

# **AIM+ 8.8**

CertifID Integration

Release Notes  
March 20, 2021



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# AIM+ 8.8 Release Notes

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**AIM 8.8** includes additional functionality, enhancements, and defect corrections in this release. 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: March 20, 2021**

## CertifID Integration with AIM+ 8.8

The purpose of this document is to demonstrate the set-up and process in AIM+ to integrate with CertifID, LLC, a real-time identity and wire fraud prevention platform. CertifID allows for the safe transfer of wire information to buyers and the validation and authentication of seller's wire information. Every transaction protected by CertifID is guaranteed up to \$1,000,000.

This release of **AIM+** includes wire fraud prevention features available for AIM+ users who also have an active CertifID account.

**Prerequisite:** You must have an active **CertifID account ID** to use the wire fraud prevention features in **AIM+**.

If you do not yet have a CertifID account ID for use with AIM+ Disbursements, contact CertifID [to book time with a CertifID rep](#) to find the right plan for you and your team.

To learn more or to register for services, visit <https://certifid.com>. For further information contact CertifID at (616) 260-4533 or [sales@certifid.com](mailto:sales@certifid.com). Inform the CertifID representative that your account will be used for an AIM+ integration. Account information will be provided, including the account username and password.

For additional support services contact CertifID at [support@certifid.com](mailto:support@certifid.com).

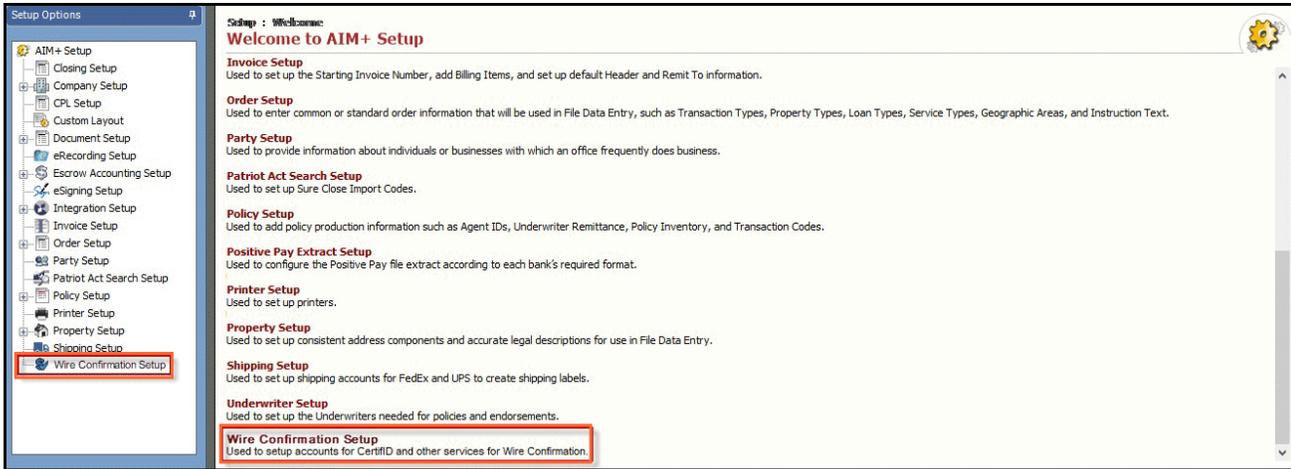


# Setup

## Using Wire Confirmation Setup

A new module, **Wire Confirmation Setup**, has been added to **AIM+ Setup**. Use *Wire Confirmation Setup* to set up your company to use the AIM+ CertifiD integration features when disbursing wires.

**Prerequisite:** You must have permissions assigned to your user in the AIM+ Admin Tool to access **Wire Confirmation Setup**.



