



AIM+[®] 6.4

Release Notes

December 9, 2016

stewart[®]

Real partners. Real possibilities.[™]

Table of Contents

AIM+ 6.4 Release Notes	1
Closing	2
Previewing Refinance Closing Disclosures	2
Selecting Printing Options.....	3
Integrations	4
Stewart Access	4
Stewart Access Draft Document Alert Message	4
Reporting Deleted Policy Inventory.....	4
Lender Connect	5
Failed Emails Report	5
View Transaction History by Transaction or Product	6
Direct Messaging Between Affiliate Offices and Lenders	7
Receiving Comments from the Lender	8
Sending Comments to the Lender	9
Receive Loan Contact Information Updates.....	10
Preview Then Print Lender Documents.....	11
Commercial Services (Revenue Reporting)	12
Auto-selecting the Agent Type	12
Displaying Additional Data on Revenue Reports	13
Enhancements to Subsequent Income	14
Redesign of the Main Excel Report	14
Defects	15
Additional Information	16
Accessing AIM+	16
Training.....	16
Technical Support.....	16

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

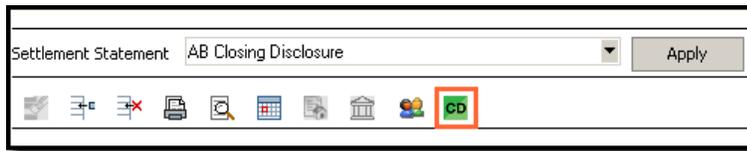
Previewing Refinance Closing Disclosures

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.

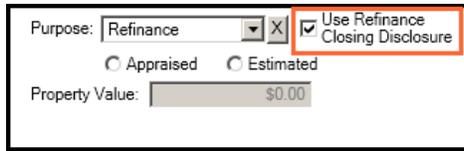
To preview and print a Refinance Closing Disclosure, be sure that the **Use Refinance Closing Disclosure** check box is selected.

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.

Generate Closing Documents

Before publishing, verify that your Calculating Cash to Close values are correct by [clicking here](#).

Heading: Normal (No Heading)

Produce Final Closing Disclosure

Show Signatures on Closing Disclosure

Show 1099 Language, Certification, and Signatures on a Separate Page on Settlement Statements

Show Buyer and Seller Signature Labels on Settlement Statements

Include Breakdown for Agent/Underwriter Split on Settlement Statements

Create Addendum with Simultaneous Issue Language

Document Name
▶ Refinance Closing Disclosure
Seller's Closing Disclosure
ALTA Borrower/Buyer's Settlement Statement
ALTA Seller's Settlement Statement
ALTA Combined Settlement Statement
1099-S Worksheet
Policy Premium Report
Disbursement Worksheet

Preview Print Send E-mail Send Electronically Save to File Close

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

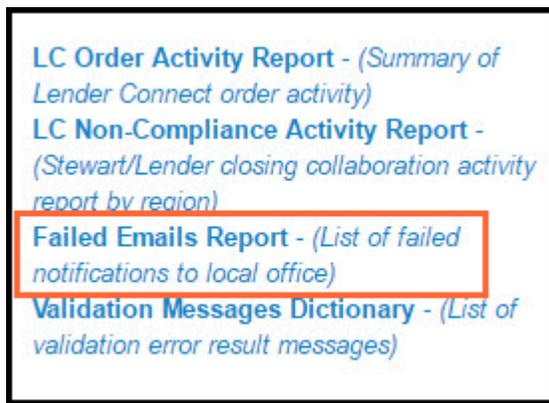
For TEFS Users Only

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.

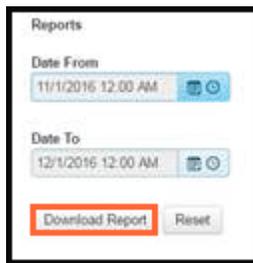
TEFS Users can click the new **Failed Email Reports** link in the *Stewart Connect Portal* to view emails that have bounced back.

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.coi	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



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.

Work Actions History									
View									<input checked="" type="checkbox"/> Show all for the Transaction selected
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.



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.

