AIM+® 6.4

Release Notes

December 9, 2016

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AIM+ 6.4 Release Notes

AIM+ 6.4 includes additional functionality, enhancements, and defect corrections. This document provides users with a brief explanation of what was fixed, and an introduction to new features and functionality implemented with this release.

Deployment Date: December 9, 2016

Closing

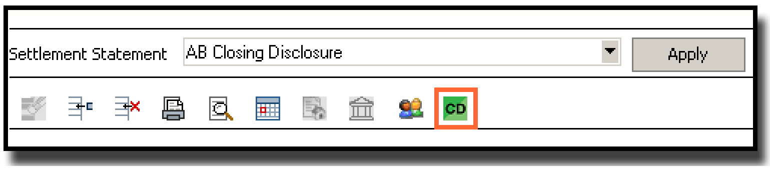
Previewing Refinance Closing Disclosures

When the *Purpose* of the Closing Disclosure Loan Terms is selected as **Refinance** in AIM+, you can now click **Preview** or **Print** to view the Refinance Closing Disclosure.

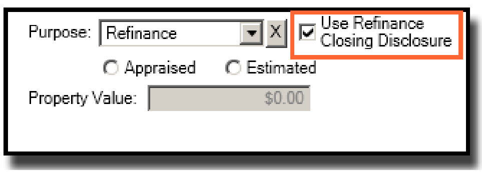
To preview and print a Refinance Closing Disclosure, be sure that the **Use Refinance Closing Disclosure** check box is selected.

Steps

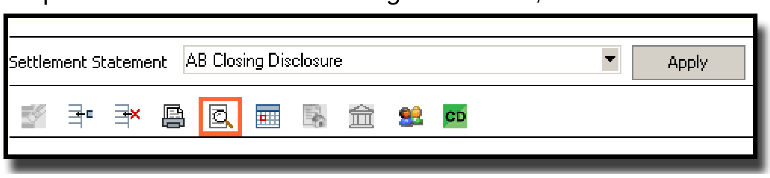
1. From *Closing*, select a Closing Disclosure template.
2. Click the **Closing Disclosure Details** button. The *Closing Disclosure Details* pop-up displays.



3. On the *Loan Terms* tab, from the *Purpose* drop-down, select **Refinance** (if not already selected).
4. Click to select the **Use Refinance Closing Disclosure** check box.



5. Click **Save & Exit**.
6. To preview the *Refinance Closing Disclosure*, click the **Preview** button.



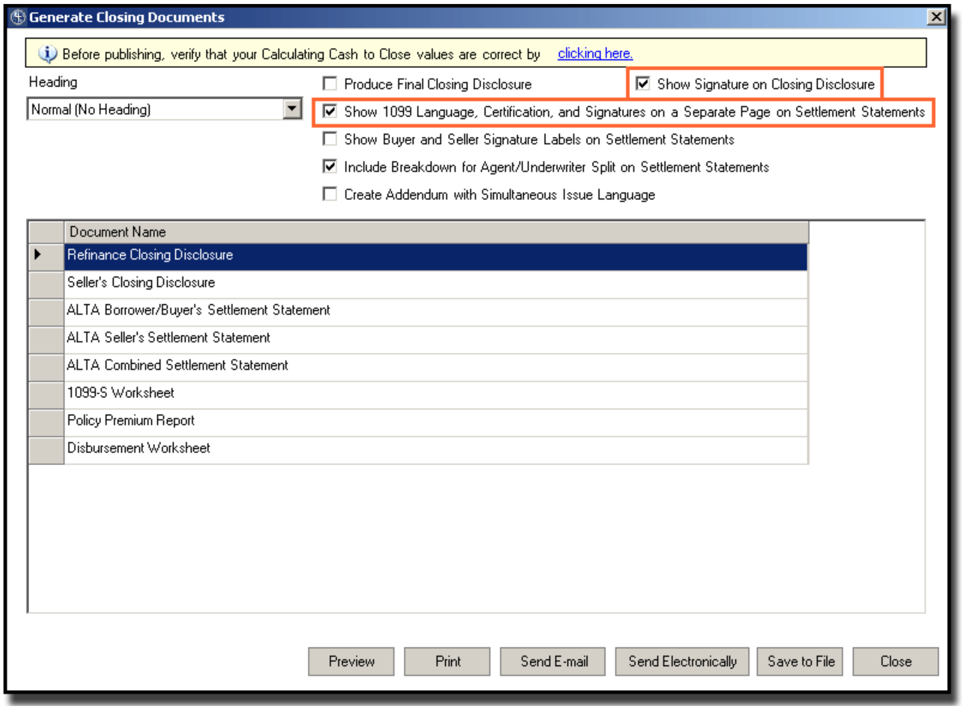
Note

(Lender Connect Users Only) For Lender Connect files, the **Use Refinance Closing Disclosure** checkbox is selected by default.

Selecting Printing Options

Two options, **Show Signatures on the Closing Disclosure** and **Show 1099 Language, Certification, and Signatures on Separate Page on Settlement Statements** are independent options.

Before printing the *Closing Disclosure*, select either of these options from the **Print** dialogue box.



Integrations

Stewart Access

Stewart Access Draft Document Alert Message

When attempting to publish a **Stewart Access draft document**, from *Documents* or from the *Document Editor*, a warning message displays alerting the user that the document is still in DRAFT form.

