

# AIM+<sup>®</sup> 7.1

Release Notes *For Independent Agents 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**.

3161-18 : Properties Properties		
I4	► н 🛍 🖬 🗙 🍇 🐀	
Select a Property	_ Existing Property: Property 3	
Description	Property Information	
Property 1	Property Description *Property Type *	Sales Price
Property 2	Property 3 ComBus Commercial Business Tra	s0.00
Property 3	Geo Area Site/Store N	lumber
	▼ ×	Show
	Property Address	
	l4 4 1 of 1 → H 🖄 🗙	
	Street Number From Street Number To	
	5511	Address could not be verified
	Direction Street Name S	treet Type Direction
	<ul> <li>Highway 90A.</li> </ul>	• x • x
	Unit Type Unit Number	

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

	Address Verification Service	*
peety Description "Property Type * Si comy 1 ST7 Commonda/Industriel ¥X o Area Sta/Store Number upenty Addres 4 € 1ct 1 → H ℃ X stere Number To Street Number To	The Address Verification Service found one or more possible matches for 5022 h Highway 90 A <sub>1</sub> Khouton, 1X 77498. Select the address to add to the order, or adect the Address not lated checkbox. Addresses Found Storet Number Jonet Name, City State Postal Code County 5022 MgNeary 504 Sugar Land TX 72488 Rot Rend	
22 Street Name Street Name Street Name Street Name Street Name Unit Number Vi Postal Code Unit Number Unit Number V V Postal Code Unit States of Americs V TX Table Street States of Americs V V TX Table States of Americs V V TX TX Table States of Americs V V TX TX Table States of Americs V V V TX		
I <b>**</b>	C Address not listed OK Cancel	

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

🚯 Address Veri	ification Servi	ce				×
The Address Veri Houston, TX 774 checkbox.	98. Select the a					
Street Number		City	State	Postal Code	County	
5022	Highway 90A	Sugar Land	ТΧ	77498	Fort Bend	
Address not	listed				ОК	Cancel

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

Properties		
(i) Order data saved.		
I≪ ▲ 1 of 1 ►	H 눱 🖬 🗙 🗞 🐁	
Select a Property	Existing Property: Property 1	
Description	Property Information	
Property 1	Property Description *Property Type * Sales	Price
	Property 1 ST7 Commercial/Industrial	\$25,000.00
	Geo Area Site/Store Number	
	××	Show
	Property Address	
	I4 4 1 of 1 → H 🎦 🗙	
	Street Number From Street Number To	
	5022	Address verified
	Direction Street Name Street Type	Direction
	▼ X Highway 90A	× × ×
	Unit Type Unit Number	
	××	

## Setup

### Setting up Patriot Act Import Codes

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

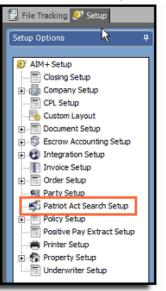


If you do not have the **Patriot Act Search Setup** permission included in your Security Groups, you will not see this option in the Setup Options menu. Simply edit the desired security group, and add this permission for the appropriate users.

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.

8 🥙 Setup 🖭 File Number: 3161-18				
Sidup : Patnist Act Search Setup Patriot Act Search Placeholders				
10 M				
Placeholder Import Code				
PAC	PAC			
PAS - PH1	PAS - PH1			
PAS - PH2	PAS - PH2			
	Selage : Railmini Act Seandi Selage Patriot Act Search Placeholders Placeholder PAC PAS - PH1			

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



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, Invoice 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.