16-0205 : Lender Connect
Lender Connect

Data and Documents From Lender

Time	Title	Applied	Actions
11/29/2016 14:04 PM	Closing Statement Modifications Requested	Yes	Update Documents
11/29/2016 14:04 PM	Closing Statement Modifications Requested	No	Documents
11/29/2016 14:04 PM	Closing Statement Modifications Requested	No	Documents

Enter Comments to Lender

Approve Final Reject Final

Review Status:

Comments History

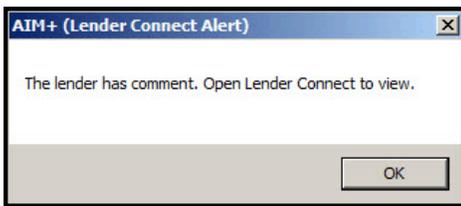
Comments	From Lender	Requires A...	Sender	Date & Time
Notes from Lender...	Yes	No	N/A	12/02/2016 10:56 AM
Please take appropriate action.	No	Yes	N/A	12/02/2016 7:41 AM

Work Actions History:

Time	Title	Product	Code	From Lender
12/02/2016 12:56 PM	Comment	Closing	220	Yes
12/02/2016 09:41 AM	Comment Action Required	Closing	222	No
11/29/2016 14:23	Closing Statement	Closing	433	No

1 - 5 of 45 items

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.

Time	Title	Product	Code	From Lender
12/02/2016 12:56 PM	Comment	Closing	220	Yes
12/02/2016 09:41 AM	Comment Action Required	Closing	222	No
11/29/2016 14:23	Closing Statement	Closing	433	No

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.

Comments	From Lender	Requires A...	Sender	Date & Time
Notes from Lender...	Yes	No	N/A	12/02/2016 10:56 AM
Please take appropriate action.	No	Yes	N/A	12/02/2016 7:41 AM

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.

Time	Title	Product	Code	From Lender
12/02/2016 12:56 PM	Comment	Closing	220	Yes
12/02/2016 09:41 AM	Comment Action Required	Closing	222	No
11/29/2016 14:23	Closing Statement	Closing	433	No

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.

Enter Comments to Lender

Approve Final Reject Final

Review Status:

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 no action 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.

Enter Comments to Lender

Approve Final Reject Final

Review Status:



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*.

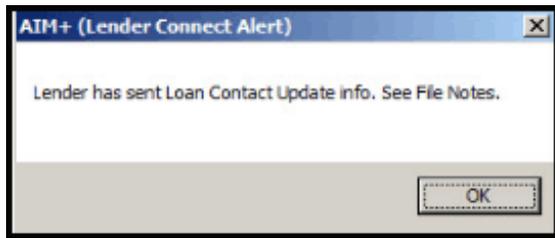
Receive Loan Contact Information Updates

Affiliate Users Only

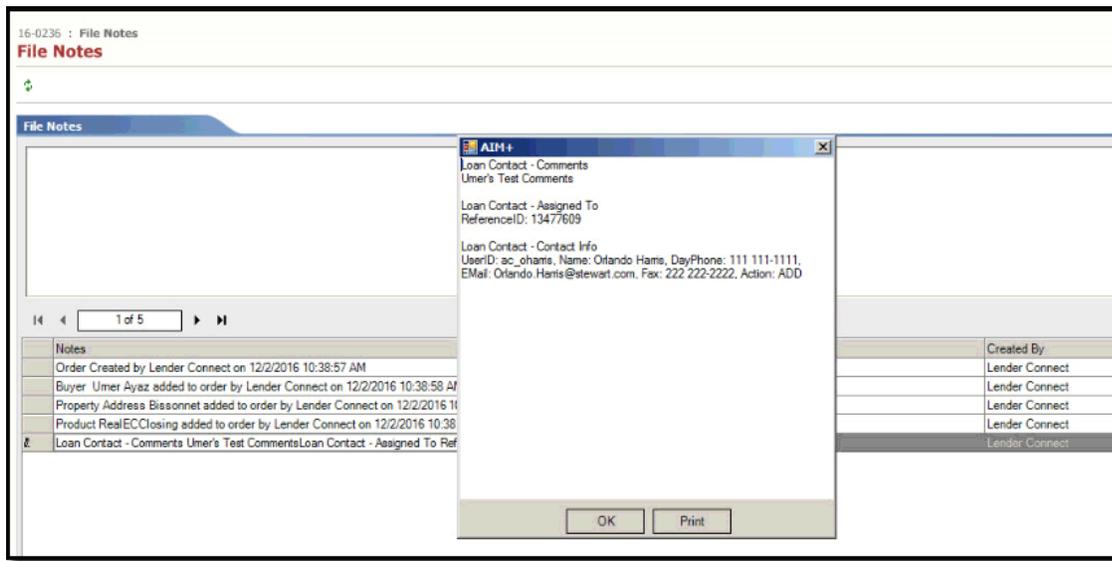
Affiliate offices now receive **Loan Contact Information** from the Lender. This Loan Contact Information flows to the **AIM+ File Notes**.