Simply click **OK** on the warning message pop-up to continue publishing the draft document.

Reporting Deleted Policy Inventory

When **Policy Inventory** is deleted in AIM+, the AIM+ Reporting Database recognizes the deleted Policy Inventory. This change ensures a more accurate inventory report generated from the *Management Console*.

Lender Connect

Failed Emails Report

For TEFS Users Only

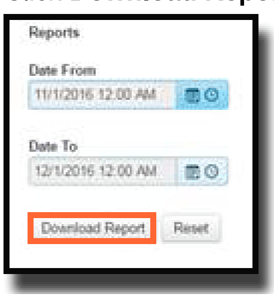
Lender Connect now provides a **Failed Emails Report** to notify TEFS Users when the *Send to Local Office* email fails, or when the receiver of the email is Out of Office.

TEFS Users can click the new **Failed Email Reports** link in the *Stewart Connect Portal* to view emails that have bounced back.

Steps

1. From the *Stewart Connect Portal*, click the **Failed Emails Report** link. The *Reports* screen displays.

2. From the *Reports* screen, enter the **Date From** and **Date To** dates.
3. Click **Download Report**.



4. The *Failed Emails Report* displays.

Company Name	Transaction Id	Provider Id	Loan Number	AIM+ File Number	Event	Local Office Email	Email Date	Is Bounced Back	Is Receiver Out Of Office
AIM Company	13477609-10808450	13476744	ObjID-0019-H	632-16	431	nayyar.raza@stewart.com	11/1/2016 5:38:18	YES	NO
AIM Company	13477609-10810601	13476744	S20632	680-16	431	farooq.jawaid@stewart.coı	11/17/2016 10:04:	YES	YES
AIM Company	13477609-10810601	13476744	S20632	680-16	432	farooq@stewart.com	11/17/2016 9:36:1	YES	NO
AIM Company	13477609-10810825	13476744	U_R_F	694-16	431	nayyar.raza123@stewart.cc	11/14/2016 11:44:	YES	NO
AIM Company	13477609-10810601	13476744	S20632	680-16	460	farooq123@stewart.com	11/17/2016 9:23:2	YES	YES

HELP

For more information on generating a **Failed Emails Report**, refer to **AIM+ Online Help** and search for the topic labeled, *Generating Failed Emails Report.*

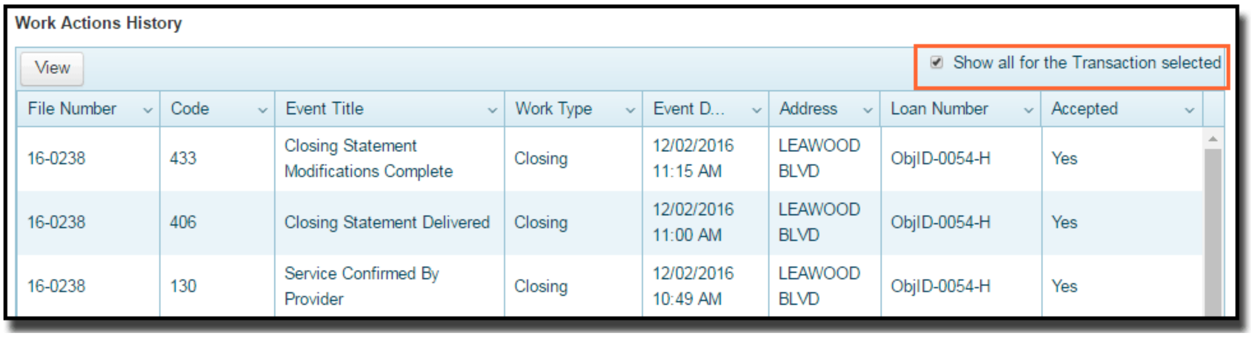
View Transaction History by Transaction or Product

For TEFS Users Only

A new option, **Show all for the Transaction selected** has been added to Lender Connect. TEFS Users have the ability to view the history of all outbound events by Transaction or by Product of the transaction.

Steps

1. From the *Stewart Connect Portal*, select the event from the **Incoming Event Grid**.
2. From the *Work Actions History* grid, click the **Show all for the Transaction selected** check box. All outbound events sent on the Transaction display.



File Number	Code	Event Title	Work Type	Event D...	Address	Loan Number	Accepted
16-0238	433	Closing Statement Modifications Complete	Closing	12/02/2016 11:15 AM	LEAWOOD BLVD	ObjID-0054-H	Yes
16-0238	406	Closing Statement Delivered	Closing	12/02/2016 11:00 AM	LEAWOOD BLVD	ObjID-0054-H	Yes
16-0238	130	Service Confirmed By Provider	Closing	12/02/2016 10:49 AM	LEAWOOD BLVD	ObjID-0054-H	Yes

Note

If you only want to view the outbound events based on the selected product for the transaction, do not select the **Show all for the Transaction selected** check box.

