AIM+® 8.1

Release Notes

June 21, 2019

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AIM+ 8.1 Release Notes

AIM+ 8.1 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: June 21, 2019

Setup

Setting up the Shipping Module for UPS® Orders

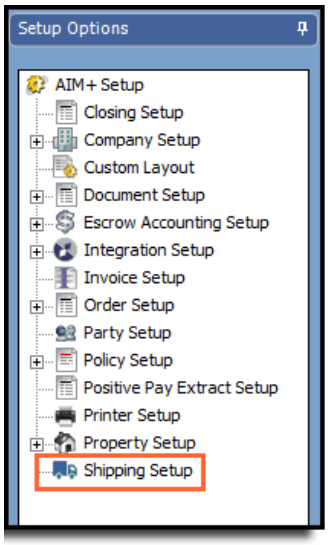
If you have access to *Setup*, you can easily configure your Shipping module in AIM+ to create, view and track UPS® shipping orders.

Creating a New UPS® Shipping Account

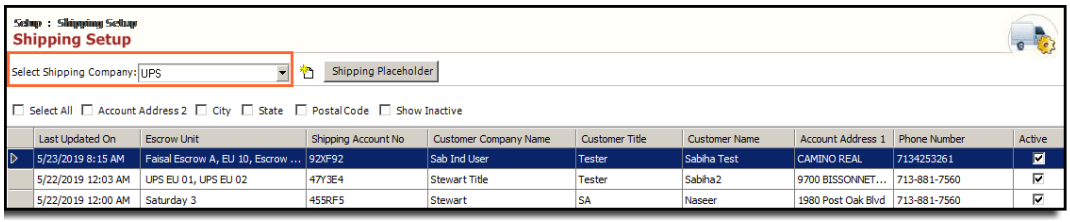
Follow the steps below to setup a shipping account for your Company.

Steps

1. From the *AIM+ Setup navigation menu*, click **Shipping Setup**. The *Shipping Setup* screen displays.



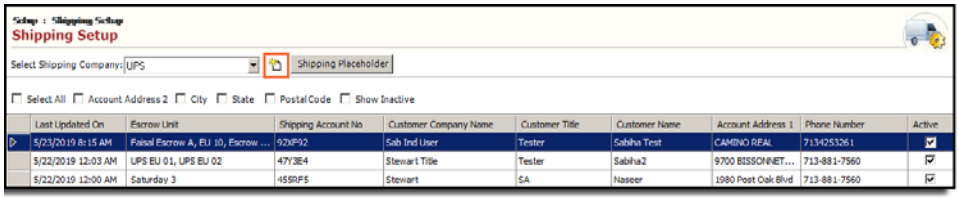
2. From the *Shipping Setup* screen, select **UPS** from the **Select Shipping Company** drop-down.



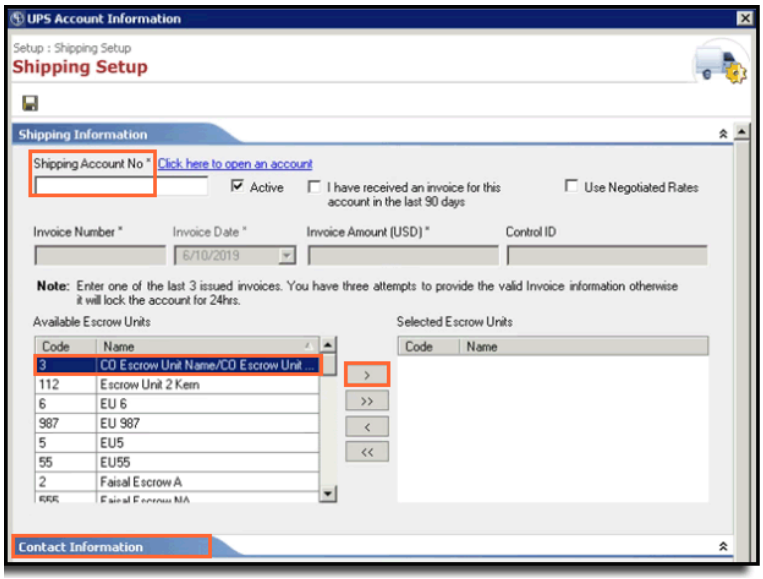
Note

UPS only displays in the **Select Shipping Company** drop-down if UPS is enabled for All Companies and Individual Company in the *Admin Tool*.

