



AIM+[®] 7.8

Release Notes

February 17, 2019

stewart[®]

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AIM+ 7.8 Release Notes

AIM+ 7.8 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: February 17, 2019

Quick Data Entry

More Enhancements to Quick Data Entry

Additional enhancements have been added to the Quick Data Entry screen (QDE).

QDE Now Resembles the Order Screen

To make your process faster when using the *Quick Data Entry* screen, some fields have been repositioned to resemble that of the Order screen.

New Code Fields

Under *File Information*, **code fields** have been added to **Bank Account**, **Underwriter**, and **Agent**.

The screenshot displays the 'Quick Data Entry' window. The 'File Information' section contains the following fields:

- File Tracking Location * (Main Office/Andreana/)
- File Number () Transaction Type * () Branch * ()
- File No. will be created if "blank"
- Sales Price (\$0.00) Closing Date () Order Type * ()
- Escrow Unit () Escrow Officer ()
- Bank Account () Business Development Officer ()
- Title Unit () Title Officer ()
- Underwriter () Agent ()

The fields for Bank Account, Underwriter, and Agent are highlighted with orange boxes. At the bottom of the window are buttons for 'Create Order', 'Clear All', and 'Cancel'.

Shipping

Phone Numbers on Shipping Labels

When creating a new Shipping Label, you now have the option to select from three different phone numbers for the **Sender** and **Recipient** based on the Party selected from the **Party** drop-down, or by clicking the **Find and add party from setup** button. You can also manually type in the phone number into the **Phone Number** drop-down.

Use the new **Phone Number** drop-down on the *Create Shipping Label* screen to select any of the following three phone numbers:

- Business Phone Number 1
- Home Phone Number 1
- Mobile Phone Number 1



Note

The phone numbers that display from the **Phone Number** drop-down are phone numbers listed under **Communication Types** in *Parties*. The options to select these phone numbers from the *Create Shipping Label* screen are limited to these Communications Types: Business Phone Number 1, Home Phone Number 1, and Mobile Phone Number 1.

Create Shipping Label

Pull_Phone : Create Shipping Label
Create Shipping Label

Shipping Company * Escrow Unit *
FedEx Faisal Escrow A

Sender

Party
Lender Business

Business Name *
Bank of Texas

Address Line 1 * Address Line 2
3009 Post Oak Blvd Suite 1300

City * Postal Code * Country * State/Province *
Houston 77056 US United States of America TX Texas

Phone Number *
1(713)706-1437 Verify Address
1(713)706-1437 Business Phone Number 1
1(713)706-1435 Home Phone Number 1
1(713)706-1436 Mobile Phone Number 1

Recipient

Party
 Business

Person Name *

Address Line 1 * Address Line 2

City * Postal Code * Country *

Phone Number *

Address Type
 Commercial Residential

Weight (lbs) * Length (in) Width (in) Height (in)

Special Services Payment Bill To * Reference Number (Will be sent to FedEx and will appear on label)

Management Reports

Creating a Shipping Report

You can now run a **Shipping Report** from *Management Reports* to display shipping records for selected companies.



Note

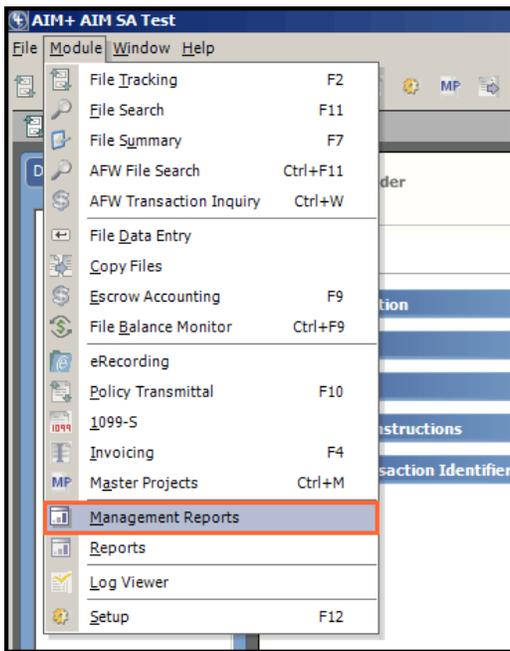
You must have permissions to use Management Reports. Should you need access to Management Reports, contact your Administrator.