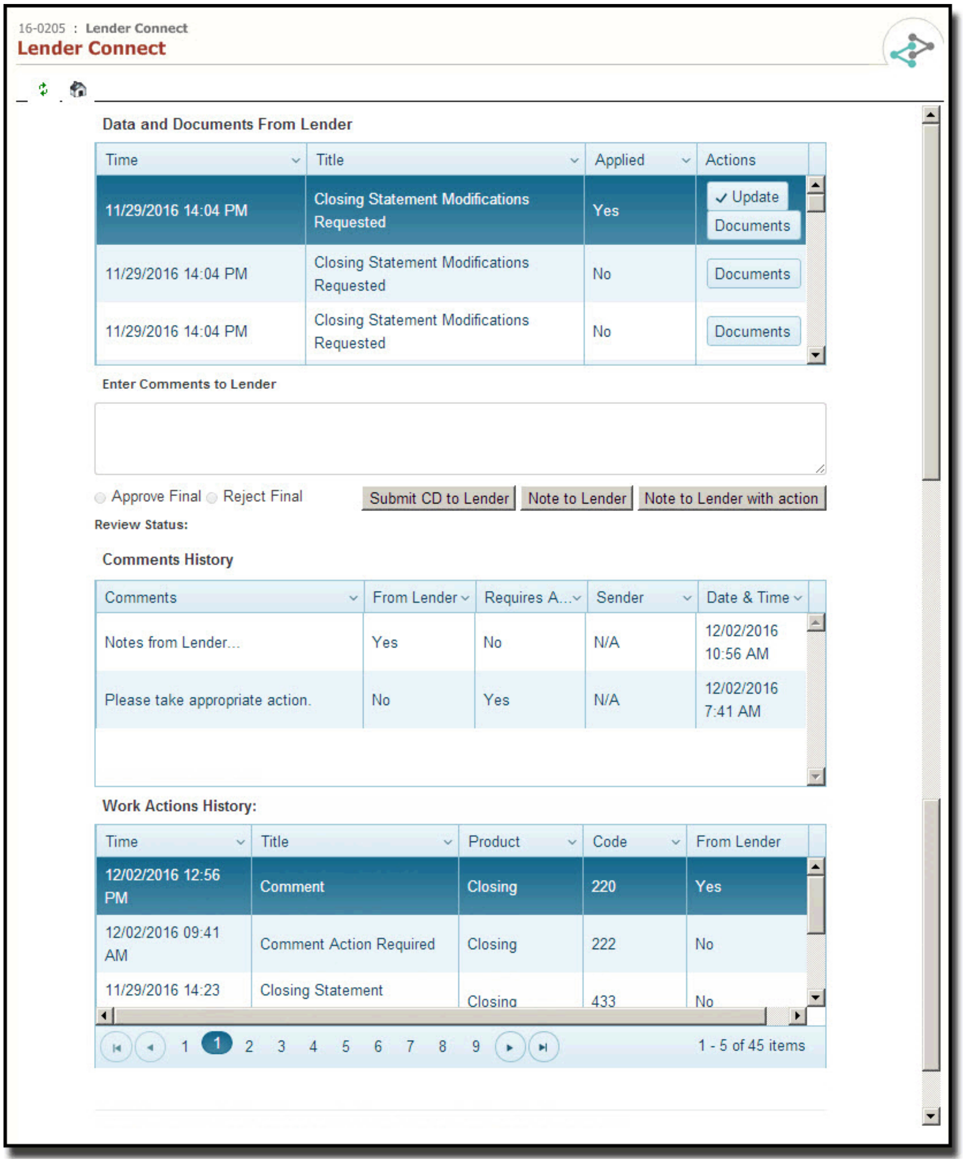
HELP

For more information on viewing transaction history, refer to **AIM+ Online Help** and search for the topic labeled, *Viewing Transaction History by Transaction or Product.*

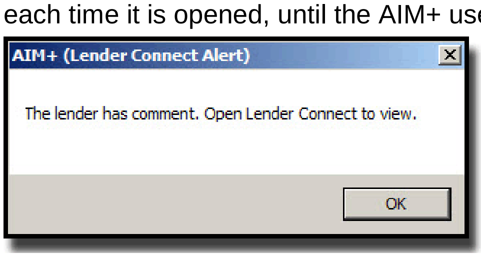
Direct Messaging Between Affiliate Offices and Lenders

Affiliate Users Only

The Lender Connect screen for Affiliates has been redesigned. Affiliate offices now directly receive electronic **Comments** from the Lender, and are able to reply electronically.



If the Lender has sent a comment, the AIM+ file user will receive a pop-up message. This message displays on the file each time it is opened, until the AIM+ user enters Lender Connect from the file.

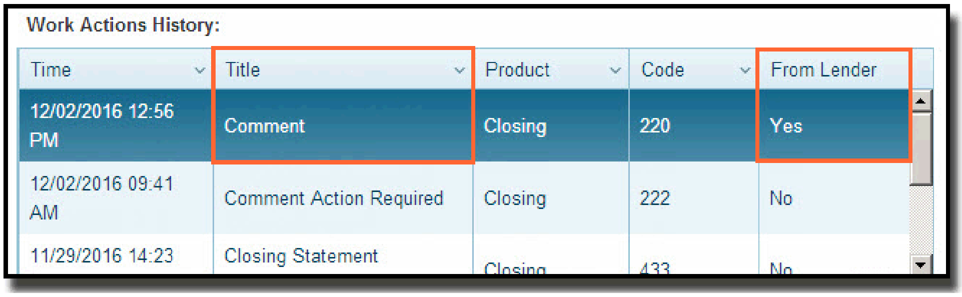


Receiving Comments from the Lender

Use Lender Connect to easily view comments sent from a Lender.

