# AIM+® 8.0

Release Notes

April 21, 2019

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# AIM+ 8.0 Release Notes

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.

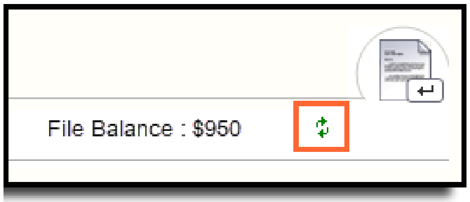
**Deployment Date: April 21, 2019**

# Displaying File Balance Across Multiple Screens

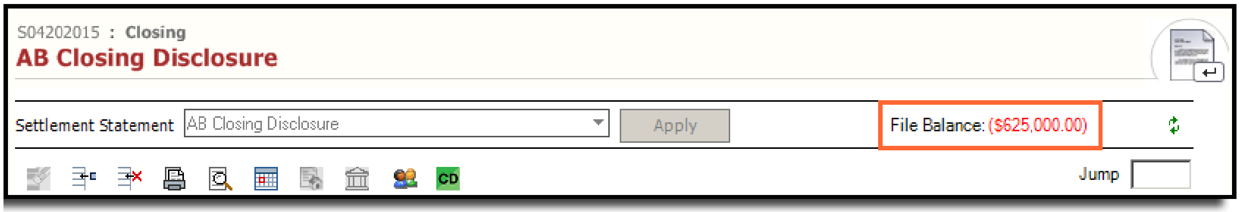
The **File Balance** (including negative balance) now displays on the top-right corner of the following screens:

- 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.