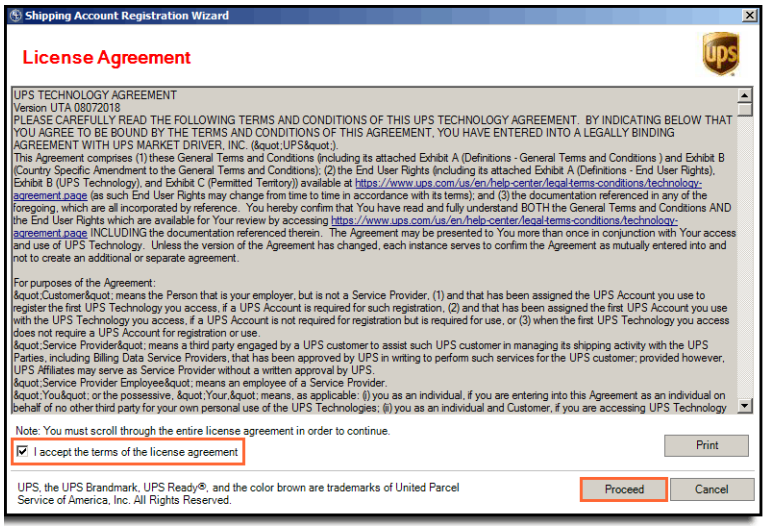
3. Click the **Add New Account** button. The *Shipping Setup* pop-up displays.



4. Enter the **Shipping Account No**. If you need to create a UPS account, click the link on the Shipping Setup pop-up, **Click here to open an account** to be redirected to the UPS® website.
5. Enter the Shipping Address information.
6. From the *Available Escrow Units* grid, select one or more Escrow Units to set up the shipping account with.
7. Click the right-arrow button to move the selected Escrow Units to the *Selected Escrow Units* grid.
8. Click to expand the **Contact Information** tab and enter all required fields.



9. Click **Save & Exit**.
10. A *License Agreement* pop-up displays. Please read and scroll through the end of the agreement.
11. Click the checkbox, **I accept the terms of the license agreement**. The **Proceed** button becomes enabled.
12. Click the **Proceed** button.



Note

One Escrow Unit can only have one shipping account; but one shipping account can have several Escrow Units.

Escrow Units display in the **Available Escrow Units** section based on the branch(es) assigned to the user logged into AIM+.

If the system fails while attempting to create an account, be sure that the **I have received an invoice for this account in the last 90 days** check box is not selected.

AIA (Account Invoice Authentication) is required to add an account number (existing) if that account number has been issued an invoice within the past 90 days (Recent three). The AIA is not needed for new accounts.

To view negotiated rates (ABR) using Shipping or Rating APIs:

- The account must be setup for negotiated rates.
- The account must be AIA authenticated if the account has generated an invoice within the 90 days (US & Canada) and 45 days (all other countries).

Help

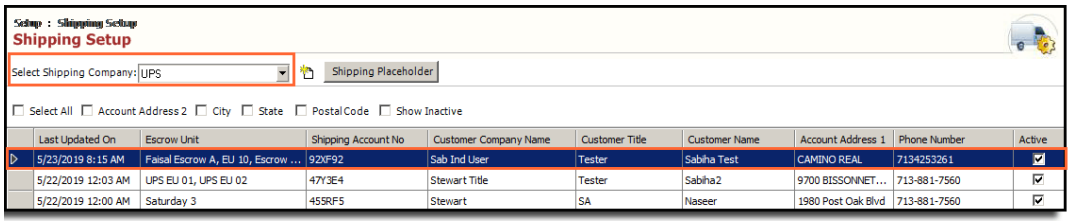
For complete step-by-step instructions, refer to AIM+ Online Help and search for the topics available under the section labeled, Creating a UPS Shipping Account.

Editing an Existing UPS® Shipping Account

Follow the steps below to edit an existing shipping account.

