AIM+® 7.1

Release Notes

For Stewart Affiliates Only

May 20, 2018

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AIM+ 7.1 Release Notes

AIM+ 7.1 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.

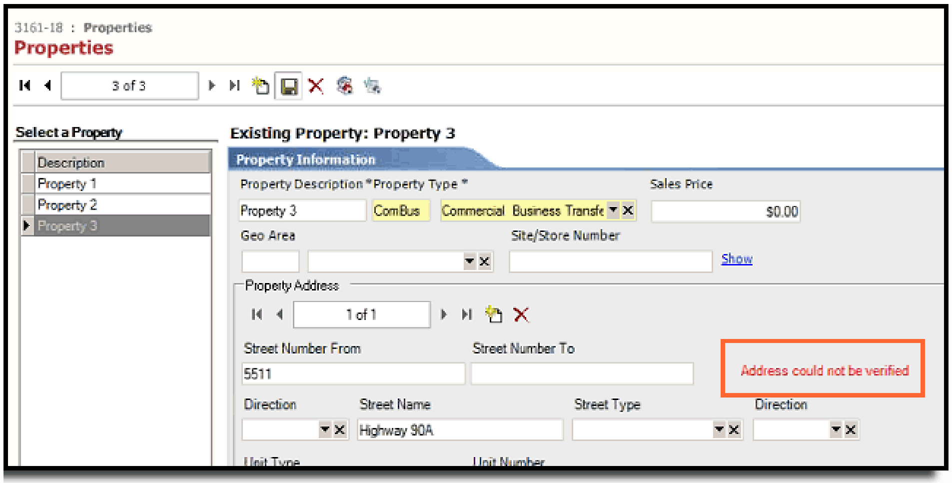
Deployment Date: May 20, 2018

Performance Enhancement

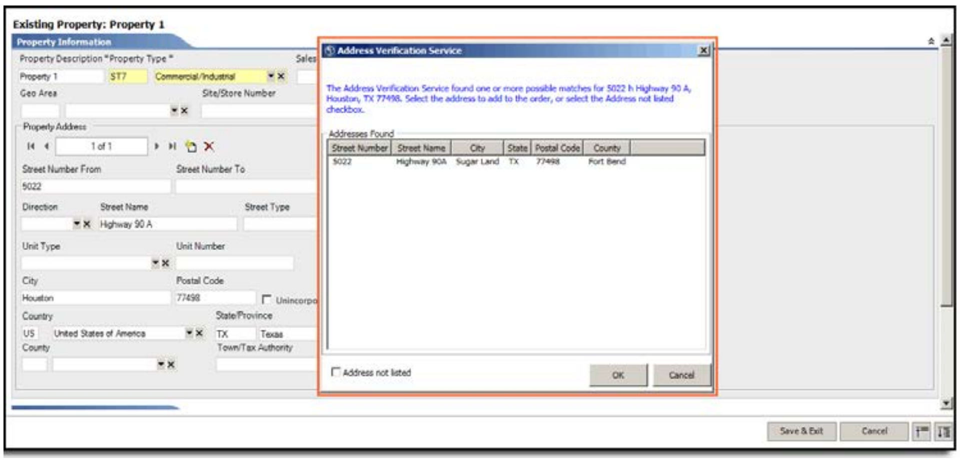
Smarty Streets Address Verification

Previously, AIM+ used *CoreLogic* to run address verification. Going forward, AIM+ will use **Smarty Streets** (via ESB) to perform address verification in *Properties*.

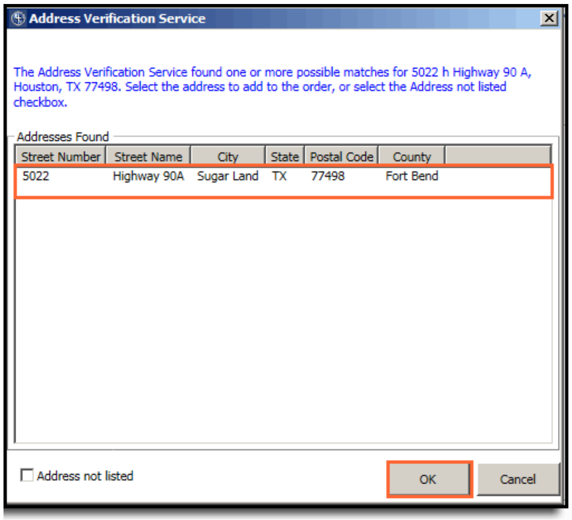
When you add property details in Properties and click **Save**, the system automatically verifies the address. If the address cannot be identified by AIM+, a red message displays, **Address could not be verified**.



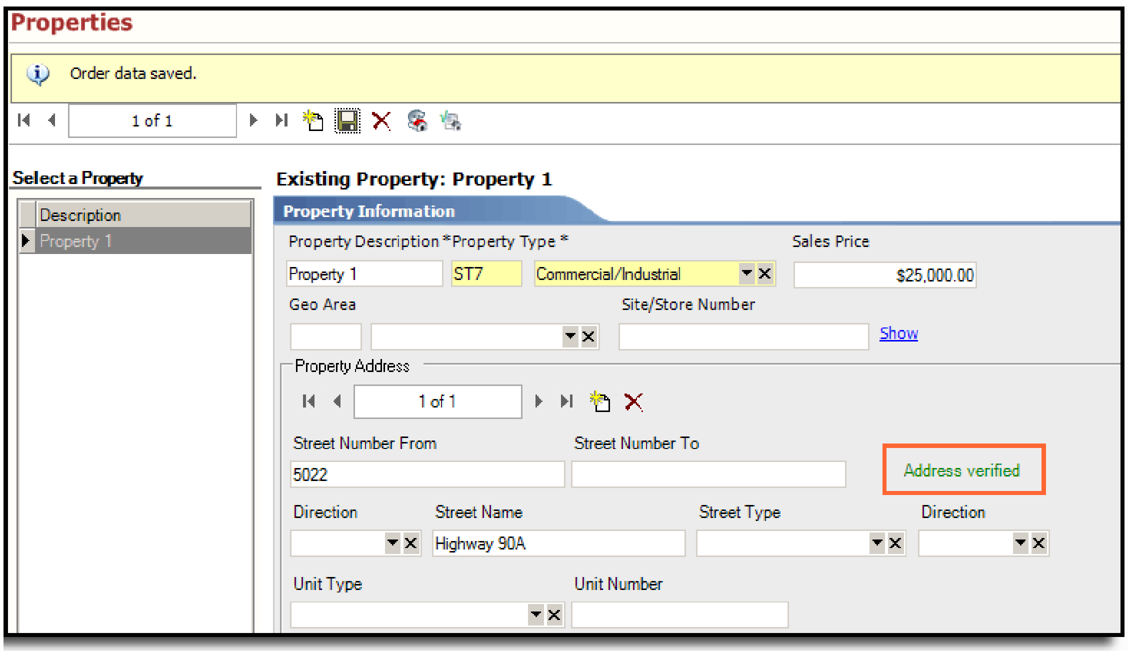
If the address is verified, AIM+ displays the standardize address suggestion for you to select the correct address.



