AIM+® 6.6.2

for Independent Agency Users Only

Release Notes

July 21, 2017

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AIM+ 6.6.2 Release Notes

AIM+ 6.6.2 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: July 21, 2017

Lender Connect

Receiving and Responding to Loan-level and Fee-level Comments

TFS21975

You can now receive comments sent from lenders on either the Loan-level or the Fee-level.

Lenders have the ability to send comments on the Loan-level or Fee-level with the Closing Instructions, Modified Closing Instructions and Final CD. User responses to loan and fee level comments are sent with the 406 and or 433.

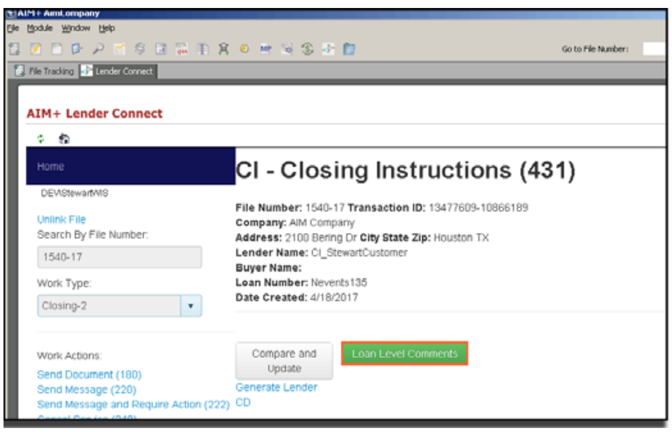
Viewing and Responding to Loan-level Comments

A new button, **Loan Level Comments**, has been added to view comments sent from a Lender. Follow the steps below for viewing and responding to Loan-level comments sent from a Lender.

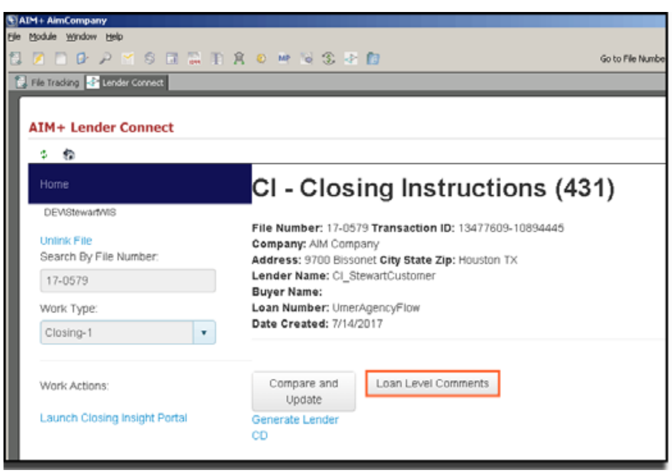
Steps

1. From *Lender Connect*, search for a file.
2. Click incoming 431, 432, or 435
3. Click **View**.

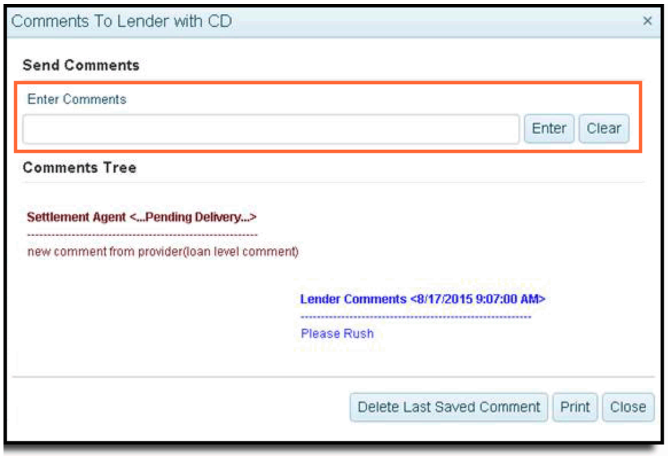
The **Loan Level Comments** button displays in green if comments are present from a Lender.



If no comments are present on the file, the **Loan Level Comments** button displays in light gray. Users may initiate the conversation even if no comments are sent by the lender.



4. Click **Loan Level Comments** button. A pop-up displays with any comments sent from the Lender or Agency office. Lender Comments display in blue font, while comments sent by agency office are in red font.



5. Use the **Enter Comments** text box to type in comments in response to a lender and click **Enter**. To delete unsent comments, click the **Delete Last Saved Comment** button.

Note

Comments are sent to the Lender with the 406/433 events.

