



# **AIM+<sup>®</sup> 7.5**

Release Notes

October 21, 2018

**stewart<sup>®</sup>**

*Real partners. Real possibilities.<sup>™</sup>*

# Table of Contents

---

<b>AIM+ 7.5 Release Notes</b> .....	<b>1</b>
<b>Quick Order Entry</b> .....	<b>2</b>
Using the Copy Data Section .....	2
Displaying Element Placeholder Data .....	3
Using the File Information Section.....	4
Additional Improvements to the Quick Data Entry Screen .....	4
Deleting Text from the Quick Data Entry Screen .....	5
<b>Closing</b> .....	<b>6</b>
Funds for Borrower Field Modified Per TRID Requirements.....	6
Updating Calculated Estimated Property Costs over Year 1 .....	7
Displaying the Estimated Property Costs over Year 1 Value.....	8
<b>Documents</b> .....	<b>9</b>
Drag and Drop Files into AIM+ Document Placeholders.....	9
<b>Integrations</b> .....	<b>11</b>
Lender Connect .....	11
Entering a Valid Disbursement Date.....	11
<b>Disbursement Worksheet</b> .....	<b>12</b>
Printing Multiple Checks .....	12
Unlocked Earnest Lines.....	12
<b>Defects</b> .....	<b>14</b>
<b>Additional Information</b> .....	<b>15</b>
Accessing AIM+ .....	15
Training.....	15
Technical Support.....	15

# AIM+ 7.5 Release Notes

---

AIM+ 7.5 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: October 21, 2018**

# Quick Order Entry

---

To make the order entry process even faster and more efficient, several enhancements have been made to the Quick Data Entry (QDE) screen in AIM+.

## Using the Copy Data Section

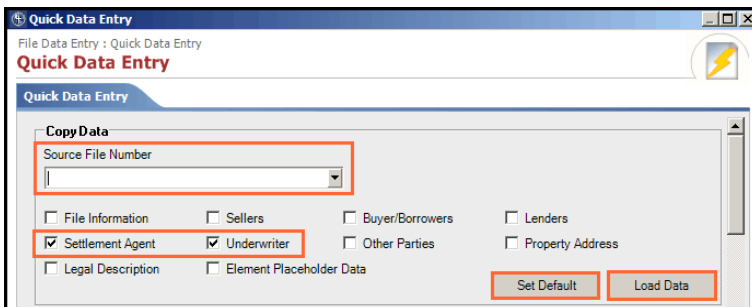
The new **Copy Data** section includes a **Source File Number** drop-down to select base files. If a file that is not a base file is needed, that file number can be typed in.

Select the check boxes in the Copy Data section to pull that data for those fields into the Quick Data Entry screen:

- File Information
- Sellers
- Buyer/Borrowers
- Lenders
- Settlement Agent
- Underwriter
- Other Parties
- Property Address
- Legal Description
- Element Placeholder Data

Use the new **Source File Number** drop-down to select the **File Number** and **Transaction Type** for the order. You can also use this field to manually type in a file number.

As you type the file number, the field may auto-populate only if that file number is a base file. The files that display in the **Source File Number** drop-down are base files.



The screenshot shows the 'Quick Data Entry' window. The 'Copy Data' section is expanded, showing a 'Source File Number' dropdown menu. Below this, there are several checkboxes: 'File Information', 'Sellers', 'Buyer/Borrowers', 'Lenders', 'Settlement Agent', 'Underwriter', 'Other Parties', 'Property Address', 'Legal Description', and 'Element Placeholder Data'. The 'Settlement Agent' and 'Underwriter' checkboxes are checked. At the bottom right of the section are two buttons: 'Set Default' and 'Load Data'.

The **Settlement Agent** and **Underwriter** check boxes are selected by default. If you have the **Order Setup** permission you will see a **Set Default** button. Select the checkboxes you want and click the button to reset the defaults.

After selecting the desired check boxes, click the **Load Data** button to quickly pull source information into the QDE screen.



