Tempo 25.3 Release Notes

Version 1

Release Date: April 26, 2025

SAGENT

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Release Summary

The following areas are impacted with this release.

Product	Description of Product
Core	Any functionality that is common to all modules, display at loan level, administration, and reporting
Order Management	Fulfilment module (title, doc gen)

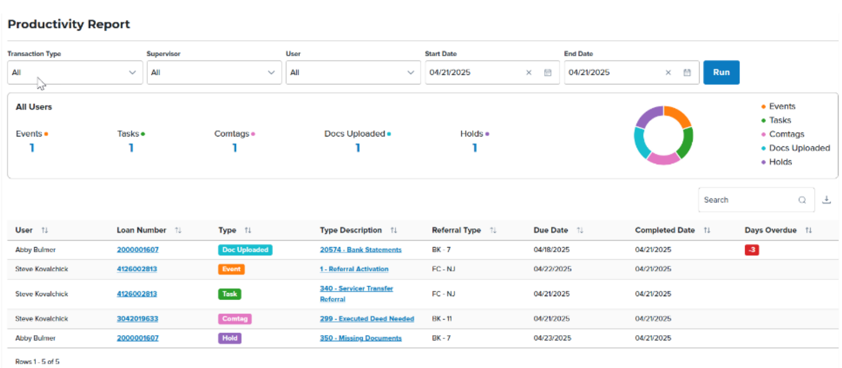
Please submit any questions or findings to Sagent at https://sagentsupport.service-now.com/csm.

Dara Claims and Dara Loss Mitigation are add-on features. If interested, please contact your Sagent Customer Success Manager.

Core

Features

Feature 402596	Tempo Productivity Report
Description	This enhancement improves the ability to track a user's productivity and to view the completed transactions in the results grid or by downloading a report. For the new Productivity Report, supervisors and non-supervisors can select a combination of completed work by Transaction Types (Comtag, Event, Document Tracking, Hold and Task) and Date Range of up to 60 days maximum from the current date.

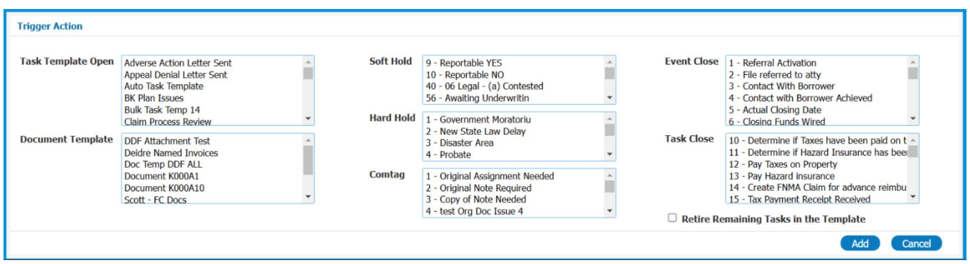


	The following filters are available for the report. • Transaction Type • Supervisor (if user is a supervisor) • Users • Start Date • End Date When viewing the Productivity Report results, • Select Download Report, then the results will be exported to a CSV file format, with the maximum of 10K records. Click **Run**. The grid will be displayed below with following fields: • User • Loan number • Type (Events, Tasks, Docs Uploaded, Comtags and Holds) • Transaction type number and description (e.g., 901 – Sale Held) • Referral type (e.g., Referral Type – Referral Sub Type 1) • Due Date (e.g., Projected Date) • Completed Date • Days Overdue
Testing Considerations	**Negative Testing:** Business as usual to ensure no negative impact on the existing processes/flows **Positive Testing:** 1. Log in to Tempo. 2. Go to Dashboard and click on Productivity Report. 3. Populate the drop down options. Select a Date Range (current to 60 days back) and click on Run. 4. Review the data pulled for accuracy of Completed Transactions. 5. Search for data points within the first 5 Headers (User, Loan Number, Type, Type Description and Referral Type). 6. Clear the current Search and ensure it resets to the existing data pulled. 7. Sort the Headers A-Z, Z-A. 8. Loan Number hyperlink will take a User to the Loan Info screen of the loan.

