

# AIM+<sup>®</sup> 8.2 & 8.2.1

Release Notes Updated: September 18, 2019



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## AIM+ 8.2 & 8.2.1 Release Notes

AIM+ 8.2 & 8.2.1 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.

8.2 Deployment Date: August 23, 2019

8.2.1 Deployment Date: September 20, 2019

## 8.2 Prerequisites

### Tasks Required to Use Simplifile Features in AIM+

Below includes a list of prerequisites needed before using Simplifile with AIM+:

#### Steps

- 1. Create an account with Simplifile.
- 2. Request to receive an API Token ID from Simplifile. A representative will send you the API Token ID via email.
- 3. If you do not have access to the AIM+ Admin Tool, contact Stewart Customer Care to help you enable the Simplifile features for your Company.
- 4. Permissions to access the eRecording Setup screen and eRecording tab need to be setup from the Admin tool first.
- 5. After your Company has been enabled to use Simplifile features, you will need to set up Simplifile account(s) for your Company in eRecording Setup. If you do not have access to Setup, contact Stewart Customer Care.

Note: If the above prerequisites are not met, your Company will not see the eRecording module in Data Entry Groups in AIM+.

#### **Integration Settings for eRecording**

To complete all required settings in the Admin Tool for eRecording, be sure that the value for **EnableSimplifile** is set to **True** for All Companies and your individual Company.

🔡 Main			
AIM+Administrator 4	AIM+ Administrator : Integration Settin Integration Settings	gs	
Companies     Companies     Companies     Companies     Component Libraries     Component Libraries     Component Libraries	Select Company All Companies Add Delete	▼ Edit	Select Integration Application eRecording
Error Reports     Error Reports     Error Reports     Error Reports     Error Sessions	Key BaseAddress		Value https://ep4-uat.erecording.com/
Application Settings     Definition Settings     SureClose Corporation     Application Security Kars	SimplifileGetCounties SimplifileGetCountyRequirements SimplifileCreatePackage		https://test.smplifile.com/sf/rest/api/erecord/recipients/key https://test.simplifile.com/sf/rest/api/erecord/recipients/{0} https://test.simplifile.com/sf/rest/api/erecord/submitters/{0}
Global Rate Calculations	SimplifileGetPackageStatus SimplifileGetBulkPackageStatus SimplifileRetrievePackage		https://test.simplifile.com/sf/rest/api/erecord/submitters/{0} https://test.simplifile.com/sf/rest/api/erecord/packages/bul https://test.simplifile.com/sf/rest/api/erecord/packages/{0}
H- → Hate Customers	SimplifileAddUpdateDocument SimplifileGetDocument		https://test.simplifile.com/sf/rest/api/erecord/packages/{0} https://test.simplifile.com/sf/rest/api/erecord/document/{0} https://test.eimplifile.com/sf/rest/api/erecord/document/{0}
	EnableSimplifile		True
	SimplifileConsumeToken SimplifileAcquireToken		https://test.simplifile.com/sf/rest/api/auth/tokens/{0}/cons           https://test.simplifile.com/sf/rest/api/auth/tokens/acquire?

## 8.2 Setup

## Setting up the eRecording Account(s) for Simplifile

A new module, **eRecording Setup**, has been added to AIM+ so that you can setup **Simplifile** accounts and link them to Escrow units.

Using the eRecording service, **Simplifile**, in AIM+, your Company can submit recording documents to Simplifile and review them before submitting to counties. Your company will be able to view the latest updates on sent packages within AIM+, and (once stamped) can view Recorded documents within AIM+ as well.

To use eRecording with Simplifile in AIM+, you must first setup the account.

IMPORTANT NOTE: If you have permissions to Setup in AIM+, and do not see eRecording Setup, please refer to the Prerequisites section to be sure you have all requirements fulfilled before attempting to create a Simplifile account in AIM+.

#### Steps

1. From AIM+ Setup, click eRecording Setup. The eRecording Setup screen displays.



2. From the *eRecording Setup* screen, click the **Add New Account** icon. The *Simplifile Account Information* pop-up displays.