Steps

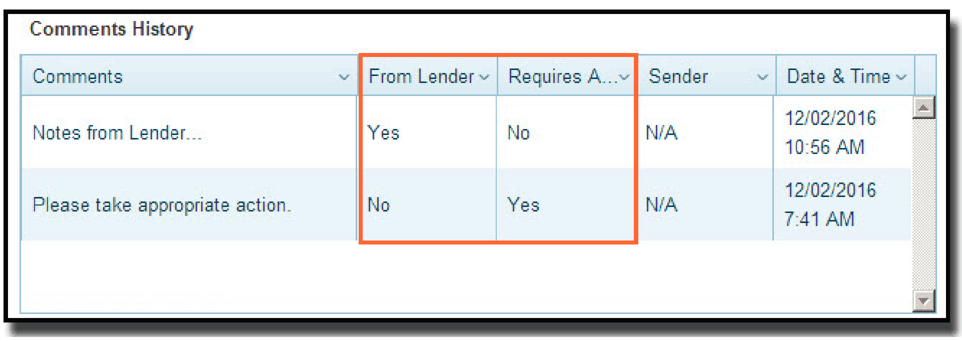
1. After receiving the pop-up message that the Lender has sent a comment, navigate to *Lender Connect*.
2. From the *Lender Connect screen*, under the **Work Action History** grid, select the **Comment** sent **From Lender** to view.



3. Under the **Comments History** grid, view the comment.

- If a comment has been sent from a Lender, the *From Lender Column* in the grid displays **Yes**.
- If no comments have been sent from a Lender, the *From Lender Column* for that comment displays **No**.

4. Read the content in the **Requires Action Column** to see if the Lender requires action, based on the comment that was sent.

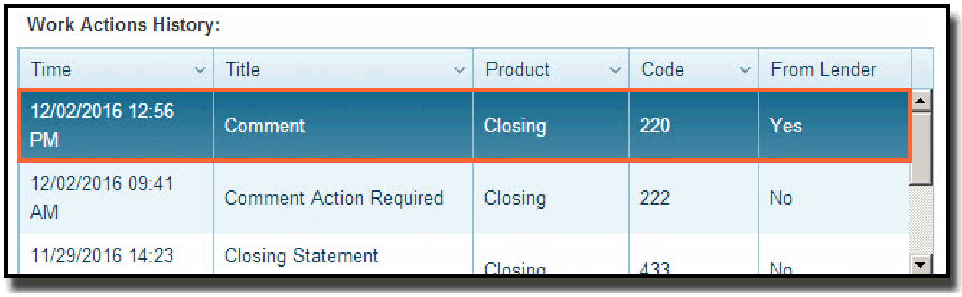


Sending Comments to the Lender

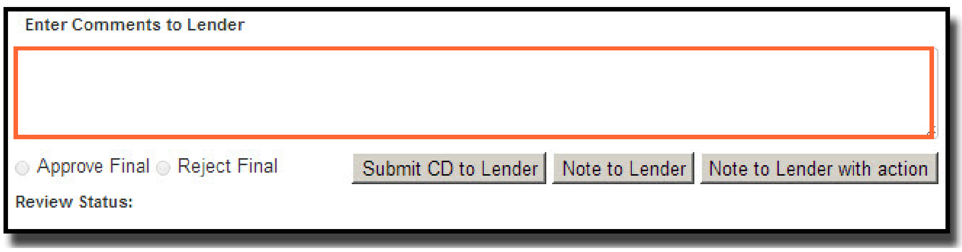
Use Lender Connect to easily send comments to a Lender.

Steps

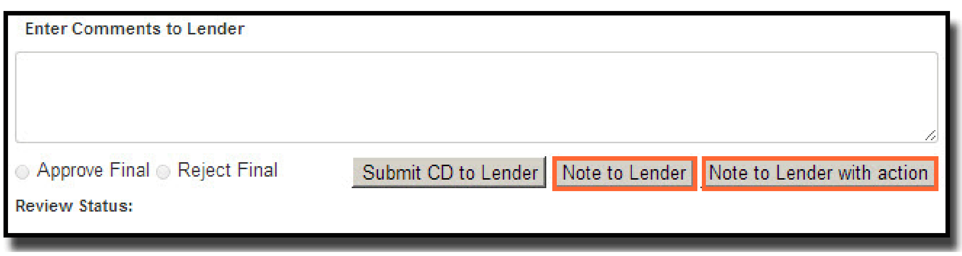
1. From the bottom of the *Lender Connect screen*, navigate to the **Work Actions History** grid.
2. From the *Work Actions History* grid, click to select the Work Action that you are responding to, or the Work Action that you want to initiate conversation.



3. To send a comment related to **Closing Instructions**, **Modified Closing Instructions** or the **Final Closing Disclosure** sent by the Lender, click to select the Closing Instructions before entering the text for the comment.
4. After selecting the Work Action to send a comment, navigate to the **Enter Comments** section.
5. Enter the comments to send to the Lender.