Select the correct address and click **OK**.



The selected address is saved on the property. The screen displays **Address Verified**.



Setup

Setting up Patriot Act Import Codes

A new module, **Patriot Act Search**, has been added to the AIM+ *Setup* menu.

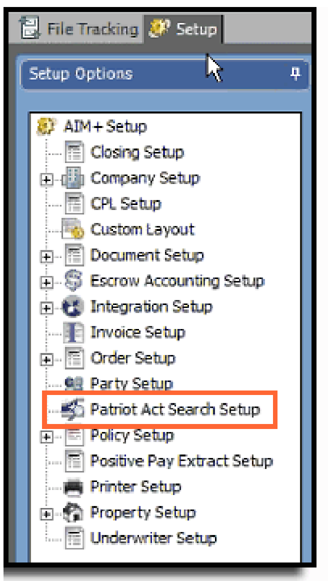
Note

If you do not have the **Patriot Act Search Setup** permission included in your Security Groups, you will not see this option in the Setup Options menu. Simply edit the desired security group, and add this permission for the appropriate users.

Use the steps below to add a new SureClose Advantage placeholder with Patriot Act Search import codes.

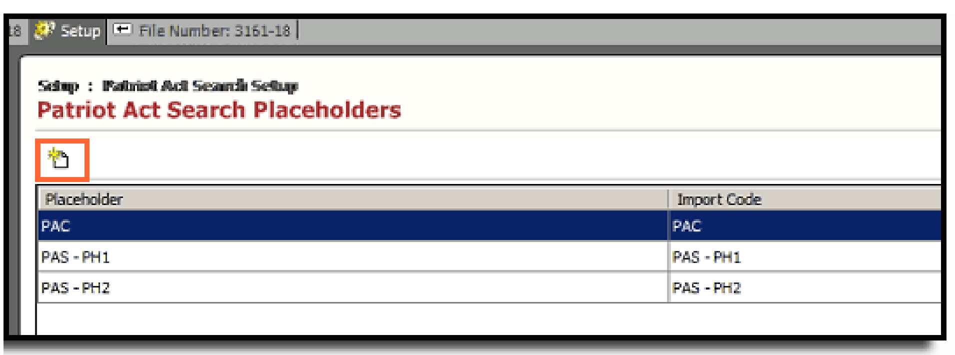
Steps

1. From the *AIM+ Setup* menu, click **Patriot Act Search Setup**.



   The *Patriot Act Search* screen displays a grid of new and existing placeholders.

2. From the *Patriot Act Search* grid, select the existing placeholder. To add a new placeholder, click the **Create New** icon.



3. A *New Placeholder* pop-up displays. Enter the **Placeholder** name and **Import Code**.
4. Click **Save**. To cancel your selections, click **Cancel**.

Note

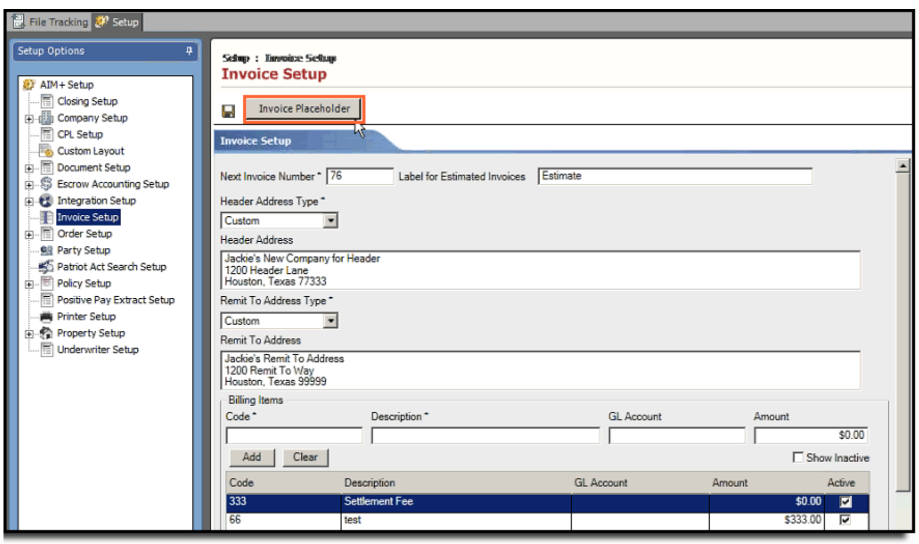
You must have access to AIM+ Setup to create a new placeholder for SureClose Advantage within AIM+. If you do not have permissions to use Patriot Search Act Setup, you will not see this module in AIM+ Setup.

Setting up Invoices for SureClose Placeholders

A new button, I**nvoice Placeholder**, has been added to *Invoice Setup*. Use this button to edit existing invoice placeholders, or to create new invoice placeholders. After setup is complete, you will be able to send an invoice that is filed into a SureClose Advantage placeholder. Below highlights the steps needed for setup only. The action of sending an invoicing must be completed on the File.

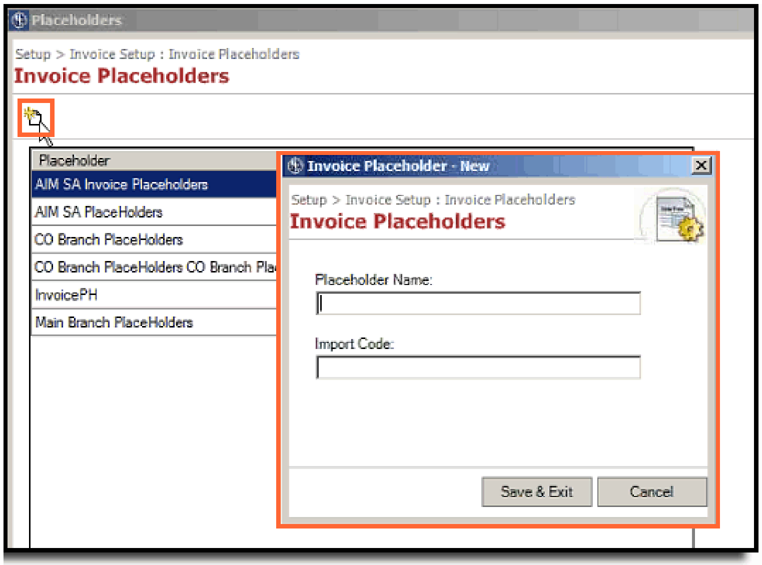
Steps

1. From the *AIM+ Setup* menu, click **Invoice Setup**. The Invoice Setup screen displays.
2. Click the Invoice Placeholder button. The Invoice Placeholders screen displays.