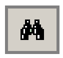


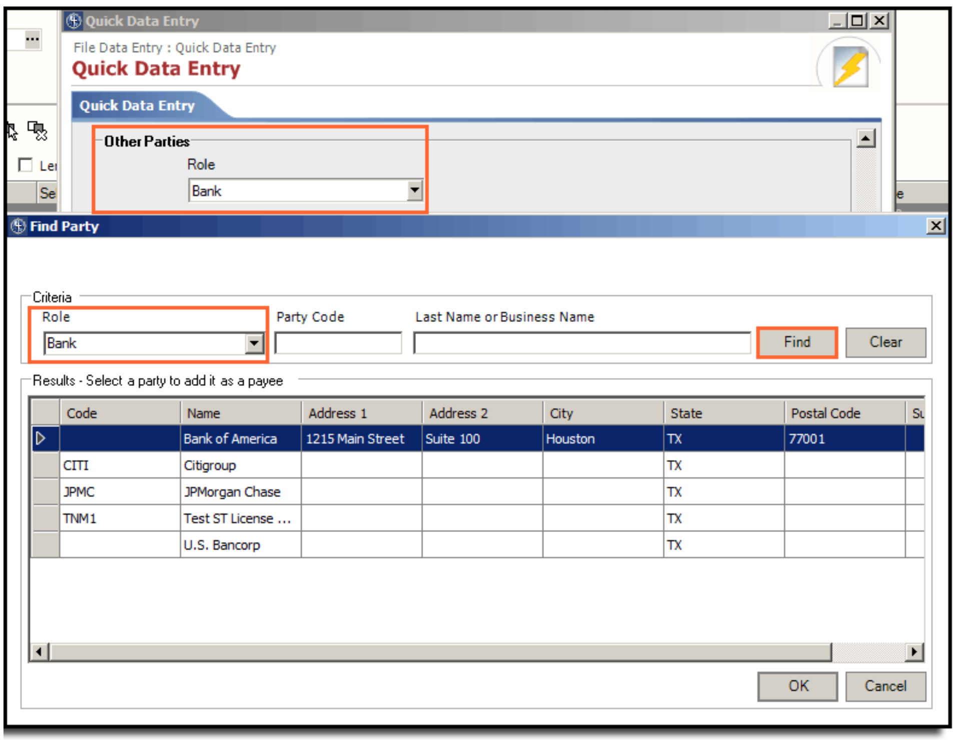
# Quick Data Entry

## 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*

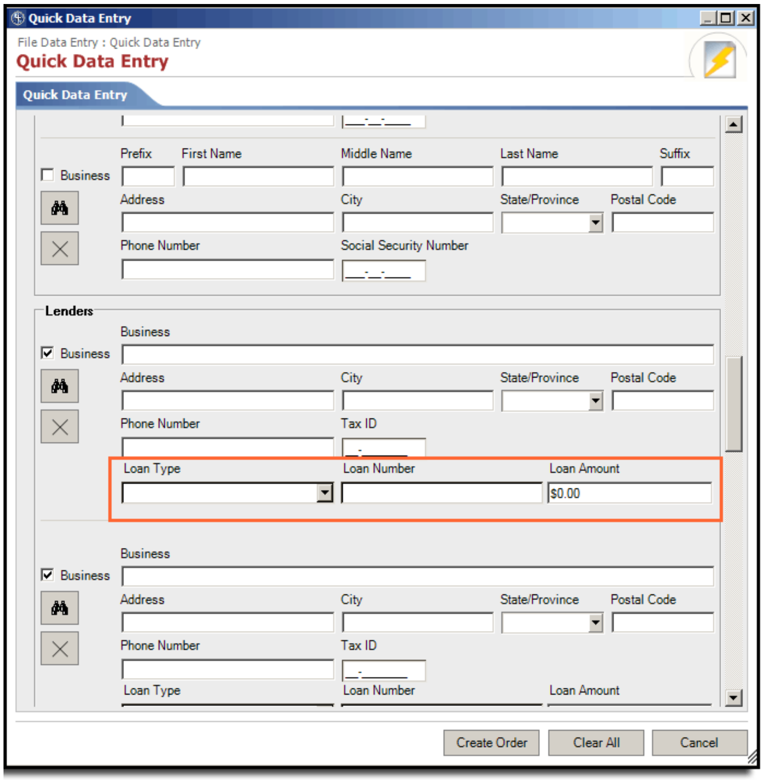
1. From the *Quick Data Entry* screen, scroll down to the section, **Other Parties**.
2. Click the **Find Party** icon 
3. From the *Role* drop-down, select the **Role**.
4. Click **Find**. The Role displays from the **Role** drop-down, in the **Other Parties** section.



# New Fields in Lender Section of QDE

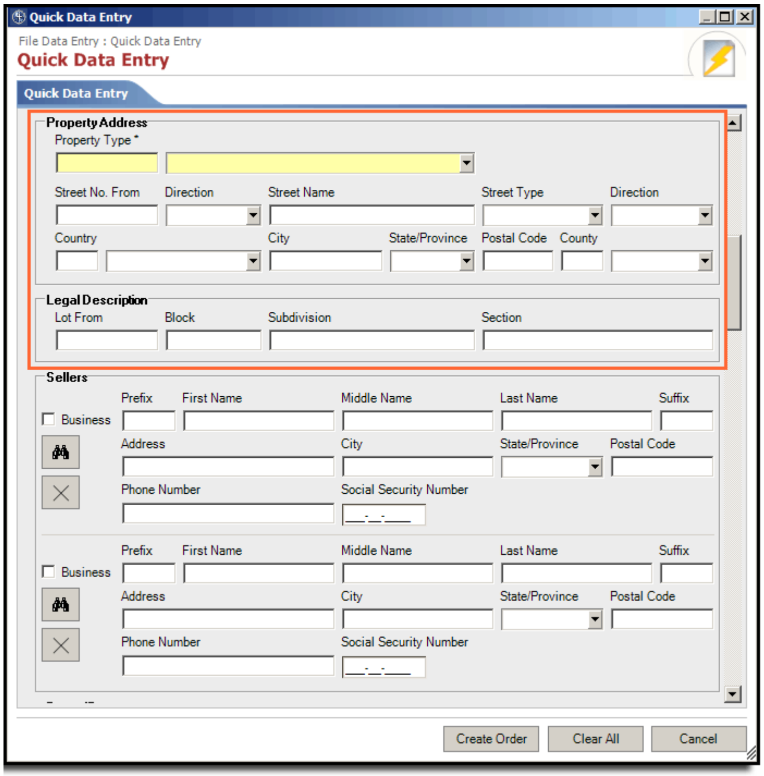
New fields have been added to the Lender section of the *Quick Data Entry* screen. These fields function the same as when using the *Order Entry* screen to enter order data:

- **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.

