



# **AIM+<sup>®</sup> 8.0**

Release Notes

April 21, 2019

**stewart<sup>®</sup>**

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# AIM+ 8.0 Release Notes

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AIM+ 8.0 includes additional functionality, enhancements, and defect corrections. This document provides users with a brief explanation of what was fixed, and an introduction to new features and functionality implemented with this release.

**Deployment Date: April 21, 2019**

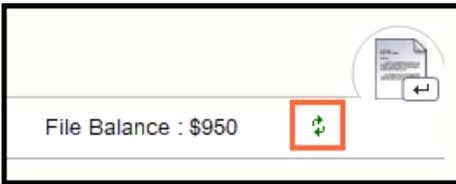
# Displaying File Balance Across Multiple Screens

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The **File Balance** (including negative balance) now displays on the top-right corner of the following screens:

- Order
- Properties
- Parties
- Closing
- Disbursements

Click the **Refresh** button to update the File Balance amount.



A negative File Balance displays in red font and in parenthesis.



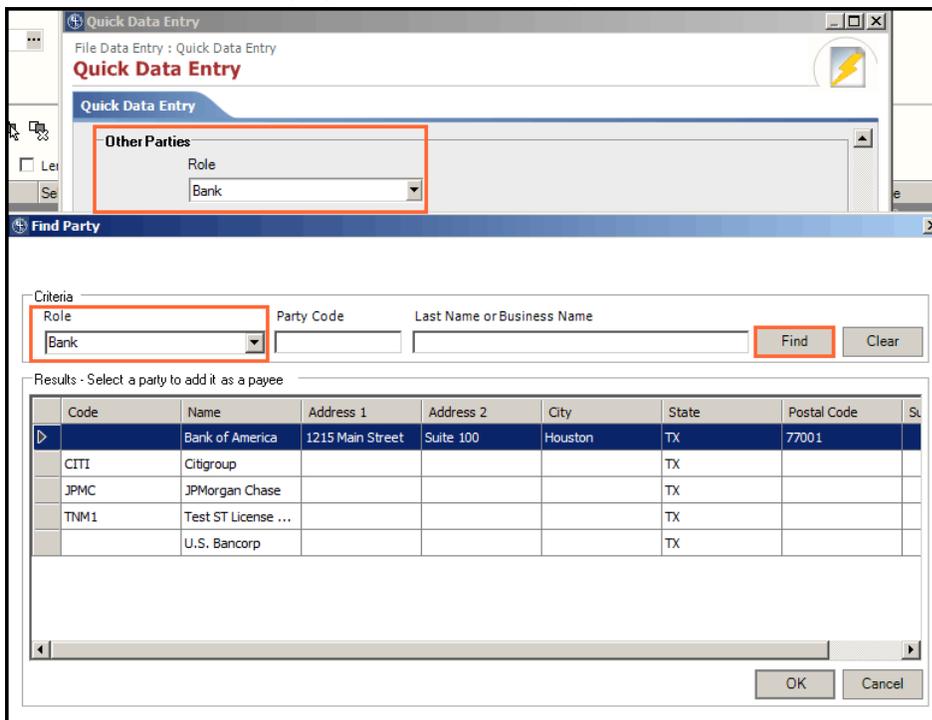
# Quick Data Entry

## Selecting the Party Role from Find Party Pop-up

For even faster data entry, the Party Role now also populates in the *Other Parties* section when using the **Find Party** pop-up.

### Steps

1. From the *Quick Data Entry* screen, scroll down to the section, **Other Parties**.
2. Click the **Find Party** icon .
3. From the *Role* drop-down, select the **Role**.
4. Click **Find**. The Role displays from the **Role** drop-down, in the **Other Parties** section.



The screenshot shows two overlapping windows. The top window is titled "Quick Data Entry" and contains a section labeled "Other Parties" with a "Role" dropdown menu set to "Bank". The bottom window is titled "Find Party" and contains a search criteria section with a "Role" dropdown menu also set to "Bank" and a "Find" button. Below the search criteria is a table of results.

Code	Name	Address 1	Address 2	City	State	Postal Code	St
▶	Bank of America	1215 Main Street	Suite 100	Houston	TX	77001	
CITI	Citigroup				TX		
JPMC	JPMorgan Chase				TX		
TNM1	Test ST License ...				TX		
	U.S. Bancorp				TX		

## New Fields in Lender Section of QDE

New fields have been added to the Lender section of the *Quick Data Entry* screen. These fields function the same as when using the *Order Entry* screen to enter order data:

- **Loan Type** drop-down – Select the Loan Type.
- **Loan Number** – Enter or paste up to 30 characters.
- **Loan Amount** – Enter up to 13 digits, and with a maximum of one decimal.