3. From the *Invoice Placeholder* grid, double-click to select an existing placeholder. Enter any changes to the Invoice Placeholders pop-up, and click **Save & Exit**.

If you want to create a new placeholder, click the **Create New** button. An Invoice Placeholder – New pop-up displays.



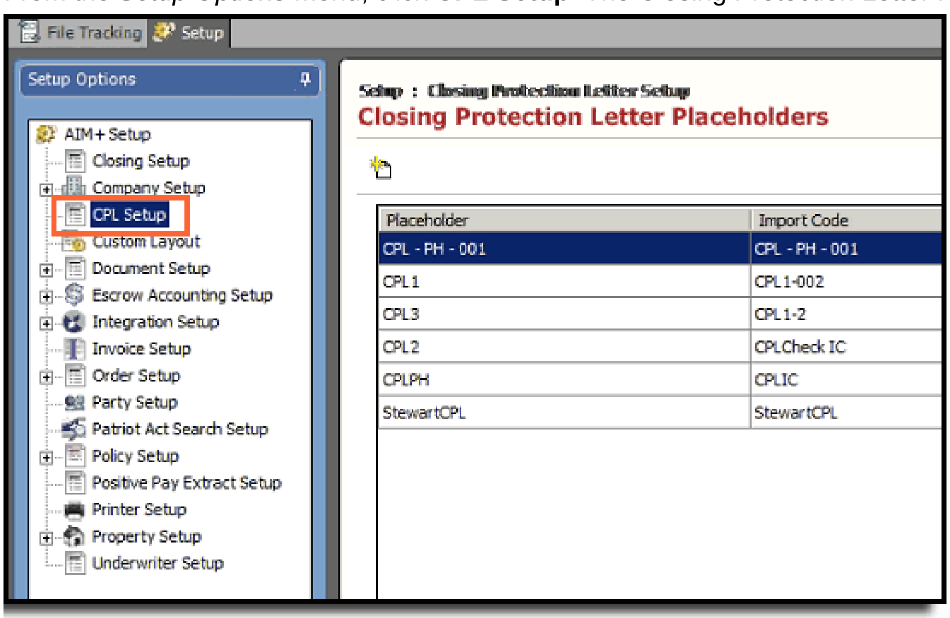
4. From the *Invoice Placeholder – New* pop-up, enter the Placeholder Name and Import Code.
5. Click **Save & Exit**.

Setting up CPL to Send to SureClose Advantage

A new permission, **CPL Setup**, has been added to *Setup*. If you have this permission assigned, you will see the **CPL Setup** module underneath *Company Setup* in the Setup Options menu. Use the steps below to setup CPL, so that CPL's can be sent to SureClose Advantage placeholders.

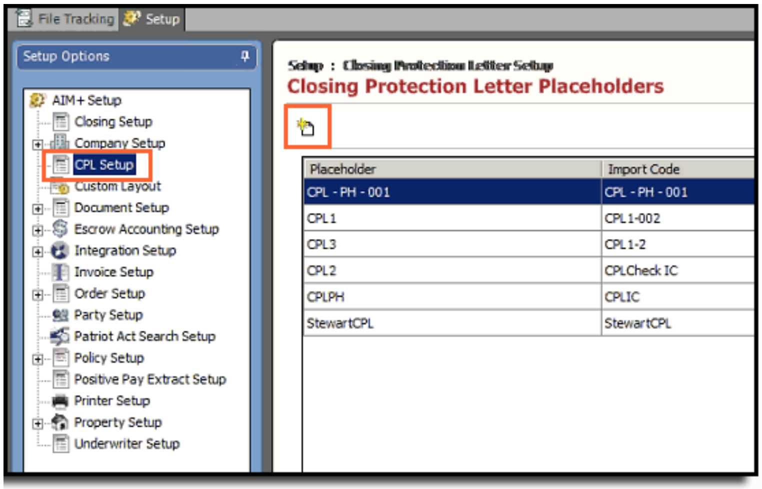
Steps

1. From the *Setup Options* menu, click **CPL Setup**. The Closing Protection Letter Placeholders grid displays.



2. From the *Closing Protection Letter Placeholders* grid, double-click to select an existing placeholder. Enter any changes to the Closing Protection Letter Placeholders pop-up, and click **Save & Exit**.

   If you want to create a new placeholder, click the **Create New** button. A Closing Protection Letter Placeholder – New pop-up displays.



3. From the *Closing Protection Letter Placeholder – New* pop-up, enter the Placeholder Name and Import Code.
4. Click **Save & Exit**.

Note

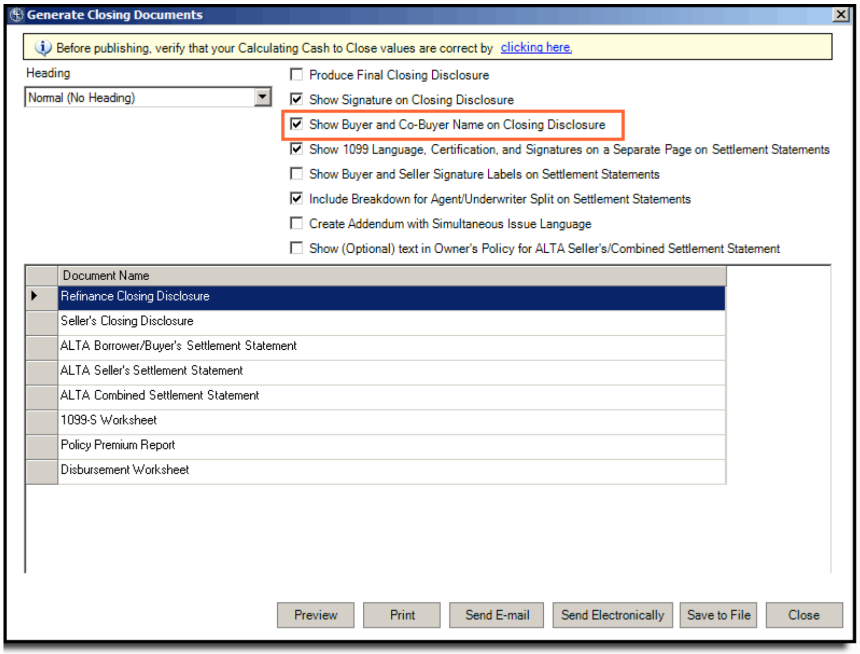
You must have access to AIM+ Setup to create a new placeholder for SureClose Advantage within AIM+. If you do not have permissions to use CPL Setup, you will not see this module in AIM+ Setup.