Viewing and Responding to Fee-level Comments

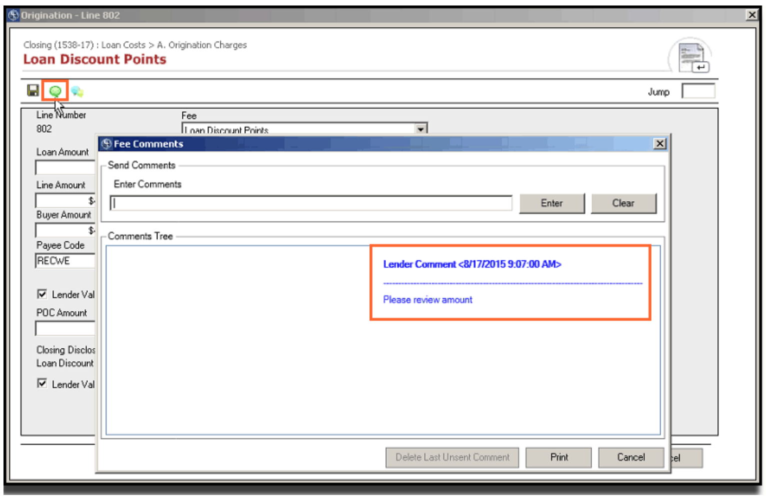
Lenders now have the ability to send comments on each fee.

Steps

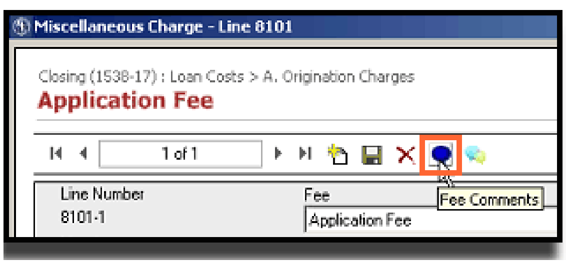
1. Navigate to the Closing.
2. Select a Fee.
3. Click the **Fee Level Comments** button to view lender comments.

Once a fee is saved, the user will know if the lender sent a related comment by viewing the color of the new Comments icon.

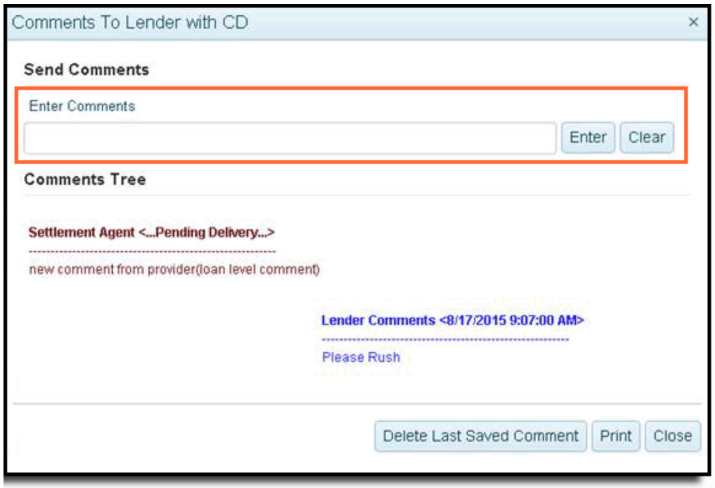
If there are comments from the lender on any added fee, the icon will be green. Lender comments display in blue font, while any comments added by agency office will be displayed in red font.



If there are no comments from the lender on any added fee, the icon will be blue.



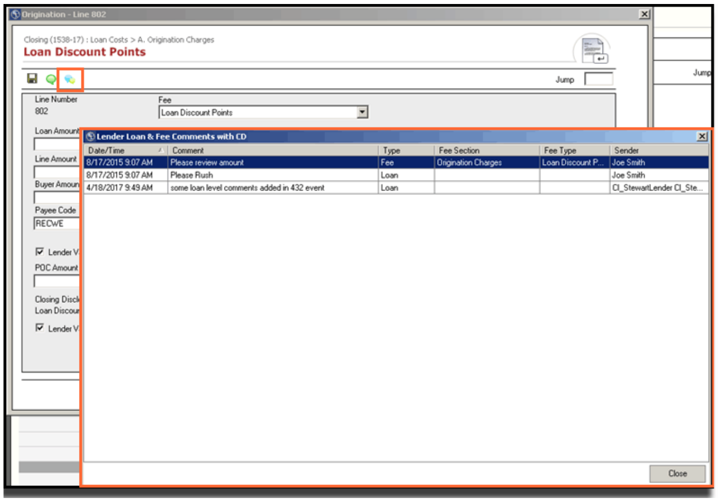
If no comments are sent from the Lender, you can click the Comments dialogue box to initiate the conversation. Simply type your comment into the **Enter Comments** text box, and click **Enter** to send the comment.



