



AIM+[®] 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.

The screenshot shows the AIM+ Administrator interface. On the left is a navigation tree with categories like Security, Management, and Data Import. The main window is titled 'AIM+ Administrator : Integration Settings' and 'Integration Settings'. It features two dropdown menus: 'Select Company' (set to 'All Companies') and 'Select Integration Application' (set to 'eRecording'). Below these are 'Add', 'Delete', and 'Edit' buttons. A table lists various API keys and their values. The 'EnableSimplifile' row is highlighted in blue and has a value of 'True'.

Key	Value
BaseAddress	https://ep4-uat.erecording.com/
SimplifileGetCounties	https://test.simplifile.com/sf/rest/api/erecord/recipients?key...
SimplifileGetCountyRequirements	https://test.simplifile.com/sf/rest/api/erecord/recipients/{0}...
SimplifileCreatePackage	https://test.simplifile.com/sf/rest/api/erecord/submitters/{0}...
SimplifileGetPackageStatus	https://test.simplifile.com/sf/rest/api/erecord/submitters/{0}...
SimplifileGetBulkPackageStatus	https://test.simplifile.com/sf/rest/api/erecord/packages/bul...
SimplifileRetrievePackage	https://test.simplifile.com/sf/rest/api/erecord/packages/{0}...
SimplifileAddUpdateDocument	https://test.simplifile.com/sf/rest/api/erecord/packages/{0}...
SimplifileGetDocument	https://test.simplifile.com/sf/rest/api/erecord/documents/{0}...
SimplifileDeleteDocument	https://test.simplifile.com/sf/rest/api/erecord/documents/{0}...
EnableSimplifile	True
SimplifileConsumeToken	https://test.simplifile.com/sf/rest/api/auth/tokens/{0}/cons...
SimplifileAcquireToken	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.

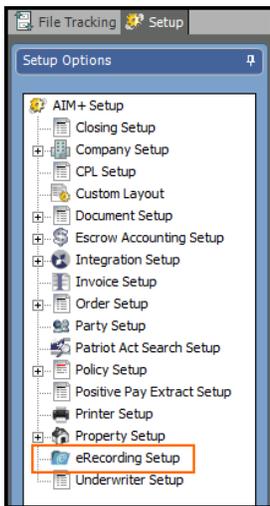
Using the eRecording service, **Simplifile**, in AIM+, your Company can submit recording documents to Simplifile and review them before submitting to counties. Your company will be able to view the latest updates on sent packages within AIM+, and (once stamped) can view Recorded documents within AIM+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

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

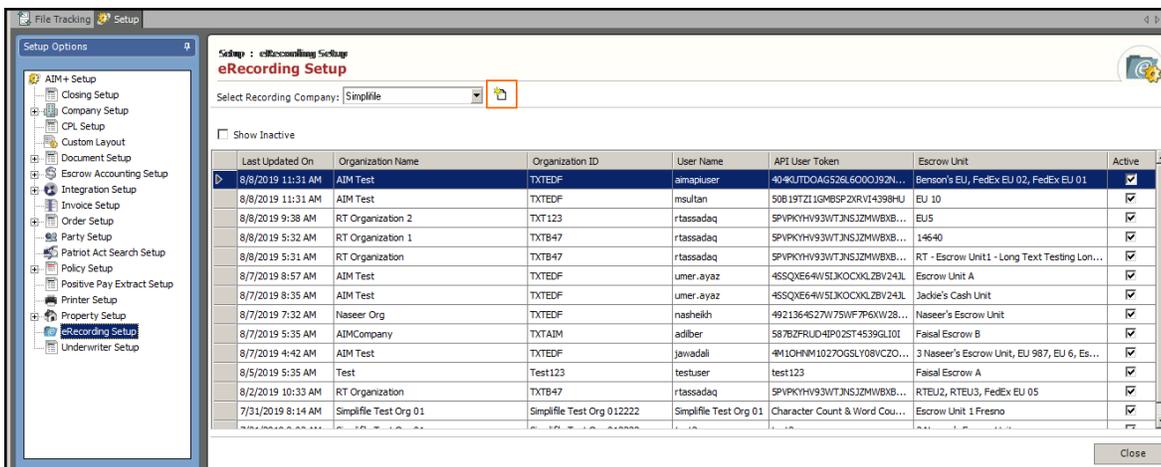
IMPORTANT NOTE: If you have permissions to Setup in AIM+, and do not see eRecording Setup, please refer to the Prerequisites section to be sure you have all requirements fulfilled before attempting to create a Simplifile account in AIM+.