Steps

1. From the *AIM+ Setup navigation menu*, click **Shipping Setup**. The *Shipping Setup* screen displays.
2. From the *Shipping Setup* screen, select **UPS** in the **Select Shipping Company** drop-down.
3. Select the record and double-click to open. The *Shipping Setup* pop-up displays.



4. Make necessary changes.
5. Click **Save & Exit**.
6. If any information has changed, a *License Agreement* pop-up displays. Please read and scroll through the end of the agreement.
7. Click the checkbox, **I accept the terms of the license agreement**. The **Proceed** button becomes enabled.
8. Click the **Proceed** button.

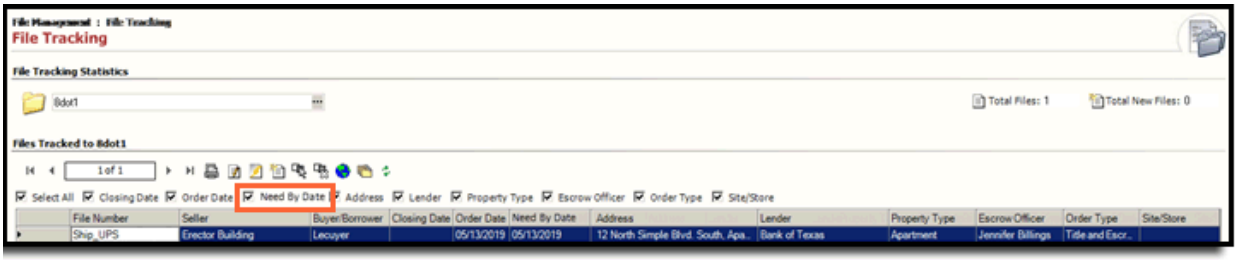
Help

For complete step-by-step instructions, refer to AIM+ Online Help and search for the topics available under the section labeled, Editing an Existing UPS Shipping Account.

File Tracking

New Option for Reporting: Need By Date

A new checkbox, **Need By Date**, has been added to the *File Tracking* menu.



Shipping

Creating a UPS® Shipping Label

You can now create UPS® shipping labels for your orders.

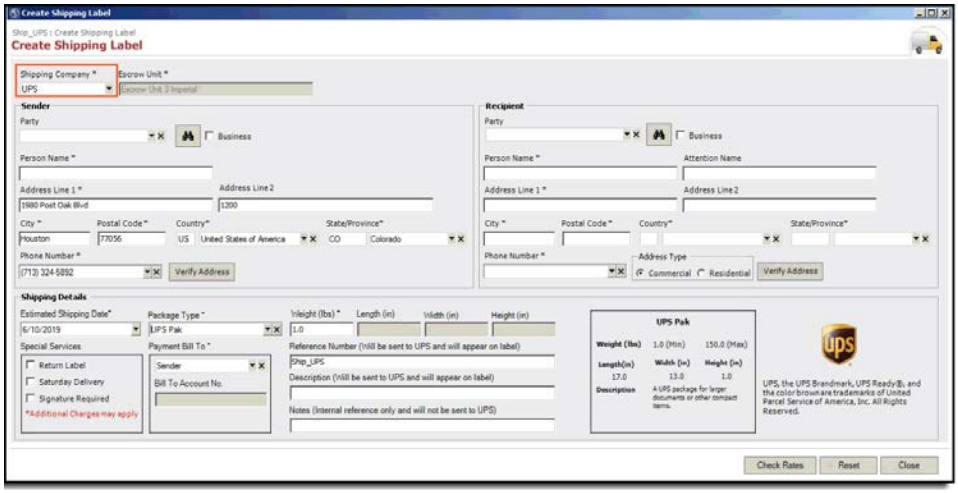
Prerequisite: You must have a UPS® account to create UPS shipping labels in AIM+. Additionally, the Shipping module must be set up in your AIM+ account before a shipping label can be created.

If you are not currently set up with the Shipping module, contact your Administrator or refer to the AIM+ Online Help section, *Shipping Setup*.