6. Once the comment is entered, decide whether or not you require additional actions by the Lender.
7. After entering in the comment, you have two choices:
   - If <u>no action</u> is required by the Lender, click the **Note to Lender** button to send the comment.
   - If additional action is required by the Lender, click on the **Note to Lender with action** button to send a comment and request action.



For more information on receiving and sending comments, refer to **AIM+ Online Help** and search for the topic labeled, *Direct Messaging Between Affiliate Offices and Lenders.*

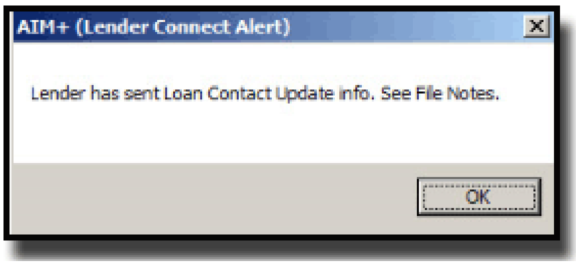
Receive Loan Contact Information Updates

Affiliate Users Only

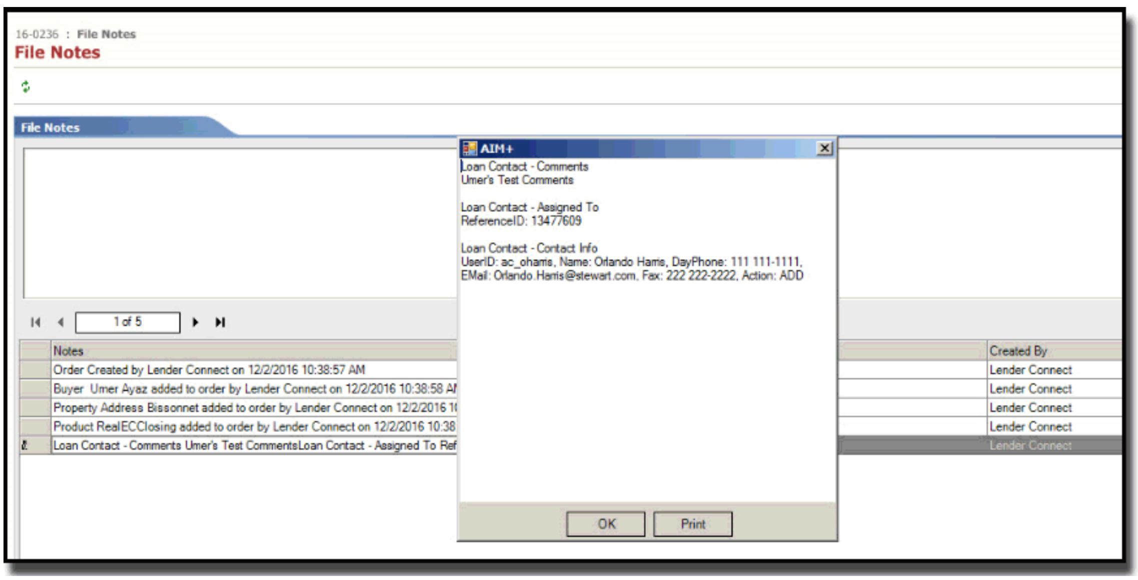
Affiliate offices now receive **Loan Contact Information** from the Lender. This Loan Contact Information flows to the **AIM+ File Notes**.

Steps

1. When the Lender sends a 325 event, an alert message displays.



2. To view the Loan Contact Update, click **OK** on the pop-up and navigate to **AIM+ File Notes**.
3. From *File Notes*, double-click the **Loan Contact Update** to view. The *AIM+ File Notes* pop-up displays.



For more information on receiving Loan Contact Information, refer to **AIM+ Online Help** and search for the topic labeled, *Receiving Loan Contact Information.*

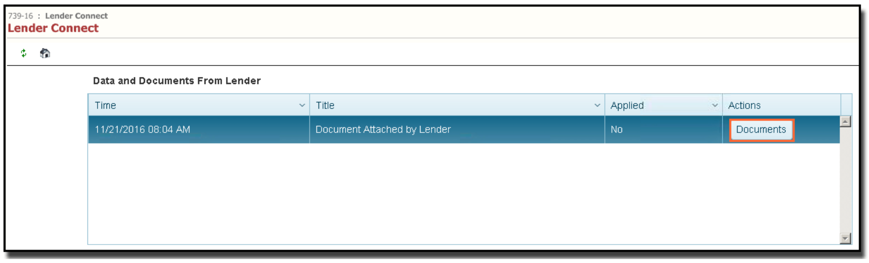
Preview Then Print Lender Documents

All Lender Connect Users

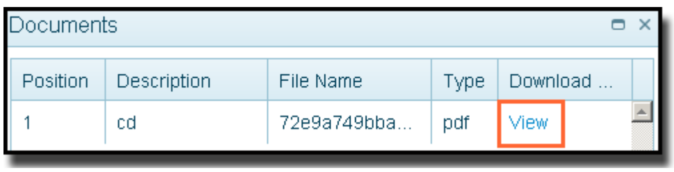
To improve performance, Lender Connect users no longer have to download documents in order to preview and print.