Closing

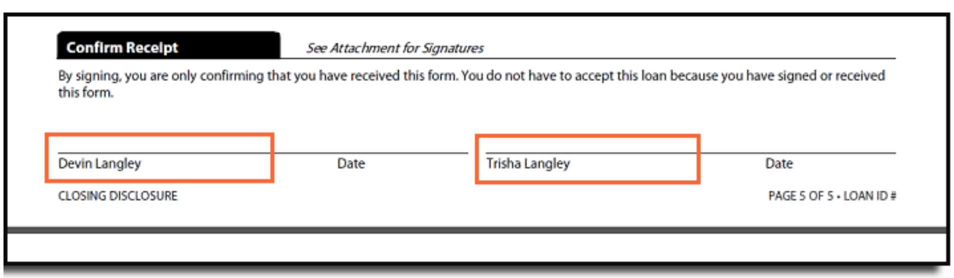
Buyer Name on Signature Line for Closing Disclosure

A new option, **Show Buyer and Co-Buyer Name on Closing Disclosure**, has been added to the *Generate Closing Documents* pop-up, in Closing. Use this checkbox to display the names of the Buyer and Co-Buyer for Closing Disclosures, Closing Disclosure Addendums, and Refinance Closing Disclosures.

Before printing a Closing Disclosure, select the **Show Buyer and Co-Buyer Name on Closing Disclosure** checkbox to display the Buyer and Co-Buyers names on Signature lines of the Closing Disclosure.



With the **Show Buyer and Co-Buyer Name on Closing Disclosure** checkbox selected, the names of the Buyer and Co-Buyer (as listed in Parties) displays on the Closing Disclosure.



Note

If the **Show Buyer and Co-Buyer Name on Closing Disclosure** checkbox is not selected before printing the Closing Disclosure, only generic names such as Applicant Signature, Co-Applicant Signature, display.

Dates for All Signature Lines on Printed Seller's Closing Disclosure

A new line to include the **Date** of signature has been added to all Signature Lines on the printed Seller's Closing Disclosure. Any additional Signature lines added in *Closing Setup* will display a corresponding Date line.

Rebecca Lee	Date
Bob Lee	Date
Devin Langley	Date

Minor Change to 1099 Verbiage on ALTA Settlement Statements

TFS45876

INC0403349

A minor change has been made to the 1099 verbiage on **ALTA Settlement Statements**. The word **our** has been replaced with **your** on the 1099 verbiage of the ALTA Combined Settlement Statements and the ALTA Seller's Settlement Statements.

SUBSTITUTE FORM 1099 SELLER STATEMENT: The information contained herein is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction will be imposed on you if this item is required to be reported and the IRS determines that it has not been reported. SELLER INSTRUCTIONS: If this real estate was your principal residence, file form 2119, Sale or Exchange of Principal Residence, for any gain, with your income tax return; for other transactions, complete the applicable parts of form 4797, Form 6252 and/or Schedule D (Form 1040). This transaction does not need to be reported on Form 1099-S if you sign a certification containing assurances that any capital gain from this transaction will be exempt from tax under new IRS Code Section 121. You are required by law to provide the Settlement Agent with your correct taxpayer identification number. If you do not provide the Settlement Agent with your correct taxpayer identification number, you may be subject to civil or criminal penalties imposed by law.

Policies

Retrieving Policy Data Multiple Times

Previously, the **Retrieve Policy Data** button on the *Policies* screen in AIM+ was only enabled (available for use) before policy had been issued. Going forward, the **Retrieve Policy Data** button will always be available for use.

Click the Retrieve Policy Data button to search for policies that have any status other than Void (with respect to the policy prefix (M-1234).

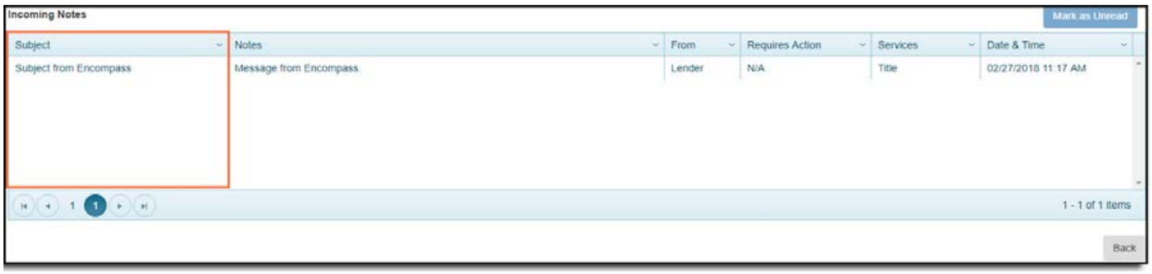
If you click the Retrieve Policy Data button, and that policy data already displays on the Policies screen, a message displays that the policy data is already retrieved.

Integrations

Encompass

Subject Field Added to the Notes Screen

A new **Subject** column has been added to the *Notes* grid in **Lender Connect/Encompass.** This column will display the Note's Subject sent from Lenders.



SureClose Advantage

Sending Patriot Act Search to SureClose Advantage from Parties

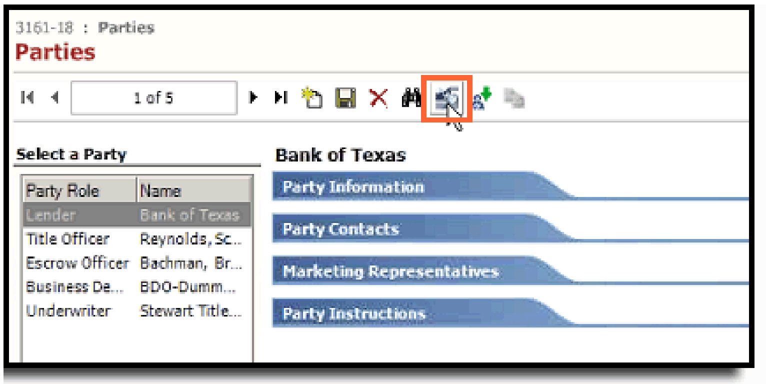
A separate **import code** has been created for **Patriot Act Search**. With Setup complete, select this import code to file the Patriot Act Search into a separate SureClose Advantage placeholder.

