the system. Any user who had permission to view the old user administration page will now see the updated page in its place.

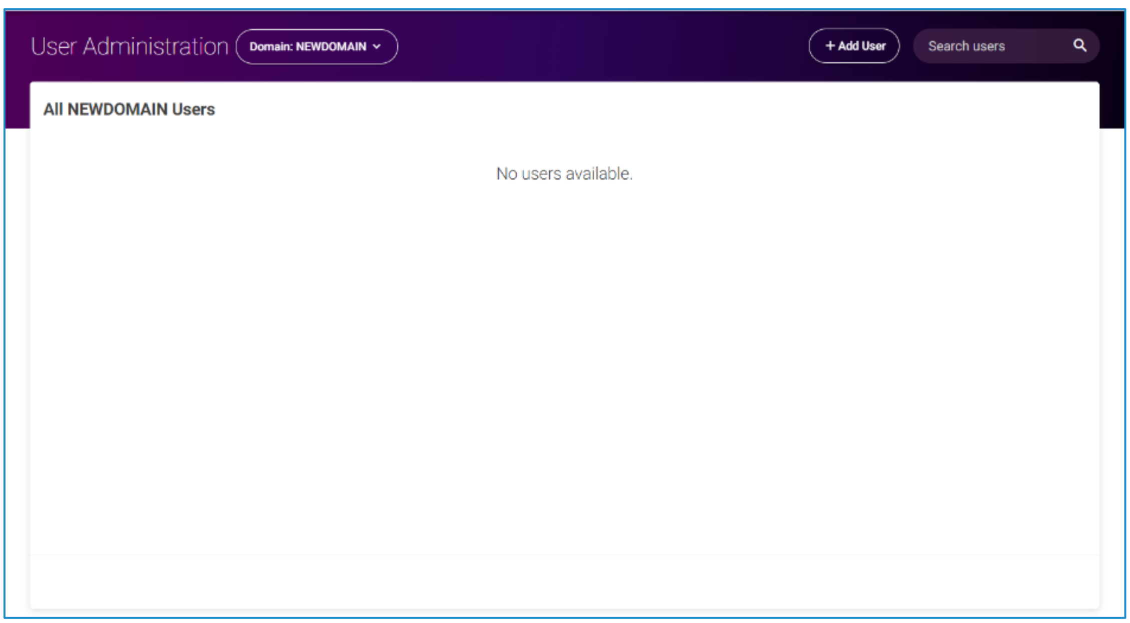
<u>User Administration User List</u>

When you first navigate to the User Administration page you will see the list of users who are in the domain that is selected, with the first 25 users displaying on the first page. If you only have access to one domain, that domain is selected by default. If you have access to multiple domains, the domain that is highest in the hierarchy that you have access to is selected by default. To switch domains, click on domain dropdown in the page header and select a domain and the table updates with the users in that domain. To see additional users in the domain, page forward using the pagination buttons in the bottom right corner of the screen. On the user list, each user’s username, status, email, and default login page display along with the last date/time that the user was edited. If there are no users in the domain selected, the message “No users available” displays instead of the table. The list of users can be sorted ascending or descending by any of the fields on the table by clicking on the field name in the table header.