Steps

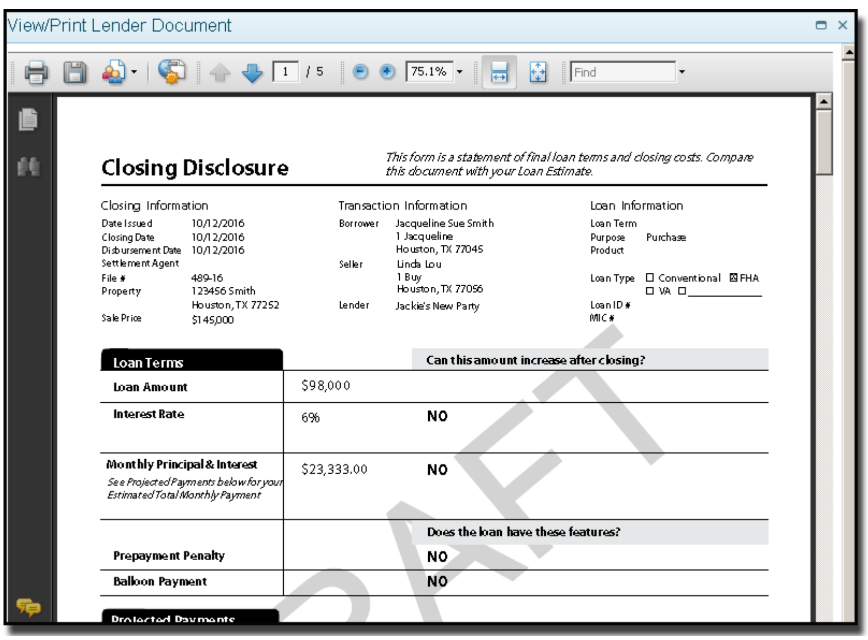
1. Navigate to Lender Connect.
2. From the *Data and Documents* grid, click **Documents** to view a PDF sent from the Lender. The *Documents* pop-up displays.



3. From the *Documents* pop-up, click **View**. A *Preview* window displays the PDF.



4. From the *Preview* window, select to **Print**, **Download** or **Save** the document as needed.



For more information on previewing and printing documents, refer to **AIM+ Online Help** and search for the topic labeled, *Previewing and Printing Documents.*

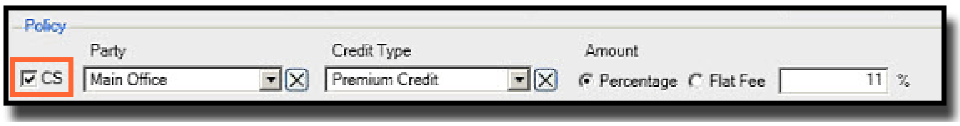
Commercial Services (Revenue Reporting)

Auto-selecting the Agent Type

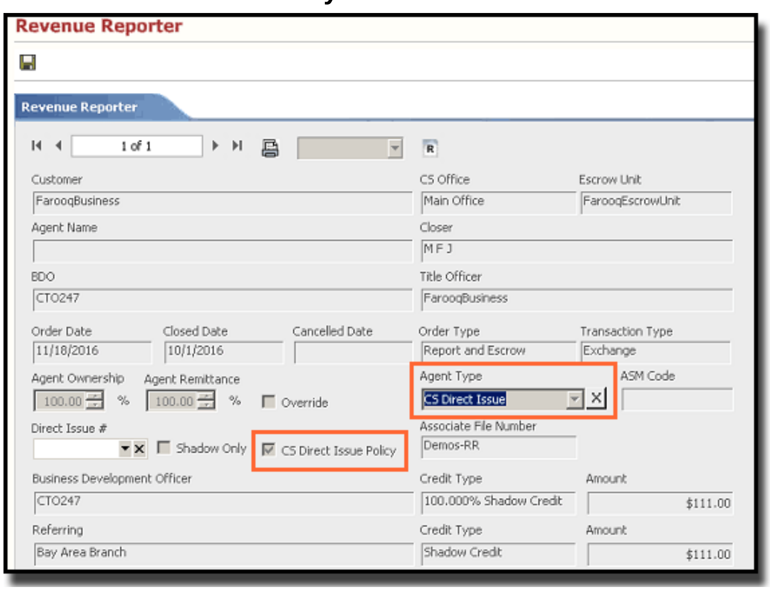
When the **CS** check box is selected on the *Credit Distribution screen*, the **Agent Type** auto-populates as **CS Direct Issue** on the *Revenue Reporter screen*. In addition, the **CS Direct Issue Policy** check box becomes selected on the Revenue Reporter screen. After selecting the **CS** check box, both the **Agent Type** and **CS Direct Issue Policy** check box both become disabled.

Steps

1. From the *Credit Distribution screen*, select the **CS** (Commercial Services) checkbox.



2. From the *Party* drop-down, select the party.
3. From the *Credit Type* drop-down, select the credit type.
4. From the *Amount* section, click the **Percentage** radio button.
5. In the *Percentage* field, enter the percentage number.
6. From the *Data Entry Groups* menu, click the **Revenue Reporter** module. The *Revenue Reporter* screen displays. The **CS Direct Issue Policy** check box is selected and disabled. The **Agent Type** is populated and also disabled.



Note

When selecting to revise the *Revenue Report*, the **CS Direct Issue Policy** and **Agent Type** are also selected and display by default. To remove these entries, go to the *Credit Distribution* screen and unselect the **CS** check box. The values are then removed, and do not display on the *Revenue Reporter*.

