



AIM+[®] 6.8

Release Notes

December 10, 2017

For Independent Agents Only

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AIM+ 6.8 Release Notes

AIM+ 6.8 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 10, 2017

Closing

Change to Amount Due Text on Settlement Statements

TFS24701

INC0431039

Previously, when printing Settlement Statements, the amount due text printed as **Amount due from Borrower**.

For better accuracy with regard to cash transactions, the *Amount due from Borrower* text has been changed to read **Amount due from Buyer/Borrower** on printed Settlement Statements.

Optional Text on the Seller's Closing Disclosure and ALTA Statements

TFS25780 and TFS25983

Previously, the **Show (Optional) text in Owner's Policy for Seller Closing Disclosure** checkbox was available on the **Generate Closing Documents** pop-up in *Closing*. This checkbox is no longer available. Optional text on the Owner's Policy for the Seller's Closing Disclosure will now always display on the Seller's Closing Disclosure.

A new checkbox, **Show (Optional) text in Owner's Policy for ALTA Seller's/Combined Settlement Statement**, has been added to the *Generate Closing Documents* pop-up.

By default, this check box is not selected, and therefore does not display optional text on printed ALTA Seller's or Combined Settlement Statements.

To display Optional text on a printed ALTA Seller's Settlement Statement, or ALTA Combined Settlement Statement, simply select this checkbox from the *Generate Closing Documents* pop-up. The text displays on the printed statement.

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 Signature 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
- Show (Optional) text in Owner's Policy for ALTA Seller's/Combined Settlement Statement

Document Name	Suppression
Closing Disclosure	No suppression
Seller's Closing Disclosure	No suppression
ALTA Borrower/Buyer's Settlement Statement	No suppression
ALTA Seller's Settlement Statement	No suppression
ALTA Combined Settlement Statement	No suppression
1099-S Worksheet	No suppression
Policy Premium Report	No suppression
Disbursement Worksheet	No suppression

Buttons: Preview, Print, Send E-mail, Send Electronically, Save to File, Close

Integrations

Stewart Access

CPL

Seller and Buyer Addresses No Longer Mandatory on CPLs

TFS23968 RITM0405572

When creating a **CPL** (for Lender, Buyer/Borrower or Seller), the **Seller** and **Buyer addresses** are no longer required if the Seller/Buyer **First** and **Last Name**, or **Business Name** is included.

Below is a list of specific exceptions when creating a CPL without the Seller and Buyer addresses:

- You can create a Lender CPL with no Buyer/Borrower address, if you enter the Buyer/Borrower name (First and Last or Business Name).
- You can create a Lender CPL with no Seller address, if you enter the Seller name (First and Last or Business Name).
- You can create a Buyer/ Borrower CPL with no Seller address, if you enter the Seller name (First and Last or Business Name)
- You can create a Seller CPL with no Buyer/Borrower address, if you enter the Buyer/Borrower name (First and Last or Business Name).

Sending CPL Pricing data to Management Console for Reporting

TFS24508

CPL pricing (including CPL pricing deletion) is now sent to *Management Console* for AIM+ reporting.



Note

CPL pricing is only available for Stewart Access enabled companies.

Buyer and Seller Country should not be defaulted on CPL screen

TFS24527

The **Buyer Country** and **Seller Country** no longer default to the *CPL* screen in AIM+. Below is a list that details the circumstances in which the **Country** does not default into a CPL:

- For a **Lender CPL**, no Country is listed by default for a **new Buyer/Borrower**, or for a **new Seller**.
- For a **Borrower CPL**, no Country is listed by default for a **new Seller**.
- For a **Seller CPL**, no Country is listed by default for a **new Buyer/Borrower**.

1099-S

Updates to the 1099-S Module for 2017

TFS25622

When the existing **Foreign Nat'l** checkbox is selected on the 1099-S screen, the character **1** displays on the Transmitted file at position 595 (Foreign Nat'l).

This distinction is required by IRS for the year 2017.

The screenshot shows the 1099-S software interface. The 'Data Entry Groups' sidebar on the left includes '1099-S'. The main window displays the following information:

File Number	Branch	Escrow Unit	Property Description	<input type="checkbox"/> Use Closing Property Description
1099-S	MFJ	101	11-21 Northeast River Southwest, Houston <small>(IRS limits to 40 characters)</small>	

Closing Date	Sales Price	Seller Tax Credits (Lines 406 & 407)	Additional Tax Credits	Total Tax Credits
9/13/2017	\$125,000.00	\$0.00	\$71.00	\$71.00

Seller Information		Reporting Information			Seller Sales Proceeds		Seller Tax Credits		
Name	Tax ID	Business	Exchange	Foreign Nat'l	Reportable	Percent	Amount	Percent	Amount
Elizabeth A Elston Sr.	987-98-7987	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100.0...	\$125,000.00	100.0...	\$71.00
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				



Note

If the **Foreign Nat'l** checkbox is not selected, **position 595** displays blank on the printed Transmittal form.

Defects

The following defects were addressed in **AIM+ 6.8**:

Encompass

- (TFS25612) When linking an Encompass transaction with an AIM+ order, or when creating a new order, the **Branch** and **Tracking Location** display correctly in email notifications.

1099-S

- (TFS26092) When forwarding an address and clicking **Save Seller** details, no exception occurs now and forwarding detail is saved successfully.
- (TFS26035) A 1099-S transmittal file, extracted from AIM+, restricts character length to 750 characters by chopping off the last character of Address or Legal Description.

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.