

AIM+[®]

Release Notes

July 1, 2011

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AIM+ 4.4 Release Notes

AIM+ 4.4 includes additional functionality, enhancements, and defect corrections. This document provides a brief explanation of what was fixed and an introduction to new features and functionality implemented with this release.

Deployment Date: **July 1, 2011**

New in This Release

An overview of new features and modifications to AIM+ 4.4 include:

- Filter information by date or date range on the Log Viewer screen
- Release locked files that may be locked due to the AIM+ session being disrupted
- Changes to Order Entry were made to significantly reduce the time it takes to enter orders
- Itemize certain credits and charges on Pages 1 and 2 of the 2010 HUD-1 and 2010 HUD-1A
- Enter text for Reverse Mortgages in the Loan Terms area of the 2010 HUD-1 on Page 3
- Changes to various Escrow Accounting Reports
- Changes to the New Invoice and Invoice Search screens
- Changes to Setup

Stewart Affiliates

If your company is a Stewart Affiliate, refer to the [Stewart Affiliates](#) section in this document to learn more about enhancements implemented with this release.

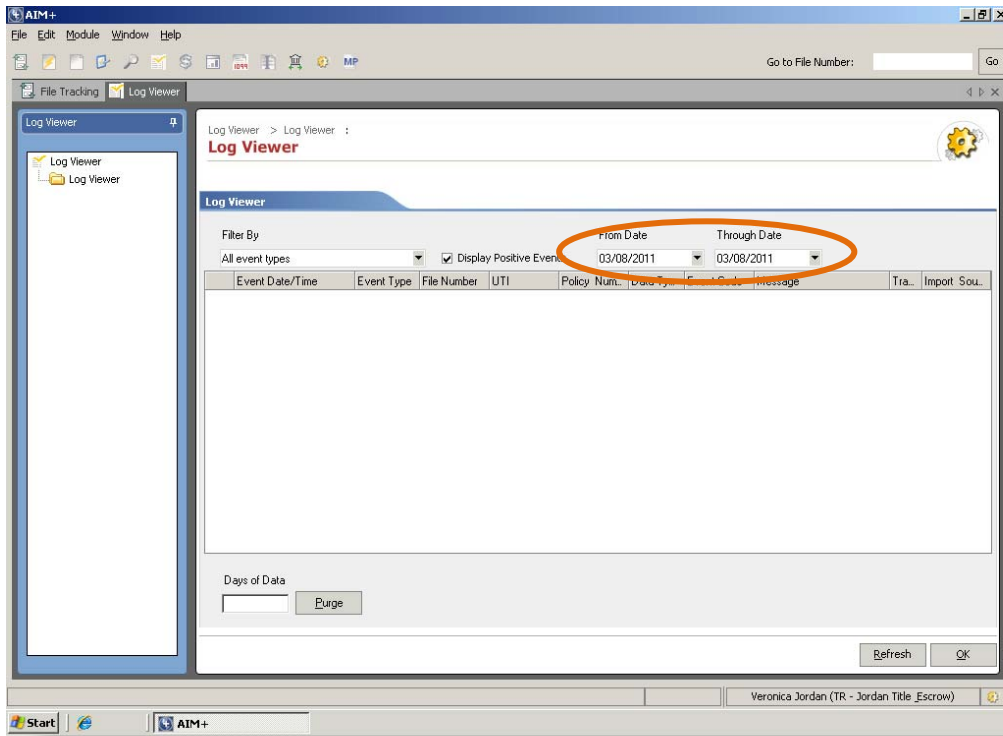
- Send anticipated wire amounts for loan information on HUD Lines 202-209 (excluding Line 203) to the Wire Information Management System (WIMS)
- Submit internal control requests, such as outgoing wires, through WIMS

General

The following changes were made in AIM+ 4.4.

Using Log Viewer

The **Event Date** fields were added to the Log Viewer screen. When using the Log Viewer, you can now filter the information by date range and event type, such as export, import, or policy transmittal.



Releasing Locked Files

If a file is currently locked by another user or due to an AIM+ session being disrupted, you can now release the locked file.

To release the locked file, type the file number in the **Go To File Number** field. Click **Go**. If the file is locked by another user, a notification message displays. Once you click **OK** to acknowledge the message, the **Clear Locked File** button displays. When the file is unlocked, the person, who originally opened the file, will have her AIM+ session terminated and will lose only unsaved changes on the screen.

Once the file is unlocked, it is available for other personnel to access. Additionally, an entry is created in File Notes with the details of who released the file, when the file was released, and the person's AIM+ session that was terminated.

To release the file, you must be assigned the applicable security permission and have branch level access for the file.

Order Entry

Several Order Entry enhancements were made to significantly reduce the time it takes to enter orders. In the *General Changes* section, you will learn more about the general changes made that are common to all of the Order Entry screens (i.e., Order, Parties, Properties, Legal Description, Sales Price, and Policies). In the sections that follow, you will learn about specific changes for each screen.

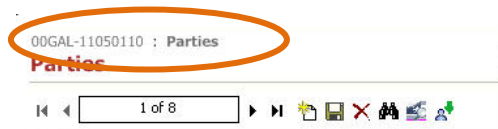
Note: The Order Entry changes do not apply to the Credit Distribution screen.

General Changes

The following general changes were made and are common to all of the Order Entry screens (i.e., Order, Parties, Properties, Legal Description, Sales Price, and Policies).

Breadcrumbs

Within the breadcrumbs across the top of the screen, the File Data Entry label was removed. The breadcrumbs now show the file number and the screen you currently have selected.



Cancel Warning Message

If you decide to cancel the file by clicking the **X** or by clicking the **Cancel** button, the cancel warning message now simply reads *Save Changes?*

Edit Menu

The Edit menu was removed.

Find As You Type

The Find As You Type feature was added to many of the dropdown lists in Order Entry. With this feature, you can type one or several characters into the field. Once you type in the certain number of characters to have the option you want selected, that option is automatically completed if it is part of the list of options.

For example, if you type **T** in the State **Description** field, the **Tennessee** option displays. If you continue typing **Tex** in the same field, the **Texas** option displays.

The screenshot shows the 'Order' application window with the 'File Information' tab active. The 'State/Province' dropdown menu is highlighted with an orange circle. The dropdown list shows 'TX' selected, and the text field next to it contains 'Tex'. Other fields in the form include File Number (00GAL-11050110), Project Description, Tracking Location, Order Date (05/11/2011), Need By Date, Closing Date (06/30/2011), Order Type (Title and Escrow), Transaction Category (Residential), Transaction Type (SALE), Associated File Number, File Status (100 New), Status Date, Status Reason, Branch (GAL Galleria Area), Master Project Description, Office Location (Country: US, State/Province: TX, County), Escrow Unit (25 Westside), Escrow Officer (Karen Mathews), and Bank Account.

Exceptions

Within the grids on the Order and Parties screens, you can type only the first letter of the entry to find the option closest to what you are looking for.

For example, you want to enter the buyer's mobile phone number. When you type **M** in the **Communication Type** list, the **Mobile Phone Number 1** communication type displays. You can then tab to the next field and enter the phone number.