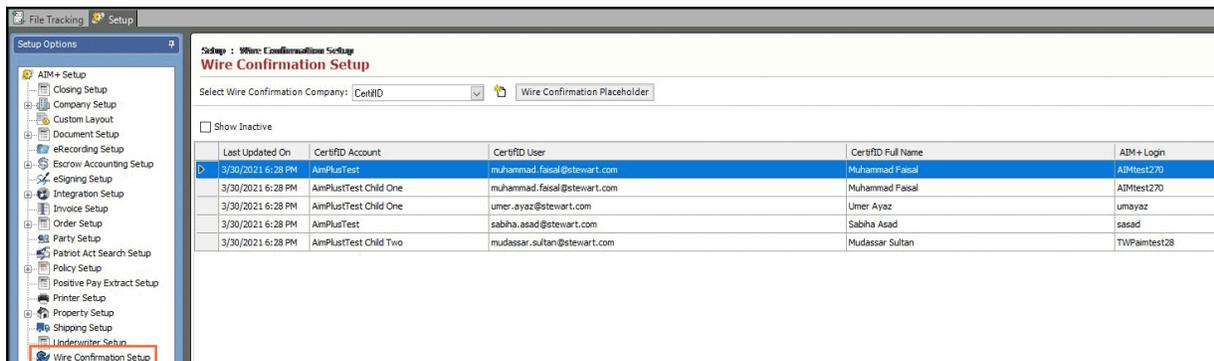
The new **Wire Confirmation Setup** module gives you the ability to set-up accounts for **CertifiD** and other services for wire confirmation. Once the accounts have been set-up, you can also view all existing AIM+ user accounts who are set-up with CertifiD (who have a configured CertifiD account) from the new *Wire Confirmation Setup* screen.

**Note:** If *Enable CertifiD* is not *True* at the *All Company* or *Individual Company*-level, then the *Select Wire Confirmation Company* dropdown will display blank. Please contact **Customer Care** if CertifiD is not enabled.

## Adding a New Wire Confirmation Account

### Steps

1. From *Setup*, click **Wire Confirmation Setup**. The *Wire Confirmation Setup* screen displays.

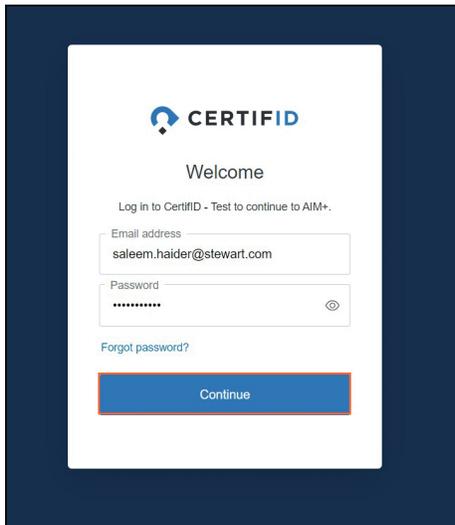


2. Click the **Add new account** button. The Wire Confirmation Account Setup pop-up displays.

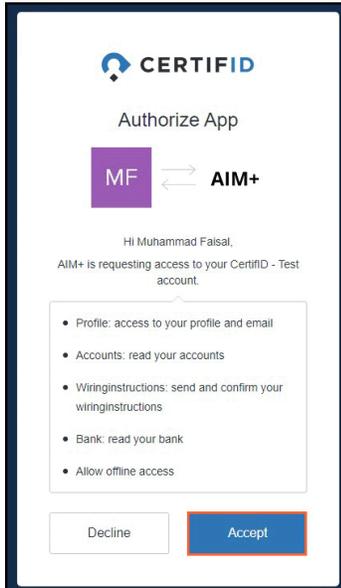


3. From the *Wire Confirmation Account Setup* pop-up, use the **CertifID User** drop-down list to locate for users who have consent.
4. For a new user, click **Get Consent** button to get the consent for this user for the AIM+ and CertifID communication. The CertifID screen displays in default browser. Provide the Email address and Password associated with your CertifID account and click **Continue**