🗒 File Tracking 🐉 Se	tup							4 Þ 3
Setup Options	+	Setup : effectively Set	Stup Up					
Cosing Secup Company Secup CPL Setup CPL Setup Custom Layout		Select Recording Compan	y:  simplifie 💽 🗋					
🗈 🗐 Document Setu	p	Last Updated On	Organization Name	Organization ID	User Name	API User Token	Escrow Unit	Active
Escrow Account	ting Setup	8/8/2019 11:31 AM	AIM Test	TXTEDF	aimapiuser	404KUTDOAG526L6O0OJ92N	Benson's EU, FedEx EU 02, FedEx EU 01	
Invoice Setup	ap	8/8/2019 11:31 AM	AIM Test	TXTEDF	msultan	50B 19TZI 1GMBSP 2XR VI 4398HU	EU 10	
🕀 🗐 Order Setup		8/8/2019 9:38 AM	RT Organization 2	TXT 123	rtassadaq	SPVPKYHV93WTJNSJZMWBXB	EU5	
93 Party Setup		8/8/2019 5:32 AM	RT Organization 1	TXTB47	rtassadaq	5PVPKYHV93WTJNSJZMWBXB	14640	
- S Patriot Act Sea	rch Setup	8/8/2019 5:31 AM	RT Organization	TXTB47	rtassadaq	SPVPKYHV93WTJNSJZMWBXB	RT - Escrow Unit1 - Long Text Testing Lon	. 🔽
Policy Setup     Policy Setup	tract Satur	8/7/2019 8:57 AM	AIM Test	TXTEDF	umer.ayaz	4SSQXE64W5IJKOCXKLZBV24JL	Escrow Unit A	
Printer Setup	a acc Setup	8/7/2019 8:35 AM	AIM Test	TXTEDF	umer.ayaz	4SSQXE64W5IJKOCXKLZBV24JL	Jackie's Cash Unit	
🕀 🏠 Property Setup		8/7/2019 7:32 AM	Naseer Org	TXTEDF	nasheikh	4921364S27W75WF7P6XW28	Naseer's Escrow Unit	
- 🐻 eRecording Set	up	8/7/2019 5:35 AM	AIMCompany	TXTAIM	adiber	587BZFRUD4IP02ST4539GLI0I	Faisal Escrow B	
🖺 Underwriter Se	tup	8/7/2019 4:42 AM	AIM Test	TXTEDF	jawadali	4M10HNM10270GSLY08VCZO	3 Naseer's Escrow Unit, EU 987, EU 6, Es	
		8/5/2019 5:35 AM	Test	Test123	testuser	test123	Faisal Escrow A	
		8/2/2019 10:33 AM	RT Organization	TXTB47	rtassadaq	5PVPKYHV93WTJNSJZMWBXB	RTEU2, RTEU3, FedEx EU 05	
		7/31/2019 8:14 AM	Simplifile Test Org 01	Simplifile Test Org 012222	Simplifile Test Org 01	Character Count & Word Cou	Escrow Unit 1 Fresno	
		7/04/0040 0 00 111	a 10 7 10 at	a 10 7 10 010000			au 1.0 1.2	
								Close

- 3. From the Simplifile Account Information pop-up, enter the required fields below:
  - Organization Name
  - Organization ID
  - User Name
  - API User Token

**Note:** Information required for these fields must be obtained from your Simplifile Account. Should you have any questions, please contact Simplifile Support.

The Organization ID is shown on Simplifile Portal interface while editing users. For reference, see screenshot below.

simplifile.	Users							
PACKAGES	1 matching user foun	d						
NEWS	Saleem	×			Add	d User	Action	IS 🔻
PAYMENTS	Name/Username		Email/Phone	Status 📑	Services	Organ	izations	
REPORTS	Muhammad Saleem	Haider 🖉	Saleem.Haider@Stewart.com	Active	Submitter	ТХТРО	W	•••
SEARCH	<mark>saleem</mark> haider		(713) 232-4315	_				
COUNTIES								
ORGANIZATIONS								
USERS								
HISTORY								

- 4. Under Available Escrow Units, select the Escrow Unit to link the Simplifile Account.
- 5. Click Save & Exit.