Note

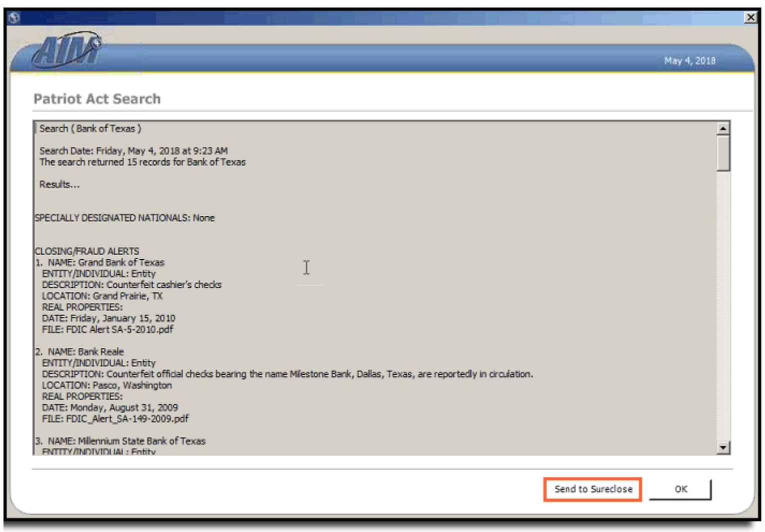
The AIM+ file must be set up to send to SureClose. If the file is not setup, an error message displays. You can map a file to SureClose Advantage after attempting to **Send to Sureclose**. However, no content will send to SureClose unless the file is mapped.

Steps

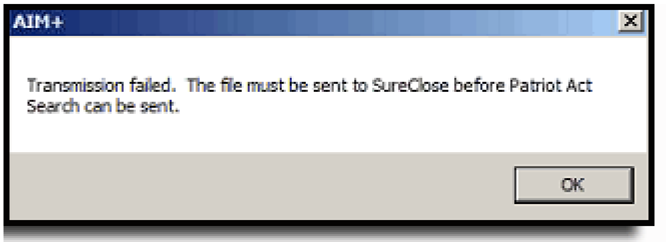
1. Locate and select the file for Patriot Act Search in AIM+.
2. From *Parties*, click the **Patriot Act Search** button. The Patriot Act Search screen displays.



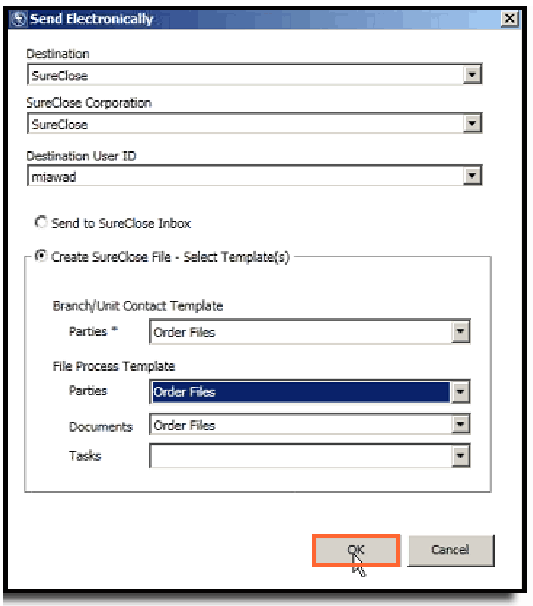
3. Read the details on the Patriot Act Search screen. When complete, click **Send to Sureclose**.



You may receive this error message if the file has not been linked to SureClose (before attempting to send Patriot Act Search results).

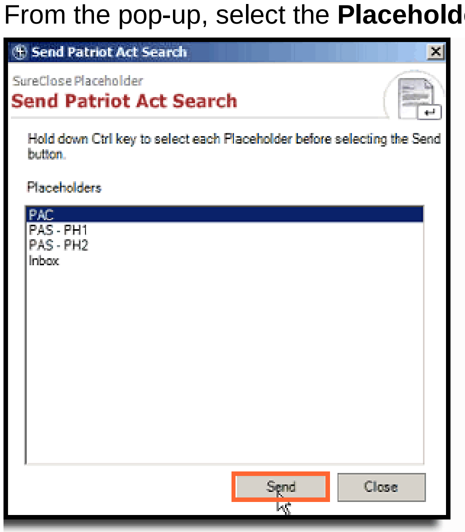


4. From the *AIM+ File* menu, select **Send File to SureClose Only**. The Send Electronically pop-up displays.
5. From the *Send Electronically* pop-up, make the appropriate selections, and click **OK** when finished.



A confirmation message displays, stating the file has been transmitted.

6. Return to the Parties screen, and click the Patriot Act Search button. The Patriot Act Search screen displays.
7. Click the **Send to Sureclose** button. The Send Patriot Act Search pop-up displays.
8. From the pop-up, select the **Placeholder** to send the search results to, and click **Send**.

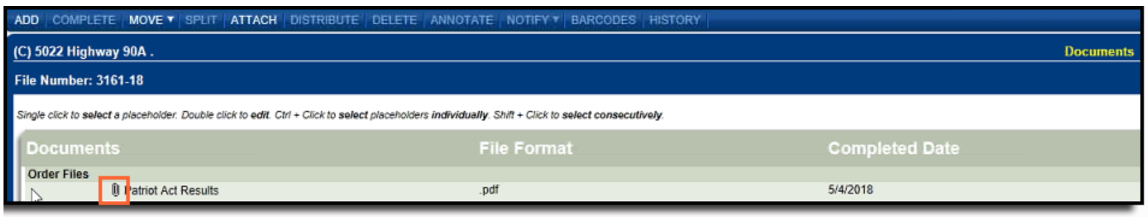


A confirmation displays that the Patriot Act Search results were successfully transmitted.

Note

The naming convention for the Patriot Act Search that is transferred to SureClose resembles *PatriotActResult_AIM File Number_YYYYMMDDHHMM.pdf.*

9. From *SureClose Advantage*, enter the file number and click the **Quick Search** button.
10. From *Documents*, you will see the placeholder and Patriot Act Search results in .pdf format.
11. Click the paperclip icon to view the Patriot Act Search results.