Creating a New Shipping Report

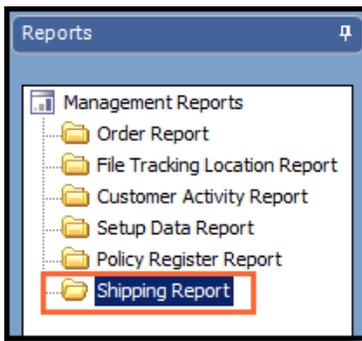
Follow the steps below to run a Shipping Report from Management Reports.

Steps

1. From the *AIM+ Module* drop-down, click **Management Reports**. The *Management Reports* screen displays.



2. From the *Reports* menu, click **Shipping Report**. The *Shipping Report* screen displays.



- From the *Shipping Report* screen, click the **Add New Report** icon. The *Shipping Reports* screen displays with all fields blank. All available **Escrow Units** and **Shipping Companies** are selected by default.

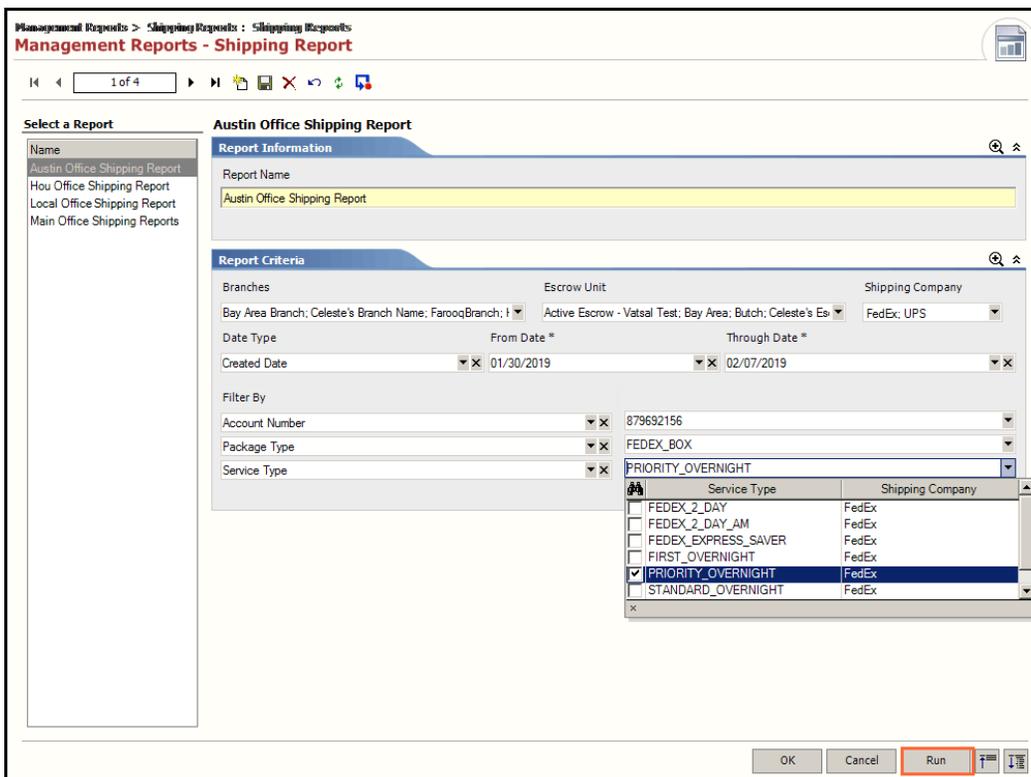


- Enter the **Report Name** and complete all other fields. To make your reporting results more specific, you can use the **Filter By** drop-down to select the **Account Number**, **Package Type** and/or **Service Type**.



Note

Selecting a Branch is mandatory to display results of the report.



- Click **Run**. The *Shipping Report* displays.