	9. Type Description hyperlink will take a User to the Closed Transaction. 10. Verify the Download Report option to Excel contains the same Headers and overall data.

<table>
<tr><th>Feature 568691</th><th>Add DDF Transaction Trigger to Retire Remaining Tasks in the Task Template</th></tr>
<tr><td>Description</td><td>

This feature provides the ability to create a DDF Task Trigger to Retire all remaining open Tasks associated with the same Task Template. A new checkbox called '**Retire Remaining Tasks in the Template'** is available on the Trigger Action pop under the Add/Edit Transaction Trigger screen in **DDF Mapping.**



When the user clicks the checkbox to Retire the remaining Open Tasks in the Template, then all remaining Tasks within the same Task Template will be retired once the DDF conditions are met.

Users can view the comments of the Retired Task as follows:

- View Comments in the Archived Tab
- Comments within the Comments screen of the Referral.

Once the Retire process has been completed, the Reason for retiring the '**Retire Remaining Tasks in the Template'** will be stated as **Task Template No Longer Valid.**

</td></tr>
<tr><td>Testing Considerations</td><td>

Negative Testing:

Business as usual to ensure no negative impact on the existing processes/flows

Positive Testing:

1. Log in to Tempo.

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</table>

	2. Go to Admin > Configuration Builder > Dynamic Data Form Creator. 3. Either create a new DDF Mapping or edit an existing configuration. 4. Within the Trigger Action Screen, select the new 'Retire Remaining Tasks in the Template' checkbox. 5. Configure the DDF into a new or existing Task Template Mapping. 6. Ensure the Template has two or more tasks in it, as you will need Tasks to Retire. 7. Find a loan number, add the Task Template, and close out the Task with the new DDF Transaction Trigger configuration. 8. Review the Task Template to ensure all remaining Open Tasks were Retired and the Task Template went to the Archived Tasks tab.

Feature 574126	Update Primary Keys for VendorInfo Data Table
Description	This feature prevents duplicate records in the VendorInfo Extract by adding primary keys to the VendorInfo Data Table. In addition, the RemovedFromReferral field in the extract will contain a “No” when appropriate.
Testing Considerations	**Negative Testing:** Verify the Delta file has a 'Yes' within the 'RemovedFromReferral' Data Field for Referrals where a Vendor was removed. Business as usual to ensure no negative impact on the existing processes/flows. **Positive Testing:** 1. Log in to Tempo. 2. Go to Administration > Configuration Builder > Data Extraction Setup Creator. 3. Configure a new Data Extract for VendorInfo or modify a current VendorInfo Extract to include this Data Field (and all the PKs). 4. Schedule and save the data extract configuration.

	5. Verify the Delta file has a 'No' within the 'RemovedFromReferral' Data Field for Referrals where a Vendor was not removed.

Feature 576165	Disable Mandatory Setting for Band Level in User Creator
Description	As a result of this feature, the Band level is no longer required in User Creator. Admin users will still be able to enter Band level if desired. The red asterisk is removed from the tool tip. In addition, this feature updates the Bulk User creation template and ReadMe file to make band level an optional field rather than mandatory. User can still choose the Band Level and can view the previous Band Levels set on existing Users. The Band Level will default to "Select" and can be saved with this configuration.
Testing Considerations	**Negative Testing:** Business as usual to ensure no negative impact on the existing processes/flows. **Positive Testing:** 1. Log in to Tempo. 2. Go to Admin > User Set Up Builder > User Creator. 3. Click on Create New User. 4. Enter data in all the mandatory fields. 5. Leave the Band Level as 'Select'. 6. Save the User. **Secondary Test Case:** 1. Find an existing user and click on Edit. 2. Edit the Band Level to 'Select' or any other value/option. 3. Save the User.