Until the related 406/433 is sent, you can click **Delete the Last Saved Comment** to remove a pending comment.

View All Comments

Another icon, **Lender Loan and Fee Comments**, has been added to view all comments, regardless of the fee. Click the new icon (from any fee). The Lender Loan and Fee Comments pop-up displays details of comments, Fee sections, the Fee Type and Comment Sender.

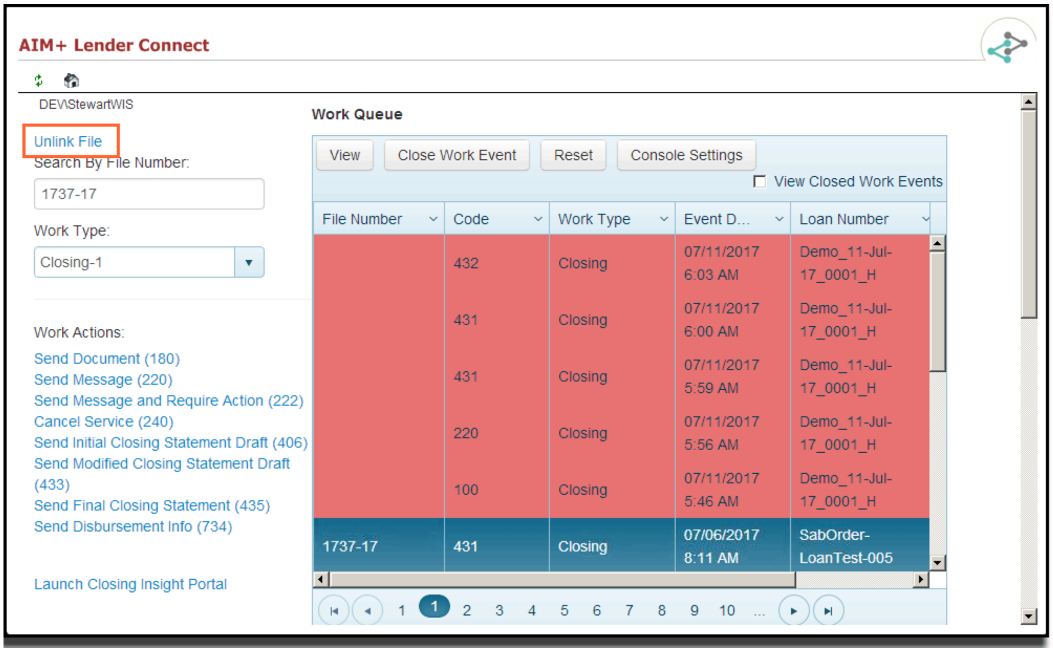


Unlink Transactions from Files

INC0426406 INC0425329

TFS22873

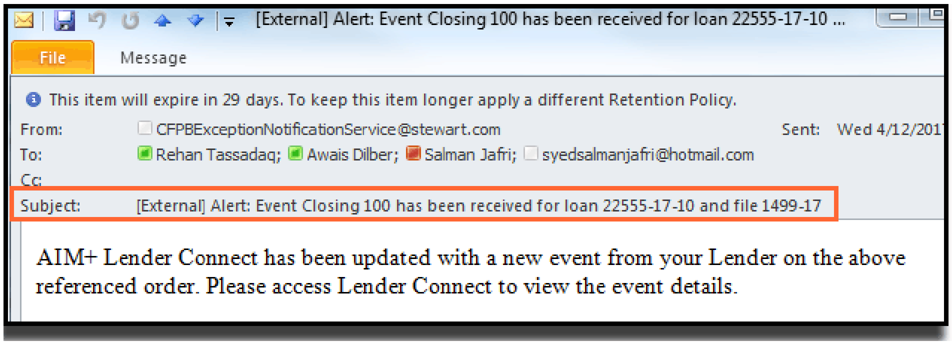
Select users are allowed to remove a transaction from a file when needed. Unlinked transactions are highlighted in red. If you have access to unlink a file option, the **Unlink File** link displays on the top left of the screen. To enable this feature, contact your Administrator.