### Note

Some fields do not load (populate) with data from source files upon clicking the Load Data button: **File Number**, **Sales Price**, **Closing Date**, and **Order Type**.

If you do not select the **File Information** check box, no file information populates in the File Information section of the QDE screen.

# Displaying Element Placeholder Data

If the **Element Placeholder Data** check box is selected on the *Quick Data Entry* screen, that data displays on the various placeholders where they are used in *Documents*.

ALTA Loan Policy (6/17/06)

LOAN POLICY OF TITLE INSURANCE  
ISSUED BY

**stewart**  
title guaranty company

Any notice of claim and any other notice or statement in writing required to be given the Company under this Policy must be given to the Company at the address shown in Section 17 of the Conditions.

COVERED RISKS

SUBJECT TO THE EXCLUSIONS FROM COVERAGE, THE EXCEPTIONS FROM COVERAGE CONTAINED IN SCHEDULE B, AND THE CONDITIONS, STEWART TITLE GUARANTY COMPANY, a Texas corporation, (the "Company") insures as of Date of Policy and, to the extent stated in Covered Risks 11, 13, and 14, after Date of Policy, against loss or damage, not exceeding the Amount of Insurance, sustained or incurred by the Insured by reason of:

Test Data for testing of Element Placeholder data  
This is the second placeholder information  
Test Data for testing of Element Placeholder data

Test Boiler Code

1. Title being vested other than as stated in Schedule A.  
2. Any defect in or lien or encumbrance on the Title. This Covered Risk includes but is not limited to insurance against loss from (a) A defect in the Title caused by (i) forgery, fraud, undue influence, duress, incompetency, incapacity, or impersonation; (ii) failure of any person or Entity to have authorized a transfer or conveyance; (iii) a document affecting Title not properly created, executed, witnessed, sealed, acknowledged, notarized, or delivered;

If you do not select the **Element Placeholder Data** check box, no element placeholder data displays on the placeholders in *Documents*.

ALTA Loan Policy (6/17/06)

LOAN POLICY OF TITLE INSURANCE  
ISSUED BY

**stewart**  
title guaranty company

Any notice of claim and any other notice or statement in writing required to be given the Company under this Policy must be given to the Company at the address shown in Section 17 of the Conditions.

COVERED RISKS

SUBJECT TO THE EXCLUSIONS FROM COVERAGE, THE EXCEPTIONS FROM COVERAGE CONTAINED IN SCHEDULE B, AND THE CONDITIONS, STEWART TITLE GUARANTY COMPANY, a Texas corporation, (the "Company") insures as of Date of Policy and, to the extent stated in Covered Risks 11, 13, and 14, after Date of Policy, against loss or damage, not exceeding the Amount of Insurance, sustained or incurred by the Insured by reason of:

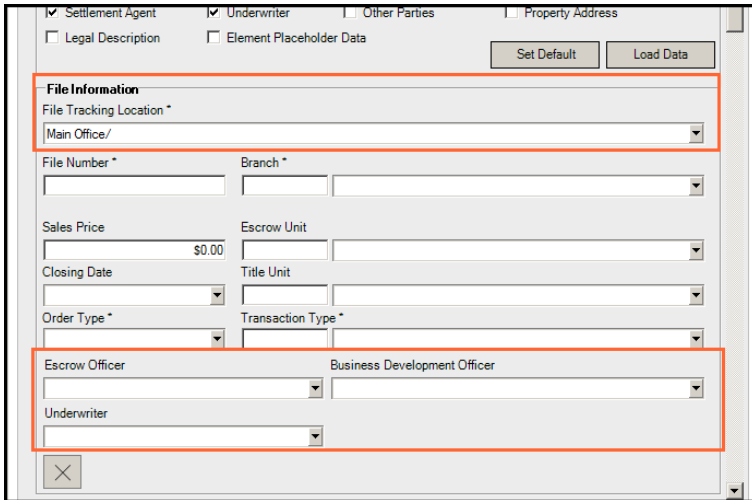
Test Boiler Code

1. Title being vested other than as stated in Schedule A.  
2. Any defect in or lien or encumbrance on the Title. This Covered Risk includes but is not limited to insurance against loss from (a) A defect in the Title caused by (i) forgery, fraud, undue influence, duress, incompetency, incapacity, or impersonation;