Shipping Report - Detail
AIMSA Test

Page 1

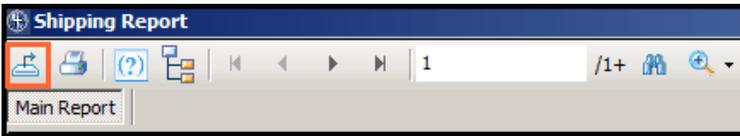
| File Number | Shipping Company | Branch | Escrow Unit | Account Number | Created Date | Shipment Date | Package Type | Service Type | Sender Name | Sender City, State, Zip | Recipient Name | Recipient City, State, Zip | Address Type | Payment Bill To | Estimated Cost | Notes |
|-------------|------------------|----------------------|----------------------|----------------|--------------|---------------|---------------|--------------------|------------------------|-------------------------|------------------------|----------------------------|--------------|-----------------|----------------|-----------------|
| 014020-0 | FedEx | Nascent Branch State | FE001190 | 079602190 | 10-10-2019 | 10-14-2019 | FedExEnvelope | Priority Overnight | J | Houston, TX, 77066-3819 | TitelOffice Company | Kingwood, TX, 77345 | Commercial | Sender | 16.92 | |
| 014020-0 | FedEx | Nascent Branch State | FE001190 | 079602190 | 10-10-2019 | 10-14-2019 | FedExEnvelope | Priority Overnight | M | Houston, TX, 77066-3819 | TitelOffice Company | Kingwood, TX, 77345 | Commercial | Sender | 13.14 | |
| 2488 | FedEx | Main Office | FE001190 | 079602190 | 12-07-2019 | 12-07-2019 | FedExBox | Standard Overnight | Javed | HOUSTON, TX, 77066-3819 | Univ | HOUSTON, TX, 77066-3819 | Commercial | Sender | 16.48 | |
| 2488 | FedEx | Main Office | FE001190 | 079602190 | 01-10-2019 | 01-10-2019 | FedExBox | Standard Overnight | Jacqueline Sa Lyon | HOUSTON, TX, 77066-3819 | Jacqueline Sa Lyon | HOUSTON, TX, 77066-3819 | Residence | Sender | 75.34 | eeee |
| 2488 | FedEx | Main Office | FE001190 | 079602190 | 01-10-2019 | 01-10-2019 | FedExBox | Priority Overnight | Jacqueline Sa Lyon | HOUSTON, TX, 77066-3819 | Jacqueline Sa Lyon | HOUSTON, TX, 77066-3819 | Residence | Sender | 76.79 | 02/14/21/23 |
| 2488 | FedEx | Main Office | FE001190 | 079602190 | 01-10-2019 | 01-10-2019 | FedExEnvelope | Priority Overnight | UnivKyal | HOUSTON, TX, 77066-3819 | StevVaugh | HOUSTON, TX, 77066-3819 | Residence | Sender | 71.67 | HoustonSuburbid |
| 21877432 | FedEx | Main Office | JACKIE ESCROW UNIT | 079602190 | 12-14-2019 | 12-14-2019 | FedExBox | FEDEX 2 Day | Stewart Title Guaranty | Houston, TX, 77066 | Bank of America | Houston, TX, 77024 | Commercial | Sender | 12.28 | |
| 018032-1 | FedEx | Main Office | JACKIE ESCROW UNIT | 079602190 | 12-08-2019 | 12-08-2019 | FedExTube | Priority Overnight | TitelOffice Company | HOUSTON, TX, 77066-3819 | Stewart Title Guaranty | Houston, TX, 77066 | Commercial | Sender | 23.43 | |
| 018790-0 | FedEx | Main Office | Escrow Unit 1 (Main) | 079602190 | 12-08-2019 | 12-08-2019 | FedExBox | Priority Overnight | Danna Gannon | HOUSTON, TX, 77066-3819 | TitelOffice Company | Kingwood, TX, 77345 | Commercial | Sender | 16.92 | Note |
| 018790-0 | FedEx | Main Office | Escrow Unit 1 (Main) | 079602190 | 12-08-2019 | 12-08-2019 | FedExEnvelope | Priority Overnight | late | HOUSTON, TX, 77066-3819 | Lance William Brown | Houston, TX, 77024 | Commercial | Sender | 13.14 | |
| 018790-0 | FedEx | Main Office | Escrow Unit 1 (Main) | 079602190 | 12-08-2019 | 12-08-2019 | FedExEnvelope | Priority Overnight | Islienev | HOUSTON, TX, 77066 | AdvLender AuroraPh | Texas, TX, 77080 | Residence | Sender | 16.33 | |
| 018790-0 | FedEx | Main Office | Escrow Unit 1 (Main) | 079602190 | 12-08-2019 | 12-08-2019 | FedExEnvelope | Priority Overnight | AdvLender AuroraPh | Texas, TX, 77080 | Danna Gannon | HOUSTON, TX, 77066-3819 | Commercial | Sender | 13.14 | |
| 018790-0 | FedEx | Main Office | Escrow Unit 1 (Main) | 079602190 | 12-08-2019 | 12-08-2019 | FedExEnvelope | Priority Overnight | AdvLender AuroraPh | Texas, TX, 77080 | Danna Gannon | HOUSTON, TX, 77066-3819 | Commercial | Sender | 13.14 | |