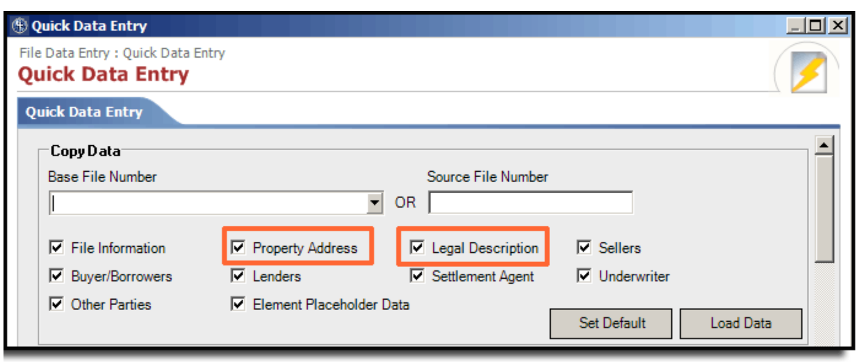


# Property Address and Legal Description Moved

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




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



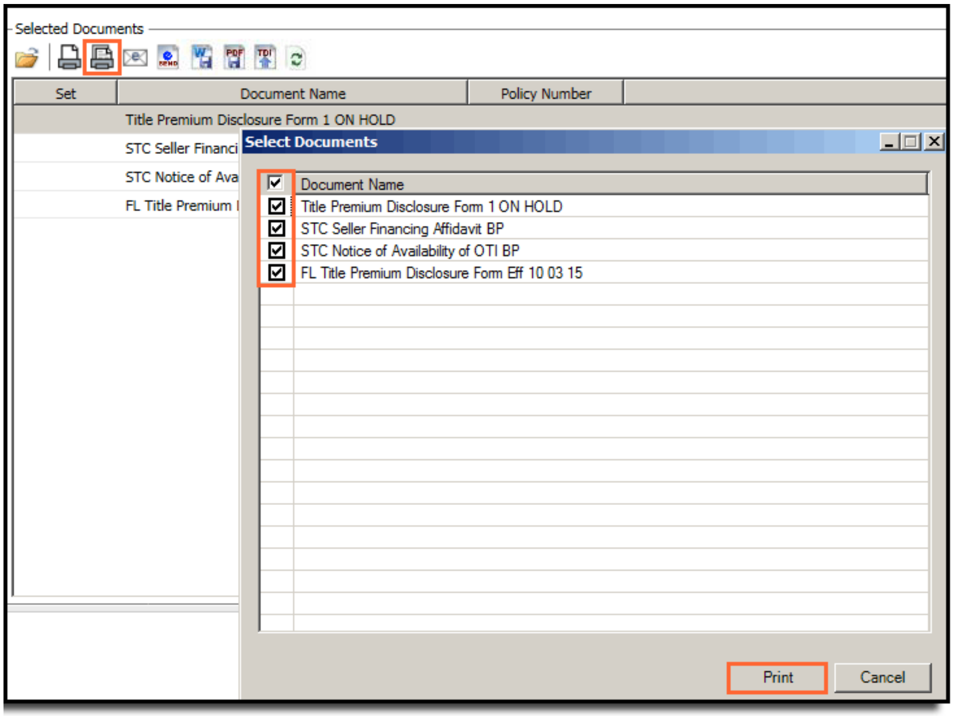
# Documents

## 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.



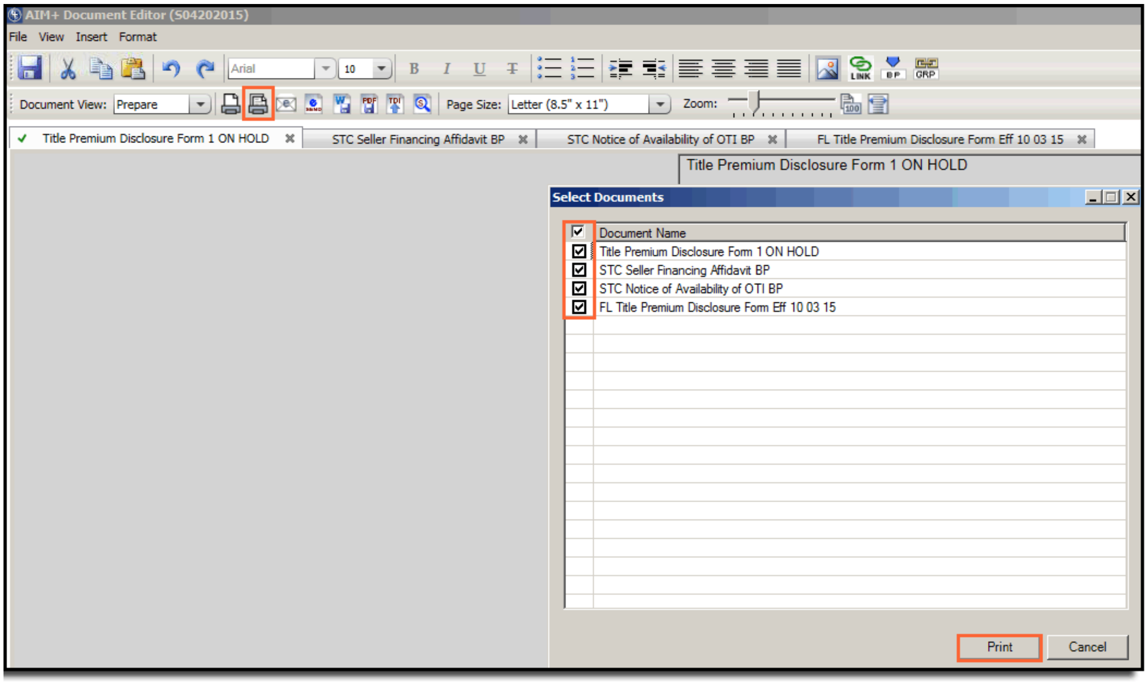

3. From the *Select Documents* pop-up, deselect the check boxes for documents you do not want to print.
4. Click **Print**. All documents selected by a check box on the *Select Documents* pop-up will print.