The screenshot shows the 'Parties' application window with the 'Party Information' tab active for Melton, Randall. The 'Party Communication Types' grid is highlighted with an orange circle. The grid has three columns: Communication Type, Data, and Extension. The first row shows 'Mobile Phone Number 1' selected in the dropdown menu, with the Data field containing '(713)689-8574'. Other tabs in the window include Party Information, Party Address, Party Contacts, Marketing Representatives, Signatories, Party Instructions, Forwarding Address, and Forwarding Communications.

Grids

When you enter information within a grid and the information is not valid, the error message now displays across the top of the screen rather than inside the grid.




Refreshing Information

If any of the options within a dropdown list, such as Transaction Type, Escrow Officer, Title Officer, or Marketing Representative, are updated from Setup, the updated options are available the next time you launch an AIM+ session.

If a Business/Person Type is associated with a party or used in an order and then inactivated, the record that includes the inactive business/person type is not affected and the inactive business/person type continues to display in the list. If you change the role of the party to another role, the inactive business/person type is no longer included in the list.

For example, you add a party with a role of Sales Representative to an order. The role is then inactivated as a Business/Person Type in Setup. Your AIM+ session is closed and then reopened. When you reopen the file with the Sales Representative party, the party remains on the order and the Sales Representative remains in the dropdown list. Suppose you change the party's role to Marketing Representative and save the order information. The next time you reopen the file, the Sales Representative role is no longer in the dropdown list.

Revised Toolbar

The **Undo** , **Undo Last Save** , and **Refresh**  buttons were removed from the toolbar on all the Order Entry screens (i.e., Order, Parties, Properties, Legal Description, Sales Price, and Policies) and tabs.

Standardized Tooltips

The tooltips are now standardized. For example, the **Save all changes** button  was renamed to **Save** and the **Add a New Property** button  was renamed to **New**.

Saving Information

AIM+ now saves information as you navigate through the Order Entry screens, create new records on the Parties, Properties, and Sales Price screens, or navigate between existing records, the information you enter is automatically saved. You no longer need to click **Save** as you enter information on each screen. When you are finished entering the order information, click **Save & Exit** to ensure that any unsaved changes will be saved.

The **OK** button was renamed to **Save & Exit**. When you press the **Save & Exit** button, the order information is saved and the Order screen closes.

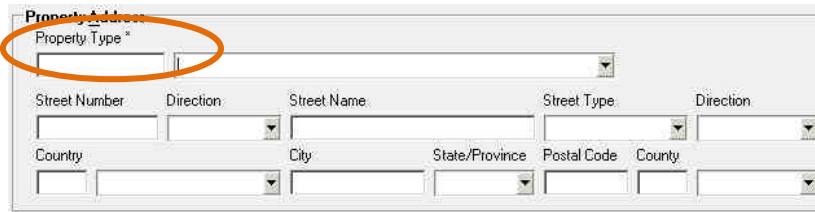
For example, if you are entering information on the Sales Price screen and navigate to the Party screen, the information you entered is automatically saved. Or you may enter information for one party on the order and realize you need to switch to another party. As you switch between parties, the information you enter is automatically saved. You can also click the **Save** or **Save & Exit** button so that any unsaved changes will be saved.

Exceptions

- If you enter an invalid code or date and tab to the next field, an error message displays. Before you can move to the next field, enter a valid code or date. Or, you can delete the code or date. For example you enter a party's address and inadvertently type a postal code with four digits instead of five. An error message displays to inform you that the postal code must be a certain number of digits in a particular format.
- If you enter information in the Credit Distribution section and navigate to a different section of AIM+ prior to saving the information, your changes may not be saved.

Quick Data Entry

On the Quick Data Entry screen, the **Property Type** field was added.

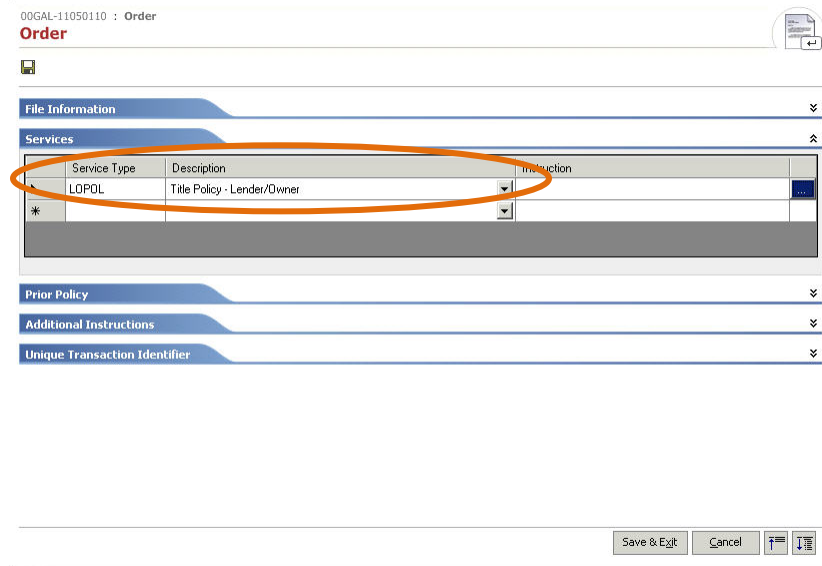


The screenshot shows a form titled "Property Address" with several input fields. The "Property Type" field at the top is circled in orange. Below it are fields for "Street Number", "Direction", "Street Name", "Street Type", and "Direction". At the bottom are fields for "Country", "City", "State/Province", "Postal Code", and "County".

Order

On the Order screen, the following changes were made:

- Before a file number is assigned to an order, you no longer receive the *Closing Date Changed* warning message each time you change the Closing Date.
- If a bank account is associated with an inactive escrow unit or an escrow unit has an inactive association with a bank account, the bank account no longer displays as the selected bank account for existing orders. The bank account is then cleared the next time the file is opened.
- When you enter a service type on the **Services** tab, the code now displays in brackets to the right of the description. Once you select the service type, the code is not included in the description. The service type descriptions flow to documents.



The screenshot shows the "Order" screen for file 00GAL-11050110. The "Services" tab is active, showing a table with columns for "Service Type", "Description", and "Instruction". One entry is circled in orange: "LOPDL" with the description "Title Policy - Lender/Owner".

Service Type	Description	Instruction
LOPDL	Title Policy - Lender/Owner	

At the bottom of the screen are buttons for "Save & Exit", "Cancel", and a refresh icon.

Parties

On the Parties screen, the following changes were made:

- When you add a party to Party Setup from Order Entry, you can only include one party contact. Additional party contacts can be included directly to Party Setup. For example, suppose Coldwell Banker is a new real estate agency in your area, and they brought their sales contract to you. When you enter the agency on the order, you select the **Add to Party Setup** check box to add Coldwell Banker as a party in Party Setup and add Teresa Taylor as a contact for the listing broker. After adding Teresa, you also need to add Jemma Mohr as a contact. When you click the **New** button to add the second contact's information, Coldwell Banker and Teresa Taylor are saved to the Order and to Party Setup. The **Add to Party Setup** check box is no longer available. So when you enter the second party contact, Jemma Mohr, her contact information is saved to the order, but is not added directly to Party Setup.