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6. If you would like to save the search criteria for this Shipping Report, exit out of the generated report, and click **Save**.

Exporting a Shipping Report

After generating a Shipping Report, you can click the **Export Report** icon to export and save the reporting results.



Shipping Report - Detail
AimCompany
Main Office

Page 1

| File Number | Shipping Company | Branch | Escrow Unit | Account Number | Created Date | Shipment Date | Package Type | Service Type | Sender Name | Sender City, State, Zip | Recipient Name | Recipient City, State, Zip | Address Type | Payment Bill To | Estimated Cost | Notes |
|---------------|------------------|-------------|------------------------|----------------|--------------|---------------|---------------|--------------------|--------------------------------|-------------------------|------------------------|----------------------------|--------------|-----------------|----------------|--------------------------------|
| 123445679-343 | FedEx | Main Office | Faisal Escrow A | 079602113 | 01-14-2019 | 01-14-2019 | FedExEnvelope | Standard Overnight | Richard S. Whitten | Dallas, TX, 75248 | Greenberg Tile Office | Houston, TX, 77067 | Commercial | Sender | 20.11 | |
| 123445679-343 | FedEx | Main Office | Faisal Escrow A | 079602113 | 01-14-2019 | 01-14-2019 | FedExEnvelope | Standard Overnight | Bank of Texas | Houston, TX, 77066 | Andrew B. Lecuyer, Jr. | Houston, TX, 77067 | Commercial | Sender | 17.61 | |
| 123445679-343 | FedEx | Main Office | Faisal Escrow A | 079602113 | 01-14-2019 | 01-14-2019 | FedExEnvelope | Standard Overnight | Bank of Texas | Houston, TX, 77066 | Greenberg Tile Office | Houston, TX, 77067 | Commercial | Sender | 17.51 | |
| 123445679-343 | FedEx | Main Office | Faisal Escrow A | 079602113 | 01-04-2019 | 01-04-2019 | FedExEnvelope | Standard Overnight | Bank of Texas | Houston, TX, 77066 | Andrew B. Lecuyer, Jr. | Houston, TX, 77067 | Commercial | Sender | 12.94 | |
| 18248APTa | FedEx | Main Office | Naseer's Escrow Unit | 079752036 | 12-06-2019 | 12-06-2019 | FedExEnvelope | Standard Overnight | Stewart Title Guaranty Company | HOUSTON, TX, 77066-3819 | Test Person | HOUSTON, TX, 77067-3700 | Residence | Sender | 15.13 | |
| 18248APTb | FedEx | Main Office | Naseer's Escrow Unit | 079752036 | 12-06-2019 | 12-06-2019 | FedExEnvelope | Priority Overnight | TitelOffice Company | HOUSTON, TX, 77066-3819 | Agent | HOUSTON, TX, 77067-3754 | Commercial | Sender | 13.14 | |
| 1864-17 | FedEx | Main Office | Faisal Escrow B | 079602190 | 02-00-2019 | 02-00-2019 | FedExPak | Priority Overnight | Stewart Title Guaranty Company | HOUSTON, TX, 77066-3819 | ON-LINE | WEBSTER, TX, 77598-4112 | Commercial | Sender | 17.41 | 1864-171864-171864-171864-1718 |
| 3346 | FedEx | Main Office | Faisal Escrow A | 079602113 | 01-10-2019 | 01-10-2019 | FedExBox | Standard Overnight | Cloud Safe | HOUSTON, TX, 77066-3819 | TitelOffice | HOUSTON, TX, 77067-3754 | Residence | Sender | 74.34 | shp |
| 3307 | FedEx | Main Office | Faisal Escrow A | 010087190 | 12-06-2019 | 12-06-2019 | FedExBox | Priority Overnight | Seller M Seller | Houston, TX, 77066 | Buyer B Buyer | HOUSTON, TX, 77067-3899 | Commercial | Sender | 15.92 | Loan Application |
| 3446 | FedEx | Main Office | Faisal Escrow A | 079602113 | 01-10-2019 | 01-10-2019 | FedExPak | Priority Overnight | Sabha | HOUSTON, TX, 77066-3819 | Free business domain | Houston, TX, 77063 | Commercial | Sender | 29.74 | (731)256-6214 |
| AV001 | FedEx | Main Office | 2 Naseer's Escrow Unit | 010087190 | 01-18-2019 | 01-18-2019 | FedExEnvelope | Standard Overnight | Buyer new | Houston, TX, 77067 | Bank of Texas | Houston, TX, 77067 | Commercial | Sender | 17.51 | |
| Demo_fad Bc | FedEx | Main Office | RTEU1 | 079602196 | 12-14-2019 | 12-14-2019 | FedExBox | Standard Overnight | it | Houston, TX, 77066 | Bank of America | Lewisville, TX, 75066 | Commercial | Sender | 21.07 | |
| Demo_fad Bc | FedEx | Main Office | RTEU1 | 079602196 | 12-13-2019 | 12-13-2019 | FedExBox | FEDEX 2 Day | RT | Houston, TX, 77066 | Bank of America | THE COLONY, TX, 76956-2913 | Commercial | Sender | 23.43 | |
| Demo_Shp prng | FedEx | Main Office | Faisal Escrow A | 079602196 | 01-22-2019 | 01-22-2019 | FedExBox | Standard Overnight | Dorothy C. Storgans | Houston, TX, 77067 | Andrew B. Lecuyer, Jr. | Houston, TX, 77067 | Commercial | Sender | 20.18 | |

