



AIM+[®] 7.0

Release Notes

March 18, 2018

For Affiliates Only

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AIM+ 7.0 Release Notes

AIM+ 7.0 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: March 18, 2018

Documents

Search Feature in Documents

A new field, **Search Documents**, has been added to the *Documents* module. To locate your documents faster, simply enter your search criteria in the Search Documents field, and click **Enter** or the **Tab** key. Your matching entries display under Available Documents.

SCDR-007 : Documents in File

Documents in File

VAX AIM File Number: Datagroup: Import AFW Import eReet Date:

Search Documents X

Available Documents

- AimCompany
 - JawadAli
 - RT-Folder
 - Faisal
 - 1099S B and C Forms
 - Defect Test View
 - MissingFolderTest
 - CFPB Disclosures Stewart
 - STGCEndorsementSATest
 - StewartAccess Testers
 - Umer

Selected Documents

Set	Document Name	Policy Number
	STG Privacy Policy Notice 1 rev 1-26-09 3rd Copy	
	TestSCDR	

To remove an entry from the **Search Documents** field, simply click the **X** button to clear the field. If no document is found, a message displays, stating that the search could not find any matching Document.

SCDR-007 : Documents in File

Documents in File

VAX AIM File Number: Datagroup: Import AFW Import eReet Date:

Search could not find any matching Document

Search Documents X

Available Documents

Selected Documents

Set	Document Name	Policy Number
	STG Privacy Policy Notice 1 rev 1-26-09 3rd Copy	
	TestSCDR	



Note

Search criteria entered into the Search Documents field is not case sensitive. Keywords entered into the Search Documents field display document names that match one or more of the keywords entered.

Integrations

Encompass

The following features are now available in Lender Connect AIM+ for Encompass orders.

When Cancel Order is Received

When a Lender receives an event 240 (Cancel Order), an email notification is sent to the AIM+ users who are set up to receive communications.

Coming Soon! Additional Encompass Features April 5th

The features below will be available for Encompass orders on **April 5th** in *Lender Connect*.

Viewing and Downloading Received Documents

The former **Send Documents** button on the *Lender Connect* File Level screen has been renamed to **Documents**. A new grid has been added to the **Documents** screen of *Lender Connect*. This new grid allows you to view and download documents sent by Encompass Lenders.

The **Notes** and **Documents** buttons display on the File-level screen.

Notes	Pending Notifications and Documents							
Documents	Work Action	Effective ...	Transac...	Lender	Loan Nu...	Property Add...	Property...	File Nu...
Select File Status Notification	Sales Contract Received	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899
Sales Contract Received	Commitment Completed	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899
<input checked="" type="checkbox"/> Attach Documents	Settlement Statement in Progress	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899
Submit Notification	Settlement Statement Completed	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899
1 - 7 of 7 items								
Completed Notifications and Documents								
	Work Action	Completo...	Transac...	Lender	Loan Nu...	Property Add...	Property...	File Nu...
	Final Policy	03/13/2018 7:56 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899
	Curative Cleared	03/13/2018 4:39 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899

The Document screen will now have additional grid to show received documents as displayed in image below:

Attach and Submit Documents

Document Name
Description

ALTA Settlement Statement / Fee ...

Upload Local Document
Get Doc from SureClose

Note: Attached document will not be submitted if document size exceeds 30MBs.

Document Work History

Document	Description	File Name	Work Action	Sent Date
Final Policy	test	105 MB.pdf		03/13/2018 4:51 AM
ALTA Settlement Statement / Fee Sheet		51 MB.pdf		03/13/2018 4:50 AM
ALTA Settlement Statement / Fee Sheet	Any written or pictorial information describing defining, specifying reporting, or certifying activities requirements procedures or results. Documenta	293 MB.pdf		03/13/2018 4:38 AM

Submit and Close
Submit and Send Next Doc
Close

Received Documents

Document Received History

Document	Description	File Name	Received Date
Loan Modification Agreement	Loan Modification Agreement- 15.4MB	Kelghtley_1963.pdf	03/09/2018 9:58 AM
Lenders Confirmation Of Funds	19.4MB	Kelghtley_1963.pdf	03/09/2018 9:21 AM
Lenders Confirmation Of Funds	Lenders Confirmation Of Funds	CLSTMT.xml	03/09/2018 7:49 AM
Death Certificate	Death Certificate	CCITT_5.TIF	03/09/2018 7:49 AM
Borrower Authorization	Borrower Authorization	SamplePNGImage_1mbmb.png	03/09/2018 7:49 AM
Right Of Rescission-Refinance	Right Of Rescission-Refinance	SamplePNGImage_3mbmb.png	03/09/2018 7:47 AM
Lender Title Request	Lender Title Request	urlcut.pdf	03/09/2018 7:47 AM

Close

Sending Notes/Messages from AIM+ to Encompass

The former **Inbox** button on the *Lender Connect* File-level screen has been renamed to **Notes**. A new grid along with text fields have been added to the **Notes** screen of Lender Connect to send a Note or Message to an Encompass Lender.