User List for Domain with Users

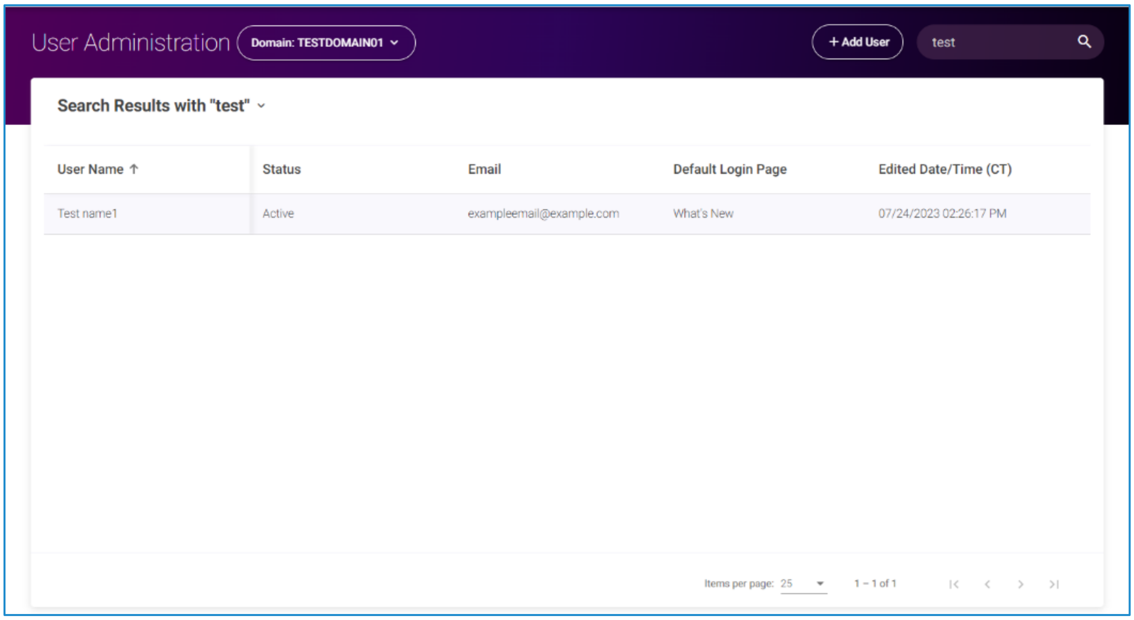


Message for Domain with No Users

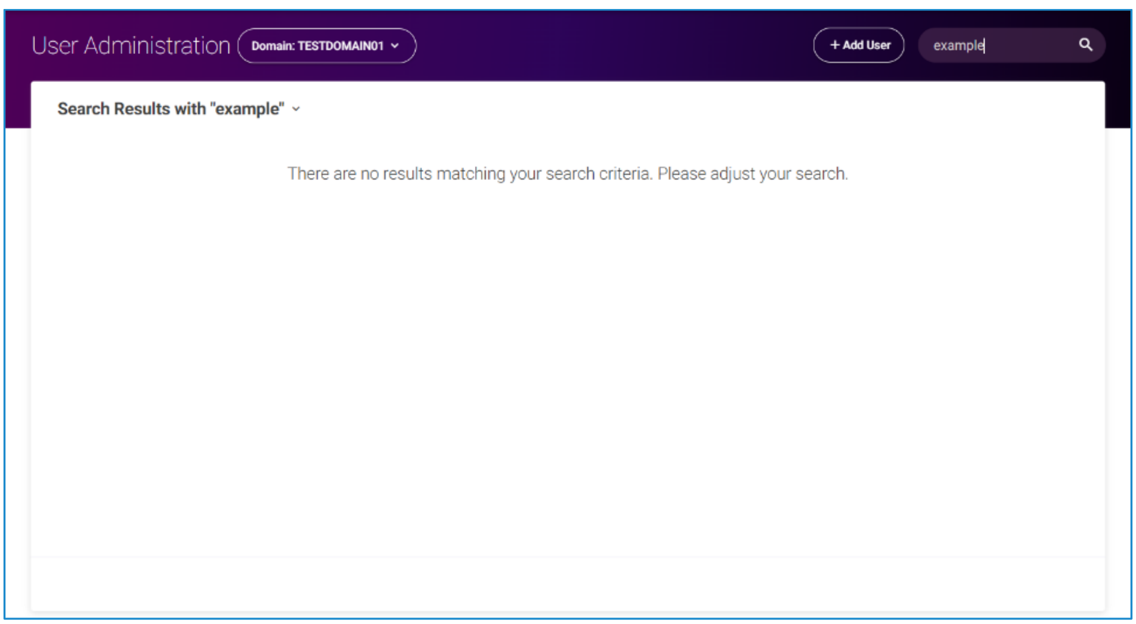


On the page header, there is a “Search users” box you can use to search for a specific user or set of users within the selected domain. In the search box you can search by username, email, cell phone number, and phone number. The search looks across all the search fields and returns any results that contain the entered search value in one of those fields. The search is triggered by pressing enter or clicking on the magnifying glass icon. If there are results, the table updates to include the search term in the table header and display the result set. If there are no results, the table updates to include the search term in the table header and display a message. After completing your search, to return to the initial all users list, click on the table header where it says, “Search Results with “search term” and then select the “all users” option from the dropdown or clear out the search term and search again and you will be returned to the initial all users list.