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*.

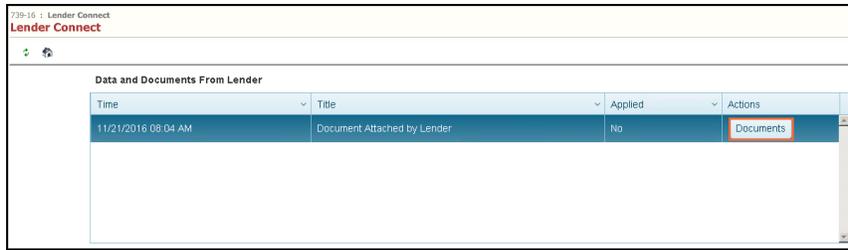
Preview Then Print Lender Documents

All Lender Connect Users

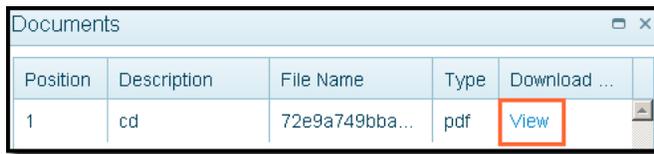
To improve performance, Lender Connect users no longer have to download documents in order to preview and print.

Steps

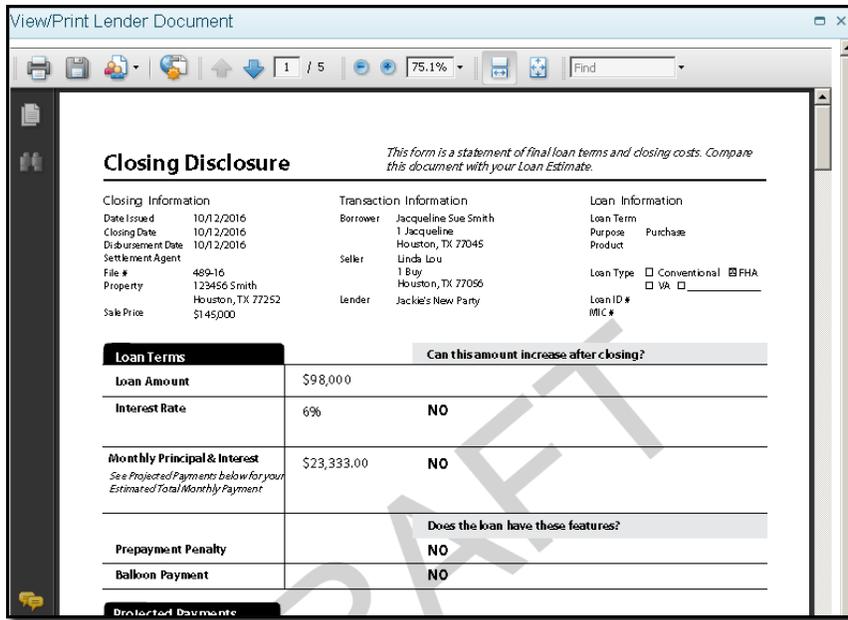
1. Navigate to Lender Connect.
2. From the *Data and Documents* grid, click **Documents** to view a PDF sent from the Lender. The *Documents* pop-up displays.



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*.