Follow the steps below to create a shipping label for a file in AIM+:

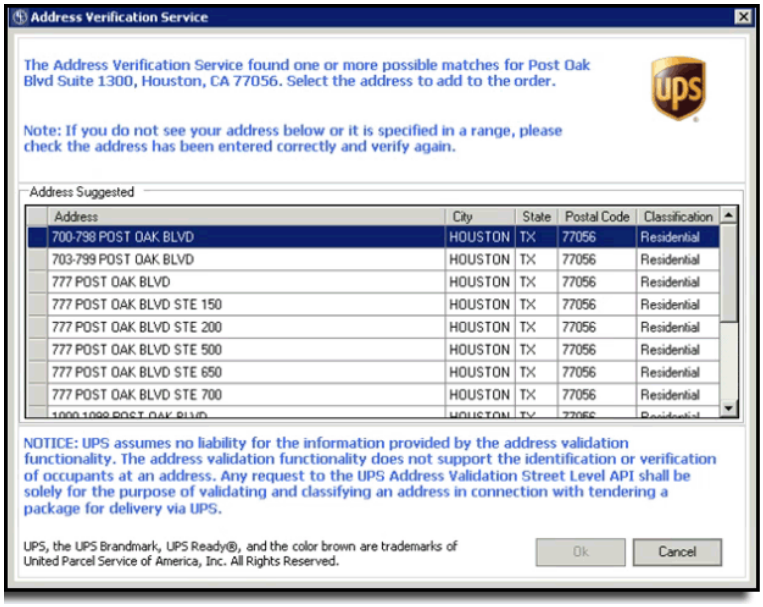
Steps

1. From *Data Entry Groups*, click the **Shipping** module. The *Shipping* screen displays.
2. From the *Shipping* screen, click the **Create Shipping Label** button . The *Create Shipping Label* pop-up displays.
3. From the *Create Shipping Label* pop-up, use the **Shipping Company** drop-down to select **UPS**. The Escrow Unit designated on file displays automatically.



4. By default, shipping account address linked with the Escrow Unit will be populated in sender (Address Lines, City, Postal Code, Country, State and Phone Number)
5. Complete the remaining fields in the *Sender* section, including the Person Name.
6. Use the **Party** drop-down or the **Binoculars** icon to add any other as Sender party. You can also manually enter the Sender information.
7. Click the **Verify Address** button for the best postal address option.
8. Use the **Party** drop-down or the **Binoculars** icon to add the Recipient. You can also manually enter the Recipient information.
9. Complete the remaining fields in the *Recipient* section, including the Person Name, Address, Phone Number and Address Type.
10. Click the **Verify Address** button for the best postal address option.
11. After the Sender and Recipient details are entered, click the **Verify Address** button in each section to select the correct postal address.

Note about Verify Address: The Shipping Company may return a suggestion for sender/recipient address (in case of any mismatch/ambiguity).



Note

If an address is selected from a range of addresses returned by UPS, the **OK** button on the **Address Verification Service** pop-up is disabled.

12. Complete the *Shipping Details* section.

Note: By default, Shipment date will always be the current system date. Change the shipment date as required.

13. From the **Package Type** drop-down, select the package type.
14. From the **Weight (lbs.)** text box, enter the approximate weight of the package.
15. In the **Reference Number** text box, the system automatically pulls in the file number, but you can also type in the file information as it is required on the printed label.
16. From the **Description** text box, enter information that will be printed on the label. Be sure to include specific descriptions, such as a description of items being shipping for documents, or non-documents.

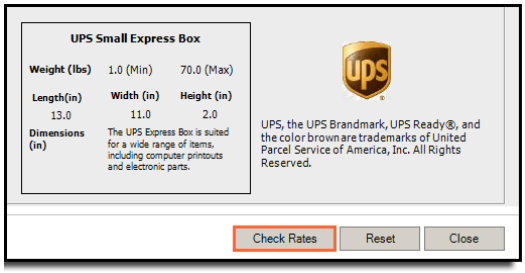
Note: If the Special Service, Return Label, is selected, a Description is mandatory.

17. From the **Notes** text box, enter in any notes that will only be viewable in the AIM+ file.
18. If Special Services apply, click the check box under **Special Services** that best describes the special service.