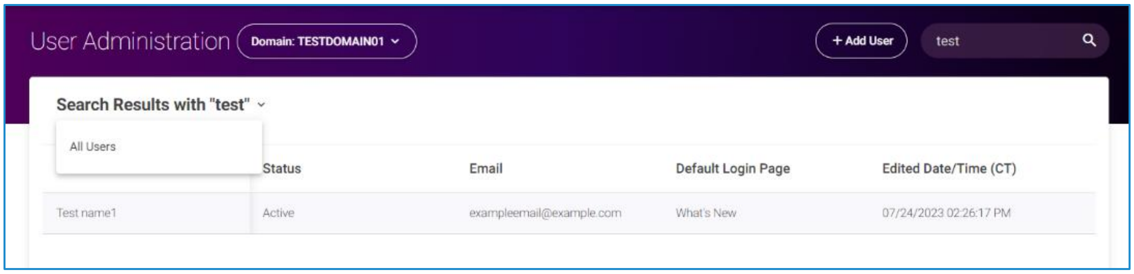
User List Search Results with Results



User List Search Results with No Results



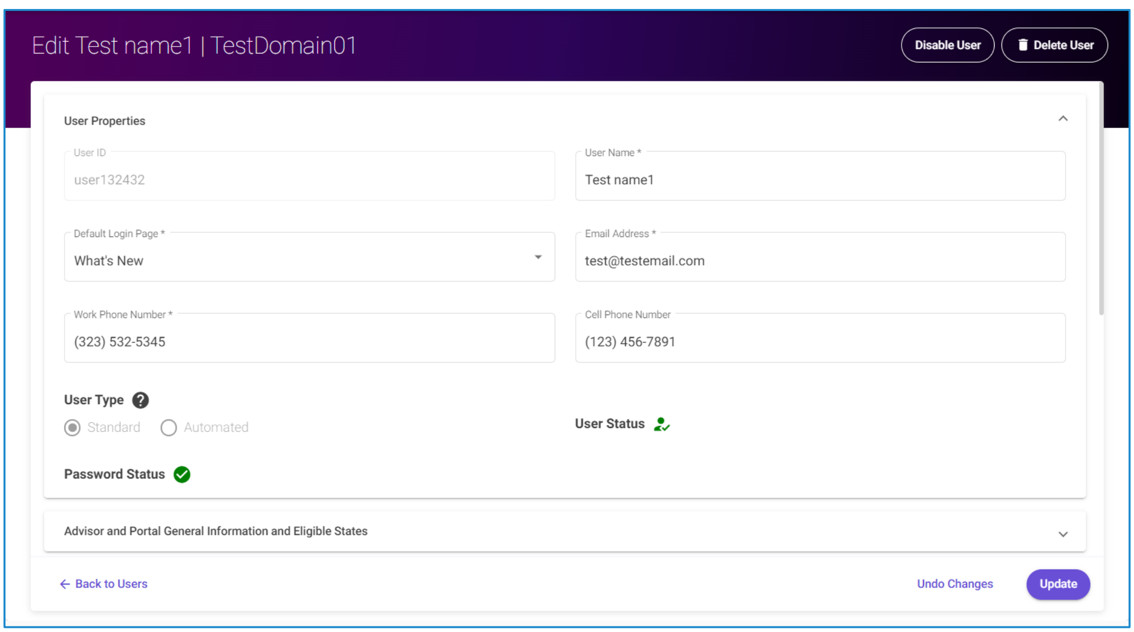
User List Search Results Navigate Back to All Users