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Once you click on **Export Report**, the *Export Report* pop-up displays. Select the file type and location to save the generated report.

| Sender City, State, Zip | Recipient Name | Recipient City, State, Zip | Address Type | Payment Bill To | Estimated Cost | Notes |
|-------------------------|-----------------------|----------------------------|--------------|-----------------|----------------|--------------------------------|
| Dallas, TX, 75248 | Greenberg Tile Office | Houston, TX, 77067 | Commercial | Sender | 20.11 | |
| Houston, TX, 77066 | Andrew B Lecuyer, Jr | Houston, TX, 77067 | Commercial | Sender | 17.61 | |
| Houston, TX | Greenberg Tile Office | Houston, TX, 77067 | Commercial | Sender | 17.51 | |
| | Andrew B Lecuyer, Jr | Houston, TX, 77067 | Commercial | Sender | 12.94 | |
| | TestPerson | HOUSTON, TX, 77067-3700 | Residential | Sender | 15.13 | |
| HOUSTON, TX, 77036-8001 | Agart | HOUSTON, TX, 77067-3754 | Commercial | Sender | 13.14 | |
| HOUSTON, TX, 77056-3619 | ON-LINE | WEBSTER, TX, 77598-4112 | Commercial | Sender | 17.41 | 1864-171864-171864-171864-1718 |
| HOUSTON, TX, 77036-8001 | TitleLockhat | HOUSTON, TX, 77067-3754 | Residential | Sender | 74.34 | yhqz |
| Houston, TX, 77066 | Buyer B Scroggins | HOUSTON, TX, 77067-3769 | Commercial | Sender | 15.92 | Loan Application |
| HOUSTON, TX, 77066-3819 | Sabha | Houston, TX, 77063 | Commercial | Sender | 29.74 | 17311256-0214 |
| Houston, TX, 77067 | Buyer new | Houston, TX, 77067 | Commercial | Sender | 17.51 | |
| Houston, TX, 77066 | it | Bank of America | Commercial | Sender | 21.07 | |
| Houston, TX, 77066 | RT | Bank of America | Commercial | Sender | 23.43 | |
| Houston, TX, 77067 | Dorothy C. Scroggins | Houston, TX, 77067 | Commercial | Sender | 20.18 | |