00GAL-11050110 : Parties
Parties

5 of 8

Select a Party

Party Role	Name
Lender	Sun Trust Mo...
Settlement A...	Stewart Tran...
Underwriter	Stewart Title...
Lender	Savings of N...
Listing Agent	Coldwell Ban...
Buyer's Agent	Rann Real E...
Buyer/Borrow...	Melton, Rand...
Seller	Montgomery...

Coldwell Banker

Party Information

Party Address

Party Communication Types

Party Contacts

1 of 1

Signatory

Prefix First Name Middle Name Last Name Suffix

Teresa Taylor

Title

Role Customer Contact

LSTAGT Listing Agent Send To SureClose

Communication Type	Data	Extension
Mobile Phone Number 1	(832)796-5874	
*		

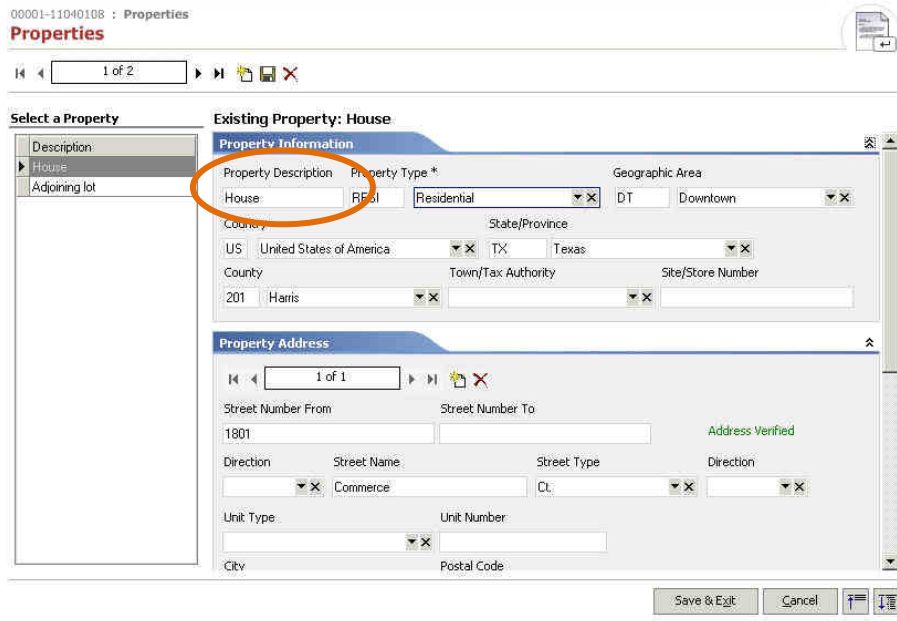
Save & Exit Cancel

- If you click the **New** button to add a party on the file and navigate to a different section of AIM+ without completing the required information on the screen, you are prompted to enter the required information. If you inadvertently added the party, click the **Delete** button. You can then navigate to a different section of AIM+.
- Within the grids of the **Party Communication Types**, **Marketing Representative**, and **Forwarding Communication** tabs, you can type only the first letter of the entry to find the option closest to what you are looking for. If you need to look for a different option, select the dropdown arrow to open the list.
- When you change the **Country** of a property on the **Party Address** or **Forwarding Address** tab, the **Postal Code** is cleared if it is not formatted correctly for countries currently being verified in AIM+, such as the United States and Canada. If you update the country to one that is not currently being verified in AIM+, such as Great Britain or France, the postal code remains.
- On the **Loan** tab, the **Loan Type** is no longer a required field for Stewart affiliates.

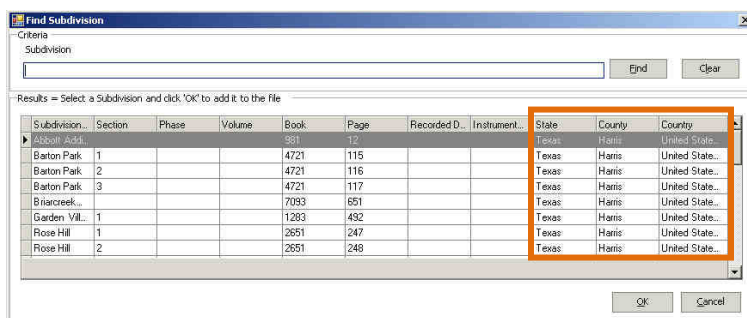
Properties

On the Properties screen, the following changes were made:

- If you click the **New** button to add a property on the file and navigate to a different section of AIM+ without completing the required information on the screen, you are prompted to enter the required information. If you inadvertently added the property, click the **Delete** button. You can then navigate to a different section of AIM+.



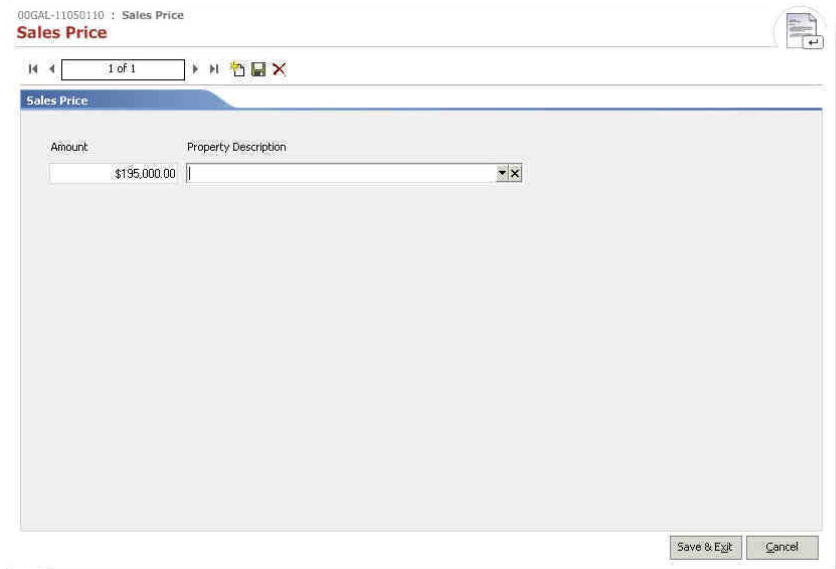
- All property descriptions must now be unique. Duplicate property descriptions are no longer allowed.
- The **Address Verification** solution integrated with AIM+ now provides enhanced search and verification features. With these enhancements, the solution attempts to verify every property address combination. If one or more addresses match the property address, the **Address Verification Service** screen displays. You can then select one of the possible matches for the property address. If the addresses found do not match the property address, select the **Address not listed** check box and click **OK**. If a match is not found for the address, the *Address not found* status displays on the screen.
- When you change the **Country** of a property on the **Property Address** tab, the **Postal Code** is cleared if it is not formatted correctly for countries currently being verified in AIM+, such as the United States and Canada. If you update the country to one that is not currently being verified in AIM+, such as Great Britain or France, the postal code remains.
- The **State**, **County**, and **Country** columns were added to the Find Abstract, Find Subdivision, Find Condominium, and Find Township screens.