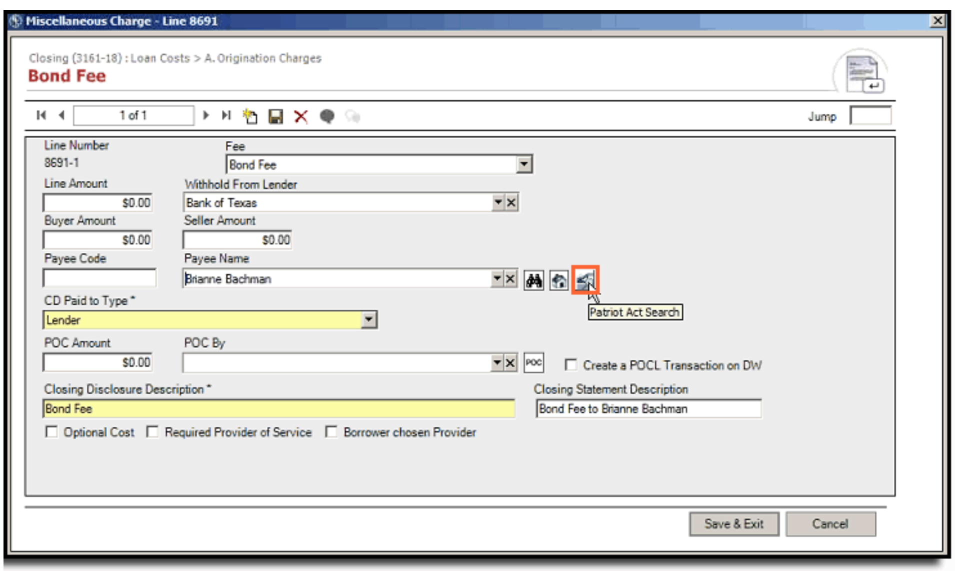


Sending Patriot Act Search to SureClose Advantage from Fee Lines

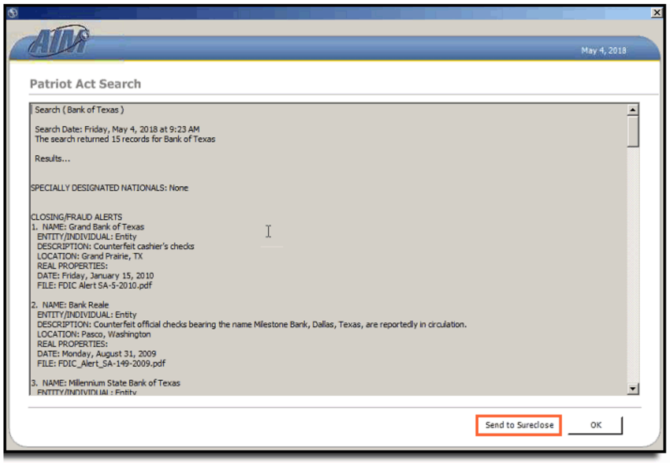
You can also send Patriot Act Search results to a SureClose placeholder from individual fee lines of a file.

Steps

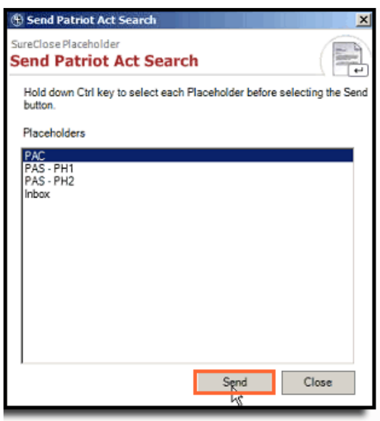
1. Select the file in AIM+, and the fee you are working in.
2. From the fee line, click the **Patriot Act Search** button. The Patriot Act Search screen displays.



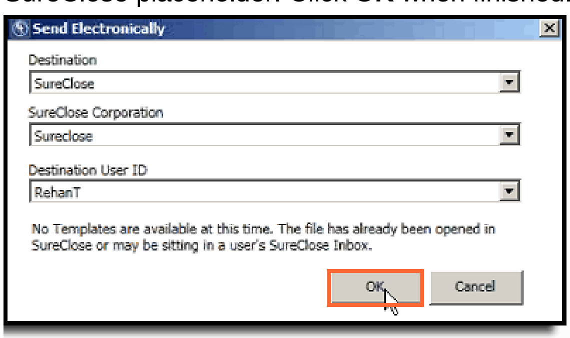
3. Read the details on the Patriot Act Search screen. When complete, click **Send to Sureclose**.



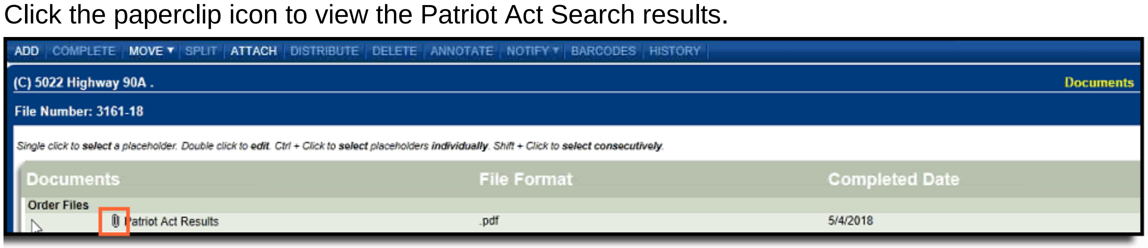
4. From the pop-up, select the **Placeholder** to send the search results to, and click **Send**. The Send Electronically pop-up displays.



5. From the Send Electronically pop-up, be sure all selections are correct for sending Patriot Search Act results to the SureClose placeholder. Click **OK** when finished.



6. From *SureClose Advantage*, enter the file number and click the **Quick Search** button.
7. From *Documents*, you will see the placeholder and Patriot Act Search results in .pdf format.
8. Click the paperclip icon to view the Patriot Act Search results.