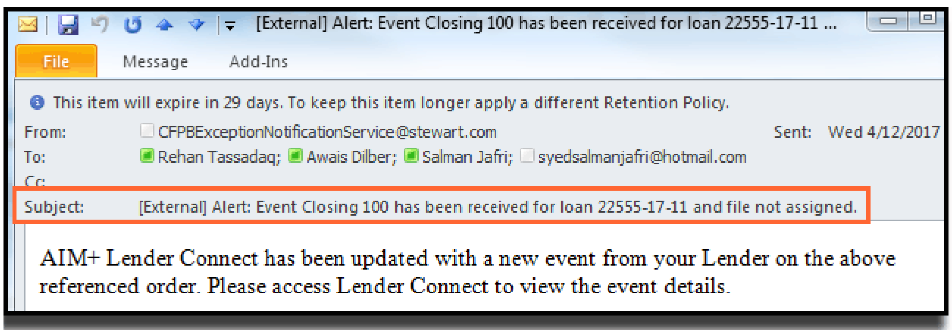
AIM+ File Number in Email Notification

TFS22555 RITM0208847

Emails now include the AIM+ File Number in the email Subject line. If the file number is already associated with the order, the file number displays in the email Subject.



If there is no file number assigned to the order, the email Subject line states, “file not assigned.”



Outgoing Messages

Outgoing email notifications from Lender Connect to Direct Operations and Agency users now includes the following details:

- Steps to complete tasks to move forward to the next event.
- The File Number and Event Number are included in the email Subject line.
- A link to additional training materials posted on the AIM+ Training Center.

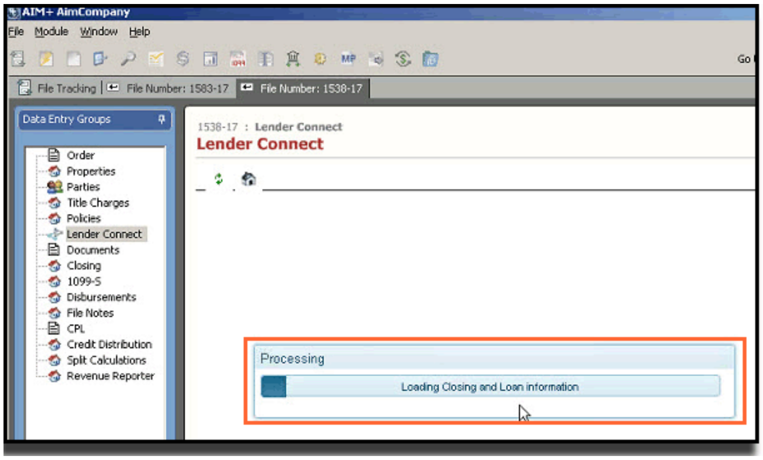
Pre-Loader on the Compare & Update Screen

INC0440727

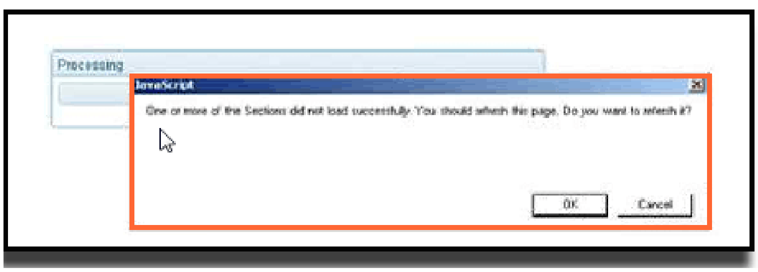
INC0451153

TFS23319

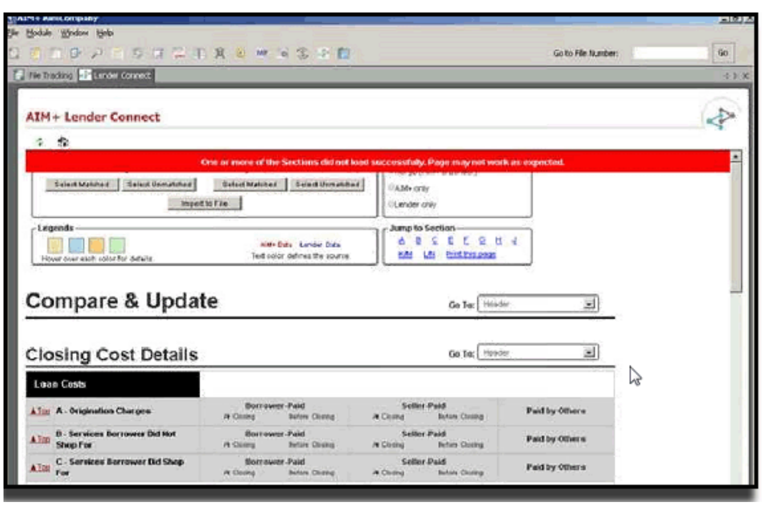
To improve user experience, the **Compare and Update** screen now displays a pre-loader, indicating the progress of the fees loaded on the screen in Lender Connect.



The pre-loader directs the user to try again when loading issues are realized by Lender Connect. Click **OK** to continue.



If after three tries, there is still not a successful screen load, a red ribbon displays at the top of the Compare and Update screen.



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.