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.

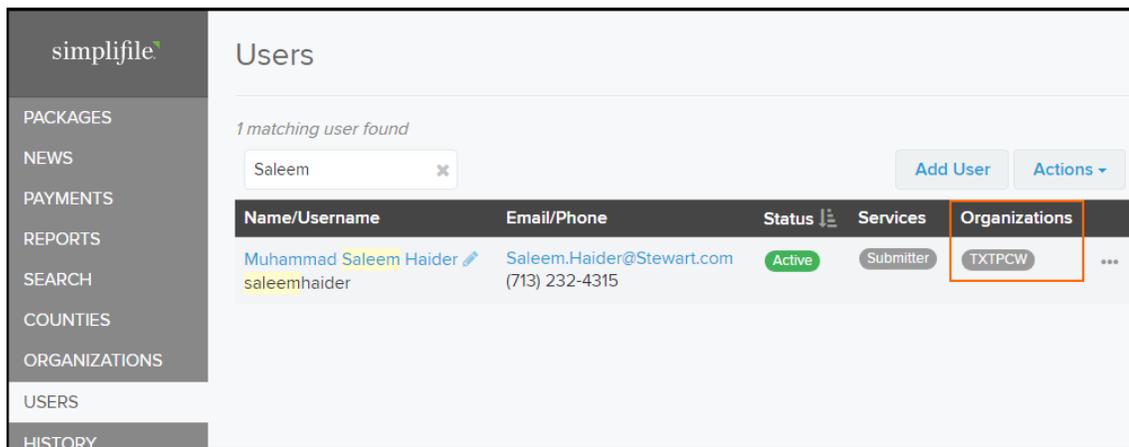


3. From the *Simplifile Account Information* pop-up, enter the required fields below:

- Organization Name
- Organization ID
- User Name
- API User Token

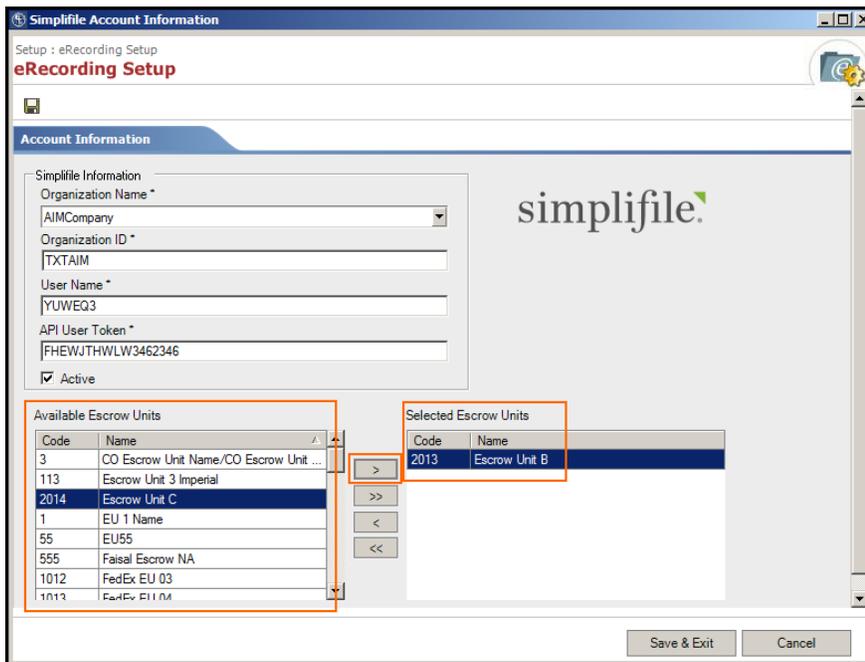
Note: Information required for these fields must be obtained from your Simplifile Account. Should you have any questions, please contact Simplifile Support.