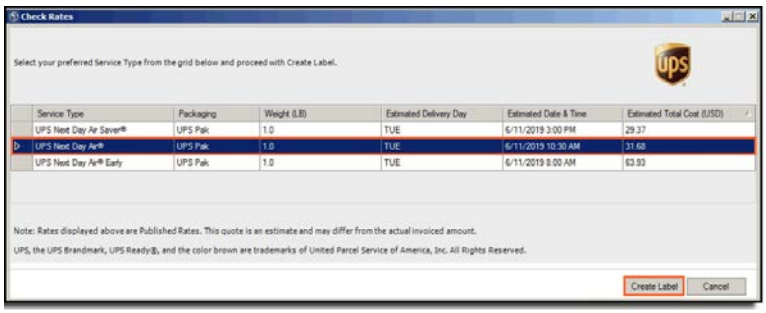
Note: If Special Services are selected, additional columns display on the *Check Rates* screen.

19. From the **Payment Bill To** drop-down, select the party to bill for the shipping costs.

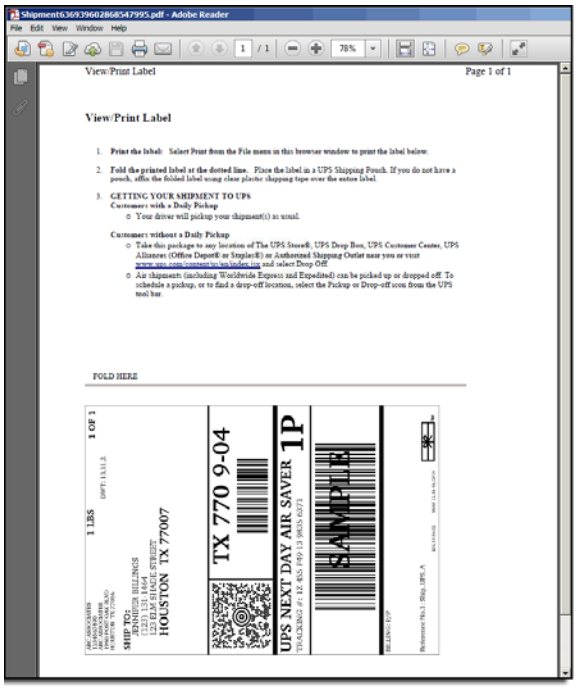
20. When all fields are complete, click the **Check Rates** button at the bottom of the *Create Shipping Label* pop-up. The *Check Rates* pop-up displays.



21. From the *Check Rates* pop-up, click to select the desired Service Type and estimated cost.
22. Click the **Create Label** button.



A PDF copy of the shipping label displays.



The new shipping label information displays in the grid on the *Shipping* screen.

Note

The Escrow Unit on the file must have a shipping account setup first, before creating shipping labels.

On *Check Rates* pop-up, the Service with least estimated cost is automatically selected by default. Same rule applies if **Saturday Delivery** is selected under **Special Service**.

For complete step-by-step instructions, refer to AIM+ Online Help and search for the topics available under the section labeled, Creating a UPS Shipping Label.

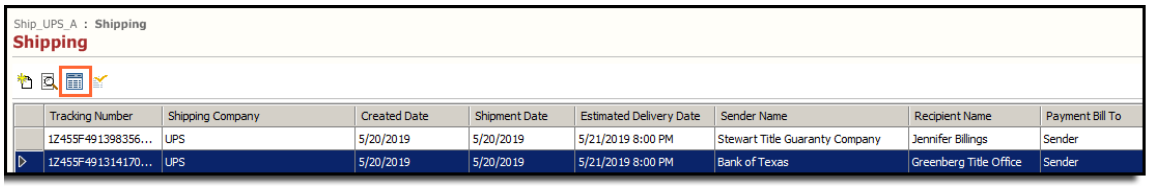
Viewing UPS® Shipping Labels

From the *Shipping* screen, you can view existing or newly created UPS shipping labels.