Sales Price

On the Sales Price screen, the following change was made:

A property can now be associated with only one sales price. So from the **Property Description** list, you can only select properties that are not associated with an existing **Sales Price**.



Policies & Endorsements

On the Policies screen, the following changes were made:

- If you navigate to a different section of AIM+ prior to saving the policy information, you receive a prompt to save.
- Once a property is linked to a policy, that property cannot be deleted from the file.
- The **Policy Property Type** field was moved down one line.

00GAL-11050110 : Policies
Policies

Total File Premium: \$2,326.00

Not Transmitted Policy: M-9991-000000001

Underwriter *	Agent *	Transaction Type *	Total Premium
STGC Stewart Title Guaranty Company	425689 425689	N New	\$2,125.00

Form Name * VJ-LoanPolicy Policy * M-9991 Serial Number * 000000001

Policy Date 06/03/2011 Issue Date 06/03/2011 Property Garden Canyon

Liability	Gross Premium	Risk Rate	UW Remittance	Add'l. Liability	Reissue Liability
	\$150,000.00	\$2,100.00	\$0.00	\$0.00	\$0.00

Premium Tax \$0.00 Municipality Parish/Rate Code Agent Parish Code

Policy Property Type Residential Home Office Issue Treaty Reinsurance Code Auth. Code

Available Transaction Codes		Selected Transaction Codes	
Code	Description	Code	Description
101	Single Issue	404	Simultaneous Issue
909	Re-issue		

Save & Exit Cancel

- Transaction codes set up for the selected Underwriter are now defined in the **Available Transaction Codes** column. If a transaction code is set up as the default for the selected policy, the transaction code automatically displays in the **Selected Transaction Codes** column. Transaction codes in both columns can be sorted by clicking either the **Code** or **Description** heading.

00GAL-11050110 : Policies
Policies

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Policy Property Type Residential Home Office Issue Treaty Reinsurance Code Auth. Code

Available Transaction Codes		Selected Transaction Codes	
Code	Description	Code	Description
101	Single Issue	404	Simultaneous Issue
909	Re-issue		

Save & Exit Cancel

- Transaction codes for the selected policy can be added or removed using the arrows that display between the **Available Transaction Codes** and **Selected Transaction Codes** columns. You can add or remove transaction codes for the policy individually or all at once.

- When you issue an endorsement for a policy, the serial number is now assigned when you click **Save**.
- The policy transmittal status is now identified by one of the following labels: **Not Transmitted**, **In Transit**, **Transmittal Error**, **Disk Transmittal**, and **Transmitted**. These new status indicators are reflected on the blue tab for the policy and any endorsements
- When a policy or endorsement is **In Transit**, the screen is now locked down preventing any changes until the transmittal is complete.

The screenshot shows the 'Policies' screen in a software application. At the top, it says 'LP 2011-JAN 01 : Policies' and 'Policies'. Below that, there's a 'Total File Premium' of '\$200.00'. A blue tab is highlighted with an orange circle, containing the text 'In-Transit Policy: M-9991-000000749'. The main form area contains various fields for policy details, including Underwriter (STGC), Agent (060062), Transaction Type (New), Form Name (FL-STG92 Loan Policy), Policy (M-9991), and Serial Number (00000749). There are also sections for Liability, Premium Tax, and Policy Property Type. At the bottom, there are 'Save & Exit' and 'Cancel' buttons.

- You can filter the *Policy Register Report* by several Transmittal Status options.

The screenshot shows the 'Management Reports - Policy Register' screen. It has a 'Select a Report' section on the left with 'Policy Register Report' selected. The main area is titled 'Policy Register Report' and contains 'Report Information' and 'Report Criteria' sections. In the 'Report Criteria' section, there's a 'Filter By' dropdown menu that is open, showing a list of transmittal status options: 'All', 'Disk Transmitted', 'In-Transit', 'Not Transmitted', 'Transmittal Error', and 'Transmitted'. The 'Transmitted' option is checked and highlighted with an orange circle. At the bottom, there are 'OK', 'Cancel', and 'Run' buttons.

- Policy transmittal no longer times out when the transmittal process takes more than 30 seconds.



Action Recommended

To help you become familiar with these new enhancements, view the [Order Entry Enhancements](#) demo available on the AIM+ Training Center page.

Closing

The following changes were made to Closing.

Itemizing Credits and Charges on a Single HUD Line

On the 2010 HUD-1 and 2010 HUD-1A Settlement Statement forms, you can itemize certain credits and charges on sublines of the same HUD Line on Pages 1 and 2. When you itemize credits or charges, the subline amounts are calculated and totaled on the appropriate line of the 2010 HUD form and Closing Documents. You can then view or print the itemized credits and/or charges on the HUD Attachment.

For example, RESPA requires that HUD Line 801 include all charges received by a loan originator be shown as a lump sum. If the lender and mortgage broker require an itemization of these charges for their business and accounting purposes, you can itemize the total amount by entering each fee on a subline of the same HUD Line. The lump sum then prints on the HUD form, and the itemized fees print on the HUD attachment.

Adding Sublines on Page 2

On Page 2, you can add sublines for the following HUD Lines to show itemization of charges, such as commission fees, lender and mortgage broker fees, title services, lender's title insurance, document preparation fees, government fees, and reconveyance fees. You can itemize fees for new and existing charges.

Description	HUD Lines
Commission	701-702, 705-799
Lender Charges	801-802, 804-899
Interest Charges	901, 902, 903, 904-999
Title Charges	1101-1102, 1109-1199

Selecting HUD Payee

If it is required that a payee name show on the HUD form, you can choose the payee name by selecting the new **HUD Payee** check box that was added to various HUD Lines on Pages 1 and 2. For new files, this check box defaults to selected for the first subline record.

If you add one or more sublines, select the **HUD Payee** check box on the subline that includes the payee and HUD Description you want to print on the HUD form. This payee and HUD Description also displays on the 2010 HUD-1 Page 3 if the HUD Line is entered on Page 3. If you select the **HUD Payee** check box on a subline other than the first subline, the check box on the first subline record is cleared.

If the **HUD Payee** check box is not selected on any subline, the payee from the first subline record prints on the HUD form. If the payee on the first subline is blank, no payee prints on the HUD form.

Splitting Sublines

If you split a subline, all the fields on the Line are locked except the **HUD Payee** check box.

Posting or Disbursing Transactions

Once you post or disburse a transaction, you can change the payee that prints on the HUD form by either selecting a different payee from the **Payee Name** list or selecting the **HUD Payee** check box on the applicable subline. The payee name on the posted or disbursed transaction does not change.

HUD Payee on Page 1

The See Attachment text applies for Page 1 sublines that do not print a payee name on the 2010 HUD form, such as sales price, personal property, and HUD Lines that include a carry-over amount (i.e., proration lines). For HUD Lines on Page 1 that do not print a payee name on the 2010 HUD form, the HUD shows the payee selected using the HUD Payee check box.