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3					
count Ir	nformation				
Simplifile I	Information				
Organiz	ation Name *		air	nnlifilo	
AIMCom	ipany	•	SII	npnjne.	
Organiz	ation ID *			- 0	
TXTAIN	1				
User Na	ime *				
YUWEO	23				
API Use	r Token *				
FHEWJ	THWLW3462346				
Iz Activ	10				
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Available	Escrow Units	Selected F	Escrow Units		
Code	Name 🛆 🛧	Code	Name		
3	CO Escrow Unit Name/CO Escrow Unit	2013	Escrow Unit B		
113	Escrow Unit 3 Imperial				-
2014	Escrow Unit C >>				
1	EU 1 Name <				
55	EU55	ī			
555	Faisal Escrow NA				
	FedEx EU 03				
1012					

The new eRecording account displays in the grid of the eRecording Setup screen.

🔡 File Tracking 🥨 Setup								∢ ≬
Setup Options #	Seb	up : elleconding Se lecording Set	1 <b>D</b> prefe					<b>M</b>
Closing Setup	Sele	ect Recording Compan	y: Simplifile 🗾 🎦					
Custom Layout		Show Inactive	Organization Name	Organization ID	User Name	API User Token	Escrow Unit	Active
Escrow Accounting Setup	⊳	8/9/2019 1:36 PM	AIMCompany	TXTAIM	YUWEQ3	FHEWJTHWLW3462346	Escrow Unit B	
Invoice Setup		8/8/2019 11:31 AM	AIM Test	TXTEDF	aimapiuser	404KUTDOAG526L6O00J92N	Benson's EU, FedEx EU 02, FedEx EU 01	~
⊕ 🗍 Order Setup		8/8/2019 11:31 AM	AIM Test	TXTEDF	msultan	50B19TZI1GMBSP2XRVI4398HU	EU 10	
😫 Party Setup		8/8/2019 9:38 AM	RT Organization 2	TXT123	rtassadaq	5PVPKYHV93WTJNSJZMWBXB	EU5	
Patriot Act Search Setup		8/8/2019 5:32 AM	RT Organization 1	TXTB47	rtassadaq	5PVPKYHV93WTJNSJZMWBXB	14640	
Policy Setup     Positive Pay Extract Setup		8/8/2019 5:31 AM	RT Organization	TXTB47	rtassadaq	5PVPKYHV93WTJNSJZMWBXB	RT - Escrow Unit1 - Long Text Testing Lon	
Printer Setup		8/7/2019 8:57 AM	AIM Test	TXTEDF	umer.ayaz	4SSQXE64W5IJKOCXKLZBV24JL	Escrow Unit A	V
🕀 🥐 Property Setup		8/7/2019 8:35 AM	AIM Test	TXTEDF	umer.ayaz	4SSQXE64W5IJKOCXKLZBV24JL	Jackie's Cash Unit	V
eRecording Setup		8/7/2019 7:32 AM	Naseer Org	TXTEDF	nasheikh	4921364S27W75WF7P6XW28	Naseer's Escrow Unit	
Underwriter Setup		8/7/2019 5:35 AM	AIMCompany	TXTAIM	adiber	587BZFRUD4IP02ST4539GLI0I	Faisal Escrow B	
		8/7/2019 4:42 AM	AIM Test	TXTEDF	jawadali	4M10HNM10270GSLY08VCZO	3 Naseer's Escrow Unit, EU 987, EU 6, Es	
		8/5/2019 5:35 AM	Test	Test123	testuser	test123	Faisal Escrow A	
		8/2/2019 10:33 AM	RT Organization	TXTB47	rtassadaq	5PVPKYHV93WTJNSJZMWBXB	RTEU2, RTEU3, FedEx EU 05	V
		3/24/2010 2 11 111		a: 10 T 10 010000	- 10 T 10 M	a . a . a		
								Close

# 8.2 eRecording with Simplifile

## **Creating a Package**

Creating a Package in AIM+ gives you the ability to view the status of your recorded Documents. Use the steps below to create a package in AIM+.