**Note:** The default browser should be **Google Chrome**.



5. The *Authorize App* screen displays. From the *Authorize App* screen, Click **Accept**



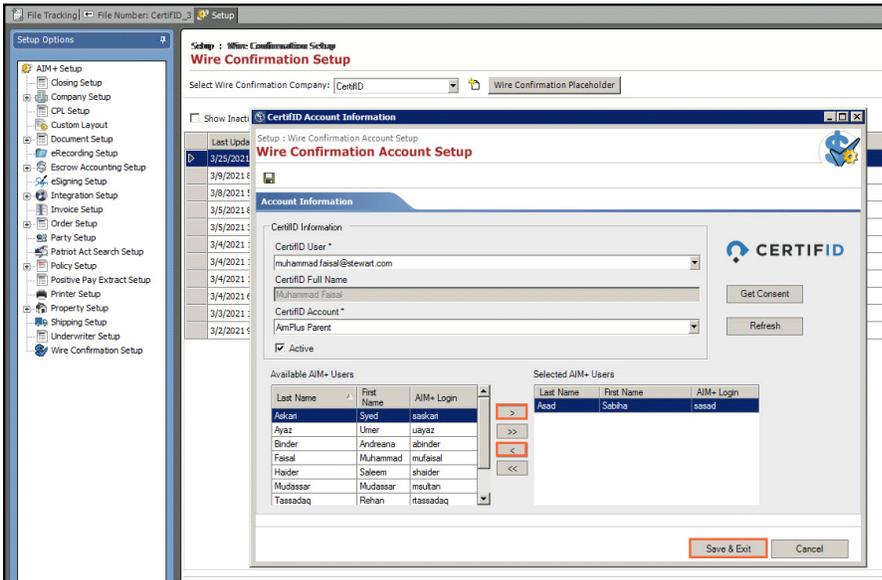
- A confirmation displays that the new CertifiD account is set-up and verified for use with AIM+. Close the web browser window or Logout and then close and return to the AIM+ Wire Confirmation Setup screen.



**Note:** Once you have finished giving consent to one user, please remember to logout. The system saves your username and password credentials (in cookies), so that you don't need to enter them each time.

- From the *Wire Confirmation Account Setup* pop-up, click **Refresh**. The list of all Available AIM+ users will be updated.
- Click the *CertifiD User* drop-down and select the user. Under *Available AIM+ Users*, use the **arrow buttons** to add one AIM+ User so that they can access these Wire Confirmation features in AIM+ *Disbursements* using the CertifiD account that you selected.

**Note:** The full CertifiD name will be automatically populated and the CertifiD account will be automatically selected if there is a default account setup on CertifiD for your user. If you have multiple accounts, they will be listed in the drop-down and you can select which account to setup.



**Note:** Additionally, **CertifiD** accounts can be authorized and users can enter their **AIM+** credentials for the **CertifiD** application. The **CertifiD** account can only be associated with one **AIM+** user. Only users who have the **Integration User** permission will be listed in Available AIM+ User list.

- Click **Save & Exit**. The verified users will be added to the **Wire Confirmation Setup** display in the grid of the *Wire Confirmation Setup* screen and will have the ability to use the CertifiD Wire Confirmation features in AIM+ *Disbursements*.



# Disbursements

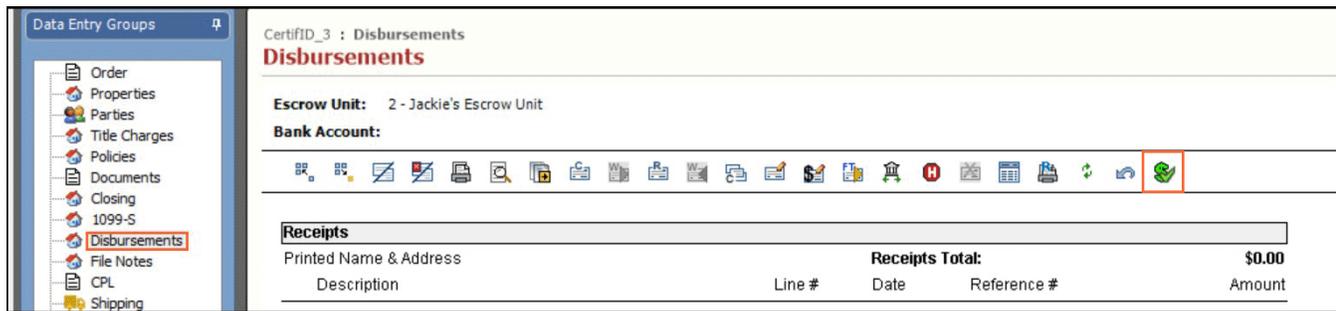
This release of **AIM+** includes wire fraud prevention features available for AIM+ users who also have an active CertifiD account.