Entering Reverse Mortgage Information

You can enter text for Reverse Mortgages in the Loan Terms area of the 2010 HUD-1 on Page 3. The **Edit Loan Terms** check box was added to Page 3. When you select this check box, you can type text (up to eight characters) in the amount and percentage fields that are associated to the Yes/No questions of the Loan Terms section. The **Edit Loan Terms** check box does print on the HUD form.

Closing

Settlement Statement: HUD-1 2010

Page 1 Page 2 Page 3

Edit Loan Terms (N/A or text as required)

Your initial loan amount is	\$224,250.00
Your loan term is	0.00 years <input checked="" type="checkbox"/> N/A
Your initial interest rate is	5.250 %
Your initial monthly amount owed for principal, interest, and any mortgage insurance is	\$0.00 includes: <input type="checkbox"/> Principal <input checked="" type="checkbox"/> N/A <input type="checkbox"/> Interest <input type="checkbox"/> Mortgage Insurance
Can your interest rate rise?	<input checked="" type="checkbox"/> No, <input type="checkbox"/> Yes, it can rise to a maximum of 5.250 %. The first change will be on N/A and can change again every N/A after N/A. Every change date, your interest rate can increase or decrease by N/A %. Over the life of the loan, your interest rate is guaranteed to never be lower than N/A % or higher than 5.250 %.
Even if you make payments on time, can your loan balance rise?	<input type="checkbox"/> No, <input checked="" type="checkbox"/> Yes, it can rise to a maximum of N/A <input type="checkbox"/> Unknown

The **Additional Notes** text box was also added at the end of the Loan Terms section. You can direct lenders, buyers, or sellers to this additional text by entering *See Note* text or similar wording in the Loan Terms section or other notes or comments.

Does your loan have a balloon payment? No, Yes, you have a balloon payment of See Note due in years on

Total monthly amount owed including escrow account payments: You do not have a monthly escrow payment for items, such as property taxes and homeowner's insurance. You must pay these items directly yourself.
 *Paid by or through draws from the principal limit. You have an additional monthly escrow payment of \$0.00 that results in a total initial monthly amount owed of \$0.00. This includes principal, interest, any mortgage insurance and any items checked below:

Property taxes
 Flood insurance
 Wind insurance

Additional Notes
 Not applicable to Reverse Mortgages

Disbursements

The following changes were made to Disbursements.

Check Remarks

When a check or outgoing wire is written from the Disbursement Worksheet and then canceled in Disbursements or Escrow Accounting, any updates made to the HUD amount after the cancelation are now correctly reflected in the voucher remarks.

The remarks do not include any information from the canceled check that is not relevant to the new check.

Processing Fee Transfers

When you process a fee transfer for a Stewart Accounting payee on the Disbursement Worksheet, an Escrow Officer **must** be assigned to the file.

Escrow Accounting

The following enhancements and changes were made to Escrow Accounting.

Consolidating Disbursements

You can no longer post date Consolidated Disbursements in Escrow Accounting.

New Escrow Accounting Reports

The *Consolidated Disbursement in Transit Detail and Summary Reports*, *Fee Transfer Registry Report*, and *Consolidated Disbursement Detail and Summary Reports* are available with the 4.4 Release.

Modified Escrow Accounting Reports

The following Escrow Accounting Reports were modified to reflect escrow accounting transactions posted to Master Project Files.

- Aged By Year Detail and Summary Reports*
- Cancelled Checks by Escrow Officer*
- Debit File History Detail and Summary Reports*
- No Activity Detail and Summary Reports*
- Open Files by Bank Account Detail and Summary Reports*
- Open Files by Escrow Officer*
- Open Files by Unit Detail and Summary Reports*
- Reconciliation Detail and Summary Reports*
- Reconciliation Worksheet*
- Secondary Bank Detail and Summary Reports*
- Stop Payment Checks Detail*
- Stop Payment Checks by Escrow Officer*
- Undeposited Receipts Detail and Summary Reports*

Bank Book Balance Summary

The *Bank Book Balance Summary* report was modified to reflect Fee Transfer transactions.

Reconciliation Summary Report

The *Reconciliation Summary Report* was modified to reflect Consolidated Disbursement transactions.

Invoicing

The following changes were made to Invoicing.

New Invoice Screen Changes

Several changes were made to the New Invoice screen.

Header/Remit To

The **Invoice Header** list can now be customized to print for a specific Branch, Escrow Unit, Title Unit, or custom name and address. The selected Branch, Branch associated with a file, Escrow Unit, Escrow Unit associated with a file, Title Unit, Title associated with a file, or custom name and address defaults from Invoice Setup. If the default is incorrect, you can change it.

The **Remit To Branch** option now includes the Title Unit when creating a new invoice. The selected Branch, Branch associated with a file, Escrow Unit, Escrow Unit associated with a file, Title Unit, Title associated with a file, or custom name and address from Invoice Setup defaults. If the default is incorrect, you can change it.

New Attention Field

The **Attention** field was added to the New Invoice screen and prints on the invoice. In this new field, you can type or find the name of the party contact that you want to direct the invoice to.

The screenshot shows the 'New Invoice' screen with the following fields and values:

- File Number: 00GAL-11030108
- Branch Name: Galleria Area
- Escrow Unit Name: Westside
- Property Address: 3348 Tearwick Ct., Houston, TX 77068
- Order Date: 3/2/2011
- Sales Price: \$195,000.00
- Loan Amount: \$0.00
- Buyer: Jennifer Montgomery
- Seller: Michael Ferguson
- Status: Estimated
- Invoice Date: 3/8/2011
- Accounting Unit: Escrow Unit
- Accounting Activity/Employee Credit: Westside
- Customer Code: SUN
- Customer Name: Sun Trust Mortgage Services
- Attention: (This field is circled in orange)
- Printed Name: Sun Trust Mortgage Services, 1980 Post Oak Blvd., Ste 1500, Houston, TX 77056

Buttons at the bottom: Save, Post, Preview & Print, Cancel.

Property Address

When printing an AIM+ invoice, the property address from the Property Address tab in Order Entry prints even if the legal description is not generated for the file. The property address prints next to the **Property** label on the invoice.

Invoice Date: 03/08/2011		Invoice No: 10013	
Sun Trust Mortgage Services 1980 Post Oak Blvd., Ste 1500 Houston, TX 77056		Remit To: Galleria Area 1980 Post Oak Blvd, Ste 500 Houston, TX 77056	
File #:	00GAL-11030108		
Buyer:	Jennifer Montgomery		
Seller:	Michael Ferguson		
Lender:	Sun Trust Mortgage Services		
Title Unit:	Residential		
Sales Price:	\$195,000.00		
Item Code	Description	Amount	
CMT	Title Commitment	\$1,500.00	
TOTAL		\$1,500.00	
Payment due 30 days from date of Invoice Thank You for Your Business			
Property:	Property Address 3348 Teawick Ct. Houston, Texas 77068		

Management Reports

The following changes were made to Management Reports.