## Using the File Information Section

A new section, **File Information**, has been added to the *Quick Data Entry* (QDE) screen. This section contains existing fields on the QDE screen. Additional drop-downs that have been added this release include: **File Tracking Location**, **Escrow Officer**, **Business Development Officer**, and **Underwriter**.

You can change the file location by selecting from the **File Tracking Location** drop-down.



The screenshot shows the QDE screen with several sections. At the top, there are checkboxes for 'Settlement Agent', 'Underwriter', 'Other Parties', and 'Property Address', along with 'Legal Description' and 'Element Placeholder Data'. Below these are 'Set Default' and 'Load Data' buttons. The 'File Information' section is highlighted with a red box and contains a 'File Tracking Location' dropdown menu currently set to 'Main Office/'. Below this are 'File Number' and 'Branch' dropdowns. Further down are 'Sales Price' (with a '\$0.00' value), 'Escrow Unit', 'Closing Date', 'Title Unit', 'Order Type', and 'Transaction Type' dropdowns. At the bottom of the 'File Information' section, there are 'Escrow Officer' and 'Business Development Officer' dropdowns, and an 'Underwriter' dropdown. A red box also highlights these three dropdowns. A close button (X) is visible at the bottom left of the form.

When Branch information is selected from the **Branch** drop-down, information relating to branch displays in the Property Address section, such as **Country**, **State/Province**, and **County**.



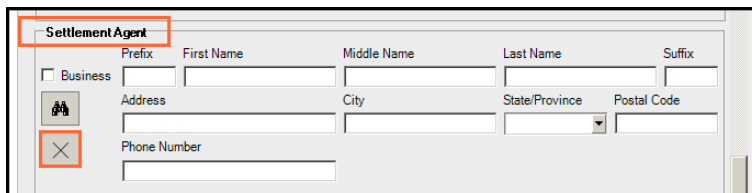
### Tip

When you click **Quick Data Entry** icon, the **File Tracking Location** field displays the file's location.

## Additional Improvements to the Quick Data Entry Screen

Additional enhancements have been added to the *Quick Data Entry* screen.

- A new party section, **Settlement Agent**, has also been added to the QDE screen.



The screenshot shows the 'Settlement Agent' section. It has a title bar with a close button (X). Below the title bar are fields for 'Prefix', 'First Name', 'Middle Name', 'Last Name', and 'Suffix'. There is a checkbox for 'Business' and a 'Business' icon. Below these are fields for 'Address', 'City', 'State/Province', and 'Postal Code'. A 'Phone Number' field is also present. A close button (X) is visible at the bottom left of the section.

- Cross buttons have been added to each individual section of the QDE screen, to clear data entered within those individual sections. You can also select the **Clear All** button at the bottom of the screen to clear all text from QDE screen.

- In the *Buyer/Borrowers* section, only the first two Buyer/Borrowers on the file display on the QDE screen. Click the **Business** check box in any of the party sections to change the Name fields (i.e. First Name, Last Name, etc.) to **Business**.

- You can now select roles for and enter **up to 6 parties**.
- In the existing *Property Address* section, the Street No. field has renamed to **Street No. From**.
- In the existing *Legal Description* section, the Lot field has been renamed to **Lot From**.
- The OK button on the bottom of the QDE screen has been renamed to **Create Order**.

## Deleting Text from the Quick Data Entry Screen

Cross buttons have been added to each individual section of the *Quick Data Entry* (QDE) screen, to clear data entered within those individual sections.

You can also select the **Clear All** button at the bottom of the screen to clear all text from QDE screen.