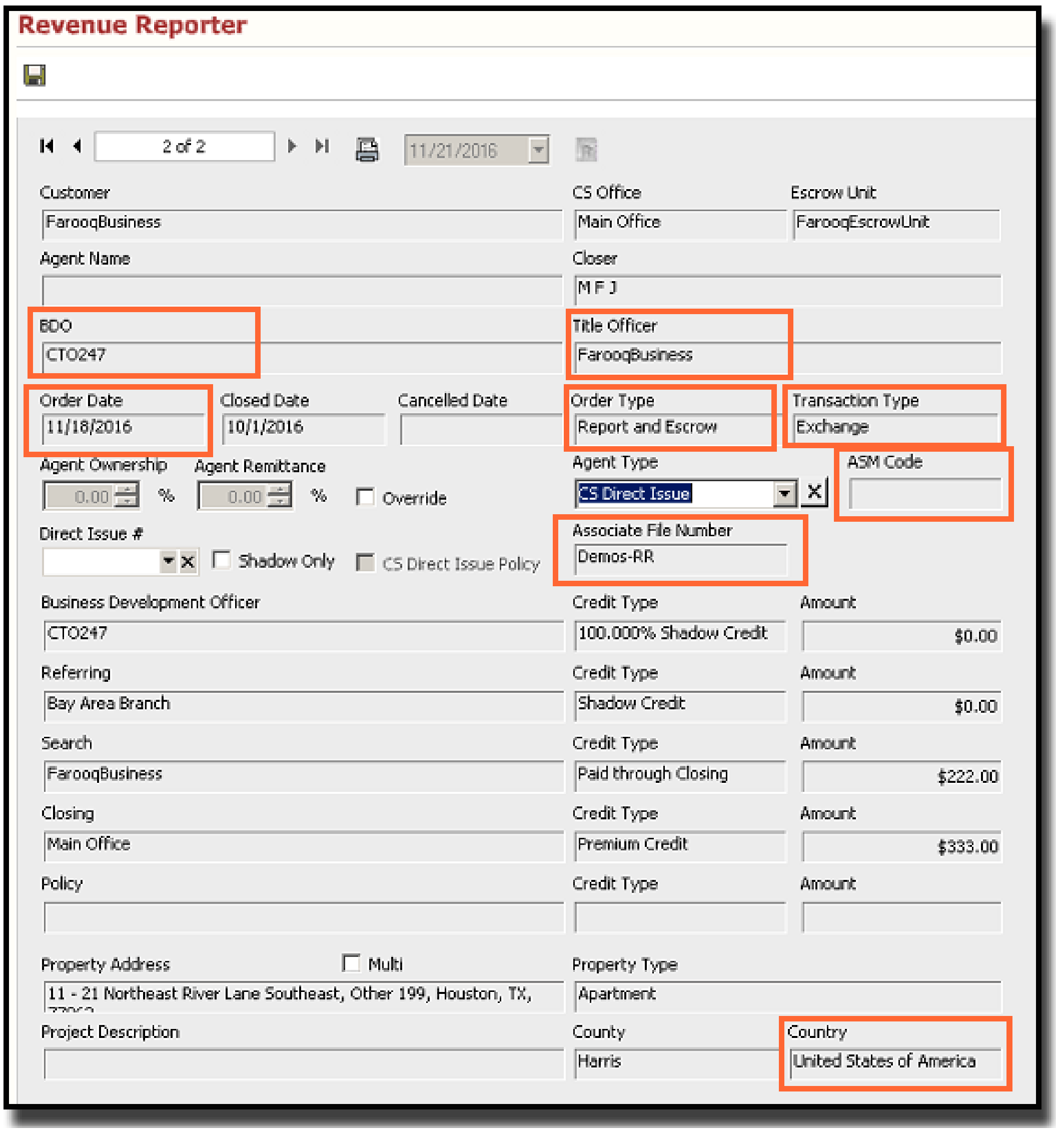
HELP

For more information on auto-selecting Agent Type, refer to AIM+ Online Help and search for the topic labeled, *Auto-selecting the Agent Type.*