Sending Invoices to a SureClose Advantage Placeholder

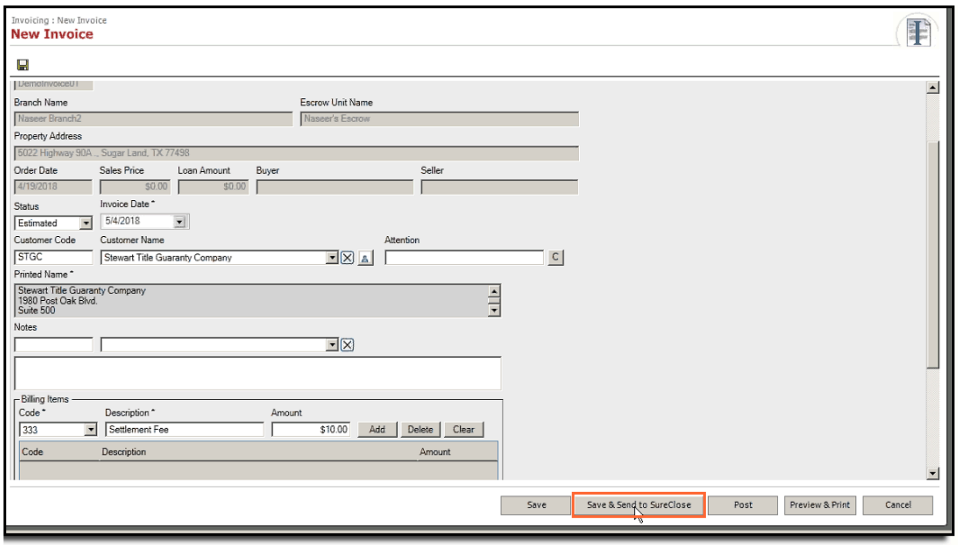
After Setup is complete, you can send an invoice to a SureClose Advantage Placeholder, by following the steps below.

Note

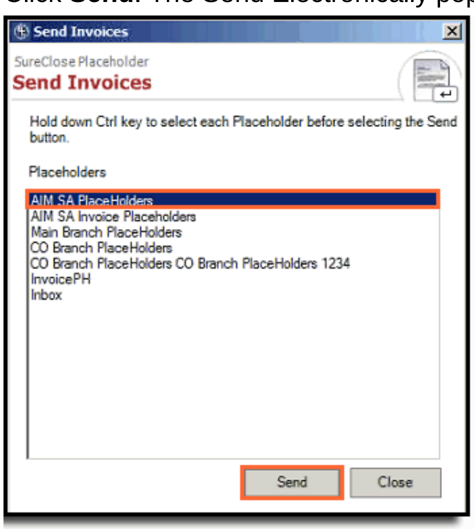
The AIM+ file must first be sent to SureClose Advantage, before an invoice can be sent to a SureClose Advantage placeholder.

Steps

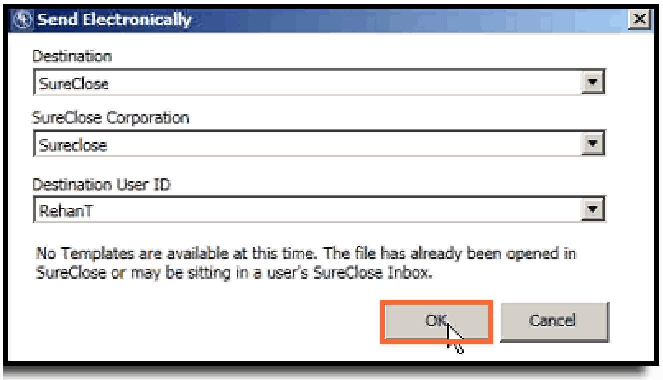
1. From the *Invoicing* module in AIM+, under the *Invoicing* menu, click **New Invoice**. The New Invoice screen displays.
2. Enter all mandatory fields on the screen, including the *Billing Items* section.
3. *Click the Save & Send to SureClose button. The Send Invoices pop-up displays.*



4. From the *Send Invoices* pop-up, click to select the Placeholder(s) to send.
5. Click **Send**. The Send Electronically pop-up displays.

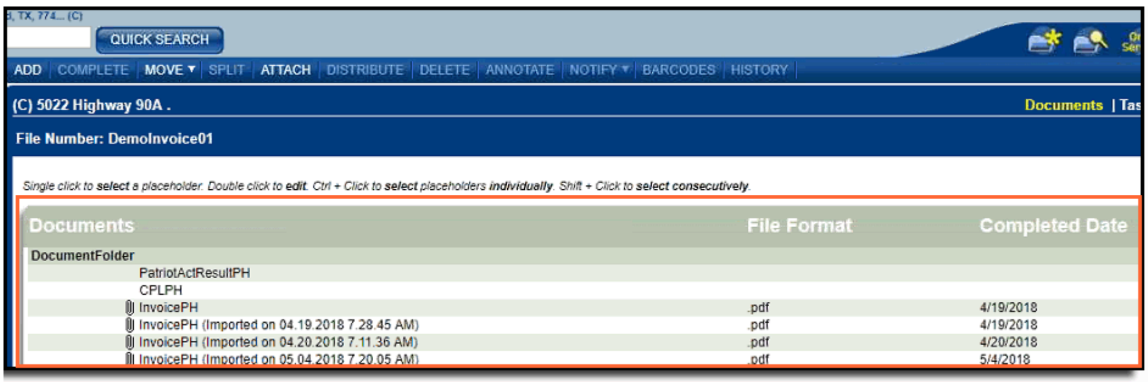


6. From the Send Electronically pop-up, verify (or select) the options for Destination, SureClose Corporation and Destination User ID. Click **OK** to continue.

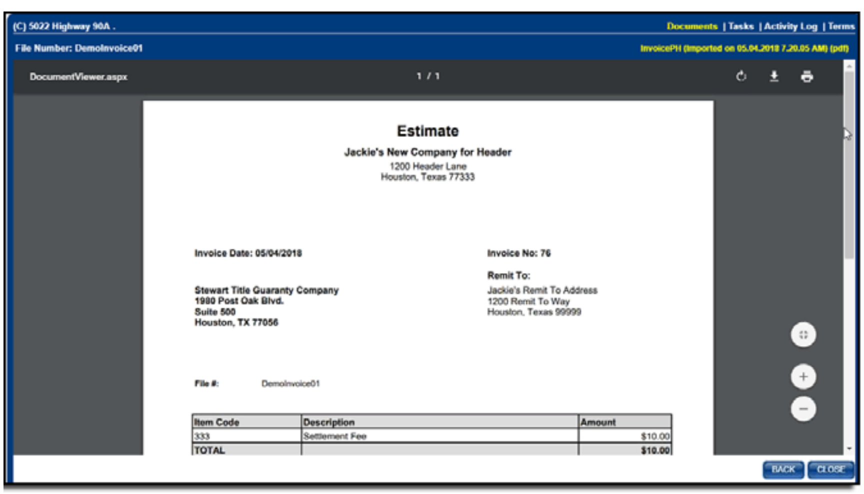


A confirmation displays, confirming the invoice was transmitted, as well as displaying the file number. Log into SureClose to view the invoice and designated placeholder under *Documents*.