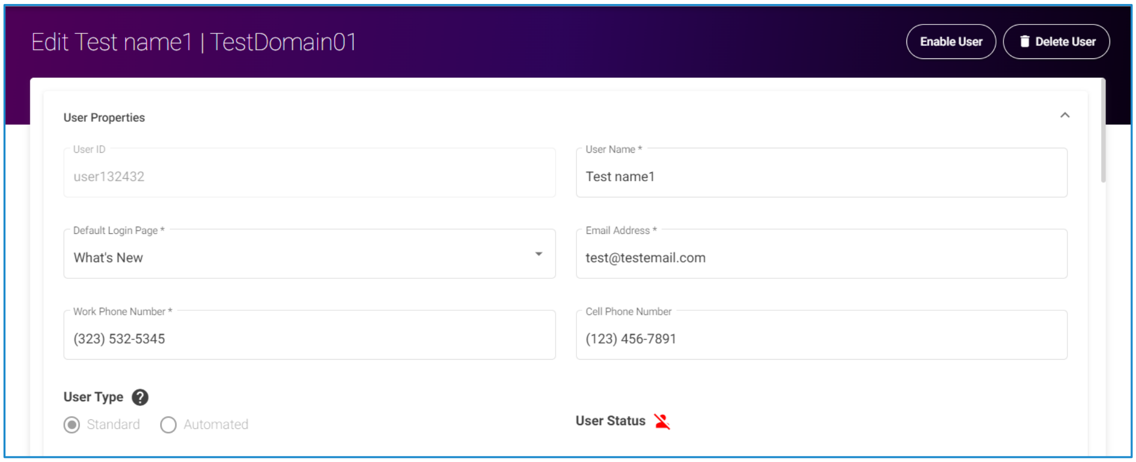
Edit User

To change user information, click on the user from the user list to display the edit user page. On the edit user page, you can update information and permissions for the user. Similar to previous functionality, the permissions that can be assigned to the user are determined by the permissions selected on the domain. The Advisor and Portal sections that display are also controlled by the permissions checked on the domain as available for the user. If the domain has any Portal permissions, the portal sections will display for all users in the domain. If the domain has any Advisor permissions the advisor sections will display for all users in the domain. To navigate back to the user list for the domain, click the Back to Users button in the bottom left corner of the screen. Any changes made on the edit user page will not be saved until the “Update” button is clicked. To reset the page back to the values in place prior to your edits, click the Undo Changes button. To disable the user, click the Disable User button located in the header of the page. The Disable User button then changes to an Enable User button and the User Status field will now have a red icon next to it. To reenable the user click the Enable User button and the user will be reenabled as indicated by the button changing to Disable User and the User Status will have a green icon next to it.

Edit User Page for Enabled User

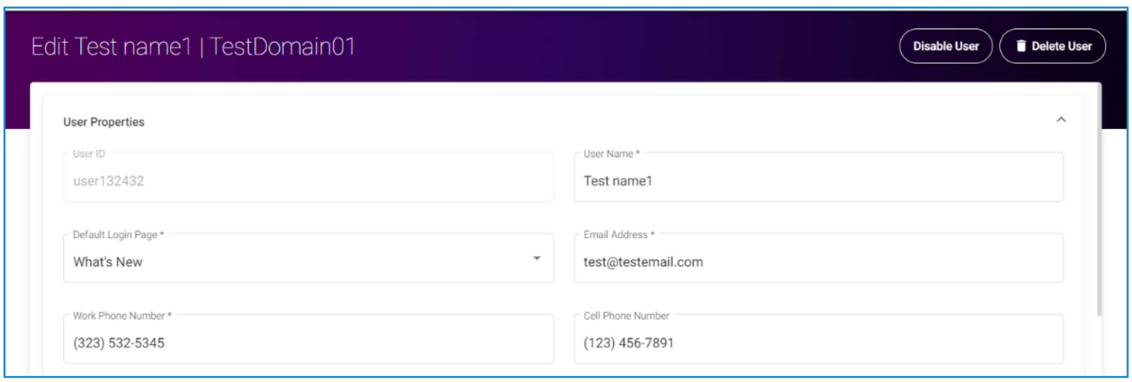


Edit User Page for Disabled User

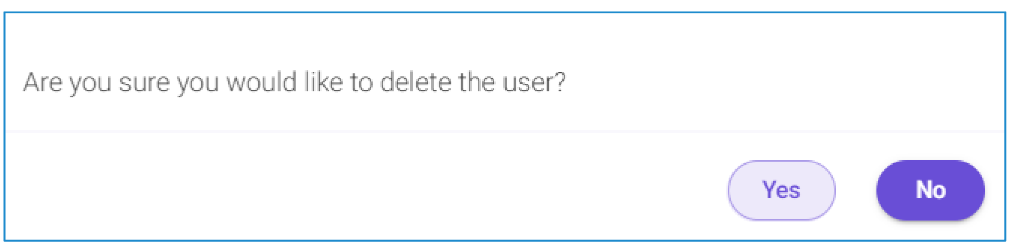


Delete User

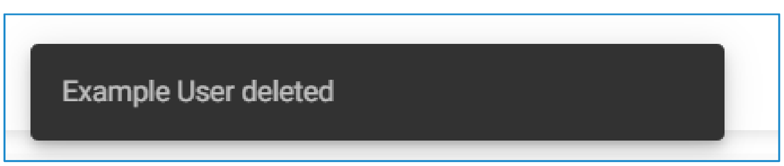
To delete a user, click on the user you want to delete from the user list. In the upper right corner of the edit users page there is a Delete User button. When you click the Delete User button a warning modal displays to ensure that you want to delete the user. If you are sure you want to delete the user click “Yes” and the user is deleted. Once the user has been deleted a message displays at the bottom of the page and you will be returned to the user list for that domain. If you do not want to delete the user, click No and you will be returned to the edit user page.