Order Report

When you filter the Order Report by Escrow Unit, you no longer receive an error message.

Untransmitted Policy Report

In the *Untransmitted Policy Report*, untransmitted policies can now be grouped by Agent ID.

Setup

The following changes were made to Setup.

Invoicing Setup

The **Header Address Type** and **Remit To Address Type** lists were enhanced on the Invoice Setup screen.

- With the **Header Address Type** list, you can change the default Header Address to a Branch, Branch associated with a file, Escrow Unit, Escrow Unit associated with a file, Title Unit, Title associated with a file, or custom name and address.

Once you select the **Header Address Type**, select the specific Branch, Escrow Unit, or Title Unit that you want to print in the header text area. If you select the Branch, Escrow Unit, or Title Unit associated with a file, the unit associated with that file prints in the header text area when the invoice is created. If you select the custom name and address, type the name and address in the **Header Address** field you want to print in the header text area.

- With the **Remit To Address Type** list, you can change the default Remit To Address to a Branch, Branch associated with a file, Escrow Unit, Escrow Unit associated with a file, Title Unit, Title associated with a file, or custom name and address.

Once you select the **Remit To Address Type**, select the specific Branch, Escrow Unit, or Title Unit where you want the payment to be sent. If you select the Branch, Escrow Unit, or Title Unit associated with a file, the unit associated with that file prints in the Remit To area when the invoice is created. If you select the custom name and address, type the name and address in the **Remit To Address** field where you want the payment to be sent.

Order Setup

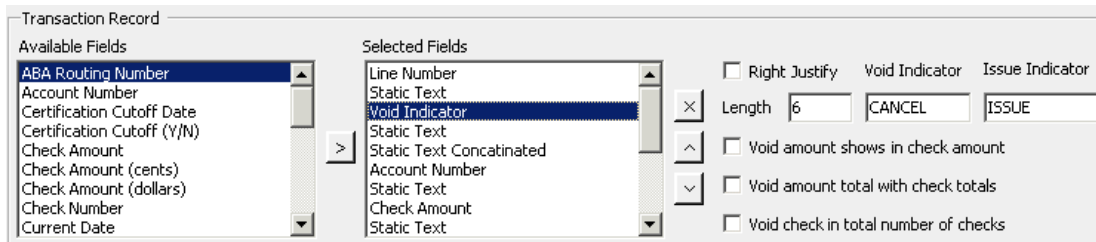
When you add, change, or inactivate frequently used information in selection lists, such as Business/Person Types, Loan Types, or Property Types, the updated options can be viewed the next time someone launches an AIM+ session.

Positive Pay Extract Setup

Transaction Record Section

When you select the **Void Indicator** field within the Transaction Record section, you can customize the Void and Issue Indicators for each bank with these new formatting options:

- Right Justify
- Length (up to 99 characters)



Transaction Record

Available Fields	Selected Fields	Options
ABA Routing Number	Line Number	<input type="checkbox"/> Right Justify
Account Number	Static Text	Void Indicator: CANCEL
Certification Cutoff Date	Void Indicator	Issue Indicator: ISSUE
Certification Cutoff (Y/N)	Static Text	<input type="checkbox"/> Void amount shows in check amount
Check Amount	Static Text Concatenated	<input type="checkbox"/> Void amount total with check totals
Check Amount (cents)	Account Number	<input type="checkbox"/> Void check in total number of checks
Check Amount (dollars)	Static Text	
Check Number	Check Amount	
Current Date	Static Text	

Integrations

Management Console

Management Console includes additional functionality, enhancements, and defect corrections. The following is a summary of what was fixed and what new features were implemented.

General Changes

- Your user login name now displays in the upper right corner of the screen
- Today's Activity, Custom Reports, and Master Party List tabs were added
- Print feature was added to all reports
- Info button was added to all tabs
- The Change Company button was added for users with access to more than one company database
- Main, Summary, and Detail screens are now expandable
- Report results are cleared when you change the report criteria
- Changed the format of currency columns. These columns can now be sorted when you paste the information into Excel
- Report results now show the File Number with a link. When you click the File Number link, the File Information screen displays with the available order information
- Report results now include a right-click menu option. When you right-click the column of a detailed report, a menu displays with the options to view file information, summarize the selected column, sort the selected column in either ascending or descending order, enable or disable links, print, and copy
- On detail reports, the File Number column (if it is the first column) remains in view when you scroll to the right to review further details

Date Range Reports

- Date Type options, such as Order Date and Closing Date, are now available
- The Closing Date (Premium Disbursed) Date Option was renamed to Premium Disbursement Date
- Info button provides information specific to the Criteria and Date Type Options you select
- Total order count now displays
- When you select an item on the Summary screen, the Details screen sorts by the summarized column and the applicable rows are highlighted
- With the Copy feature on the Details screen, you can select whether to copy all or selected rows and indicate which columns to include, and select whether to include or exclude column headers
- With the Print feature on the Details screen, you can select whether to print all or selected rows, indicate which columns to include, indicate whether to include a report title, opt to shade alternating rows, select whether to print grid lines, and change the font size
- Summary function was added to the *Revenue Report* and *Unissued Policy Report*
- Bar and Pie charts were added to certain reports
- The *Daily Orders by Transaction Type/County* was added

- The *Revenue Report* now includes the following enhancements:
 - ❖ Limited to a one month date range
 - ❖ Shows the **Other** column; this column includes the Escrow Fee, Government Service Change and Release Tracking
 - ❖ Primary Customer/Contact and Secondary Customer/Contact columns
 - ❖ Ability to search for a specific File Number
 - ❖ The Escrow Unit and File Number columns remain in view when you scroll to the right to review further details
 - ❖ Recording Fees now include HUD Line 1206 on the 2010 HUD Settlement Statement

Analysis Reports

- Reports can be run for combined Business Types, such as Listing/Selling Agent
- With the Copy feature on the Details screen, you can select whether to copy all or selected rows and indicate which columns to include, and select whether to include or exclude column headers
- With the Print feature on the Details screen, you can select whether to print all or selected rows, indicate which columns to include, indicate whether to include a report title, opt to shade alternating rows, select whether to print grid lines, and change the font size

Today's Activity

- The Today's Activity tab shows a report with Opened and Closed Orders for the current day and is grouped by Escrow Unit

Custom Reports

- View the Custom Reports tab and Customer Report Setup screen if you are assigned the appropriate permissions
- Displays total order count
- Copy a Custom Report format either within a company or to another company
- The Closing Date, Date Type option, is now available
- The Closing Date (Premium Disbursed) Date Option was renamed to Premium Disbursement Date
- New fields were added: Associated File Number, County Code, Escrow Assistant, Need By Date, Order Created By, Order Date and Time, Premium (without endorsements), Premium (Endorsements), Project Description, Remittance Amount, Settlement/Escrow Fee, State, Status Changed Date, Tracking Location, separate Buyer 1 and 2 fields, separate Seller 1 and 2 fields, separate Property Address fields
- On ungrouped reports, the File Number column (if it is the first column) remains in view when you scroll to the right to review further details
- Parties and contacts (other than Escrow Officer, Title Officer, Marketing Representative, Title Company, and Underwriter) show in the report results as links. When you click the party or contact link, the Party Information screen displays and includes all orders for that party or contact and a summary of orders
- When you add or edit Custom Reports, you can:
 - ❖ add or remove fields by double-clicking the field
 - ❖ move a field multiple times without reselecting it each time

- Custom Report Setup was moved to the Custom Reports tab. Click the **Custom Report Setup** button to access.
- Within the Custom Report Setup, a Disbursements Group tab was added. You can add or edit Disbursement Groups (group of HUD Lines applicable for both the HUD and 2010 HUD forms). When you add a Disbursement Group to a Custom Report, the group displays as a column within the report and contains the sum of the selected HUD Lines. For example, you can create and add a group called **Title Fees** to a Custom Report. The report would then show the total amount of the applicable HUD Lines for each file.