Saving a Shipping Report Query

To save Shipping Report query you created, click the **Save** icon. This action will save the search criteria with the Report Name. A message displays, confirming that the report has been saved. The saved Report Name displays under the *Select a Report* section.

Management Reports - Shipping Report

1 of 4

The Report, Austin Office Shipping Report, has been saved.

Select a Report

- Austin Office Shipping Report
- Hou Office Shipping Report
- Local Office Shipping Report
- Main Office Shipping Reports

Austin Office Shipping Report

Report Information

Report Name: Austin Office Shipping Report



Note

Click **Save** before or after running a Shipping Report to avoid losing the search criteria for future use.

Deleting a Shipping Report Query

Follow the steps below to delete a Shipping Report.

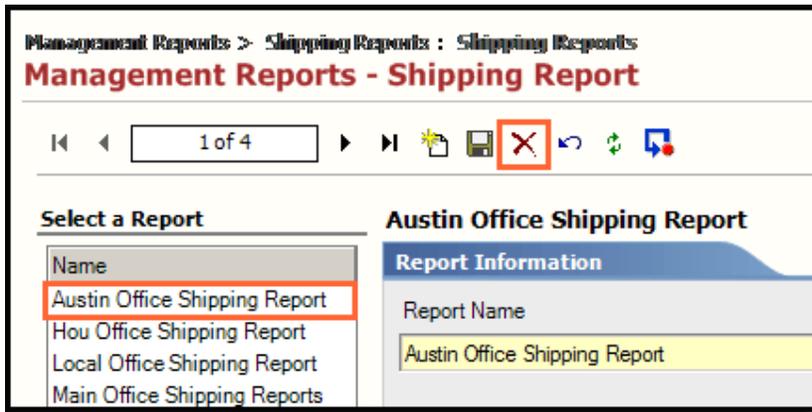


Note

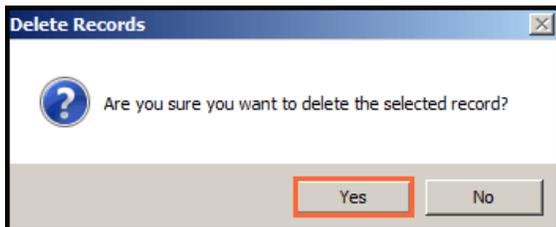
This action permanently deletes the report criteria.

Steps

1. From the *Shipping Report* screen, select the **Report Name** under **Select a Report**.
2. Click the **Delete** icon.



3. The *Delete Records* pop-up displays, asking if you are sure you want to delete this report. Click **Yes**. The Report Name no longer displays under *Select a Report*.



Defects

The following defects were addressed in **AIM+ 7.8**:

Policies

- From *Policies*, the **Policy Record Prefixes** display correctly, instead of 0000 and accurate information is passed to EPR and STNET1 for Non-SA policies.

Parties

- From *Parties*, the **State information** saves and displays correctly when selecting another Party with other Country.

Additional Information

Accessing AIM+

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.



Tip

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

Need help? Stuck? We're here for you. Should you have any questions, please contact one of the following support teams – representatives are standing by to assist:

- **Direct Ops Users:** Please contact the **Business Support Center** at (855) 330-2800 or customer care@stewart.com.
- **Agency Users:** Please contact the **Agency Support Center** by phone at (844) 835-1200 or by email at customer care@stewart.com.