

Collateral360®: What's New in January 2025



Place External Services On-Hold – Gain greater control and flexibility with the ability to pause external services independently of internal job statuses, with automatic vendor notifications and seamless adjustments via the Amend Award functionality. For more information, click [here](#)



Three New Global Reports - Simplify daily reporting tasks with the addition of three global Advanced Reports—All Current Assignments, Completed Service Summary by Primary Assignee, and Detailed Completed Service by Month—now accessible in the Global Reports folder for clients with this feature enabled.

Filter Vendors

Showing vendors that meet all of the following criteria:

Areas of Expertise

is equal to

Multi-Family

ADD FILTER

CANCEL

UPDATE FILTERS

RFP Filter updates

Improved vendor filtering experience to **your RFP workflow**: Enhanced mapping for RFP filters to improve accuracy between the vendor's areas of expertise, property types and custom property types.

Clear Capital updates

Streamline your workflow with multiple updates to our Clear Capital integration, including:

- **In-Platform Messaging:** Receive order messages directly within Collateral360.
- **Compliance Enhancements:** Automatically disable Tier 2 evaluations in states where they're not permitted.
- **Simplified Billing:** Access Clear Capital invoices directly in Collateral360.

Workflow Updates

Enjoy a smoother user experience with updated labels, clearer messaging, and enhanced instructions throughout the platform, reflecting our commitment to continual improvement and ease of use.

Engagement Letter Updates

NOTE: If this feature has not been enabled for your organization yet, please reach out to your CSM for onboarding and training on the new Engagement Letter processes.

Service Information


Reviewer City: Reviewer City
Reviewer State: Reviewer State
Reviewer State: Reviewer Zip
Reviewer Address: Reviewer Address

New RFP and Reviewer Variables: Added more variables to the Service Information section: Reviewer Address, Reviewer City, Reviewer State, Reviewer Zip, displaying more Primary Assignee information for our users

New Amendment Letter Variables and Behavior: Created an entirely new section called **Amendment Variables** in the Engagement Letter Builder and Editor - **Amendment Reason, Additional Comments, RFP Comments**. These variables will allow for the data transfer of RFP and amended information to flow successfully between the different versions.

- The Amend Award feature needs to be active for your company.
- These new variables will replace the existing RFP Comments and Additional RFP comments for vendor(s) found under the RFP Information Section.

Insert Variables



AMENDMENT DETAILS

Additional Comments

Amendment Reason

Additional RFP comments for vendor(s)

RFP Comments

phoretis passere nati, surus conque una frustaque eget. Donec id foedus Mauris, ut
murtor lae. Mauris est amet massa nec est inuolutus aliquam et amet et lorem.
Pellentesque conatili, libero at sociis rutrum, ex lorem venenatis ligula, vitae passere
quam est et sapien.

Additional Comment

#	Valuation Premise	Valuation Type	Valuation Interest
1	N/A	N/A	N/A

Improved Valuation Scenarios Behavior: Valuation Scenarios table now populates the premise, type, and interest sections with “N/A” if there are no inputs added to the respective fields.

Signatures

My Client/Trainer Executive

Sign on Behalf:

Select Email Signature to enable Sign on Behalf

Web Sign ... (no digital signatures in printed report)

EDIT SIGNATURE **REMOVE SIGNATURE**

PREVIEW ENGAGEMENT LETTER

CANCEL, CHANGES AND GO BACK **SAVE AND ATTACH TO ANSWER**

[illegible]

Changing “Award Fee” Variable to a Numerical/Currency field: Fixed display of the “Award Fee” variable in the Engagement Letter Builder and Editor.

Cancel Changes and Go Back: Fixed behavior of the Cancel Changes and Go Back button for non-auto attach Engagement Letters. The button now fully exits from the Engagement Letter Editor and brings you back to the Collateral Overview page.

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