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



4. Under *Available Escrow Units*, select the **Escrow Unit** to link the Simplifile Account.

5. Click **Save & Exit**.



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

The screenshot shows the 'eRecording Setup' window. On the left, the 'Setup Options' sidebar has 'AIM+ Setup' expanded, with 'eRecording Setup' selected. The main area displays a table of recording accounts. The 'Select Recording Company' dropdown is set to 'Simplifile'. A 'Show Inactive' checkbox is present. The table lists various organizations and their associated users and tokens.

Last Updated On	Organization Name	Organization ID	User Name	API User Token	Escrow Unit	Active
8/9/2019 1:36 PM	AIMCompany	TXTAIM	YUWEQ3	FHEWJTHLW3462346	Escrow Unit B	<input checked="" type="checkbox"/>
8/8/2019 11:31 AM	AIM Test	TXTEDF	aimapiuser	404KUTDOAGS26L6000392N...	Benson's EU, FedEx EU 02, FedEx EU 01	<input checked="" type="checkbox"/>
8/8/2019 11:31 AM	AIM Test	TXTEDF	msultan	50B19TZ11GMBSP2XR14398HJ	EU 10	<input checked="" type="checkbox"/>
8/8/2019 9:38 AM	RT Organization 2	TXT123	rtassadaq	5PVPKYHV93WJTJNSJZMWBX...	EU5	<input checked="" type="checkbox"/>
8/8/2019 5:32 AM	RT Organization 1	TXTB47	rtassadaq	5PVPKYHV93WJTJNSJZMWBX...	14640	<input checked="" type="checkbox"/>
8/8/2019 5:31 AM	RT Organization	TXTB47	rtassadaq	5PVPKYHV93WJTJNSJZMWBX...	RT - Escrow Unit1 - Long Text Testing Lon...	<input checked="" type="checkbox"/>
8/7/2019 8:57 AM	AIM Test	TXTEDF	umer.ayaz	4SSQXE64W5LJKOCXKLZBV24L	Escrow Unit A	<input checked="" type="checkbox"/>
8/7/2019 8:35 AM	AIM Test	TXTEDF	umer.ayaz	4SSQXE64W5LJKOCXKLZBV24L	Jadie's Cash Unit	<input checked="" type="checkbox"/>
8/7/2019 7:32 AM	Naseer Org	TXTEDF	nasheikh	4921364S27W75WFF7P6XW28...	Naseer's Escrow Unit	<input checked="" type="checkbox"/>
8/7/2019 5:35 AM	AIMCompany	TXTAIM	adilber	587BZFRUD4IP02ST4539GLI0I	Faisal Escrow B	<input checked="" type="checkbox"/>
8/7/2019 4:42 AM	AIM Test	TXTEDF	jawadali	4M1OHNW1027OGLY08VCZO...	3 Naseer's Escrow Unit, EU 987, EU 6, Es...	<input checked="" type="checkbox"/>
8/5/2019 5:35 AM	Test	Test123	testuser	test123	Faisal Escrow A	<input checked="" type="checkbox"/>
8/2/2019 10:33 AM	RT Organization	TXTB47	rtassadaq	5PVPKYHV93WJTJNSJZMWBX...	RTEU2, RTEU3, FedEx EU 05	<input checked="" type="checkbox"/>