# 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.

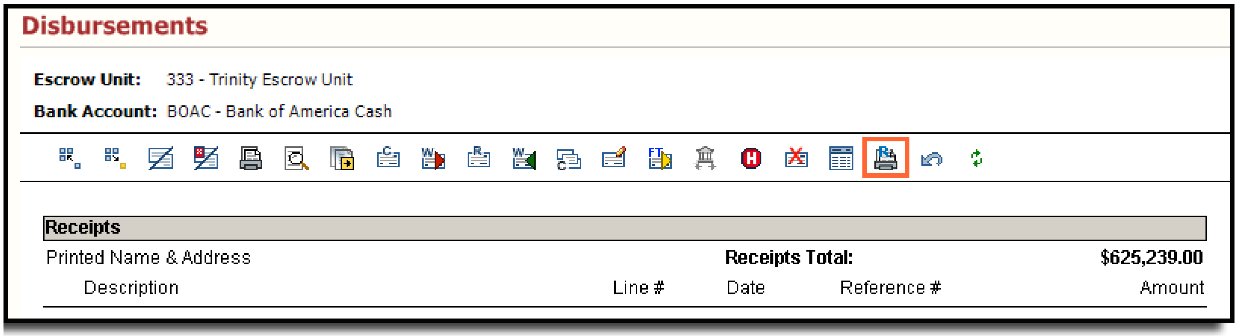
# Disbursement Worksheet

## 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.




**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

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

## 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 customercare@stewart.com.
- **Agency Users:** Please contact the **Agency Support Center** by phone at (844) 835-1200 or by email at customercare@stewart.com.