

# **AIM+ 8.7**

Release Notes  
January 15, 2020

*For Stewart Employees Only*



<b>AIM+ 8.7 Release Notes</b> .....	<b>1</b>
<b>Enhancements</b> .....	<b>2</b>
Revenue Reporter .....	2
Agent Issued Policy.....	2
Total Premium.....	2
Revenue Report Extract.....	2
Credit Distribution .....	2
Affiliate File Number and Affiliate AU on Credit Distribution .....	2
New Credit Types.....	2
Filter to Remove Credit Types .....	3
<b>Defects</b> .....	<b>4</b>
<b>Additional Information</b> .....	<b>5</b>
Accessing AIM+ .....	5
Training.....	5
Technical Support.....	5

# AIM+ 8.7 Release Notes

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**AIM 8.7** 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: January 15, 2020**

# Enhancements

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AIM+ 8.7 includes several time-saving enhancements for Stewart associates only.

## Revenue Reporter

### Enhancements to Revenue Reporter

#### For NS Commercial Services Users only

Multiple enhancements were added to the Revenue Report screen.

- Many label changes are done in Revenue Reporter / Subsequent Income UI and PDF reports to report revenue correctly for 2021 without intervention as well as assign credit to the other Stewart companies on the shared file.
- In addition, a new checkbox, **SSU**, will replace the Multi checkbox.

### Agent Issued Policy

You now have the option in *Revenue Reporter and Subsequent Income* to mark the file *Agent Issued Policy* and show the information on the *Revenue Reporter PDF and Subsequent Income PDF*. Once the **Agent Issued Policy** is selected on the *Order* screen or on the *Revenue Reporter*, the Revenue Reporter PDF report should display **Yes**.

If the **Agent Issued Policy** checkbox is not selected on the *Order* screen or *Revenue Reporter or Subsequent Income*, the word **No** displays on the Revenue Reporter PDF report.

### Total Premium

A new **Total Premium** field has been added to the *Revenue Reporter and Subsequent Income screens*. The Total Premium displays the sum of all premium fields values available in Revenue Reporter, including Owner's Premium, Mortgagee's Premium, OTP Endorsement Premium, MTP Endorsement Premium, OTP Leasehold Premium, MTP Leasehold Premium, OTP Endorsement Leasehold Premium, MTP Endorsement Leasehold Premium, and Other Premium. This will also appear on Revenue Reporter and Subsequent Income PDF reports

### Revenue Report Extract

There are now enhancements to the new revenue model report area in the existing **Revenue Report**. This includes some label changes, and new columns such as *Admin Override, SSU, Affiliate File Number and Affiliate AU*.

## Credit Distribution

Several enhancements have been made to the Credit Distribution screen for Stewart associates only.

### Affiliate File Number and Affiliate AU on Credit Distribution

The new **Affiliate File Number** and **Affiliate AU** textboxes have been added to *Revenue Reporter and Subsequent Income* against each Party type and accordingly these will appear on Revenue Reporter and Subsequent Income screens and Reports.

### New Credit Types

New *Credit Types* have been added to the **Credit Distribution** screen. The new formula will be calculated for a 3-Way *Gross Split* option only.

**Note:** For all new Credit Types, the **Flat Fee** radio button is disabled by default.

## Filter to Remove Credit Types

Previously, *Credit Types* were filtered according to the CS checkbox. In this release of AIM+, *Credit Type* filtering is removed based on the selection of the CS checkbox on the **Credit Distribution** screen. All credit types display in alphabetical order, regardless if the CS checkbox is selected or not.

# Defects

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The following defects were resolved for all AIM+ users in this release:

- The Close button no longer disappears from the **Disbursements** screen and functions as expected.
- AIM+ no longer crashes upon printing a document that includes '/' in the document name.
- Selected pages can now be printed from **AIM+ Documents**.

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