# Closing

## Funds for Borrower Field Modified Per TRID Requirements

To meet compliance with TILA-RESPA Integrated Disclosure (TRID), the **Funds for Borrower** section under *Calculating Cash to Close* table will display **\$0** (not \$0.00) when zero amount is determined for the Loan Estimate, and Final Funds for Borrower Amounts while printing Closing Disclosure on CD form.

The Funds for Borrower amount displays on **Page 3** of the printed Closing Disclosure.

Calculating Cash to Close		Use this table to see what has changed from your Loan Estimate		
	Loan Estimate	Final	Did this change?	
Total Closing Costs (J)	\$8,054.00	\$8,400.66	YES	• See Total Loan Costs (D) and Total Other Costs (I)
Closing Costs Paid Before Closing	\$0.00	-\$779.80	YES	• You paid these Closing Costs <b>before closing</b>
Closing Costs Financed (Paid from your Loan Amount)	\$0.00	\$0.00	NO	
Down Payment/Funds from Borrower	\$18,000.00	\$30,000.00	NO	
Deposit	-\$10,000.00	-\$10,000.00	NO	
<b>Funds for Borrower</b>	<b>\$0</b>	<b>\$0</b>	<b>NO</b>	
Seller Credits	\$0.00	-\$2,500.00	YES	• See Seller Credits in Section L
Adjustments and Other Credits	\$0.00	-\$686.36	YES	• See details in Sections K and L
<b>Cash to Close</b>	<b>\$16,054.00</b>	<b>\$24,434.50</b>		

On Closing Disclosure Details screen, Calculating Cash to Close tab there will be no change.

The screenshot shows the 'Closing Disclosure Details' window with the 'Calculating Cash to Close' tab selected. The table below is a digital representation of the data shown in the screenshot:

	Loan Estimate	Final	Did this change?	
Total Closing Costs (J)	\$0.00	\$0.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Closing Costs Paid Before Closing	\$0.00	\$0.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Closing Costs Financed (Paid from your Loan Amount)	\$0.00	\$0.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Down Payment / Funds from Borrower	\$0.00	\$0.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	You increased this payment. See details in Sections: <input type="checkbox"/> K <input type="checkbox"/> L
Deposit	\$0.00	\$0.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	This amount has <input checked="" type="radio"/> increased <input type="radio"/> decreased
<b>Funds for Borrower</b>	<b>\$0.00</b>	<b>\$0.00</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No	Your available funds from the loan amount have <input checked="" type="radio"/> increased <input type="radio"/> decreased
Seller Credits	\$0.00	\$0.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	The amount the seller will pay for loan costs has <input checked="" type="radio"/> increased <input type="radio"/> decreased
Adjustments and Other Credits	\$0.00	\$0.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	
<b>Cash to Close</b>	<b>\$0.00</b>	<b>\$0.00</b>		



### Note

\$0 in the Funds for Borrower field only displays on the Closing Disclosure.



# Updating Calculated Estimated Property Costs over Year 1

A new field, **Estimated Property Costs over Year 1**, has been added to the **Projected Payments** tab of the *Closing Disclosure* module.

The screenshot shows the 'Closing Disclosure Details' window with the 'Projected Payments' tab selected. The 'Payment Calculations' section includes a 'Years (Range)' dropdown set to '1', and input fields for 'Principal & Interest' (min: \$0.00, max: \$0.00), 'Mortgage Insurance' (+ \$0.00), and 'Estimated Escrow' (+ \$0.00). The 'Estimated Total Monthly Payment' is \$0.00. Below this, the 'Estimated Taxes, Insurance & Assessments' section has a table with columns for 'This estimate includes', 'In escrow?', and 'Amount'. A row for 'Estimated Property Costs over Year 1' is highlighted with a red box, showing a value of \$0.00. The 'Add' and 'Remove' buttons are visible to the right of the table.

The **Estimated Property Costs over Year 1** field has also been added to **Loan Disclosure** tab. However, this field is disabled on the Loan Disclosure tab.

