



# **AIM+<sup>®</sup> 7.0**

Release Notes

March 18, 2018

*For Independent Agency Use Only*

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# AIM+ 7.0 Release Notes

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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.

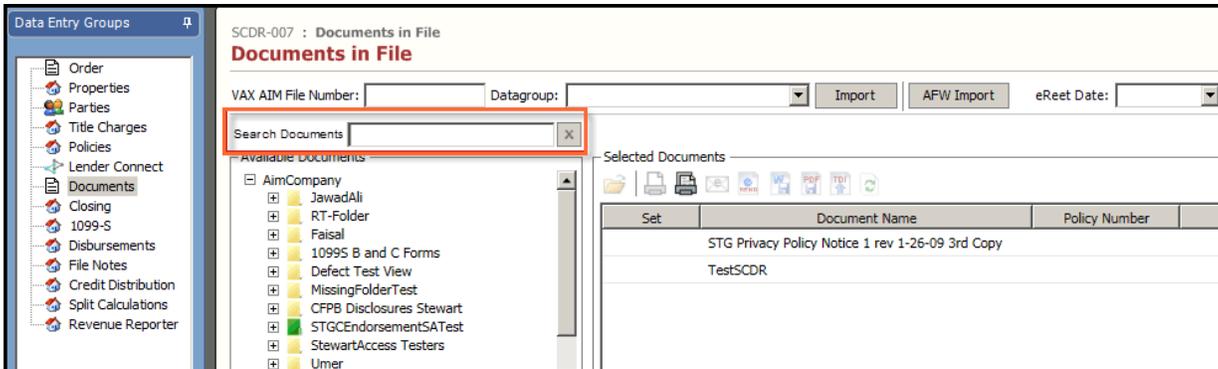
**Deployment Date: March 18, 2018**

# Documents

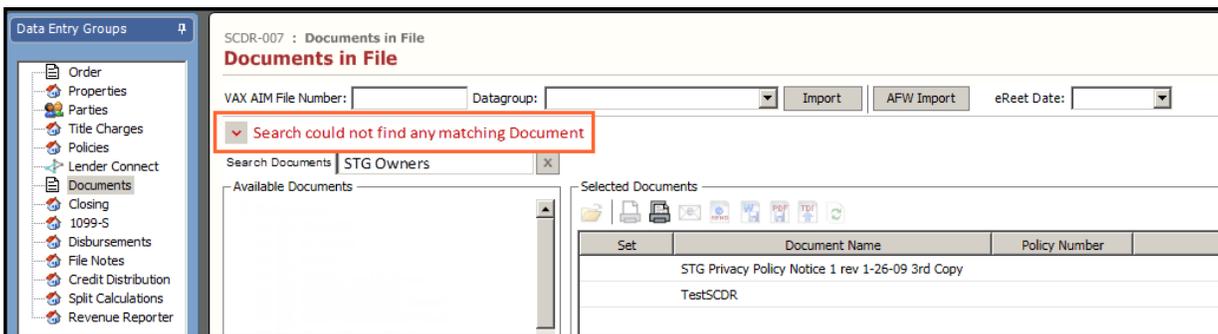
## Search Feature in Documents

TFS26504

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.



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.



### 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

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## Stewart Access

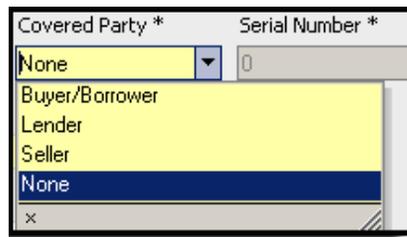
The following items below were added to the **Policies** section of *AIM+* for Stewart Access enabled policies.

### Required Fields on Stewart Access Jackets for the State of Indiana

TFS26046

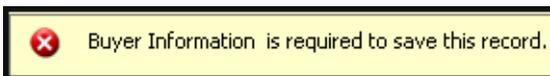
Some new rules have been implemented on the *Policies* screen for **Binder** and **Guarantee** types of policies, when the property state is Indiana. Loan and Owner types of policies will not be affected with this change. Only Binder and Guaranty types of policies will be affected.

A Binder and Guarantee type of policy can now be created without sending any party information to Stewart Access. However, there is an option available on the *Policies* screen to select a **Covered Party**. This drop-down that can be used to optionally send a specific type of party information to Stewart Access.



The following options are available from the **Covered Party** drop-down on the *Policies* screen.

- **None:** No party information will be sent to Stewart Access.
- **Buyer/Borrower:** Only Buyer/Borrower party information will be sent to Stewart Access. If there is no Buyer/Borrower party on the *AIM+* file, the following message displays:



Additionally, the First and Last name of the party are **mandatory**. If the mandatory fields are missing, the following message displays on the *Parties* screen:

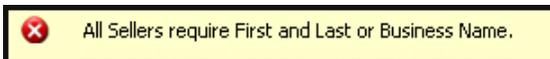


A partial address is now allowed for the Buyer/Borrower party.

- **Seller:** Only Seller party information will be sent to Stewart Access. If there is no Seller party on the *AIM+* file, the following message displays:



Additionally, the First and Last name of the party are **mandatory**. If the mandatory fields are missing, the following message displays on the *Policies* screen:



A partial address is now allowed for the Seller party.