Delete User Warning Message

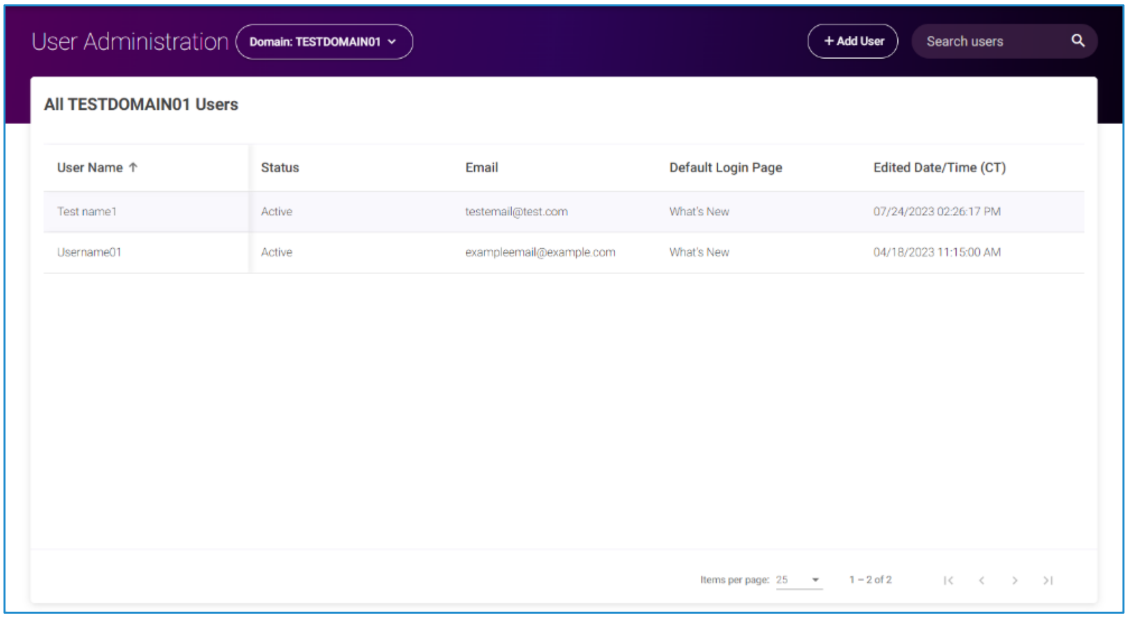


Delete User Confirmation Message



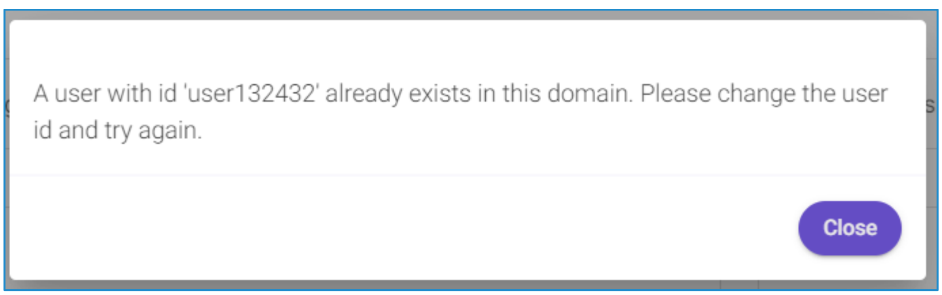
Add User

To add a user to the selected domain, click the Add User button.