Master Party List

- The Master Party List tab shows a report with a list of all customers. You can filter this report by Business Name/Last Name, Role (business type), and Status of Customer (active/inactive).

Company Options (Setup)

- Displays the user's full name rather than the login name
- Change the user's or unit permissions
- Under the **Misc. Settings** tab, the following options were added:
 - ❖ Hide empty columns on detail screens
 - ❖ On Closed Reports based on the disbursement of premium, include orders with Order Type "Escrow Only" if HUD Line 1102 has been disbursed (or Line 1101 on the old HUD)
 - ❖ Base Closed Orders on File Status (rather than disbursement premium)

Orders Gateway (formerly Stewart Orders)

The following changes were implemented in the AIM+ 4.4 release for integration with Orders Gateway.

Orders Originating from Orders Gateway

- When you initially place a title search request through Orders Gateway and download the title search information into AIM+, the following placeholders are overwritten in AIM+ documents: Legal Description, Exceptions, Requirements, Derivation Clause, Effective Date, and Title Vested In. Any time you request an update from Orders Gateway and download the title search information into AIM+, information is then appended to these placeholders.
- For orders that originate in Orders Gateway,
 - ❖ You can choose whether to use the Orders Gateway file number or use the file numbering from AIM+ Setup.
 - ❖ The party information is automatically added to the order where a customer ID matches an existing customer ID from AIM+ Setup. If a matching customer ID is not found in AIM+ Party Setup, only the first and last name of the party is added to the AIM+ order. If the party is a lender, the loan amount and loan type are also added to the AIM+ order.

Orders Originating from AIM+

- The Town/Tax Authority entered in the Property Address tab of AIM+ is now sent to Orders Gateway.
- The SureClose Unique Transaction Identifier (UTI) is now sent from AIM+ to Orders Gateway.

SureClose

The following changes were implemented in the AIM+ 4.4 release for integration with SureClose.

- The Unique Transaction Identifier (UTI) is now sent from AIM+ to Salesforce.
- If your Company uses SureClose Professional view, the following change applies:

If the **Property Type** on an AIM+ order is set to either **Residential** or **Single Family Dwelling**, these property types are now mapped to the **Single Family Residence** when the order is sent to SureClose Professional.
- When you send an AIM+ order with a company to SureClose and that company is set with a role that automatically imports into SureClose, the company is added to the file with a **File Security Profile of No Access**.
- When you add a party from Party Setup to an AIM+ order (if the **Send to SureClose** check box is selected in Order Setup for that contact's role), the **Send to SureClose** check box is now active for the first party contact.
- When you add a party on the fly to an AIM+ order and tab off the **Last Name** field, the middle initial is no longer deleted. Previously, the middle initial was cleared. When the middle initial was added back, the **Send to SureClose** check box was cleared and the middle initial did not update in the Signatories area.
- When you add multiple parties from Party Setup or on the fly to an AIM+ order, the **Send to SureClose** check box is no longer cleared if you do not save the parties.
- When you send an AIM+ order that includes a legal description (i.e., subdivision, abstract, PIN, or condominium), this description now populates correctly in the SureClose **Legal Description** field. The property address is no longer included in this field.

Stewart Affiliates

This section provides a brief explanation of the additional functionality and enhancements implemented with this release for Stewart Affiliates only.

Closing

The following changes were made to Closing.

Entering Anticipated Incoming Wire Amounts for WIMS

To ensure that the actual incoming wire is matched with the anticipated incoming wire, the general file information for the anticipated incoming wire must be stored in Wire Information Management System (WIMS). While the amount for each may not match, the match between the anticipated incoming wire and the actual incoming wire occurs automatically based on the file number, which is a unique identifier.

Before You Begin

If your company or site uses WIMS and you have the applicable security permissions, anticipated wire amounts and information from HUD Lines 202-209 (excluding HUD Line 203) are sent to WIMS.

HUD Lines 202, 204-209

The Detail screens for HUD Lines 202, 204-209 are the same. Let's look at HUD Line 202 as example.

Open HUD Line 202. Notice the amount on HUD line 202 defaults from the loan amount entered in Order Entry. Verify this amount is correct, or edit if needed. When ready, click **Save & Exit**. The WIMS Anticipated Incoming Wire screen then displays.

The screenshot shows the 'WIRE INFORMATION MANAGEMENT SYSTEM' interface. The title bar indicates 'Stewart Title - WIMS - Windows Internet Explorer'. The main heading is 'WIRE INFORMATION MANAGEMENT SYSTEM'. Below it, the section is titled 'Anticipated Incoming Wire'. The form contains the following fields and values:

- File Number: 2490
- Bank Account Code: [Dropdown menu]
- Amount: \$150,000.00
- Borrower: Michael Ferguson
- Additional Information: 2373 Sunchase Ct, Katy TX 77493; ;
- Loan Number: [Empty field]
- Due By: 1/19/2011
- Email Notification: 24

At the bottom of the form, there are three buttons: 'Submit' (circled in orange), 'Reset', and 'Cancel'. There are also two checkboxes: 'On Bank Notification' and 'Not Received by Due Date', both of which are unchecked.

Review all information on the WIMS Anticipated Incoming Wire screen for accuracy. When finished, click **Submit** to send the anticipated wire amount to WIMS.

Note: Any time you change the amount on HUD Line 202, 204-209, and click **Save & Exit**, the WIMS Anticipated Incoming Wire screen displays. Verify the information and click **Submit** to send the updated loan amount to WIMS.

Sublines

When you add a subline for a loan amount, the subline amount is added to the main HUD Line. Suppose you add a loan amount on HUD Line 204 for \$175,000.00 then you add another loan amount for \$5,000.00 to subline 204-1. The subline amount is added to the total expected amount on HUD Line 204 for a total of \$180,000.00.