- **Lender:** Only select Lender party information will be validated and sent to Stewart Access. If there is no Lender party on the AIM+ file, the following message displays:



You cannot enter a partial address for the Lender party. If he/she provides only a partial address, the following message displays:



**Note**

Previously, there was functionality to send test party information to Stewart Access when **None** is selected in **Covered Party** drop-down, that functionality is removed. No party information will now be sent in this case.

By default, **None** is selected in **Covered Party** drop-down when Policy type is **Binder** or **Guarantee**. However, you can select a specific Covered Party as well.

## Required Fields on Stewart Access Jackets in all States (except IN)

TFS26044

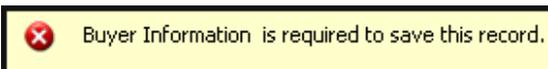
Some new rules have been implemented on the *Policies* screen for all type of policies (Loan, Owners, Binder and Guarantee), when the property state is any state **other than Indiana**.

A policy can now be created without sending any party information to Stewart Access. However, there is an option available on the *Policies* screen to select a **Covered Party**. This drop-down that can be used to optionally send a specific type of party information to Stewart Access.

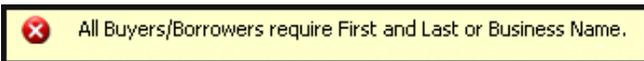


The following options are available from the **Covered Party** drop-down on the *Policies* screen.

- **None:** No party information will be sent to Stewart Access.
- **Buyer/Borrower:** Only Buyer/Borrower party information will be sent to Stewart Access. If there is no Buyer/Borrower party on the AIM file, then system will show following message to the user.



Additionally, First and Last name of the party are mandatory. Application will display following message if these mandatory fields are missing on the parties screen.



Another change is that partial address is now allowed for Buyer/Borrower party.

**Seller:** Only Seller party information will be sent to Stewart Access. If there is no Seller party on the AIM file, then system will show following message to the user.

 Seller Information is required to save this record.

Additionally, First and Last name of the party are mandatory. Application will display following message if these mandatory fields are missing on the parties screen.

 All Sellers require First and Last or Business Name.

Another change is that partial address is now allowed for Seller party.

- **Lender:** Only selected Lender party information will be validated and sent to Stewart Access. If there is no Lender party on the AIM file, then system will show following message to the user.

 A Lender is required to save this record.

User can't enter a partial address for Lender party. If he/she provides any address then it has to be complete otherwise following validation message will be displayed.

 Name, Address, City, State, Postal Code and Country are required for Lenders.



#### Note

Previously there was a functionality to send test party information to Stewart Access when **None** is selected in **Covered Party** drop-down, that functionality is removed. No party information will now be sent in this case.

By default, **None** is selected in the **Covered Party** drop-down. However, you can select a specific Covered Party as well.

## Removed Branch Name and County from Lender for CPL

TFS26051

**Branch** and **County** fields have been removed for the Lender on the *CPL* screen. Branch and County information will no longer send to Stewart Access.

### Previous CPL Lender Screen

The screenshot shows the 'Lender' form interface. At the top, there is a navigation bar with a search bar and several icons. Below this, the form contains several input fields: 'Name \*', 'Address \*', 'Attention To', 'Branch', 'Loan Number', 'City \*', 'Postal Code \*', 'State/Province \*', 'County', 'Country \*', 'Phone', 'Fax', 'Email', and 'Successor Language'. The 'Branch' and 'County' fields are highlighted with red rectangular boxes, indicating they are the focus of the update.

### New CPL Lender Screen

The screenshot shows the updated 'Lender' form interface. The layout is similar to the previous version, but the 'Branch' and 'County' fields have been removed. The fields now include: 'Name \*', 'Attention To', 'Address \*', 'Loan Number', 'City \*', 'Postal Code \*', 'State/Province \*', 'Country \*', 'Phone', 'Fax', 'Email', and 'Successor Language'. The 'Include Successor' checkbox is also present.

## Copying a CPL

TFS26042

A new **Copy CPL** button has been added to the CPL screen. Use this button to copy CPL information, similarly to copying a file in AIM+.

Once you click the Copy CPL button, all of the data in the existing CPL copies into the newly created CPL, except for the date. The date on the newly created CPL will be the date it was copied – not the date in the original CPL.

## Issuing a CPL on a File after Issuing Binder or Guarantee on File

TFS26050

You can now create, copy, revise or issue a CPL on a file after issuing the Binder or Guarantee on the file. However, if there is an issued Loan/Owners policy exists on the file, you will receive the following error message.

 A policy has already been issued on this file and new CPLs, copies, or adjustments are not allowed on serialized items. If you need a modification, you must contact support with your file number and reason for needing a modification along with the changes you need. 

## Revising an Issued CPL

TFS26043

A new **Revise** button has been added to the *CPL* screen. Use the Revise button to edit an issued CPL if no Loan or Owners jacket has been issued on the file.

Once you click the Revise button, all of the CPL fields become editable for making changes. The CPL date is set to the current date. The following occurs once you've completed your revision:

- The initial CPL will be voided or cancelled with the reason set as **Duplicate**.
- A new CPL will be created with an issued status.
- The newly issued CPL will be selected on the grid.



### Note

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The **Revise** button will be disabled if the selected CPL status is other than Issued.

# Revenue Reporter

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## Locking Revenue Reporter and SI on 1<sup>st</sup> Business Day

*TFS26354, INC0615015*

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

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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.

## 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

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## 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](mailto:CustomerCare@stewart.com).