**Prerequisites:** If Wire Confirmation Setup is not configured, you will not see the Wire Confirmation features in AIM+ Disbursements. In addition, you must have an active [CertifiD account ID](#) to use the wire fraud prevention features in AIM+.

## New! Wire Confirmation Button on Disbursements Screen

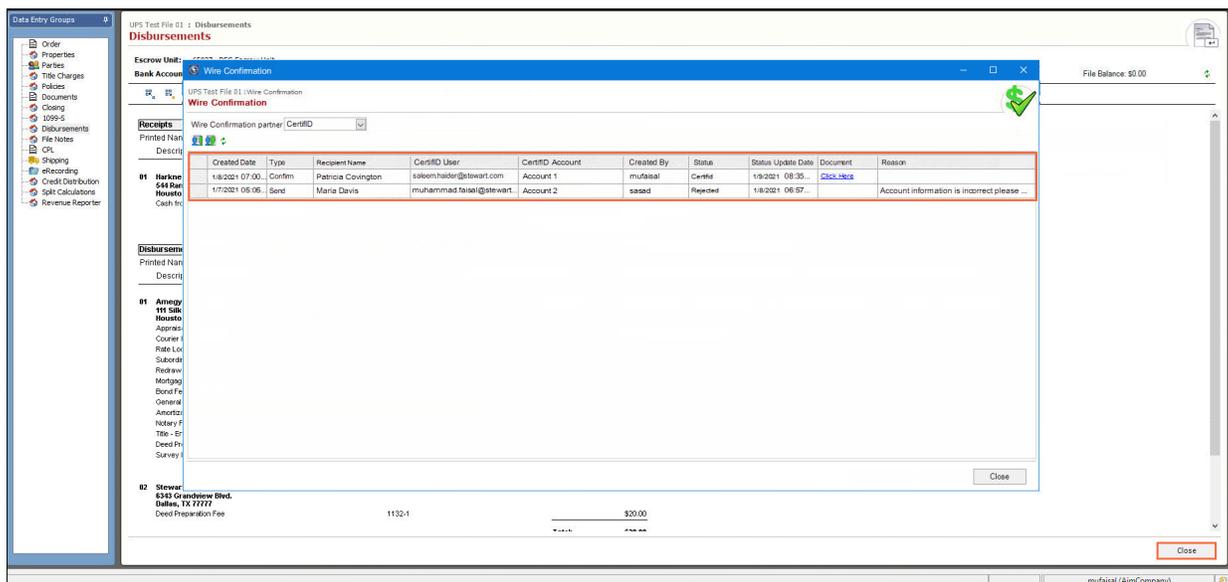
A new button, **Wire Confirmation** (🟢) has been added to the **Disbursements** screen in AIM+, allowing you the ability to manage your wires against fraud using CertifiD wire confirmation services to help prevent wire fraud prior to sending disbursements.

**Note:** You must have **Wire Confirmation Access** assigned to your AIM+ user account in the **AIM+ Admin Tool** to see the 🟢 Wire Confirmation button. Also, the company should have a check box enabled against your company in the **Enable Wire Confirmation** Admin tool.



## New! Wire Confirmation Screen

The new **Wire Confirmation** screen in AIM+ *Disbursements* allows you to verify secure wires using your **CertifiD** account ID. You can also view the status of confirmed and sent wires and send wire confirmation documents to **SureClose**.



**Note:** If *Enable CertifID* is not True at the *All Company* or *Individual Company*-level, then the “**Confirm Wiring Info**” and **Send Wiring Info** buttons will be disabled. Please contact **Customer Care** if CertifID is not enabled.

From the new **Wire Confirmation** screen, you will be able to see wire record details, such as *Created Date, Type, Recipient Name, CertifID User, CertifID Account, Created By, Status, Status Update Date, Document* and *Reason*. By default, the last record created will be located on top. After the **Confirm** and **Send Wiring Info** requests are submitted, these records will be saved, and the data displays in the grid of the Wire Confirmation screen.