🔁 File Tracking 🐉 Setup					
Setup Options ? AIM+ Setup Closing Setup	Schup : Janvaice Schup Invoice Setup	1			
Company Setup     CPL Setup     CPL Setup     CPL Setup     Costom Layout	Invoice Setup	t.			
Comment Setup     Scrow Accounting Setup	Next Invoice Number * 76	Label for Estimated Invoices Est	imate		-
Integration Setup     Invoice Setup     Order Setup	Header Address Type * Custom Header Address				
Party Setup     Patriot Act Search Setup     Policy Setup	Jackie's New Company for H 1200 Header Lane Houston, Texas 77333	leader			
Positive Pay Extract Setup     Printer Setup     Property Setup	Remit To Address Type * Custom				
Underwriter Setup	Remit To Address Jackie's Remit To Address				
	1200 Remit To Way Houston, Texas 99999				
	Billing Items Code *	Description *	GL Account	Amount	1
				\$0.00	
	Add Clear			Show Inactive	
		escription	GL Account	Amount Active	
		ettlement Fee		\$0.00	
	66 te	st		\$333.00	

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.

Placeholders Setup > Invoice Setup : Invoice Placehol Invoice Placeholders	ders
Placeholder AIM SA Invoice Placeholders AIM SA PlaceHolders CO Branch PlaceHolders CO Branch PlaceHolders CO Branch PlaceHolders InvoicePH Main Branch PlaceHolders	Invoice Placeholder - New  Setup > Invoice Setup : Invoice Placeholders  Invoice Placeholders  Placeholder Name:  Import Code:
	Save & Exit Cancel

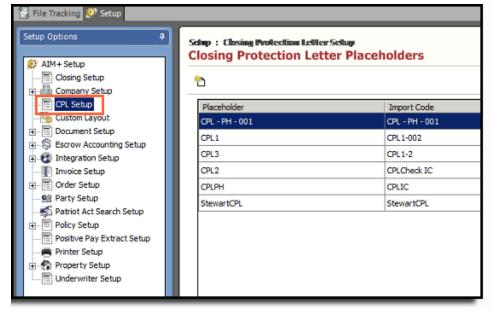
- 4. From the *Invoice Placeholder New* pop-up, enter the Placeholder Name and Import Code.
- 5. Click Save & Exit.

### 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.

🔁 File Tracking 🥙 Setup					
Setup Options         4           Image: AIM+Setup         Image: Closing Setup	Selap : Closing Protection Closing Protection	Letter Placeholders			
CPL Setup	Placeholder CPL - PH - 001	Import Code CPL - PH - 001			
Escrow Accounting Setup      Integration Setup	CPL1 CPL3	CPL1-002 CPL1-2			
Invoice Setup 	CPL2 CPLPH StewartCPL	CPLCheck IC CPLIC StewartCPL			
Patriot Act Search Setup  Policy Setup  Positive Pay Extract Setup  Printer Setup  Property Setup  Underwriter Setup					

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



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.

Head	ding	Produce Final Closing Disclosure	
Nom	nal (No Heading)	✓ Show Signature on Closing Disclosure	
		Show Buyer and Co-Buyer Name on Closing Disclosure	
		Show 1099 Language, Certification, and Signatures on a Separate Page on Settlement Stater	ment
		Show Buyer and Seller Signature Labels on Settlement Statements	
		<ul> <li>Include Breakdown for Agent/Underwriter Split on Settlement Statements</li> </ul>	
		Create Addendum with Simultaneous Issue Language	
		Show (Optional) text in Owner's Policy for ALTA Seller's/Combined Settlement Statement	
	Document Name		
Þ	Refinance Closing Disclosure		
	Seller's Closing Disclosure		
	ALTA Borrower/Buyer's Settlement Statem	nent	
	ALTA Seller's Settlement Statement		
	ALTA Combined Settlement Statement		
	1099-S Worksheet		
	Policy Premium Report		
	Disbursement Worksheet		

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.

			_
Devin Langley	Date	Trisha Langley	Date
CLOSING DISCLOSURE			PAGE 5 OF 5 + LOAN ID

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.

Note

## 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).

Policies			
P E 🖬 🛤 🔍	OE 💽	¥ 🖀	E.

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.

