Using AIM+ Lender Connect - Company Level

Overview

Use this document to access the company level section of Lender Connect in AIM+.

Company Level Access

All new transactions (products) must be accepted first by the company level user. Any subsequent products that come to the **Work Queue** after the transaction has a file number, those can then be accepted by the file level user in the **Lender Connect** Data Entry Group.
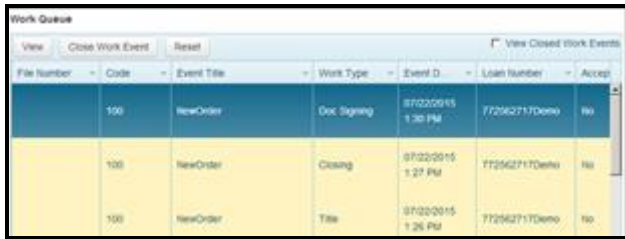

To access lender records, permission must be given to the user to see the Lender Connect icon on the toolbar. Contact CustomerCare@Stewart.com if access is needed.

Work Queue - Inbound Events and Work History - Outbound Events

The **Work Queue** contains work events that have arrived from the lender (inbound events). Once the order is accepted, they may send over updated file information afterwards as well as request additional documents. The lender may send over the first order which is a request for work.

The lender can request up to three different **Work Type** requests: Doc Signing, Closing, and Title.

The **Work History** queue contains outbound events on files and lists what actions have been taken in the **Event Title** column. For example, if an order has been accepted would display **Service Confirmed By Provider**.

Note: When you click on a work event in the **Work Queue** would display those results for that file in the **Work History** queue.

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Based off of the file **Work Type** (product) selected on the left (Closing, Doc Signing, and Title) will determine which **Work Actions** (outbound actions) will appear to perform. Some common actions do appear on both Closing and Title products. For example, if needed a document and a message could be sent for both products.

> **Note**: When a **Work Action** is selected and performed is when those actions appear in the **Work History** queue.

## Accept New Orders in the Work Queue

Steps

1. Select the new order in the **Work Queue** then click on **Accept Order** under the **Work Actions** on the left. Prior to accepting, if you would like to view the information that came from the lender click **View** at the top.

   > **Note**: If you would like to view the file information prior to accepting, click **View** at the top. This provides the ability to save as a PDF and email if needed. To return to the Home page, click the **Home** icon located in the top left corner.

2. In the **AIM+ Order Number** field, either type in the file number or leave blank for AIM+ to generate. Type any notes to the lender in the **Comments** field then then click **Submit**. A message displays **Work event submitted**. If multiple orders are to be accepted, click **Next** to advance to the next order.
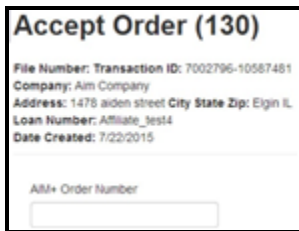
   If for some reason the order submitted from the lender will not to be created, select **Reject Order**, type any comments to the lender then click **Submit**.

   Work events that appear in yellow in the **Work Queue** are those that have a possible match in AIM+. An example would be the Sales Contract was received at the settlement office and entered in AIM+ and then the lender sends over the electronic new order request

   > **Note**: This can be linked to an existing order or can be created as a new order. When choosing to link to an existing order, select the file in the **Possible File Matches** list, add any comments, and then click **Submit**. The system will block this action if the file that this is being linked to is cancelled or closed. If the file is at least 60 days old the action will not be blocked, however a warning message displays.

3. Once created the file number will display in the **Search By File Number** field providing the ability to perform various actions based on the **Work Type** selected. For example, documents and messages can be sent by selecting the file and Work Action on the left.

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Now that the file is created, various work can now be performed. For example, a message or documents can be sent to the lender. This same function can be accomplished in the **Lender Connect** Data Entry Group.

Note: Electronic orders created can automatically be routed to their own tracking location. If a tracking location currently exists for Orders Gateway files, these two can be combined if needed.
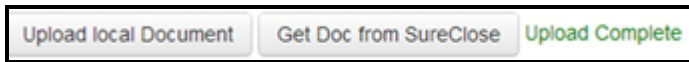
Send Documents

Steps

1. Select the file in the **Work Queue** then click on **Send Document** under the **Work Actions** on the left. The lender may request certain documents to be sent back.

2. Browse and locate document(s) on your local computer by clicking **Upload local Document** or browse and locate document(s) in SureClose by clicking **Get Doc from SureClose**.

3. Type any comments, description of document, version number, and whether or not it's a final or draft. Then click the **Doc Type** dropdown to select the type of document being sent. When done click **Submit.**

Note: If multiple files with the same **Work Type** requests (Doc Signing, Closing, and Title) need documents sent to the lender, click **Next** to advance to the next file. Click **Home** located in the top left corner to go back to the **Work Queue** and **Work History** queue.
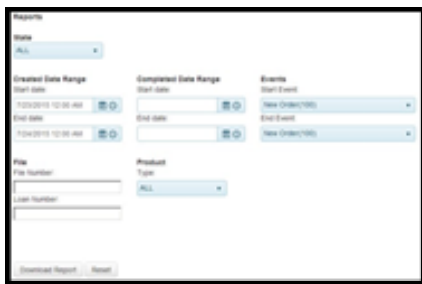
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Reports

This activity report provides the ability for the company level user to learn how many new events have come in within a certain amount of time. For example, a report can be created to see how many new orders have come in within a certain amount of time that were accepted or not accepted. Or how many orders have come within a certain amount of time where a request for a document has come in that hasn't had been responded.

Steps

1. Select **Reports** located on the left side next to the **Work History** queue.
2. Fill out each field then click **Download Report**. Click **Home** to return back to the **Work Queue**