## Wire Confirmation Options

The new **Wire Confirmation** screen includes a status of wires sent to and confirmed by CertifID, as well as button for additional actions:

- [Confirm Wiring Info](#)  – Click to send a wire in AIM+ to CertifID to verify the source of the approaching disbursement.
- [Send Wiring Info](#)  – Click to send a wire through AIM+ Disbursements to CertifID.
- **Refresh** – Click for the latest status updates on wires confirmed and sent for your company.
- [View Request Details](#)  – Click to read the details of the request that you submitted.
- [Send to SureClose](#) – Click to send wire confirmation documents to SureClose.



## Confirm Wiring Info

Use the **Confirm Wiring Info** button to securely share wiring information to the recipient. Once you click the **Confirm Wiring Info** button, the system should validate that you have an existing active account.

**Note:** If no active accounts are present, the user will not be allowed to proceed to **Confirm Wiring Info** screen and will be directed to contact their **AIM+** admin for assistance.

Follow the instructions below to confirm wiring information using your CertifID account ID:

### Steps

1. From *Disbursements*, with your file selected, click the **Wire Confirmation** button . The *Wire Confirmation* screen displays.
2. From the *Wire Confirmation* screen, click the **Confirm Wiring Info** button .

Created Date	Type	Recipient Name	CertifID User	CertifID Account	Created By	Status	Status Update Date	Document	Reason
03/04/2021 06:0...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Certifid	03/04/2021 06:08:20...	<a href="#">Click Here</a>	
03/04/2021 06:0...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Certifid	03/04/2021 06:06:58...	<a href="#">Click Here</a>	
03/04/2021 05:5...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Certifid	03/04/2021 06:03:54...	<a href="#">Click Here</a>	
03/04/2021 05:0...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/04/2021 05:05:58...		
03/04/2021 04:1...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	Sent	03/04/2021 04:16:40...		
03/04/2021 04:1...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/04/2021 04:14:58...		
03/02/2021 09:3...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	Certifid	03/02/2021 09:37:07...	<a href="#">Click Here</a>	
03/02/2021 09:2...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	Certifid	03/02/2021 09:29:39...	<a href="#">Click Here</a>	
03/02/2021 09:2...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	Rejected	03/02/2021 09:26:58...		Incorrect account number - The number provided...
03/01/2021 09:3...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/01/2021 09:35:59...		
03/01/2021 09:3...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/01/2021 09:35:13...		

- From the *Confirm Wiring Info* pop-up, use the **Party** drop-down to select the party. You can click the **Find Party** button to search for a user in AIM or type out the recipient information manually. Enter the mandatory fields\*, including bank account numbers and Click **Submit**.

**Note:** The **Party** drop-down displays all parties for file from AIM+ *Parties*.

- If the **AIM+** user has multiple active **CertifID** accounts, the system will display the following *Select CertifID Account* pop-up where the user can select from available **CertifID** accounts. Select from the available accounts and click **OK**.

CertifID User	CertifID Full Name	CertifID Account
muhammad.faisal@stewart.com	Muhammad Faisal	AimPlusTest
muhammad.faisal@stewart.com	Muhammad Faisal	AimPlusTest Child One

At the bottom right, there are 'OK' and 'Cancel' buttons.

**Note:** An active **CertifID** account must be selected before the system can direct you to the **Confirm Wiring Info** screen.

5. Once your account setup is validated, the **Confirm Wiring Info** pop-up displays. Enter the recipient details and click Submit.

Confirm Wiring Info

Confirm Wiring Info : Confirm Wiring Info

**Confirm Wiring Info**

**CERTIFID**

**Recipient**

Party  Property

First Name \*  Last Name \*

Email Address \*  Underwriter \*

Phone Number \*  Transaction Value  Expected Settlement Date

Mobile phone number recommended

Custom E-mail Message

This message will be displayed in the email sent to the recipient.

