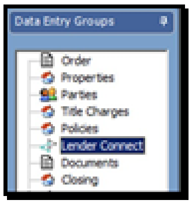
Using AIM+ Lender Connect – File Level

Overview

Use this document to access the File Level Lender Connect in AIM+.

Lender Connect Data Entry Group

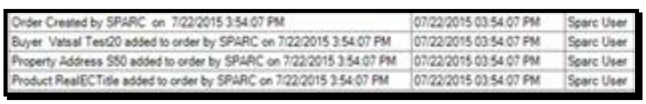
To begin communicating with the lender, click on the Lender Connect Data Entry Group.



Note: File level permission must be given in order to see this data entry group.

File Notes

Once the file is accepted and given a file number in the Lender Connect company level screen, the file is ready to be worked on. File Notes displays the order creation date and time stamp. This also displays what product was ordered and when it was added, as well as the property address. Any subsequent orders will be updated.



Order Created by SPARC on 7/22/2015 3:54:07 PM	07/22/2015 03:54:07 PM	Sparc User
Buyer Vatsal Test20 added to order by SPARC on 7/22/2015 3:54:07 PM	07/22/2015 03:54:07 PM	Sparc User
Property Address 550 added to order by SPARC on 7/22/2015 3:54:07 PM	07/22/2015 03:54:07 PM	Sparc User
Product RealECTitle added to order by SPARC on 7/22/2015 3:54:07 PM	07/22/2015 03:54:07 PM	Sparc User

Work Queue

The difference between Lender Connect on the file level and company level is all inbound and outbound events will display in the same queue. Select the event, and then click on the work action on the left. Click View at the top if you would like more information about the request from the lender.

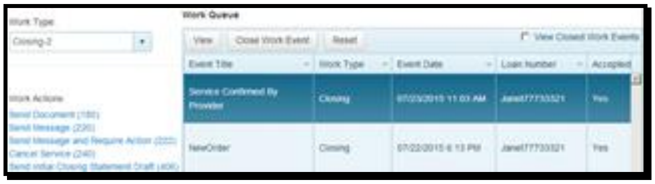
Note: **Work Type** column can be filtered to only display certain products. For example, if you only want to work on Title type products, click the dropdown in the **Work Type** column and choose **Filter**. Click **Reset** to put it back the way it was.

Send Message

Steps

1. Select the **Work Type** - product then select **Send Message** under **Work Actions** on the left.

Using AIM+ Lender Connect – File Level



2. Type the message in the **Comments** area then click **Submit.**

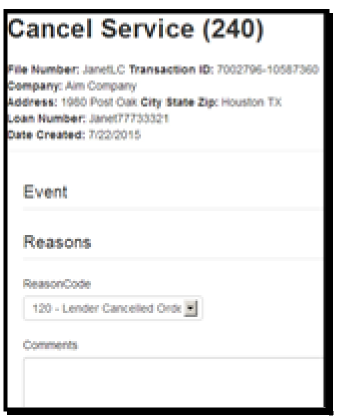
Note: If a message is to be sent to multiple Work Types – products, click **Next** to advance to the next product.

Cancel Service

Steps

1. Select the **Work Type -** product then select **Cancel Service** under Work Actions on the left.

2. Select why the request is being cancelled from the **ReasonCode** dropdown list, Type notes in the **Comments** field then click **Submit.** An example would be when the lender sends a request by mistake. This can then be cancelled and cleared out of your inbound queue.



Send Documents

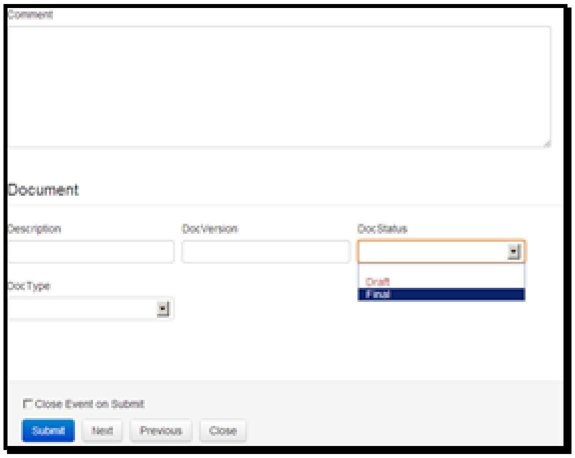
Steps

1. Select the file in the **Work Queue** then click on **Send Document** under the **Work Actions** on the left.

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**.

Using AIM+ Lender Connect – File Level

2. 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.