The Notes screen will have additional options for sending Notes back to the Lender.

Notes

Subject *
Note *

Outgoing Notes

Test Notes for Release 7.0
Any written or pictorial information describing defining, specifying reporting, or certifying activities requirements procedures ...
Lender
03/15/2018 7:24 AM

1 - 1 of 1 Items

Note Details

Any written or pictorial information describing defining, specifying reporting, or certifying activities requirements procedures or results. Documentation is as important to a products success as the product itself. If the documentation is poor non-existent or wrong it reflects on the quality of the product and the vendor. As per the IEEE Documentation describing plans for or results of the testing of a system or component Types include test case specification test incident report test log test plan test procedure test report. Hence the testing of all the above mentioned documents is known as documentation testing. This is one of the most cost effective approaches to testing. If the documentation is not right there will be major and costly problems. The documentation can be tested in a number of different ways to many different degrees of complexity. These range from running the documents through a spelling and grammar checking device to manually reviewing the documentation to remove

Incoming Notes

Notes
From
Requires Action
Services
Date & Time

Any written or pictorial information describing defining.Any written or pictorial information describing defining.Any ...
Lender
N/A
Title
03/13/2018 6:03 AM

Any written or pictorial information describing defining.Any written or pictorial information describing defining.Any ...
Lender
N/A
Title
03/13/2018 6:03 AM

Test 56356564556
Lender
N/A
Title
03/13/2018 6:02 AM

1 - 3 of 3 Items

Back

Email Notifications for Received Documents

AIM+ File-level users working with Encompass orders will receive an email notification when a new document is received from a Lender.

AIM+ Lender Connect has received a new document from your Lender on the above reference order. To view received document details in Lender Connect, following steps are required:

1. Login to AIM+ and open your file.
2. Go to Lender Connect **Data Entry Group**.
3. Select **Encompass**.
4. Click **Documents** button to view list of send and received documents.
5. Find and select document from **Received Documents** grid.
6. Click **File Name** hyperlink to download the document.

Sender Application	Encompass
File Number	18-0900
Order Received Date	3/14/2018 9:40:20 AM
Transaction Type	Refinance
Lender	
Loan Number	180301612
Loan Amount	\$648,648.00
Lender Contact Name	Encompass User
Lender Contact Email	abena.sandy-montgomery@stewart.com
Sales Amount	\$648,648.00
Borrower	Kabir Khanna
Property Address	16906 Scenic Lakes Way, Houston, TX 77095
Property County	Harris
Document Received Date	3/14/2018 11:17:51 AM
Document Type	Critical Documents
File Name	ALTA_Settlement_Statement_Borrower-Buyer_05-01-2015.pdf
Description	Critical Documents: from EPI, to AIM

Training materials can be found [here](#)



Note

While you may see these screens in Lender Connect, please note that the features mentioned above are not functional for use until **April 5th**.

Revenue Reporter

Locking Revenue Reporter and SI on 1st Business Day

The Revenue Reporter and Subsequent Revenue Reporter screens in AIM+ now lock after **11:59pm** on **first business day** of the month. The reason for allowing the first business day to be active is so that you can make necessary changes to these screens on the first business day.

Defects

The following defects were addressed in **AIM+ 7.0**:

Closing

- AIM+ errors but issues record when adding endorsement data, then adjusting premium values before issuing.

Policies

- Reissue/Refinance is no longer checked by default on the Subsequent Policy Record.
- When Reissue is removed, the reissue specific data no longer clears.

Encompass Portal

- Companies no longer duplicate in the **Affiliates Companies** grid for the Encompass TEFS Portal.
- The complete Tracking Location now displays in email notifications while linking an Encompass transaction with an AIM+ order.

CSC eRecording

The error message, *CSC eRecording credentials are not setup for your branch/location*, displays when no credentials are setup against a file's branch.

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 1.855.330.2800 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 CustomerCare@stewart.com.