**Beneficiary Bank**

ABA Routing Number \* Bank Name

**Correspondent Bank**

ABA Routing Number Bank Name

**Credit To**

Account Number \* Account Name \*

**Final Credit To**

Account Number Account Name

Submit Cancel

### Additional Information: What Flows to the Confirm Wiring Info Screen

When making selections on the **Confirm Wiring Info** screen, you may notice some of these Party rules that indicate how some information flows from AIM+ to Certifid.

- From the **Party** drop-down, if you select **Business**, then its contact displays in Recipient.
- AIM+ pulls both Email Address 1 and Email Address 2, if both are provided. However by default, the system selects **Email Address 1**. In addition, AIM+ also pulls Phone Number 1, Mobile Phone Number 2, Business Phone Number 1 and Home Phone Number 1 if provided. By default, **Mobile Phone Number 1** is selected.
- From the Underwriter drop-down, the underwriter options that display are underwriters available against your Certifid account.

# Send Wiring Info

Use the new **Send Wiring Info** button to securely transfer important wiring information to the recipient. Once the user clicks the **Send Wiring Info** button, the system will validate the user's account setup in **Wire Confirmation**.

**Note:** If no active accounts are present, the user will not be allowed to proceed to the **Send Wiring Info** screen and will be directed to contact their **AIM+** admin for assistance.

Follow the instructions below to confirm wiring information using your CertifiD account ID.

## Steps

1. From *Disbursements*, with your file selected, click the **Wire Confirmation** button (🟢). The *Wire Confirmation* screen displays.
2. From the *Wire Confirmation* screen, click the **Send Wiring Info** button (👤). A pop-up window displays.

The screenshot shows a web browser window titled "Wire Confirmation". At the top, it says "CertifiD\_3 : Wire Confirmation" and "Wire Confirmation". Below that, there is a dropdown menu for "Wire Confirmation partner" set to "CertifiD". A table lists various transactions with columns for Created Date, Type, Recipient Name, CertifiD User, CertifiD Account, Created By, Status, Status Update Date, Document, and Reason.

Created Date	Type	Recipient Name	CertifiD User	CertifiD Account	Created By	Status	Status Update Date	Document	Reason
03/04/2021 06.0...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	CertifiD	03/04/2021 06:08:20...	<a href="#">Click Here</a>	
03/04/2021 06.0...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	CertifiD	03/04/2021 06:06:58...	<a href="#">Click Here</a>	
03/04/2021 05.5...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	CertifiD	03/04/2021 06:03:54...	<a href="#">Click Here</a>	
03/04/2021 05.0...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/04/2021 05:05:58...		
03/04/2021 04.1...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	Sent	03/04/2021 04:16:40...		
03/04/2021 04.1...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/04/2021 04:14:58...		
03/02/2021 09.3...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	CertifiD	03/02/2021 09:37:07...	<a href="#">Click Here</a>	
03/02/2021 09.2...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	CertifiD	03/02/2021 09:29:39...	<a href="#">Click Here</a>	
03/02/2021 09.2...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Child D	mufaisal	Rejected	03/02/2021 09:26:58...		Incorrect account number - The number provided...
03/01/2021 09.3...	Send	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/01/2021 09:35:59...		
03/01/2021 09.3...	Confirm	Muhammad Faisal	sam_fasee@hotmail...	AimPlus Parent	mufaisal	Sent	03/01/2021 09:35:13...		

3. If the **AIM+** user's account has multiple, active **CertifiD** accounts associated with it, the **Select CertifiD Account** pop-up displays with a list of available CertifiD accounts to choose from. Select the CertifiD account user and click **OK** to continue.

The screenshot shows a pop-up window titled "Select CertifiD Account". It contains a table with the following data:

CertifiD User	CertifiD Full Name	CertifiD Account
muhammad.faisal@stewart.com	Muhammad Faisal	AimPlusTest
muhammad.faisal@stewart.com	Muhammad Faisal	AimPlusTest Child One

At the bottom of the window, there are "OK" and "Cancel" buttons. The "OK" button is highlighted with a red box.

**Note:** An active **CertifiD** account must be selected before the system can direct you to the **Send Wiring Info** screen.

- Once the user account setup is validated, the **Send Wiring Info** pop-up displays. Enter the mandatory fields on the Send Wiring Info pop-up. Click **Submit** to send this wiring information to Certifid.