The screenshot shows the 'Quick Data Entry' application window. The interface includes a top navigation bar with the title 'Quick Data Entry' and a search icon. Below this, there are input fields for 'Prefix', 'First Name', 'Middle Name', 'Last Name', and 'Suffix'. A 'Business' checkbox is present. The main section is titled 'Lenders' and contains three identical forms. Each form has a 'Business' checkbox, an 'Address' field, 'City', 'State/Province', and 'Postal Code' fields, and 'Phone Number' and 'Tax ID' fields. The first form in the 'Lenders' section has a red box highlighting the 'Loan Type' (a drop-down menu), 'Loan Number', and 'Loan Amount' (containing '\$0.00') fields. At the bottom of the window, there are three buttons: 'Create Order', 'Clear All', and 'Cancel'.

# Property Address and Legal Description Moved

The **Property Address** and **Legal Description** sections of *Quick Data Entry* have been moved underneath the **File Information** section.

The screenshot shows the 'Quick Data Entry' window. The 'Property Address' section is highlighted with a red box and contains the following fields: Property Type (dropdown), Street No. From, Direction, Street Name, Street Type, Direction, Country, City, State/Province, Postal Code, and County. Below it, the 'Legal Description' section contains Lot From, Block, Subdivision, and Section fields. The 'Sellers' section below contains two identical sets of fields for Prefix, First Name, Middle Name, Last Name, Suffix, Address, City, State/Province, Postal Code, Phone Number, and Social Security Number. At the bottom are 'Create Order', 'Clear All', and 'Cancel' buttons.

In addition, the **Property Address** and **Legal Description** check boxes have been moved beside the File Information check box of the **Copy Data** section.

The screenshot shows the 'Quick Data Entry' window in the 'Copy Data' section. It features 'Base File Number' and 'Source File Number' dropdown menus with an 'OR' label between them. Below are several checked checkboxes: File Information, Property Address (highlighted with a red box), Legal Description (highlighted with a red box), Sellers, Buyer/Borrowers, Lenders, Settlement Agent, Underwriter, and Other Parties. Element Placeholder Data is also checked. At the bottom are 'Set Default' and 'Load Data' buttons.

# Documents

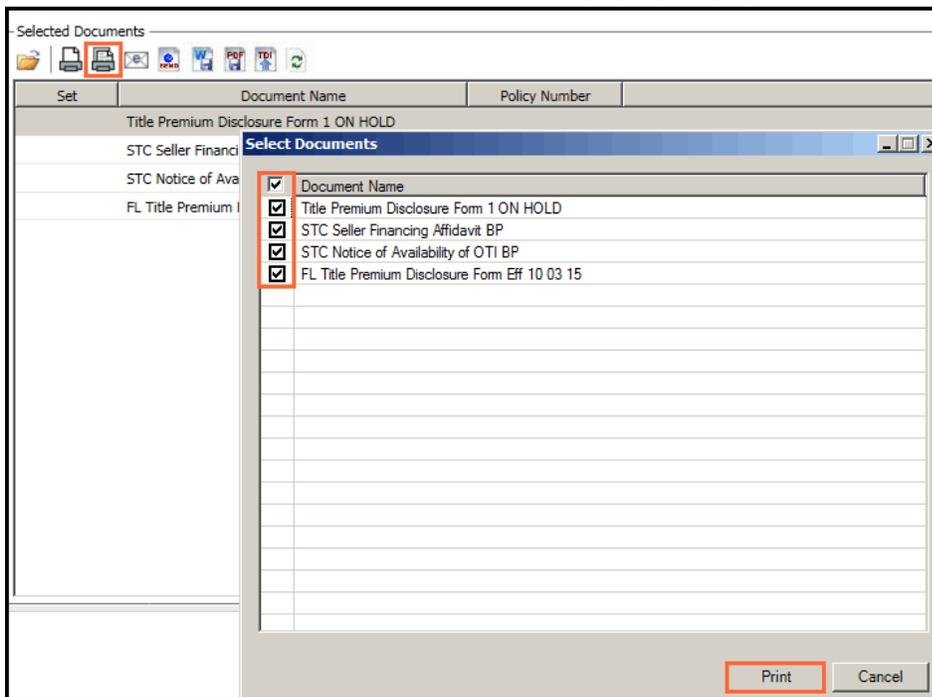
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## Printing Select Documents

The new **Select Documents** pop-up allows you to print selected documents instead printing one or all opened documents.

### Steps

1. From *Documents*, select the documents to print if none are currently selected.
2. Click the **Print All** button. The *Select Documents* pop-up displays with all documents selected to print by default.