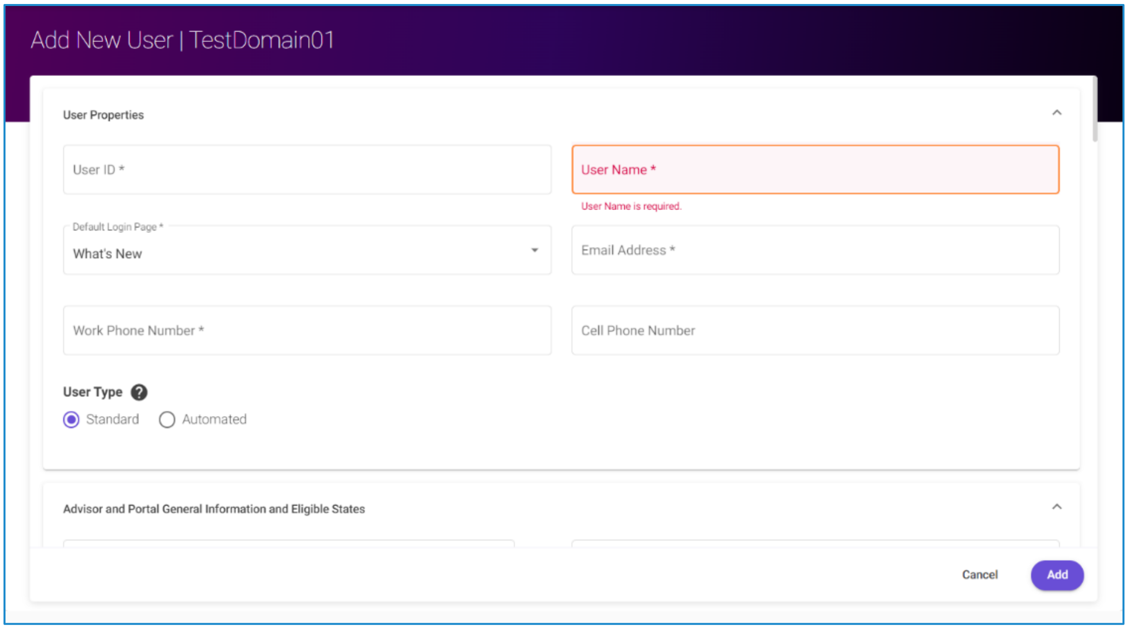


The Add New User page opens and can be filled out with the applicable information and permissions for this new user. Once the user information is complete click the Add button. If the user is successfully added, a message displays that the user was added, and you are then returned to the user list for that domain. If you decide that the user should not be added, click the Cancel button and you are returned to the user list for the domain. The User ID must be unique to the user within the domain. If it is not unique, you will receive an error message when trying to add the new user.

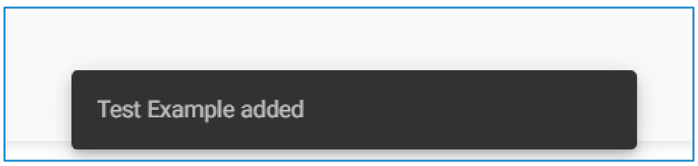
Error Message When Trying to Add User with User ID that already exists in the Domain



Add User Page



User Successfully Added Message



Note: The functionality described above to create a user and display an error message when a User ID is already taken addresses Request for Change 00312477.

Create Password/Update Password

After a user is added, they will need to click on "Forgot Password" and enter in their User ID and domain. They are then emailed a temporary password that is used to log in for the first time. After they log in successfully using the temporary password, they are prompted to set up a new password.

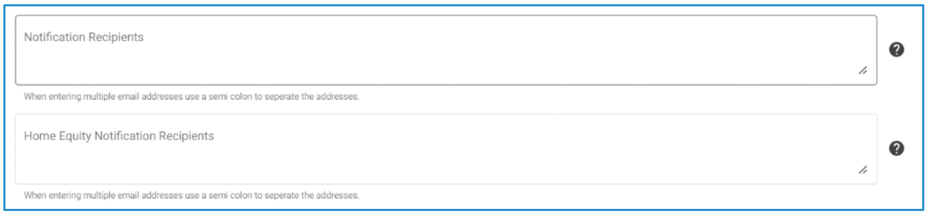
If the user needs to reset their password because they are locked out, the password has expired, or they forgot their password, they must click "Forgot password" and enter in their user id and domain. They are then emailed a temporary password. After they log in successfully using the temporary password, they are prompted to set up a new password.