**Note:** The *Select Account* dropdown includes the bank accounts that are available for your Certifid account in Certifid and you can select that account in AIM+.

## Viewing Submitted Record Details

A new **View Request Details**  button has been added to the **Wire Confirmation** screen of **Certifid**. After selecting a submitted record and clicking the  button, the user should be prompted to the **Confirm/Send Wiring Information** screen where the previously submitted request details display.

**Note:** You can double-click on a submitted request to view Record details.

# Sending Wire Confirmation Documents to SureClose

**Prerequisite:** You should be able to access **Wire Confirmation Setup** and the **Wire Confirmation** button on the **Disbursements** screen. Additionally, at least one request needs to be selectable with the **CertifID** status.

You can now setup **SureClose** placeholders using the **Wire Confirmation Placeholder** button in the Wire Confirmation Setup screen. Once you click the button, all existing placeholders will display. It will include a *Setup Path*, *Screen Title*, *Placeholder List* and *New* and *Close* buttons. Additionally, a **Send to SureClose** button has been added in the main Wire Confirmation screen so the user can send **CertifID** documents to **SureClose**.

The screenshot shows the 'Wire Confirmation' application window. At the top, there is a dropdown menu for 'Wire Confirmation partner' set to 'CertifID'. Below this is a table with columns: Created Date, Type, Recipient Name, CertifID User, CertifID Account, Created By, Status, Status Update Date, Document, and Reason. A modal dialog titled 'Send Wire Confirmation Document' is open in the foreground. The dialog has a title bar with a close button (X). The main content area of the dialog includes the text 'SureClose Placeholder' and 'Send Wire Confirmation Document' in red. Below this, there is a list of placeholders: 'SA - CertifID PH1', '7.7 Check Duplicate PHs', 'SA - CertifID PH11', and 'Inbox'. At the bottom of the dialog, there are two buttons: 'Send' and 'Close'. The 'Send' button is highlighted with a red box.

Created Date	Type	Recipient Name	CertifID User	CertifID Account	Created By	Status	Status Update Date	Document	Reason
03/04/2021 06:0...	Confirm					Certifid	03/04/2021 06:08:20...	<a href="#">Click Here</a>	
03/04/2021 06:0...	Send					Certifid	03/04/2021 06:06:58...	<a href="#">Click Here</a>	
03/04/2021 05:5...	Confirm					Certifid	03/04/2021 06:03:54...	<a href="#">Click Here</a>	
03/04/2021 05:0...	Confirm					Sent	03/04/2021 05:05:58...		
03/04/2021 04:1...	Send					Sent	03/04/2021 04:16:40...		
03/04/2021 04:1...	Confirm					Sent	03/04/2021 04:14:58...		
03/02/2021 09:3...	Send					Certifid	03/02/2021 09:37:07...	<a href="#">Click Here</a>	
03/02/2021 09:2...	Confirm					Certifid	03/02/2021 09:29:39...	<a href="#">Click Here</a>	
03/02/2021 09:2...	Confirm					Rejected	03/02/2021 09:26:58...		Incorrect a...
03/01/2021 09:3...	Send					Sent	03/01/2021 09:35:59...		
03/01/2021 09:3...	Confirm					Sent	03/01/2021 09:35:13...		

# Defects

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The following **Defects** were resolved in **AIM 8.8**:

- The premium Percentage for the *Lender-Only* policy is now calculated accurately when multiple tiers for **Underwriter Remittance** are used.
- The **UER** no longer appears while printing a file that includes a special character in the file name.

# 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.

## Signing Up for a CertifID Account

If you do not yet have a CertifID account ID for use with AIM+ Disbursements, contact CertifID [to book time with a CertifID rep](#) to find the right plan for you and your team.

To learn more or to register for services, visit <https://certifid.com>. For further information contact CertifID at (616) 260-4533 or [sales@certifid.com](mailto:sales@certifid.com). Inform the CertifID representative that your account will be used for an AIM+ integration. Account information will be provided, including the account username and password.

For additional support services contact CertifID at [support@certifid.com](mailto:support@certifid.com).

## 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).