Order Management

Feature 567817	Add new Title Subtype for Update Foreclosure Information Report - 2 Owner
Description	This feature adds a new Order Sub Type called **Update FC Information Report - 2 Owner.** This sub type will be available on the drop down only when the order type field is selected as **Title Report** in the Order Management screen. • **U-FIR2 (Update FC Information Report - 2 Owner)** Order Subtype is added to the **Bulk Order Template** on the Read Me File tab. It is also available on the Administration>Parameter Builder>Order Management Parameters: Default Transaction Rules, Order Timeline Threshold, Order Rule Assignment and Order Service Levels.
Testing Considerations	**Negative Testing:** 1. Log in to Tempo. 2. Navigate to Order Management and select the Order Type = Title Report. 3. Attempt to select the Order Sub Type = Update FC Information Report - 2 Owner. 4. New Order Subtype isn't there because it hasn't been approved for any vendors. **Positive Testing:** 1. Log in to Tempo. 2. Navigate to Administration>Reference Builder>Vendor Creator. Select any approved Title Vendor by selecting Servicer Assigned = Yes, Vendor Type = 3rd Party Vendor, Vendor Sub Type = Title, State = All, then select the Vendor of your choice (Mortgage Connect, Title365, First American, Vylla) and click Submit. 3. In the Region Contact Information section, under the Order Management Service Offerings, make sure "Update FC Information Report - 2 Owner" is selected. Then click **Save**. 4. Navigate to Order Management and select the Order Type = Title Report. 5. Select the Order Sub Type = Update FC Information Report - 2 Owner.

	6. The Vendor Name list should contain all/any Vendors you added the new U-FIR2 Owner to in Vendor Creator. 7. Pick a Vendor, enter a Loan Number and place an order. 8. The new Subtype is also visible in other Admin screens including Administration>Parameter Builder>Order Management Parameters: Default Transaction Rules, Order Timeline Threshold, Order Rule Assignment and Order Service Levels.

Feature 551652	Add new Order Type Loss Mit Doc Gen for Bulk Ordering
Description	This feature adds a new Order Type called **"Loss Mit Doc Gen"** to the Order Management screen. The Sub Types for Loss Mit Doc Gen will be the same as the Mod Doc Order Type as follows. • FHLMC Deferral Payment • Flex Mod (3179) • FNMA Deferral Payment • HUD-Hamp-Combo • Partial Claims • Standard Mod • Standard Mod 5161 • USDA MRA • USDA MRA Combo • VA Combo • VA Extension Mod • VA Mod • VA Partial Claim **Loss Mit Doc Gen** Orders can be placed through Bulk template and can be viewed in Order Status screen. • If the user retrieves the Order in Order Management screen, and in the Order Update Action pop up, when the Update Status is selected as Cancelled, then the updates will be sent to the Vendor. • If the user retrieves the Order in Order Management screen, and in the Order Update Action popup, when the Add Comment is selected, then the updates will be sent to the Vendor.

	• If the user selects the Order Management - Bulk Order Template, the updates can then be forwarded to the Vendor. • Users can update the "Change Requested By to" through the Order update.
Testing Considerations	**Negative Testing:** 1. Use an older version of the Bulk Order Template. 2. Loss Mit Doc Gen is not available as an Order Type. **Positive Testing:** 1. Log in to Tempo. 2. Navigate to Order Management>Submit Order. 3. Download the Bulk Order Template. 4. View the "Read Me File" tab. In the Order Type field, see Loss Mit Doc Gen as an available Order Type.