Miscellaneous User Admin Updates

- An update was made to allow the User Code field to support spaces and apostrophes. (This addresses Request for Change 00515391.)
- An update was made to allow the First Name, Middle Name, and Last Name fields in the Advisor and Lending Portal 1003 interviewer information to support apostrophes. (This addresses Request for Change 00308035.)
- An update is made to the Advisor and Portal General Information and Eligible States section of the user profile to add a Home Equity notification recipients' field. This new field allows you

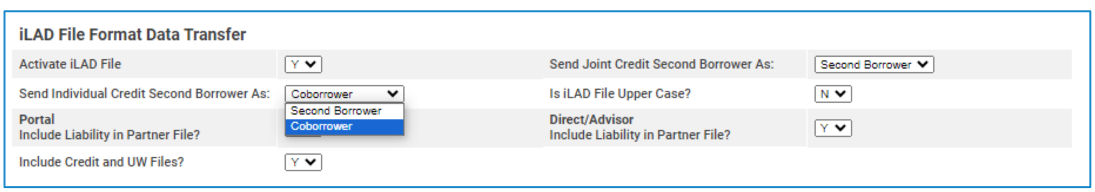
to send notifications to a different email for home equity applications than the one used for all other mortgage types. This field has been populated with the same individual(s) that are in the Notification Recipient’s field but is editable. (This addresses Request for Change 00314150.)

<u>Notification Recipient Fields on User</u>

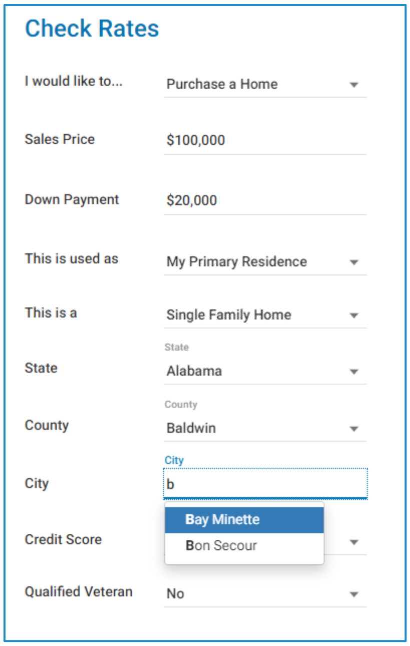


Miscellaneous Updates

- An update is made to allow you to transfer an application with two unmarried borrowers in the iLAD differently based on whether joint or individual credit is pulled. With this change, the existing Send Second Borrower As field in Partner Administration > iLAD File Format Data Transfer section is renamed to Send Joint Credit Second Borrower As. The field controls how the second borrower is sent when joint credit is pulled for the borrowers. Additionally, a new field, Send Individual Credit Second Borrower As is added to the same section. This field controls how the second borrower is sent when individual credit is pulled for the borrowers. Both fields allow for selecting either Coborrower or Second Borrower. Both fields are automatically populated with the way that you currently send the second unmarried borrower in the iLAD file, and no change is required if you do not want to send the second borrower differently based on the type of credit pulled.



- An issue is resolved for Responsive Loan Status where the View Disclosures button did not display on the loan status not available page when the integration with MortgagebotLOS is enabled. (This update addresses Request for Change 00558453)
- An issue is resolved where recalculating fees in Lending Portal errored out on applications that were moved from Responsive to Lending Portal and subsequently had the coborrower deleted in Lending Portal.
- An update is made to add autocomplete to the city field on Responsive Check Rates based on the characters entered and the cities available in the selected county. This now matches the behavior of the field on Direct Check Rates.



- An update is made to the PowerManager login screen and application header to display the updated product name of Originate Mortgagebot.
- An update is made to Lending Portal to allow No Product and Pricing applications to be submitted to Dual Underwriting, DU, and LPA. (This update addresses Request for Change 00574270)
- An update is made to send version number 5.2.00, in the LPA submission.
- An update is made to include applications without a loan purpose that the user has access to in the Mortgage Pipeline results anytime that a filter is not applied to loan purpose.
- An issue is resolved in Direct and Responsive sites, where applicants had to click the Submit button multiple times to submit an application when the selected loan product was an ARM that is also configured for QM Review. (This update addresses Request for Change 00583067)
- An update is made to the Simple Interest calculations to support Balloon loans. This feature is automatically available for all consumer-facing sites and Lending Portal with Simple Interest configuration. To configure products to use Simple Interest submit a change request for Add Simple Interest Product.

Finastra Support

Finastra support offers several options to help you get the most out of your software, including a self-service Case Management tool, and phone support.

Please visit the Finastra Customer Success Community at https://support.finastra.com to log in to our online self-service Case Management system. If you forgot your password, simply click the Forgot Password link. Once logged in, you have the ability to use the Finastra Customer Success Community to troubleshoot issues and find answers to questions.

If your financial institution is not currently using these tools and would like to, please contact Finastra support for assistance.

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