▲	All policy data is already retrieved.	
		Ē

## Integrations

### SureClose Advantage

### Sending Patriot Act Search to SureClose Advantage from Parties

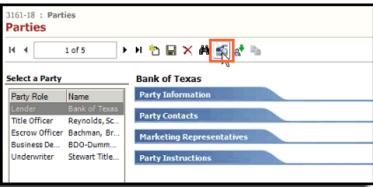
A separate **import code** has been created for **Patriot Act Search**. With Setup complete, select this import code to file the Patriot Act Search into a separate SureClose Advantage placeholder.



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

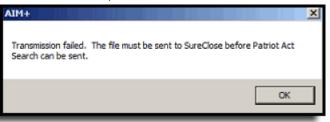
- 1. Locate and select the file for Patriot Act Search in AIM+.
- 2. From Parties, click the Patriot Act Search button. The Patriot Act Search screen displays.



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

9			
2	ALLA	May 4, 20	18
	Patriot Act Search		
	Search (Bank of Texas )		-
	Search Date: Friday, May 4, 2018 at 9:23 AM The search returned 15 records for Bank of Texas		
	Results		
	SPECIALLY DESIGNATED NATIONALS: None		
	LOSINGFAUD ALERTS LI NATE: card abit of Texas LI NATE: card abit of Texas LOCATION: Grand Praine, TX REAL PROPERTIES: DATE: FINAs, January 15, 2010 FILE: FINCA ket SA-520 Log df		
	2 NAME: Bank Reale ENTTY/ID/DIUAL E-Bity ENTTY/ID/DIUAL E-Bity CONTROL Countefet official checks bearing the name Miestone Bank, Dallas, Texas, are reportedly in circulation. ICONTROL MINIMUM ICONTROL MINIMUM ICONTROL MINIMUM ATE: Monday, Magust 31, 2009 FIE: FOTIC_Alert, SA-199-2009.pdf		
	3. NAME: Millernium State Bank of Texas FWITTY/INDIVIDLIAL : Fnitty		¥
	Send to Sureclose	ок	

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.

🛞 Send Electronica	ly		1	×
Destination				
SureClose			•	
SureClose Corporati				
SureClose			•	
Destination User ID			•	
miawad			<u> </u>	
C Send to SureClo	an Tahaw			
C Send to Sureck	SE INDOX			
Create SureClos	e File - Select Template(s)			
Branch/Unit Co	ntact Template			
Parties *	Order Files		•	
File Process Ter	nplate			
Parties	Order Files		-	
Documents	Order Files		•	
	orber mes			
Tasks			•	
			I	1
		9K	Cancel	
		<i>.0</i>		_

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**.

(f) Send Patriot Act Search	×
SureClose Placeholder Send Patriot Act Search	1
Hold down Ctrl key to select each Placeholder before selecting the Se button.	nd
Placeholders	
PAC PAS - PH1 PAS - PH2 Inbox	
Send Close	

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



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.

Α	DD COMPLETE MOVE Y SPLIT ATTACH DISTRIBUTE DELETE ANNOT	ATE NOTIFY * BARCODES HISTORY			
0	(C) 5022 Highway 90A . Documents				
F	ile Number: 3161-18				
	ingle click to select a placeholder. Double click to edit. Ctrl + Click to select placeholders individu	ally. Shift + Click to select consecutively.			
1	Documents	File Format	Completed Date		
	Order Files	.pdf	5/4/2018		

#### 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.

4 1 of 1			Jump
ine Number 1691-1	Fee Bond Fee	-	
ine Amount	Withhold From Lender		
\$0.00	Bank of Texas	- x	
Suver Amount	Seller Amount	1.1	
\$0.00	\$0.00		
Payee Code	Payee Name		
	Brianne Bachman	-× 🛤 🍙 🚮	
D Paid to Type *	1.		
Lender		Patriot Act Search	
POC Amount	POC By		
\$0.00		Create a POCL Transaction on DW	
Closing Disclosure Des		Closing Statement Description	
Closing Disclosure Des Bond Fee	cription	Bond Fee to Brianne Bachman	
Optional Cost	Required Provider of Service 🔲 Borrower chosen Provide	r	

