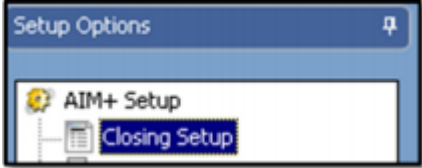# Customizing Closing Templates in AIM+

Overview

This document walks you through how to Customize Closing Templates.

Steps

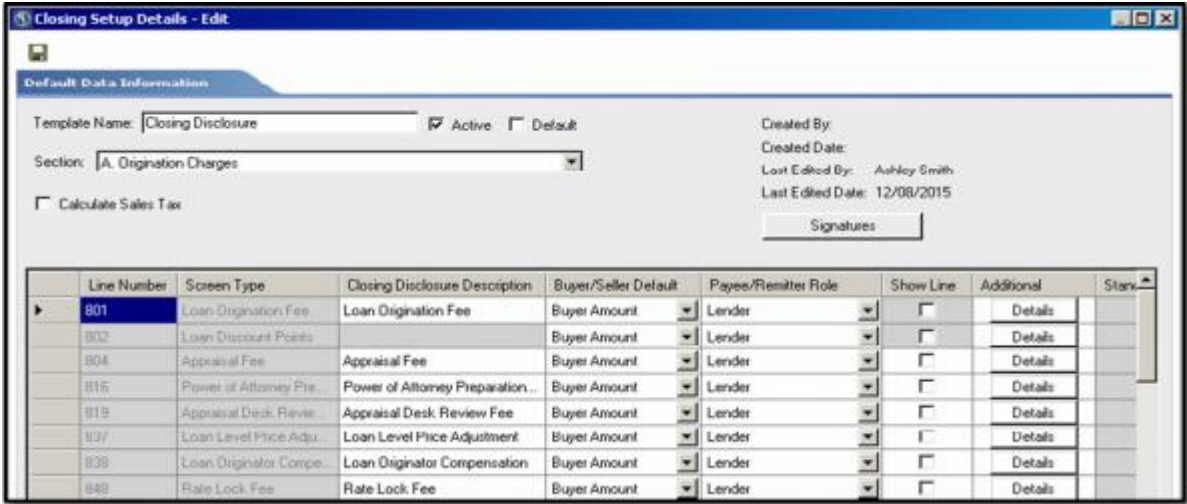1. Select the **Setup icon** from the *AIM+ toolbar*.

2. Select **Closing Setup**.

3. Double click the template you wish to update/change.

Template Name	Settlement Statement	Active	Last Edited By	Last Edited Date
Closing Disclosure	Closing Disclosure	☑	Ashley Smith	12/08/2015
Closing Statement	Closing Statement	☑	Michelle Demman	09/30/2015
HUD-1	HUD-1	☑	Michelle Demman	07/20/2015
HUD-1 2010	HUD-1 2010	☑	Michelle Demman	09/08/2015
HUD-1A	HUD-1A	☑		
HUD-1A 2010	HUD-1A 2010	☑		

4. The Default Data information displays.

Customizing Closing Templates in AIM+

5. Select the section of charges to be edited.

Section:	A. Origination Charges
	A. Origination Charges
	B. Did Not Shop For - Loan Charges
	B. Did Not Shop For - Title Charges
	C. Did Shop For - Additional Charges
	C. Did Shop For - Loan Charges
	C. Did Shop For - Title Charges
	E. Taxes and Other Government Fees
	F. Prepaids
	G. Initial Escrow Payment At Closing
	H. Other Costs - Commissions
	H. Other Costs - Premiums
	H. Other Costs - Title Charges
	H. Other Costs - Additional Charges
	J. Total Loan Costs
	K/M. Due at Closing
	K. Adjustments
	K/M. Adjustments Paid by Seller
	L/N. Paid By or on Behalf of Borrower
	L. Other Credits
	L. Adjustments
	N. Due from Seller at Closing
	L/N. Adjustments Unpaid by Seller

6. Select a line you would like to add or edit.

1122	Other Fee		Buyer Amount	None		Details

7. Add a description of the Fee.

Screen Type	Closing Disclosure Description
Power of Attorney Pre...	Power of Attorney Preparation...
Other Fee	Test Description

8. Select **Defaults** and **Payee/Remitter Roles**.

Buyer Amount	Examiner/Abstractor

9. Select **Details** button.

Details

10. Enter the *Fee Description*, Select **Active Radio** button, and identify if you would like a hard coded amount in the line *amount* field.

Other Fee - Line 1124

Fee Description
Test Description ☑ Active

Line Amount
$0.00

Save & Exit   Cancel
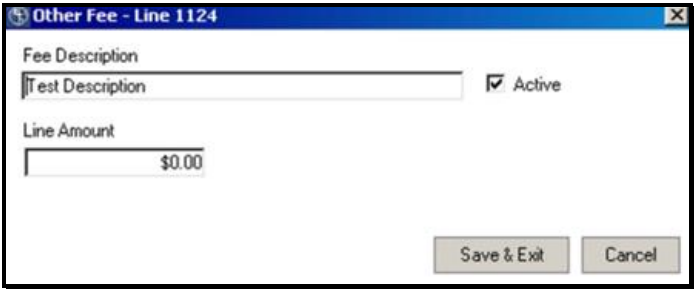
11. Once all fees/lines have been added, Select **Save** and **Exit**.

Save & Exit   Cancel