The screenshot shows the 'Closing Disclosure Details' window with the 'Loan Disclosure' tab selected. The 'Late Payment' section has a dropdown for 'If your payment is more than' days late, with radio buttons for '% of monthly principal and interest amount' and '\$0.00'. The 'Negative Amortization' section has radio buttons for 'are scheduled to make monthly payments that do not pay all of the interest due that month', 'may have monthly payments that do not pay all of interest due that month', and 'do not have negative amortization feature'. The 'Partial Payment' section has radio buttons for 'may accept payments that are less than the full amount due (partial payment) and apply them to your loan', 'may hold them in a separate account until you pay the rest of the payment, and then apply the full payments to your loan', and 'does not accept any partial payments'. The 'Security Interest' section has a dropdown for 'You are granting a security interest in:' and a text field for 'other description:'. The 'Escrow Account' section has radio buttons for 'will have an escrow account (also called "Impound" or "trust" account) to pay the property costs associated to property.', 'will not have an escrow account because you declined it', and 'you lender does not offer one'. The 'Estimated Property Costs over Year 1' field is highlighted with a red box and contains the value '\$180,000.00'. 'Save & Exit' and 'Cancel' buttons are at the bottom.

The watermark, **Lender sent amount**, displays under the **Estimated Property Costs over Year 1** field in the Projected Payments tab for any file that has been created against a RealEC transaction. The Estimated Property Costs over Year 1 field in this case becomes disabled.

## Displaying the Estimated Property Costs over Year 1 Value

The value in the Estimated Property Costs over Year 1 field displays in the **Loan Disclosure Escrow Account** section of the Closing Disclosure form, on **Page 4**.

If the radio button, **will have an escrow account**, is selected on the **Loan Disclosure** tab of the *Closing Disclosure Details* screen, the value displays in the **Estimated Property Costs over Year 1** row of the Closing Disclosure form in Escrow section, on **Page 4**.

Escrow		
Escrowed Property Costs over Year 1	\$0.00	Estimated total amount over year 1 for your escrowed property costs: Homeowner's Insurance
Non-Escrowed Property Costs over Year 1	\$7,200.00	Estimated total amount over year 1 for your non-escrowed property costs: Property Taxes You may have other property costs.
Initial Escrow Payment	\$0.00	A cushion for the escrow account you pay at closing. See Section G on page 2.
Monthly Escrow Payment	\$0.00	The amount included in your total monthly payment.

If the radio button, **will not have an escrow account**, is selected on the **Loan Disclosure** tab of the *Closing Disclosure Details* screen, the value displays in the **Estimated Property Costs over Year 1** row of the Closing Disclosure form in the **No Escrow** section, on **Page 4**.

No Escrow		
Estimated Property Costs over Year 1	\$12,000.00	Estimated total amount over year 1. You must pay these costs directly, possibly in one or two large payments a year.
Escrow Waiver Fee	\$0.00	



### Note

For files that are not created against RealEC transaction user can override calculated value in **Estimated Property Costs over Year 1** on Closing Disclosure Detail screen, Projected Payment tab. In this case manually provided value will be displayed on Closing Disclosure form page 4.

# Documents

## Drag and Drop Files into AIM+ Document Placeholders

Previously, you could add hyperlinks to documents into document placeholders by clicking the Link button at the top of the Document View screen in AIM+. You could also click the Insert drop-down from the main menu to insert a link to a document.

In AIM+ 7.5, you can now also drag and drop a file into an AIM+ document and drop it on a placeholder. Doing so creates a hyperlink to the dropped document. Use this feature to drag and drop one document at a time.