Feature 559708	Add No Referral data to the Order Management Data Extracts
Description	This feature adds the "**No Referral"** data (Non-defaulted Loan) into the Valuation Information Data Extracts. When a user sets up the Valuation Information data extraction in the **Administration>Data Extraction Setup Creator>Create Data Extraction Setup** screen, the system will include No Referral Valuation Order details into the Valuation Information Data Extract. When the No Referral Valuation Order for Appraisal, AVM, or BPO is created (manually or bulk) within the Order Management screen, it will be included in the Valuation Information Data Extract.
Testing Considerations	**Negative Testing:** 1. View the Valuation Information Data Extract from before the release 2. There are no "No Referral" orders listed in the extract **Positive Testing:**

	1. Log in to Tempo and place a No Referral Valuation Order (loan is NOT in Tempo/Dara Default). 2. Receive data back from the Vendor, i.e. Appraisal, BPO or AVM. 3. View the Valuation Information Data Extract and see the No Referral Order with data is listed in the Extract.

Document History

This section details the history of the document at each version. It's good to know what has changed in each version and when it happened.

Version	Date	Changes
1	04/26/2025	N/A

Dara Default

Release 25.3

April 26, 2025

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Release Summary

The following areas are impacted with this release.

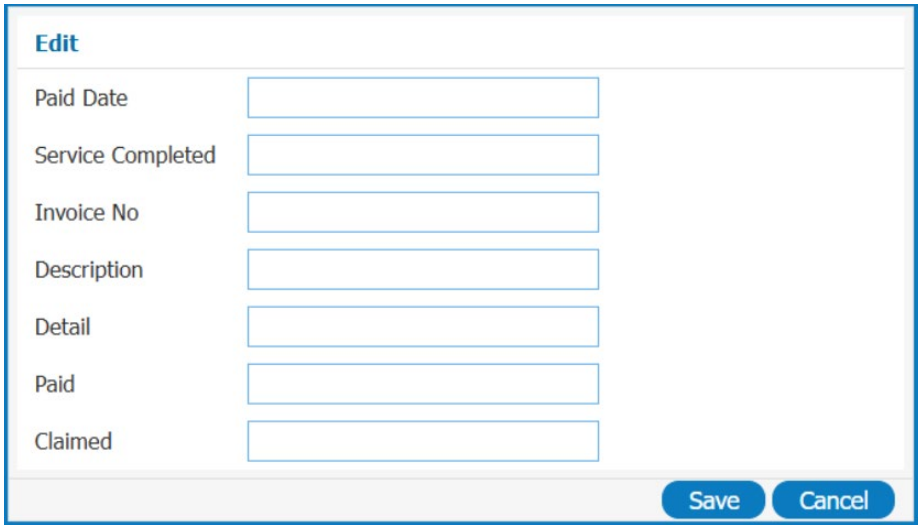
Product	Description
Dara Claims	Claims functionality within Dara and with Claims partners

Please submit any questions or findings to Sagent at https://sagentsupport.service-now.com/csm.

Dara Claims and Dara Loss Mitigation are add-on features. If interested, please contact your Sagent Customer Success Manager.

Claims

Feature 567827	Loss Analysis Enhancements
Description	This feature allows the user to edit or update multiple line items at once on the **Loss Analysis> Loss Attribution Shortfall** Assessment grid, thereby enabling accurate loan balancing, except for validation or calculated fields. In the **Utility>Preferences tab**, if the admin turns **ON** the **Loss Mit Shortfall – Edit,** then the Edit button will be enabled on the **Loss Attribution Shortfall Assessment** grid. ○ The system provides a "Select All" functionality that allows users to select all items on the grid with one click. ○ Users can select applicable line items and use the edit button to update the selected line items. ○ **Edit** pop-up screen will allow users to input values and make the necessary changes to multiple line items as shown below:

	 **Editable fields are**: – Paid Date – Service Completed – Invoice No. – Description – Detail – Paid – Claimed (this field accepts only positive values. The system will not allow the user to enter negative values.) Removed the Checkbox and Edit icon on the UPB Loss and Interest Loss line items.
Testing Considerations	**Configuration Needed:** 1. Client Admin accessibility needed to turn on the edit or delete option in the Loss Attribution Shortfall table. 2. Access Utilities > Preference. 3. Select the Account Name that you would like to grant access to such as LMT. 4. To enable the Loss Attribution Shortfall - Edit function select the radio button under the On column. **Functional Testing:** 1. Verify that all applicable fields in the Loss Attribution table are editable. 2. Ensure that the validations for Credits and Reimbursements are enforced correctly. 3. Confirm that calculated fields (Recovered, Shortfall, Attributed) are computed accurately.