#### Steps

1. From Data Entry Groups, click the eRecording module. The eRecording screen displays.



2. From the *eRecording* screen, select **Simplifile** from the *Choose the Recording Partner* drop-down.

🔁 File Tracking 🔮 Setup 📼 Fil	e Num	ber: Andrear	na 🏴 File Numbe	er: 3690 💻 File N	lumber: 3691								4 ▷ 3
Order	eRe	cording	ling J										Ø
Properties	Choo	ose the Reco	rding partner Simp	lifile									
Policies	2	\$ Create	Darduara	No. of Docum	Chabur	Status Data	County and C	Orrestingting	Tatal Day Cas	Culturing Data	President Data		Last Indated Dr.
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Disbursements		8/6/201	3690PKG2019	1	RECORDED	8/6/2019 6:07:	Harris, TX	AIM Test	\$32.00	8/6/2019 6:05:5	8/6/2019 6:06:	8/6/2019 9:25:2	
🔄 File Notes		8/5/201	3690PKG2019	1	RECORDED	8/5/2019 10:3	Harris, TX	AIM Test	\$32.00	8/5/2019 10:29:	8/5/2019 10:2	8/6/2019 9:26:1	
CPL		8/5/201	3690PKG2019	1	REJECTED	8/5/2019 10:2	Harris, TX	AIM Test	\$16.00	8/5/2019 10:27:	8/5/2019 10:2	8/5/2019 10:28:	
eRecording		8/5/201	3690PKG2019	1	REJECTED	8/5/2019 10:2	Harris, TX	AIM Test	\$16.00	8/5/2019 10:22:	8/5/2019 10:2	8/5/2019 10:23:	
S Creat Usroution													
													Close

- 3. Click the Create New Package icon. The Create New Package pop-up displays with two tabs:
  - Package Summary
  - Document Details

- 4. From the Create Package pop-up, on the Package Summary tab, enter the required fields.
- 5. State and Counties listed in the dropdown are populated based on value(s) entered in the Property Tab.
- 6. Based on the County selection, the County Requirements will be automatically filled-in.
- 7. The *Document Grid* lists the recordable line(s). Users can either choose the **Document Type** from the drop-down menu within the grid or users can select the **Document Type** from the *Document Details* tab.

🗄 Simplifile Package Details														_ 8 ×
3690 : Create Package Create Package														[@
14														
Package Summary														
Package Name *		State/	Province *		County *									
3690PKG20190809030430		TX	Texas	• ×	201	Hamis		×						
Estimated Recording Time	Organization	Created By	Cre	ated Date	Last Up	dated By	Last Upo	lated On	Submission Date	Received	Date	Status	Status Date	
N/A - N/A	AIM Test	aimapiuser			aimapiu	ser								
-View County Requirements -														
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bocuments														
10 ×														
Order Attach	Line Fee Type/Doc	Name	Page Count	File Fee Bu	iyer Fee	Seller Fee	Status	Rec Date	Document Type		Rec Fee	Rec Pages	Variance	Instrument
▶ 1 ▼	1210-1 Municipal Lien	Certificate	5	\$50.00 \$2	5.00	\$25.00				•	\$0.00	0	\$50.00	
2 💌	Other		0	\$0.00 \$0	.00	\$0.00				<b>_</b>	\$0.00	0	\$0.00	
3 💌	Other		0	\$0.00 \$0	.00	\$0.00				•	\$0.00	0	\$0.00	
•														Þ
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- 8. Click to expand the **Document Details** tab to provide additional information (if required).
- 9. From the *Document Type* drop-down menu, select the Document Type. The remaining fields populate according to the information on the file.