**Note**

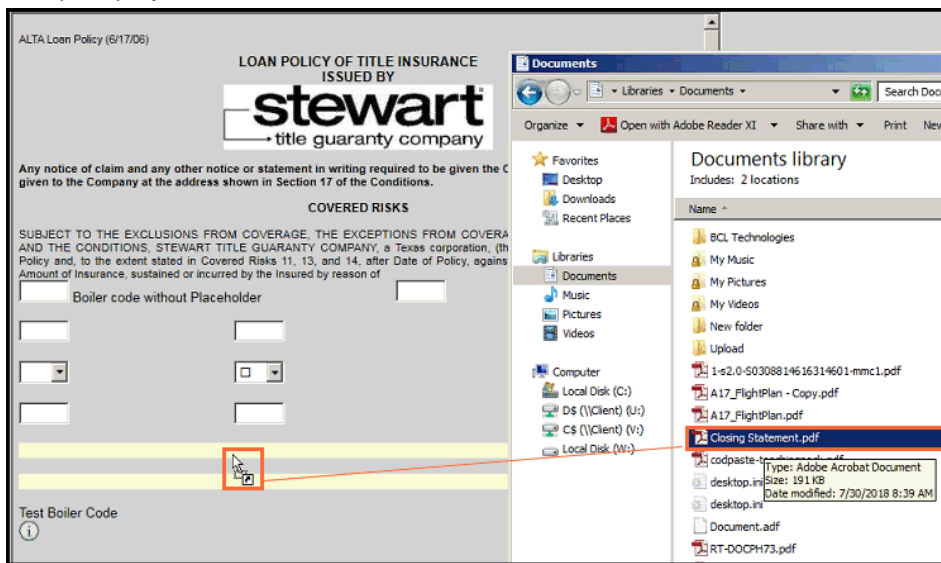
Drag and drop is not available for inserting multiple documents simultaneously.

### Steps

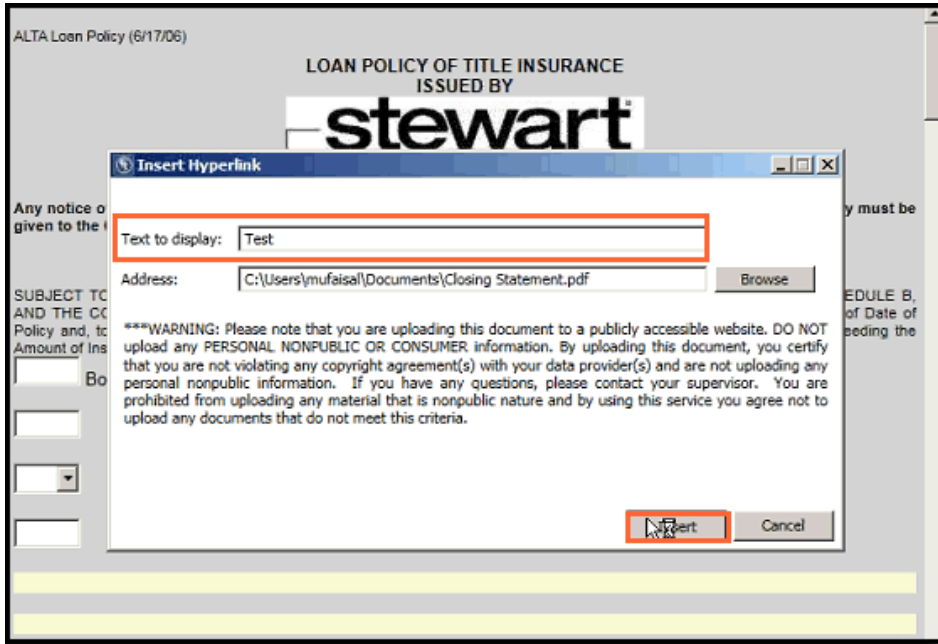
1. Using *Windows Explorer*, select and open the document you want to add a hyperlink to. The document displays.