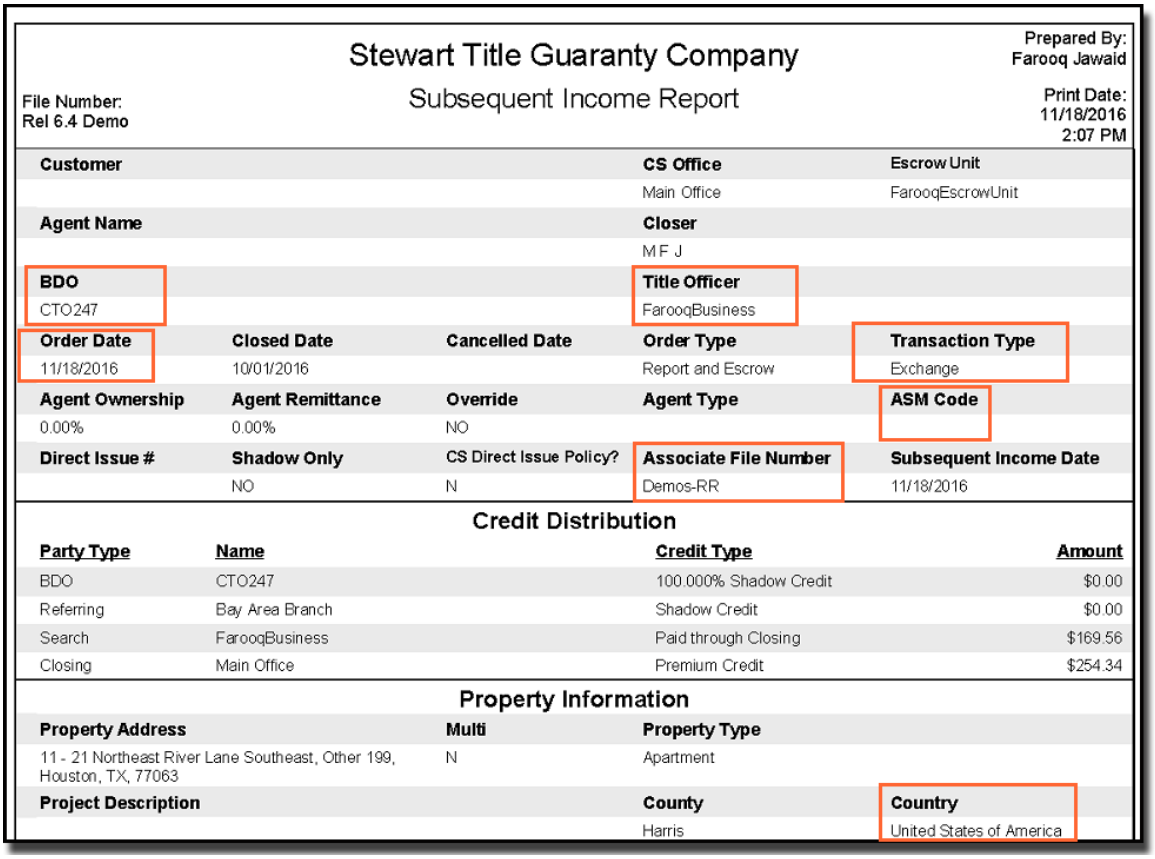
Displaying Additional Data on Revenue Reports

New fields have been added to the **Revenue Reporter screen** in AIM+:

- BDO
- Title Officer
- Order Date
- Order Type
- Transaction Type
- ASM Code
- Associated File Number
- Country



The new fields also displays on the printed **Revenue Report**:



Stewart Title Guaranty Company

Subsequent Income Report

Prepared By: Farooq Jawaid

File Number: Rel 6.4 Demo

Print Date: 11/18/2016 2:07 PM

Customer			**CS Office**	**Escrow Unit**
			Main Office	FarooqEscrowUnit
Agent Name			**Closer**	
			M F J	
BDO			**Title Officer**	
CTO247			FarooqBusiness	
Order Date	**Closed Date**	**Cancelled Date**	**Order Type**	**Transaction Type**
11/18/2016	10/01/2016		Report and Escrow	Exchange
Agent Ownership	**Agent Remittance**	**Override**	**Agent Type**	**ASM Code**
0.00%	0.00%	NO		
Direct Issue #	**Shadow Only**	**CS Direct Issue Policy?**	**Associate File Number**	**Subsequent Income Date**
	NO	N	Demos-RR	11/18/2016

Credit Distribution

Party Type	Name	Credit Type	Amount
BDO	CTO247	100.000% Shadow Credit	$0.00
Referring	Bay Area Branch	Shadow Credit	$0.00
Search	FarooqBusiness	Paid through Closing	$169.56
Closing	Main Office	Premium Credit	$254.34

Property Information

Property Address	**Multi**	**Property Type**	
11 - 21 Northeast River Lane Southeast, Other 199, Houston, TX, 77063	N	Apartment	
Project Description		**County**	**Country**
		Harris	United States of America

Enhancements to Subsequent Income

New fields have been added to the **Subsequent Income screen** in AIM+. These fields also display on the printed **Subsequent Income Report**:

- Canceled Date (When the File is set to Cancelled)
- Associated File Number
- Order Date
- Order Type
- Transaction Type
- Country
- Title Officer
- Prepared By
- Subsequent Income Date

Redesign of the Main Excel Report

New fields and redesign of the **Main Excel Report** have been added in AIM+ release 6.4. The new fields on this report are the same items added to the Revenue Reporter and Subsequent Income screens.

Defects

Only performance-related defects were addressed in **AIM+ 6.4**.

Additional Information

Accessing AIM+

You can access AIM+ one of two ways depending on your setup:

- *If you access AIM+ through the Citrix environment*, AIM+ is automatically updated to the latest version when you log in. If you are new to StewartWorkPlace or TitleWorkPlace, contact Customer Care at 1.877.800.3132 for assistance.
- *If you are using AIM+ in a Citrix environment*, maximize the Citrix screen and the AIM+ screen for best viewing results.

Training

Through the AIM+ Help Contents, you can access an online library of interactive tutorials and quick reference cards by clicking the **Additional Learning Resources** link or navigate to the AIM+ Training Center page.

Technical Support

For technical support, contact Stewart Customer Care Center at 1.877.800.3132 or CustomerCareCenter@stewart.com.