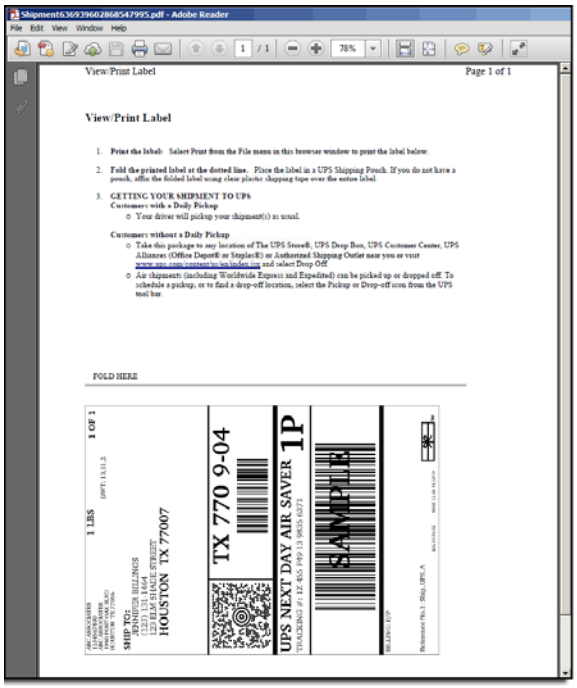
Follow the steps below to view existing shipping labels:

Steps

1. From *Data Entry Groups*, click the **Shipping** module.
2. From the *Shipping* screen, select the shipping record.



3. Click the **View Label** button . The PDF of the shipping label displays.



For complete step-by-step instructions, refer to AIM+ Online Help and search for the topics available under the section labeled, Viewing Shipping Labels.

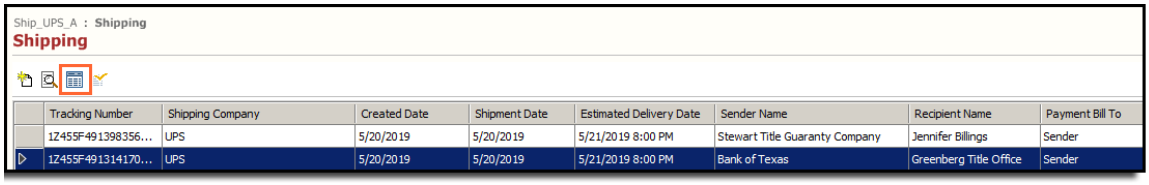
Viewing UPS® Shipment Details

You can view the shipping details of your order.

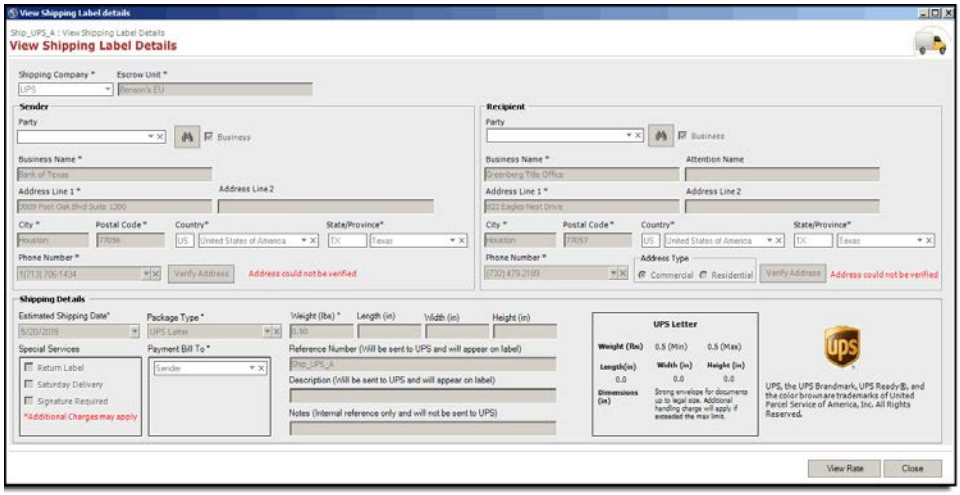
Follow the steps below to view details of an existing shipping label:

Steps

1. From *Data Entry Groups*, click the **Shipping** module.
2. From the *Shipping* grid, select the shipping record.
3. Click the **View Shipment Labels** button , or double-click the record.