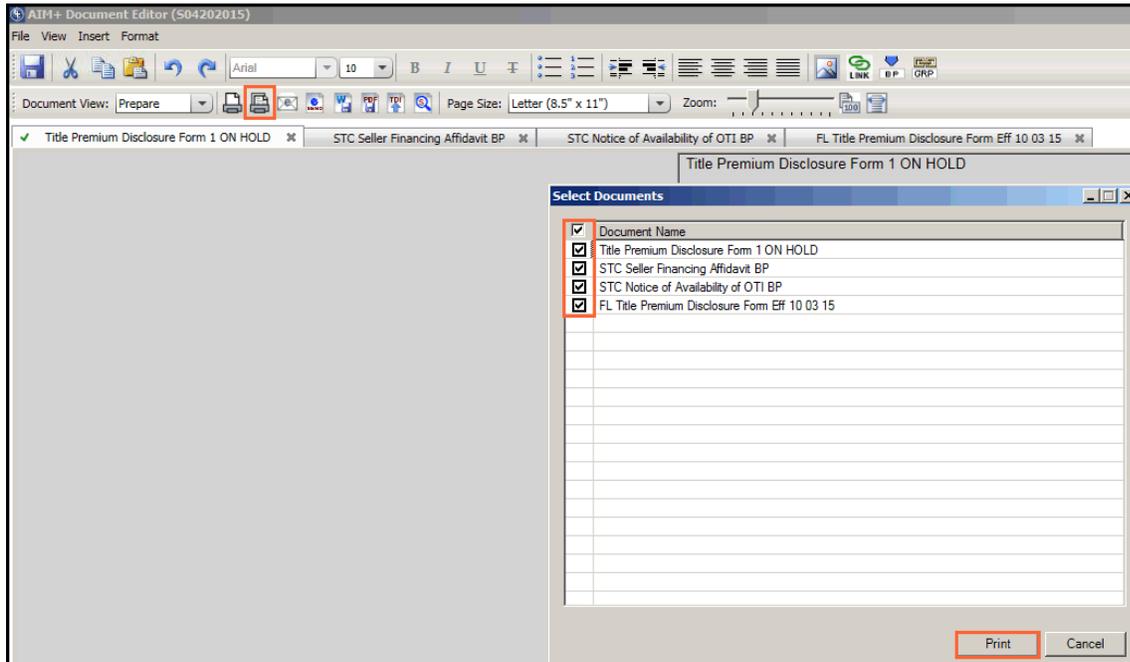
3. From the *Select Documents* pop-up, deselect the check boxes for documents you do not want to print.
4. Click **Print**. All documents selected by a check box on the *Select Documents* pop-up will print.

# Printing Opened Documents

You can also print select documents if they are already opened from the *Document Editor*.

## Steps

1. From the *Document Editor*, click the **Print All** button. The *Select Documents* pop-up displays.



2. From the *Select Documents* pop-up, deselect the check boxes for documents you do not want to print.
3. Click **Print**. All documents selected by a check box on the *Select Documents* pop-up will print.

# Disbursement Worksheet

## Reprinting Receipts for Receipts and Incoming Wires

A new button, **Reprint Receipt**, has been added to the Disbursement Worksheet for reprinting receipts and Incoming Wires.

### Steps

1. From the *Disbursement Worksheet*, click to select a posted transaction in **Receipts** section.
2. Click the **Reprint Receipt** button to reprint the receipt information. The receipt will be sent to the printer that is configured in the setup area against Escrow Accounting.

**Disbursements**

**Escrow Unit:** 333 - Trinity Escrow Unit  
**Bank Account:** BOAC - Bank of America Cash



**Receipts**

Printed Name & Address	<b>Receipts Total:</b>			<b>\$625,239.00</b>
Description	Line #	Date	Reference #	Amount



### Note

Reprinting of manual receipts is not supported. In addition, reprinting of a receipt cannot be done when more than one group is selected, or line(s) in different groups are selected. You must select a single group or line(s) in the same group to reprint a receipt.

## Reprinting Receipts Captured Prior to AIM+ 8.0

When reprinting receipts for Incoming Wires/Receipts (that were captured prior to the AIM+ 8.0 release), the message **Information is not available**, will display on the printed receipt on these sections:

- **Incoming Funds Bank Name**
- **Incoming Funds Wire Number**

# Defects

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The following defects were addressed in **AIM+ 8.0**:

## Document Setup

- No error displays when attempting to **Print or Print All** in document templates setup area.

## Shipping

- **Phone number** formats correctly when retrieved from *Creating Shipping Label* screen for FedEx.

## Disbursement Worksheet

- Duplicate payment warning does not display after selecting **Write All Undisbursed Checks** for files that do not have duplicate payees.

# Additional Information

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## 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

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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](mailto: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](mailto:customer care@stewart.com).