® 5	implifile Package	Details										<u>_ 8 ×</u>
3690 Cre	) : Create Package ate Packag	e										(e)
14												
D	ocument Details											
-	Document Type *			Fee Type/Documen	t Name	Page Count	File Fee	Buyer Fee	Seller Fee	Security Instrument Date		
	REAL PROPERTY		-	Municipal Lien Certifi	cate	5	\$50.00	\$25.00	\$25.00	8/23/2019	•	
	Status	Recording Date	Recording Fee	Recorded Pages	Variance	Instrument	Book	Page	1	,		
			\$0.00	0	\$50.00							
	i itatus Reason	,	J.	,	j.	,	,	,				
	SureClose Docume	ots				- Selected (	Documents					
		1100				Selected I						
										1	1	Total Pages: 0
	Document Name					Selected	Documents			File Size	File Pages	
	No Documents an	e available in SureC	lose against this fi	le		Note: Pro	vided attachmer	its will always be over	written by the lates	t on Simplifile		
												-
•												
											_	
												Submit Cancel

- 10. Upload your SureClose document or select a document from your local Drive. The document(s) display on the **Document Details** tab under the selected documents grid.
- 11. Click the **Submit** button. The Simplifile website displays for you to finish formatting your document before recording.
- 12. After required steps are completed in Simplifile, return to the eRecording screen in AIM+ to view the status of your submitted document(s).
- 13. Users can check status of a package by clicking the Refresh icon on the main *eRecording* screen.
- 14. Details of an already sent package can be viewed by a user, by double-clicking on a package row. This will display *Simplifile Package Details* in read-only mode, with latest information retrieved from Simplifile.

Note: Status Reason in the Document Details is displayed as received from Simplifile.

SureClose documents will have same rules applied as implemented in the **Documents** Data Entry group.

Only PDF files are currently supported for the recording document(s).

369 eF	0 : eRecord	ing										ſ@
Ch	oose the Reco	rding partner Simpl	ifile		¥							
	Created	Package	No. of Docum	Status	Status Date	County and St	Organization	Total Rec Fee	Submission Date	Received Date	Last Updated On	Last Updated By
₽	8/6/2019	3690PKG20190	2	RECORDED	8/6/2019 11:06	Harris, TX	AIM Test	\$56.00	8/6/2019 11:05:	8/6/2019 11:0	8/7/2019 11:17:	
	8/6/2019	3690PKG20190	1	RECORDED	8/6/2019 6:07:	Harris, TX	AIM Test	\$32.00	8/6/2019 6:05:5	8/6/2019 6:06:	8/6/2019 9:25:2	
	8/5/2019	3690PKG20190	1	RECORDED	8/5/2019 10:30	Harris, TX	AIM Test	\$32.00	8/5/2019 10:29:	8/5/2019 10:2	8/6/2019 9:26:1	
	8/5/2019	3690PKG20190	1	REJECTED	8/5/2019 10:28	Harris, TX	AIM Test	\$16.00	8/5/2019 10:27:	8/5/2019 10:2	8/5/2019 10:28:	
	8/5/2019	3690PKG20190	1	REJECTED	8/5/2019 10:22	Harris, TX	AIM Test	\$16.00	8/5/2019 10:22:	8/5/2019 10:2	8/5/2019 10:23:	

# 8.2 Policy Transmittal

### **Using the Select All Checkbox**

A **Select All** checkbox has been added to the *Policy Transmittal* screen to give you the ability to select all or deselect all policies if needed.

Transmittal : Policy Transmittal Policy Transmittal								A CONTRACTOR
Policy Transmittal								*
Underwriter *	Agent *							
STGC Stewart Title Guaranty Company	Select All LP4321		•					
From Date *	Through Date * E-mai	l Status To						
○ Policy Date	08/14/2019 × andrea	ana.binder@stewart.com						
Manual Transmittal Folder	Only p	oolicies for File Number						
С								
URL  f http://test-prism_stewart_com/EPB/EPBPackageBeceip	/er/PackageReceiver.asmy							
		Search Clea	ir					
Policies								*
Agent File Number Transaction Type	Policy Number 1	Original Policy Cou Number Cod	unty de State	PolicyDate	Liability	Additional Liability	Reissue Liability	Gross Premium

## 8.2 Defects

The following defects were addressed in AIM+ 8.2:

#### Shipping

• The UPS registration process in AIM+ no longer fails if a company name is longer than 35 characters.