4. The *View Shipping Label* pop-up displays details of the order.



5. Click the **View Rate** button. The *View Rate* pop-up displays with the rate and service type information which was selected while creating the label.

Help

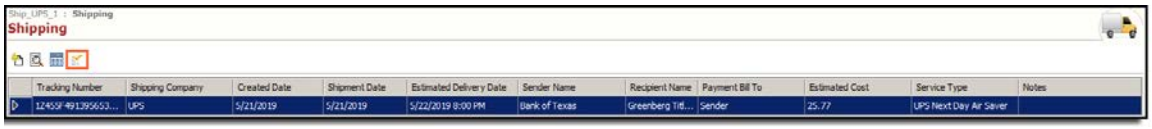
For complete step-by-step instructions, refer to AIM+ Online Help and search for the topics available under the section labeled, Viewing Shipping Details.

Viewing UPS® Tracking Information

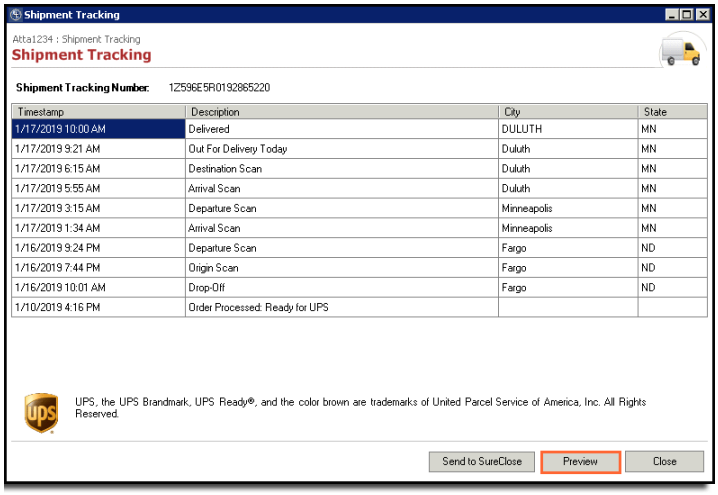
Follow the steps below to view tracking information on a shipped order:

Steps

1. From *Data Entry Groups*, click the **Shipping** module.
2. From the *Shipping* screen, select the shipping record.
3. Click the **View Tracking Information** button .



4. Read the **UPS Legal Agreement** and click **OK** to continue. The *Shipment Tracking* pop-up displays.
5. From the *Shipment Tracking* pop-up, you will see the shipping order's Timestamp, Description, City and State.



6. Click the **Preview** button to view the Shipping Tracking report in PDF format.

Note from UPS

Some tracking data may not be returned in the response because the data rolled off. Database retention times:

- Manifest information, and Manifest Voided scans: 120 days
- Exceptions scans: 120 days
- In Transit scans like Origin/Arrivals/Departures/Destination scans: 120 days
- Delivery records and signatures images: 120 days

Tracking numbers are available up to 120 days after delivery. UPS makes every effort to ensure that a tracking number uniquely identifies a package for 120 days. However, it is possible that a tracking number may be reused within a shorter time period. If this occurs, a query by tracking number returns all packages matching the tracking number.

Help

For complete step-by-step instructions, refer to AIM+ Online Help and search for the topics available under the section labeled, Viewing UPS Tracking Information.

Voiding a UPS® Shipping Label

To void a UPS® label, please go to UPS website and follow the steps below:

Steps

1. Navigate to https://www.ups.com.
2. Select your Region.
3. From the top menu, select **Shipping**. A drop-down menu displays.
4. From the drop-down, under *Existing Shipments*, select **Void Shipment**. The *Login* screen displays.
5. Enter your Login information and click **Log In**.
6. From the *Actions* menu, select **Void** for the appropriate shipment(s).
7. Confirm you wish to void the shipment. A pop-up displays, confirming the void was completed successfully.

Note

This instruction is for the UPS® site *only*. If you experience issues, please contact UPS for your account information. Stewart IT is unable to assist with issues relating to the UPS website.

For complete step-by-step instructions, refer to AIM+ Online Help and search for the topics available under the section labeled, Voiding a UPS Shipping Label.

Defects

No defects were addressed in **AIM+ 8.1**:

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.