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

and a constant			
ALLA			May 4, 2018
			The second s
Patriot Act Search			
Search (Bank of Texas )			
Search Date: Friday, May 4, 2018 at 9:23 AM The search returned 15 records for Bank of Texas			
Results			
PECIALLY DESIGNATED NATIONALS: None			
LOSING/PRALD ALERTS I. IMANE: Grant Bark of Texas BETTY/IDE/DURAL: Entry DESCRIPTION: Counterfeit cashier's checks LOCATION: Grant Praire, TX RAL PROFERTIES: DATE: Fridex, January 15, 2010 File: FOIC Alex 54-52030.pdf	I		
2. NAME: Bank Reale BYTET//IJID/WDUAL: Entity DESCRIPTION: Dearco, Washington LOCATION: Pasco, Washington REAL PROPERTIES: DATE: Monday, August 31, 2009 FILE: FDIC_Met_SA:149-2009.pdf	name Milestone Bank, Dallas, Texas, are reportedly in circulatio	n.	
3. NAME: Millennium State Bank of Texas ENTITY/INDIVIDUAL: Entity			
		Send to Sureclose	ок [

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

🔄 Send Patriot Act Search 🔀
SureClose Placeholder Send Patriot Act Search
Hold down Ctrl key to select each Placeholder before selecting the Send button.
Placeholders
PAC PAS-PH1 PAS-PH2 Inbox
Send Close

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.

Destination	
SureClose	*
SureClose Corporation	
Sureclose	•
Destination User ID	
RehanT	
No Templates are available at this time. SureClose or may be sitting in a user's S	
	OK Cancel

- 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.

ADD COMPLETE MOVE V SPLIT ATTACH DIST	RIBUTE DELETE ANNOTATE NOTIFY # BARCODES HISTORY	
(C) 5022 Highway 90A .		Documents
File Number: 3161-18		
Single click to select a placeholder. Double click to edit. Ctrl + Cli	k to select placeholders individually. Shift + Click to select consecutively.	
Documents	File Format	Completed Date
Order Files	.pdf	5/4/2018

### 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.



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.

Invoicing : New Invoice New Invoice		T
LlemalnvoiceU I		
Branch Name	Escrow Unit Name	
Naseer Branch2	Naseer's Escrow	
Property Address		
5022 Highway 90A Sugar Land, TX 77498		
Order Date Sales Price Loan Amount Buyer	Seller	
4/19/2018 \$0.00 \$0.00		
Status Invoice Date *		
Estimated 5/4/2018		
Customer Code Customer Name	Attention	
STGC Stewart Title Guaranty Company		
Printed Name*		
Stewart Title Guaranty Company 1980 Post Oak Blvd. Suite 500	<u>*</u>	
Notes	_	
	×	
Billing Items		
Code * Description * Amo	nt	
333 Settlement Fee	\$10.00 Add Delete Clear	
Code Description	Amount	
		<b>•</b>
	Save	Save & Send to SureClose Post Preview & Print Cancel
		<i>,<sup><i>b</i></sup></i>

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

Send Invoices	×
SureClose Placeholder Send Invoices	t d
Hold down Ctrl key to select each Placeholder before selecting the S button.	iend
Placeholders	
AIM SA RaceHolders AIM SA Invoice Placeholders CO Branch PlaceHolders CO Branch PlaceHolders CO Branch PlaceHolders CO Branch PlaceHolders 1234 InvoicePH Inbox	
Send Close	

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

🛞 Send Electronically	×
Destination	
SureClose	
SureClose Corporation	
Sureclose	
Destination User ID	
RehanT 💌	
No Templates are available at this time. The file has already been opened in SureClose or may be sitting in a user's SureClose Inbox.	
OK Cancel	

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.