	Mass Edit Testing: 1. Test the "Select All" functionality to ensure it selects all items on the grid. 2. Verify that the delete button works correctly for both single and multiple line-item update. **Configuration Testing:** 1. Check that the admin user can enable or disable the edit/update functionality and mass edit through the preference settings. 2. Ensure that the configuration changes are reflected correctly in the Loss Attribution table.

Feature 594680	Loss Analysis: Validation and Error Handling
Description	This feature enhances the Loss Analysis process to validate and prevent duplication of data. The system will identify and flag incomplete or missing information to assist users in resolving data issue in a timely manner. **Improve Error Handling for Empty Details** Prior to this enhancement, the system displayed a "success" status on Items Details/Recovered Details even if required fields were empty. Going forward, the status will be displayed as "failed," the error status will be "400," and the error message "Failed No Data" displays if data is missing. If the system validation detects no missing data, then the status will be displayed as "success." **Prevent Duplicate Recovered Detail Records** If a Recovered Detail Record is received that has the same SeqNumber/AltSeqNumber and Claim Key as an existing record, then the system will prevent the addition of the duplicate record. If a Recovered Detail Record is received that has the same SeqNumber/AltSeqNumber and Claim Key as an existing record but a different Paid Amount due to a split expense, the system will update the claimed/deducted paid amount for the original Alt SeqNumber. If a unique Recovered Detail Record is received, with different SeqNumber/Alt SeqNumber and the same Claim Key, then the system will add the claimed/deducted amounts as a new line item. If multiple Recovered Detail Records are received, then the system will ensure that claimed and deducted amounts are accurately reflected without creating negative shortfalls. If a Supplemental Claim or subsequent Record Detail Record is received with a different Claim Key, then the system will add the claimed/deducted amounts to the initial claim Paid Amount.
Testing Considerations	**Testing** **Error Handling for Empty Details**

1. Empty Details Handling: Test scenarios where Items Details / Recovered Details are empty or blank to ensure that the system displays a "Failed" status.
   - This may be difficult to reproduce as this is a system anomaly from our Claims Management system that does not occur consistently.
2. Non-Empty Details Handling: Verify that the system displays a "Success" status when Items Details / Recovered Details are not empty or blank. (Regression)

Prevent Duplicate Recovered Detail Records

Duplicate Record Detection: Test the system's ability to detect and prevent the addition of duplicate Recovered Detail Records based on the same Item SeqNumber/AltSeqNumber and Claim Key.

Initial Claim

1. Claims Management system sends a duplicate Recovered Detail to the Loss Analysis grid.
2. The system receives these records with the same Item SeqNumber/Alt SeqNumber, the same Claim Key, and the same Paid Amount for the line item.
3. The Tempo system validates the records and ignores updating the Paid Amount.
4. This will prevent the addition of duplicate claimed or deducted amounts.

Split Expense

1. A duplicate Recovered Detail Record is received.
2. The system receives these records with the same Item SeqNumber/Alt SeqNumber and the same Claim Key but a different Paid Amount.
3. This indicates that a user has split an expense.
4. The Tempo system updates the claimed/deducted Paid Amount for the original Alt SeqNumber.

Supplemental Claim

1. A subsequent Recovered Detail Record is received (such as a Supplemental).
2. The system receives these records with a different Claim Key.

	3. The Tempo system adds the claimed/deducted amounts to the initial claim Paid Amount. New Line Item 1. A subsequent Recovered Detail Record is received. 2. The system receives these records with a different Item SeqNumber/Alt SeqNumber and the same Claim Key. 3. The Tempo system adds the claimed/deducted amounts as a new line item.