**Note: If you want to drag a file from your local machine, it can be retrieved by navigating to the v: drive.**

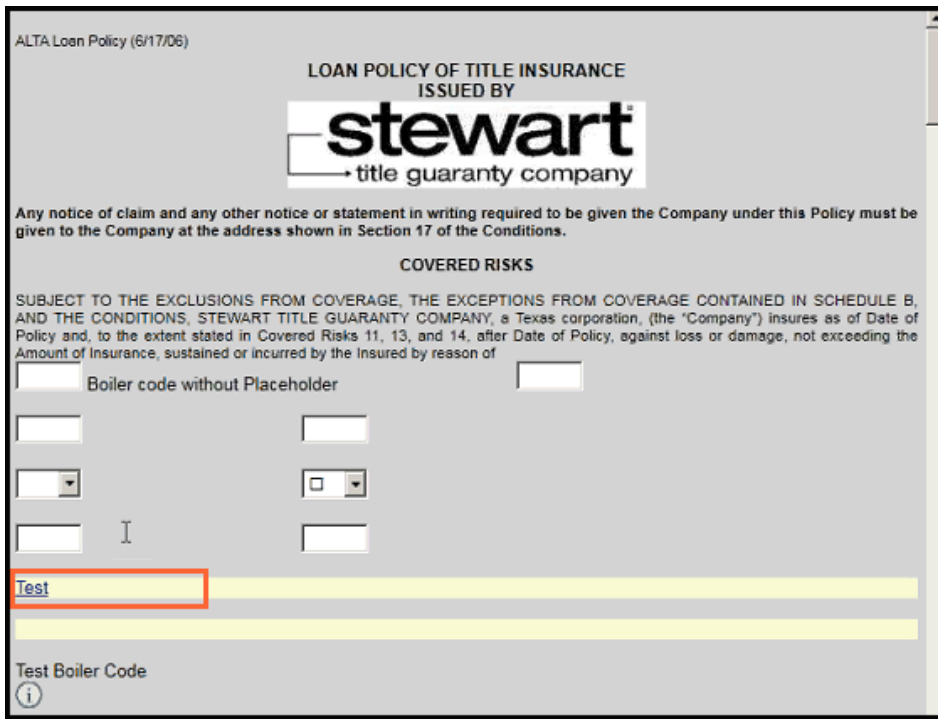
2. Drag and drop the document file from Windows Explorer into the document placeholder. The *Insert Hyperlink* pop-up displays.



- From the *Insert Hyperlink* pop-up, in the **Text to display** field, enter the text you would like to display. This text will contain the hyperlink to the document you drag and drop into the placeholder.



- Click **Insert**. The text displays as a hyperlink. You (or other document reviewers) can click this hyperlink to view the document within the document placeholder.



**Note**

If you attempt to drop a document into an area other than the placeholder, an error message displays.

# Integrations

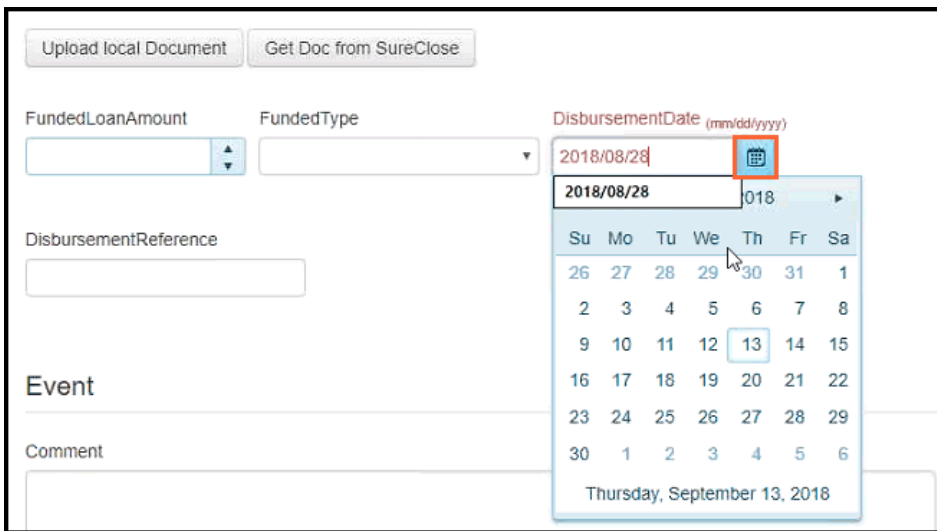
---

## Lender Connect

### Entering a Valid Disbursement Date

When entering a **Disbursement Date** on the *Send Disbursement Info (734)* screen in *Lender Connect*, a label displays, showing you how to enter the correct format of month, day and year (**mm/dd/yyyy**).