TX, 774_(C)							
QUICK SEARCH		🗾 🛃 🚵					
ADD COMPLETE MOVE Y SPLIT ATTACH DISTRIBUTE DELETE ANNOTATE NOT	TIFY * BARCODES HISTORY						
(C) 5022 Highway 90A .	Documents   Tas						
File Number: DemoInvoice01							
Single click to select a placeholder. Double click to edit. Ctrl + Click to select placeholders individually. Shift +	onon to serect consecutively.						
Documents	File Format	Completed Date					
DocumentFolder							
PatriotActResultPH							
CPLPH							
InvoicePH	.pdf	4/19/2018					
InvoicePH (Imported on 04.19.2018 7.28.45 AM)	.pdf	4/19/2018					
InvoicePH (Imported on 04.20.2018 7.11.36 AM)	.pdf	4/20/2018					
III InvoicePH (Imported on 05.04.2018 7.20.05 AM)	.odf	5/4/2018					

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

lumber: Demolnvoice01				In	voicePH (Impor	rted on 05.0	1.2018 7.	20.05 /
cumentViewer.aspx							Ŧ	÷
		_	stimate					
		120	v Company for Header 0 Header Lane Ion, Texas 77333					
	Invoice Date: 05/04/20	18	Invoice No: 76 Remit To:					
	Stewart Title Guarant 1980 Post Oak Blvd. Suite 500 Houston, TX 77056	Company	Jackie's Remit To A 1200 Remit To Way Houston, Texas 995	(				
								0
	File#: Demoin				_			0 0
	Item Code	Description		Amount				
	333 TOTAL	Settlement Fee			0.00		BAC	RÌ

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.



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.

DemoCPL7 : Closing Protection Letter Closing Protection Letter						
1 🛛 🗏 🖨 🖀	i 🖻 🗹 💽					
CPL Order						
Issuing Agency StewartAccess Test Agen	Issuing Agency Stewart Access Test Agency					
CPL Date	CPL Number	Status	Covered Party	Lender	Buyer	Seller
5/3/2018	803469184	Issued	Lender	Bank of Houston		
4/20/2018	802196669	Issued	Buyer/Borrower	Spirit Of Texas Bank, S.S.8.		
	TX T-51 Insured Closing Letter - Purchaser, Sel. * Blah Test * X 802196669 Issued					
Secondary Agency/Atto	econdary Agency/Attorney ender					

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

۲	Send CPL
	end CPL
	Hold down Ctrl key to select each Placeholder before selecting the Send button.
	Placeholders
	CPL - PH - 001 CPL1 CPL3 StewartCPL CPL9
	CPL2
	Styd

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.

Send Electronically	
Destination	
SureClose	•
SureClose Corporation	
Sureclose	
Destination User ID	
naseerahmed	•
No Templates are available at th SureClose or may be sitting in a	is time. The file has already been opened in user's SureClose Inbox.
	OK Cancel

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

AIM+	X
CPL_DemoCPL7_802196669.pdf: Successfully transmitted.	
ОК	
/-8.	

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.

V Note

ADD COMPLETE MOVE * SPLIT ATTACH DISTRIBUTE DELETE ANNOTATE NOTIFY * BARCODES HISTORY								
(C) 2100 Bering Dr., new (B), new (S) Documents								
File Number: DemoCPL7								
Single click to select a placeholder. Double click to edit. Ctrl + Click to select placeholders individually. Shift + Click to select consecutively.								
Documents	File Format	Completed Date						
DocumentFolder								
PatriotActResultPH	PatriotActResultPH							
() CPLPH	.pdf	4/19/2018						
CPLPH (Imported on 04.20.2018 5.57.23 AM)	.pdf	4/20/2018						
CPLPH (Imported on 05.03.2018 11.41.38 AM)	.pdf	5/3/2018						
CPLPH (Imported on 04.20.2018 7.17.19 AM)	.pdf	4/20/2018						

## 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 <u>AIM+ Training Center</u> page.

## **Technical Support**

For technical support, contact Stewart Agency Support Center at 1.844.835.1200 or CustomerCare@stewart.com.