For more information about submitting entering anticipated wire amounts, refer to the following AIM+ Help topic:

Using AIM+>Closing>Using 2010 HUD Settlement Statement>Preparing HUD-1 Page 1>Entering Loan Amounts

Disbursements

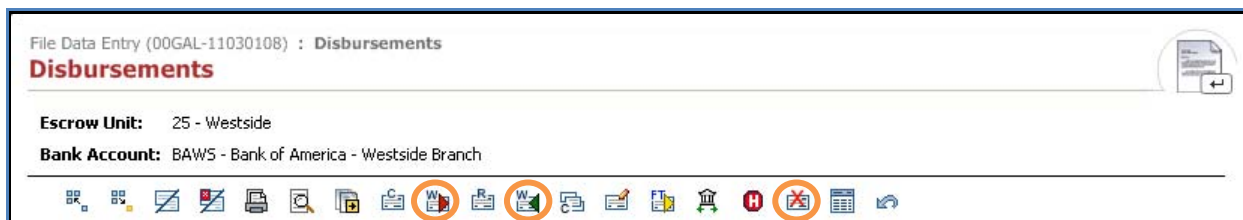
The following changes were made to Disbursements.

Submitting Internal Control Requests through WIMS

Depending on the settings and permissions for your Company, anticipated wires, outgoing wire requests, and any internal control requests (ICRs) for fees are sent through the Wire Information Management System (WIMS) for Centralized Escrow Accounting (CEA) to approve.

Note: The applicable WIMS security permission will be assigned when your company or site begins using WIMS integration.

With the WIMS integration, the **Incoming Wire**, **Outgoing Wire**, and **Cancel** buttons are no longer available on the Disbursement Worksheet.




However, you can still write checks and receipts, write all undisbursed checks simultaneously, record manual transactions, cancel manual transactions, process fee transfers, place items on hold, and release items from hold.

With WIMS integration, only manual transactions posted on the Disbursement Worksheet can be canceled.

Submitting Internal Control Requests

Internal control requests for fees, such as stop payment, cancel check, cancel receipt, remove hold status, or transfer funds from one file to another are sent through the Wire Information Management System (WIMS) for Centralized Escrow Accounting (CEA) to approve.

Steps

1. From within a file on the Disbursement Worksheet, select the disbursement item.
2. Click the **Wire Information Management** button . The WIMS Options screen displays.
3. From the WIMS Options screen, select the **Internal Control Request** option.
4. Click **OK**.
5. From the Wire Information Management System screen, you can select the applicable action for the fee. If your request is based on a file, you can access WIMS from the AIM+ toolbar.

Important! When you submit an ICR, you may want to make note of the request as the receipt or disbursement item is not locked down when the ICR is submitted.

Once the submitted item is approved by Centralized Escrow Accounting (CEA), the transaction information prints on the Disbursement Worksheet and File Ledger. Additionally, the item is automatically reflected on Escrow Accounting reports and other reporting services, such as Lawson, as appropriate.

Additionally, you can submit the following internal control requests for a file by accessing the WIMS button from the AIM+ toolbar:

Add Secondary Bank	Loss Request
Cancel Check, Fee Transfer, and Receipt	Reassign File Escrow Unit
HOA Request	Remove Hold
Investment Close	Stop Payment
Investment Deposit	Transfer File Funds
Investment Open	Transfer Funds to Escheat
Investment Withdrawal	


For more information about submitting internal control requests for fees, refer to the following AIM+ Help topic:

Using AIM+>Disbursements>Using the Wire Information Management System

Submitting Outgoing Wires

Outgoing wire requests sent through the Wire Information Management Systems (WIMS) are approved by Centralized Escrow Accounting (CEA).

Steps

1. From within a file on the Disbursement Worksheet, select the disbursement item.
2. Click the **Wire Information Management** button . The WIMS Options screen displays.
3. From the WIMS Options screen, the **Outgoing Wire Request** option defaults.
4. Click **OK**.
5. From the Wire Information Management System screen, you can select the applicable action for the fee.
6. Click **Continue** on the WIMS Options screen when finished.

When you submit an outgoing wire request, the date, pending status (**P**), transaction type, and reference number (e.g., **P-OW 1752**) for the wire display on the disbursement worksheet. On the File Ledger, the **Pending** status displays in the main reason field.

Once the outgoing wire is approved by Centralized Escrow Accounting (CEA), the pending status is removed from the transaction reference information on both the disbursement worksheet and file ledger. Additionally, the item is automatically reflected on Escrow Accounting reports and other reporting services, such as Lawson, as appropriate.

For more information about submitting outgoing wires, refer to the following AIM+ Help topic:

Using AIM+>Disbursements>Writing Outgoing Wires

Accessing WIMS Outside of Files

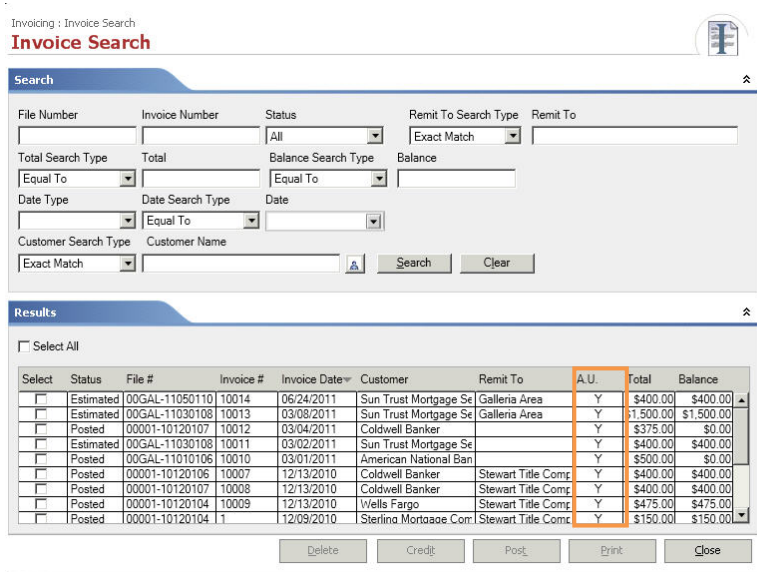
When someone has the disbursement worksheet open on a file and you access WIMS outside of that file, a warning message displays that the disbursement worksheet should be closed to ensure that WIMS actions are represented in a timely manner.

Invoicing

The following changes were made to Invoicing.

Accounting Information

The **A.U.** (Accounting Unit) column was added to the Invoice Search Results screen. This new column helps you identify invoices that may be missing the required accounting unit information. If your company is integrated with Lawson, each invoice must be created with the required accounting unit information. If your company created invoices in AIM+ prior to integration with Lawson, some invoices may be missing the required accounting unit information.



To find invoices with the missing information, use the **Invoice Search** screen to search for invoices. Click **Search** to see a list of invoices matching the search criteria. Under the Search Results tab, invoices that are missing the required accounting information are identified by a red **N** in the **A.U.** column. The accounting unit information must be added to these invoices before these invoices can be posted.

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 Stewart Workplace or Title Workplace, contact Customer Care at 1.888.526.3282 for assistance.

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. Click on the **Additional Learning Resources** link when you want an interactive solution or a graphical representation for completing a specific action.

Technical Support

For technical support, contact PropertyInfo Customer Care at 1.888.526.3282.