You can also click the new calendar icon to select the month, day and year to populate this field in the correct format automatically.



The screenshot shows a web form with several fields. At the top, there are two buttons: "Upload local Document" and "Get Doc from SureClose". Below these are two dropdown menus: "FundedLoanAmount" and "FundedType". The "DisbursementDate (mm/dd/yyyy)" field is highlighted with a red box and contains the text "2018/08/28". A calendar icon is visible to the right of the date field, and a calendar popup is open, showing the date "2018/08/28" selected. The calendar popup displays a grid of dates from August 26 to September 6, 2018, with the date "13" highlighted. Below the calendar, the text "Thursday, September 13, 2018" is displayed. Other fields in the form include "DisbursementReference", "Event", and "Comment".



#### Note

Once the correct date format is selected (mm/dd/yyyy), the system will then convert this date format into the RealEC required format.

# Disbursement Worksheet

## Printing Multiple Checks

You can now print multiple checks simultaneously on the Disbursement Worksheet.

### Steps

1. From the *Disbursement Worksheet*, hold down the **Control** key and select multiple parties or lines.
2. Click the existing **Write Checks** button to write checks for the multiple lines/parties selected.

Printed Name & Address	Description	Line #	Date	Reference #	Amount	
					<b>Total:</b>	<b>\$103,946.00</b>
<b>Disbursements</b>						
					<b>Disbursements Total:</b>	<b>\$157,946.00</b>
<b>01 Bank of Texas</b> 4677 hastings TX	Amortization Fee	809-1			\$809.00	
	Documentary Stamp Fee	8722-1			\$722.00	
	General Counsel Fee	8743-1			\$42.00	
					<b>Total:</b>	<b>\$1,573.00</b>
<b>02 Billie Pyron</b> 1 Billie Road Houston, TX 77056	Application Fee	8102-1			\$102.00	
					<b>Total:</b>	<b>\$102.00</b>
<b>03 buyer new</b>	Radon Inspection Fee	1322-1			\$1,322.00	
	Repairs Fee	1349-1			\$349.00	
					<b>Total:</b>	<b>\$1,671.00</b>



### Note

This feature does not affect Master Disbursement Worksheets.

## Unlocked Earnest Lines

Previously, earnest money was grouped with other deposits. You could not switch settlement statements on a file where the Earnest Money was grouped with another line and receipted.

Now you no longer need to ungroup your earnest money. You can now switch settlement statements on a file with ease.



### Note

For previously created files that had earnest lines already added, you will need to either **Reset Disbursement Worksheet**, or **remove existing and add new earnest lines (from Closing)** to have them ungrouped by default.

The earnest lines that by default will be ungrouped on **Disbursement Worksheet** are as following:

CD Lines	HUD-1	HUD-1A	HUD-1 2010	HUD-1A 2010	Closing Statement
201 - Deposit	201 – Deposit or Earnest money	No line for this Deposit in this Settlement Statement	201 – Deposit or Earnest money	No line for Deposit in this Settlement Statement	201 – Earnest Money with Carryover
291 – Additional Deposit	No items for Additional Deposits in these Statements				



**Note**

Each subline of mentioned earnest lines will also by default fall under their own group on the Disbursement Worksheet.

# Defects

---

The following defects were addressed in **AIM+ 7.5**:

## Documents

- An Invalid prompt no longer displays on the Documents screen for a Placeholder message (when a company has not opted in for the SureClose Drag and Drop feature).



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