7. Click to the paperclip icon to view the invoice.



The invoice (.pdf) sent from AIM+ displays in SureClose Advantage.



Note

You can also send previously issued invoices to SureClose. Search for and open the existing invoice and follow the directions above.

Sending CPL to SureClose Advantage

A new button, **Send to SureClose**, has been added to the *CPL* screen. Use the Send to SureClose button to send a CPL to a SureClose Advantage Placeholder.

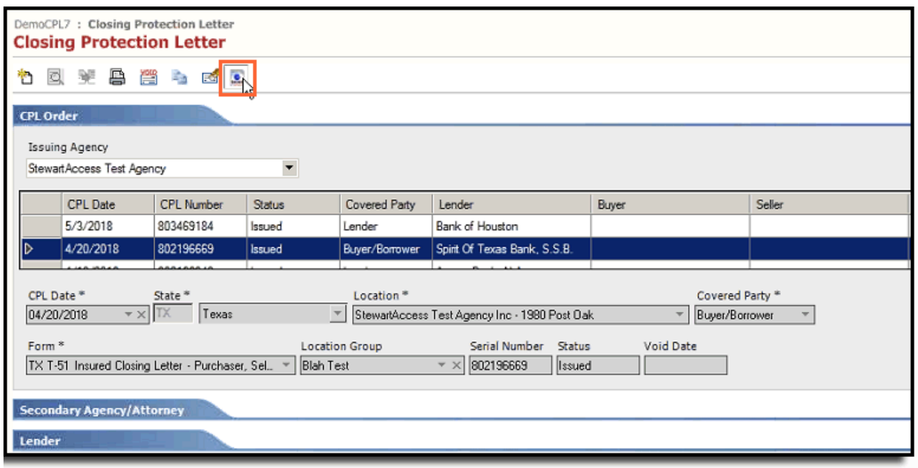
Note

The file must be sent to SureClose first, before attempting to send a CPL to a placeholder in SureClose.

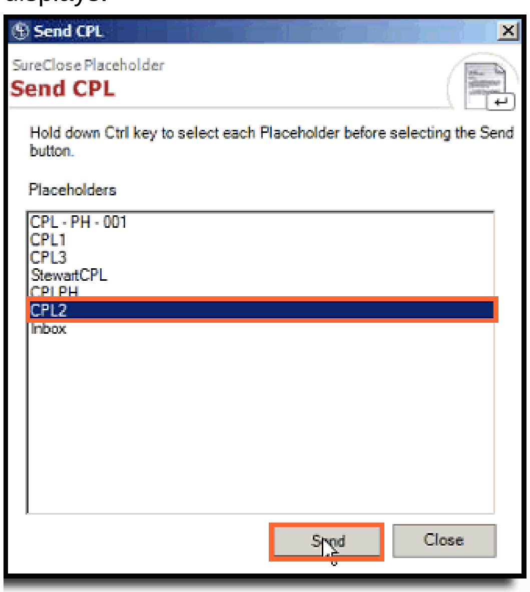
The **Send to SureClose** button is only enabled for CPL with a status of *Issued*. The Send to SureClose button is disabled for CPL's with a status of Draft, or Void.

Steps

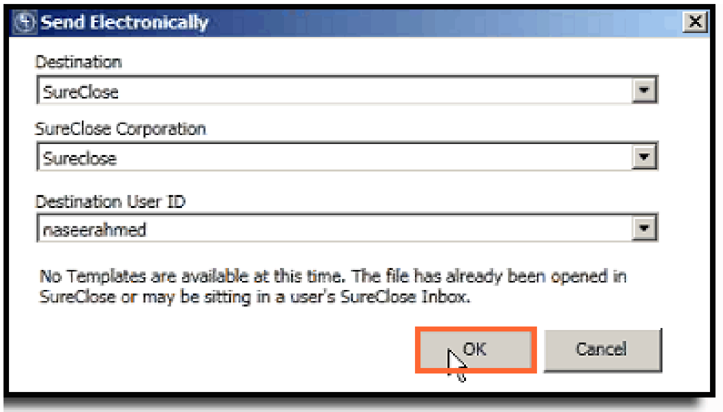
1. From the *CPL* module in AIM+, select the Issued CPL.
2. Click the **Send to SureClose** button. The Send CPL pop-up displays.



3. From the *Send CPL* pop-up, click to select the CPL placeholder, and click **Send**. The Send Electronically pop-up displays.



4. From the *Send Electronically* pop-up, verify your selections are correct, or enter the Destination, SureClose Corporation and Destination User ID. Click **OK** when finished.

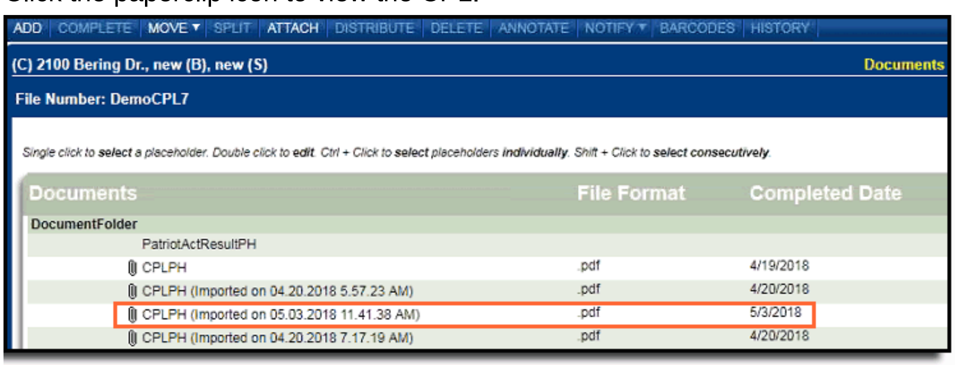


A confirmation message displays, with the file name of the CPL sent to the SureClose placeholder.

Note

The naming convention for the CPL that is transferred to SureClose resembles *CPL_AIM File Number_CPLSerialNumber.pdf*".

5. From *SureClose Advantage*, enter the file number and click the **Quick Search** button.
6. From *Documents*, you will see the placeholder and CPL in .pdf format.
7. Click the paperclip icon to view the CPL.



Defects

The following defects were addressed in **AIM+ 7.1**:

Revenue Reporter

- Duplicate entries no longer display for the same closings/file on the *Generic Reports for* **Revenue Reporter**.

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.