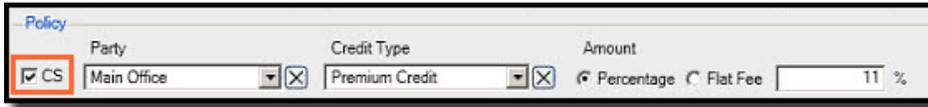
Commercial Services (Revenue Reporting)

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.

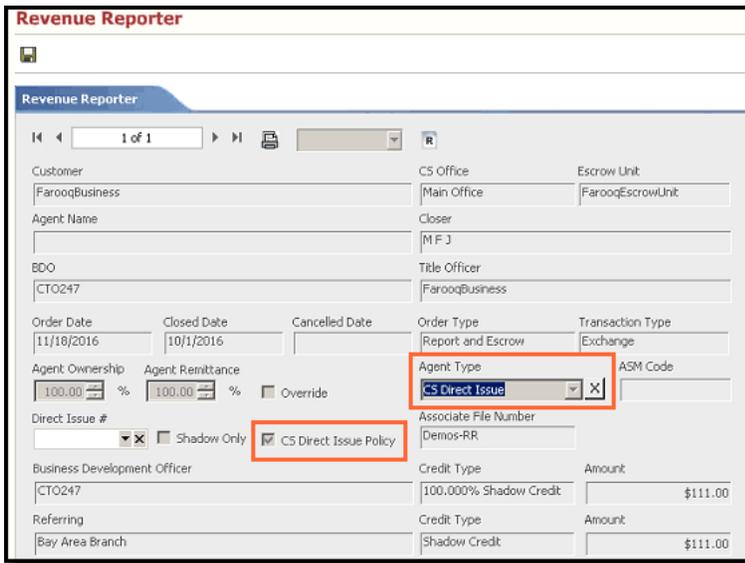
Steps

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



The screenshot shows a form titled "Policy" with three columns: "Party", "Credit Type", and "Amount". Under "Party", there is a checked checkbox labeled "CS" and a dropdown menu set to "Main Office". Under "Credit Type", there is a dropdown menu set to "Premium Credit". Under "Amount", there are radio buttons for "Percentage" (selected) and "Flat Fee", and a text field containing "11 %".

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.



The screenshot shows the "Revenue Reporter" screen. It contains various fields for customer, agent, and order information. The "Agent Type" dropdown menu is highlighted with a red box and contains the text "CS Direct Issue". The "CS Direct Issue Policy" checkbox is also highlighted with a red box and is checked. Other fields include "Customer" (FarooqBusiness), "Agent Name" (Closer), "Order Date" (11/18/2016), "Closed Date" (10/1/2016), "Order Type" (Report and Escrow), and "Transaction Type" (Exchange).



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*.



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

Revenue Reporter

2 of 2 | 11/21/2016

Customer: FarooqBusiness | CS Office: Main Office | Escrow Unit: FarooqEscrowUnit

Agent Name: | Closer: M F J

BDO: CTO247 | **Title Officer**: FarooqBusiness

Order Date: 11/18/2016 | **Closed Date**: 10/1/2016 | **Cancelled Date**: | **Order Type**: Report and Escrow | **Transaction Type**: Exchange

Agent Ownership: 0.00% | Agent Remittance: 0.00% | Override | **Agent Type**: CS Direct Issue | **ASM Code**: | X

Direct Issue #: | Shadow Only | CS Direct Issue Policy | **Associate File Number**: Demos-RR

Business Development Officer	Credit Type	Amount
CTO247	100.000% Shadow Credit	\$0.00
Referring	Credit Type	Amount
Bay Area Branch	Shadow Credit	\$0.00
Search	Credit Type	Amount
FarooqBusiness	Paid through Closing	\$222.00
Closing	Credit Type	Amount
Main Office	Premium Credit	\$333.00
Policy	Credit Type	Amount

Property Address: 11 - 21 Northeast River Lane Southeast, Other 199, Houston, TX, | Multi | Property Type: Apartment

Project Description: | County: Harris | **Country**: United States of America

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

Stewart Title Guaranty Company					Prepared By: Farooq Jawaid
Subsequent Income Report					Print Date: 11/18/2016 2:07 PM
File Number: Rel 6.4 Demo					
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.