# 8.2.1 Transmitting Policies

In this patch release, the **Policy Property Type** field has been updated to provide more accurate reporting when transmitting policies to *Stewart Title Guaranty Company*; this includes the ability to also transmit policies for both *Residential* and *Commercial* properties.

#### **Transmitting New Policies**

When transmitting a new policy, the **Policy Property Type** field in the *Policies* section will now be required. If needed, you can set a default value for this field. For more information, refer to <u>Setting Up a Property Policy Type Default</u>.

Selecting **Stewart Title Guaranty Company** as the underwriter, now displays two new options in the **Policy Property Type** field, *Residential* and *Commercial*.



This change does not apply if any other underwriter is selected.

Total File Premium:	Not Transmitted Policy: NEW POLICY	
\$0.00	Underwriter *	Agent * Transaction Type * Total Premium
NEW POLICY	STGC Stewart Title Guaranty Company  Form Name *	O60062         N         New         ¥         \$0.00           Policy *         Covered Party *         Serial Number *
	▼ × Policy Date * Issue Date	Property *     County / State
	• × • • ×	Property   Chaffee / CO
	Lender	Agency Location *
	Liability * Gross Premium	Risk Rate UW Remittance Add'l.Liability Reissue Liability
	Premium Tax Municipality	Parish/Rate Code Agent Parish Code
	\$0.00	
	Policy Property Type * HOI	Treaty Reinsurance Code Auth. Code
	Search Tr C Commercial R Residential	Rate Neg. Reinsurance Coinsurance Reissue Policy
	Code Uescription	Selected Transaction Codes     Code   Description
		>>> <

#### Setting a Property Policy Type Default

If preferred, and for your convenience, you can set a default value for the Policy Property Type.

#### Steps

- 1. From the **Setup** menu, navigate to **Custom Layout**.
- 2. With Custom Layout open, select Policies—Policy—Policy Property Type.
- 3. With the *Policy Property Type* window open, click the **Default Value** drop-down and select an option from the list.
- 4. When finished, click **Save** to set the default.

Quick Tip

Setup Options	Siday: : Custom Layout Custom Layout Custom Layout	
<ul> <li>Company Setup</li> <li>Clastom Layout</li> <li>Clastom Layout</li> <li>Clastom Layout</li> <li>Clastom Layout</li> <li>Serrow Accounting Setup</li> <li>Serrow Accounting Setup</li> <li>Clastom Setup</li> <li>Order Setup</li> <li>Patriot Act Search Setup</li> <li>Policy Setup</li> <li>Policy Setup</li> <li>Policy Setup</li> <li>Property Setup</li> <li>Recording Setup</li> <li>elsipping Setup</li> <li>elsipping Setup</li> <li>elsipping Setup</li> <li>elsipping Setup</li> <li>Material Setup</li> <li>Underwriter Setup</li> <li>Underwriter Setup</li> </ul>	<ul> <li>○ Order Entry</li> <li>④ Order</li> <li>④ Porperties</li> <li>④ Parties</li> <li>○ Policies</li> <li>○ Policies</li> <li>○ Policy</li> <li>Underwriter</li> <li>Agent</li> <li>Property</li> <li>Folicy Property Type</li> <li>Transaction Code</li> <li>Home Office Issue</li> <li>Policy Type - Negotiated</li> <li>Policy Type - Coinsurance</li> <li>Policy Type - Coinsurance</li> <li>Policy Type - Reissue Policy</li> <li>○ Endorsement</li> <li>Transaction Code</li> <li>Home Office Issue</li> </ul>	Policy Property Type Is Required Default Value Commercial

Don't forget, if you need help setting up the default simply refer to one of our support teams who can assist.

# **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 StewartWorkPlace or TitleWorkPlace, contact Customer Care at 1.855.330.2800 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 by clicking the **Additional Learning Resources** link or navigate to the <u>AIM+ Training Center</u> 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 <u>customercare@stewart.com</u>.
- Agency Users: Please contact the Agency Support Center by phone at (844) 835-1200 or by email at <u>customercare@stewart.com</u>.