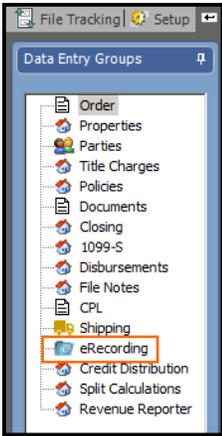
8.2 eRecording with Simplifile

Creating a Package

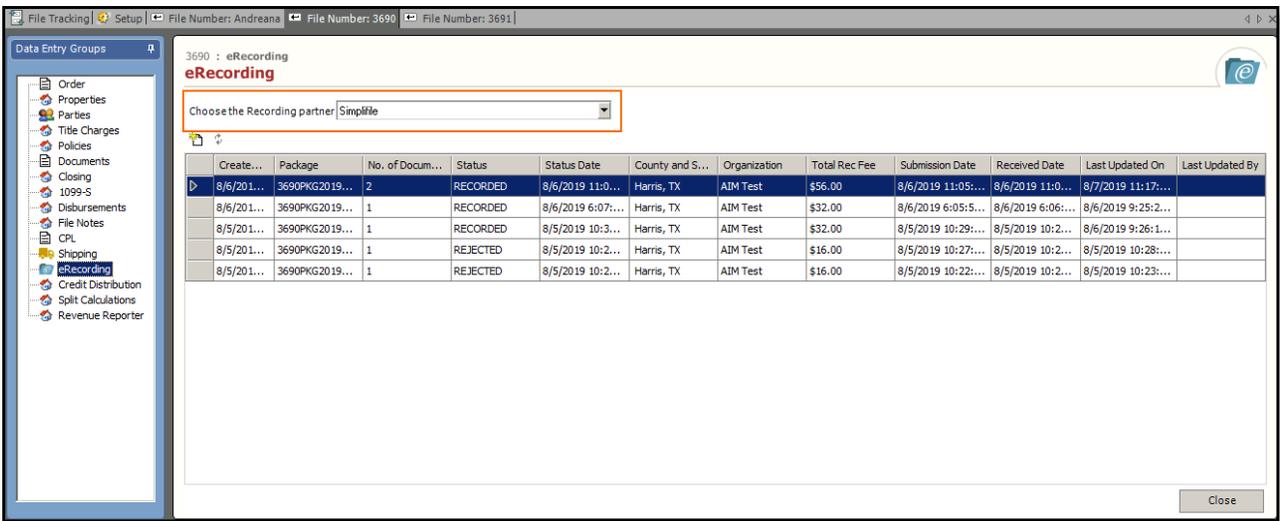
Creating a Package in AIM+ gives you the ability to view the status of your recorded Documents. Use the steps below to create a package in AIM+.

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.



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.

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.

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).

3690 : eRecording

eRecording

Choose the Recording partner | Simplifile

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.

The screenshot shows the 'Policy Transmittal' interface. At the top, there's a header 'Transmittal : Policy Transmittal' and a sub-header 'Policy Transmittal'. Below this are search filters for 'Underwriter *' (STGC, Stewart Title Guaranty Company), 'Agent *' (LP4321, Select All), 'From Date *' (08/14/2019), 'Through Date *' (08/14/2019), and 'E-mail Status To' (andrea.binder@stewart.com). There are also options for 'Manual Transmittal Folder' and 'URL'. A 'Search' button and a 'Clear' button are at the bottom of the filter section. Below the filters is a table titled 'Policies' with columns: Agent, File Number, Transaction Type, Policy Number, Original Policy Number, County Code, State, PolicyDate, Liability, Additional Liability, Reissue Liability, and Gross Premium. A red box highlights a checked checkbox in the 'Agent' column of the first row.

<input checked="" type="checkbox"/>	Agent	File Number	Transaction Type	Policy Number	Original Policy Number	County Code	State	PolicyDate	Liability	Additional Liability	Reissue Liability	Gross Premium
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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 [Setting Up a Property Policy Type Default](#).

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



Note

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

Policies

Total File Premium: \$0.00

Not Transmitted Policy: NEW POLICY

Underwriter * Agent * Transaction Type * Total Premium
STGC Stewart Title Guaranty Company 060062 060062 N New \$0.00

Form Name * Policy * Covered Party * Serial Number *
[] [] [] 0

Policy Date * Issue Date Property * County / State
[] [] Property Chaffee / CO

Lender Agency Location * ReFi Reissue
[] []

Liability * Gross Premium Risk Rate UW Remittance Add'l. Liability Reissue Liability
[] \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00

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

Available x

Code Description

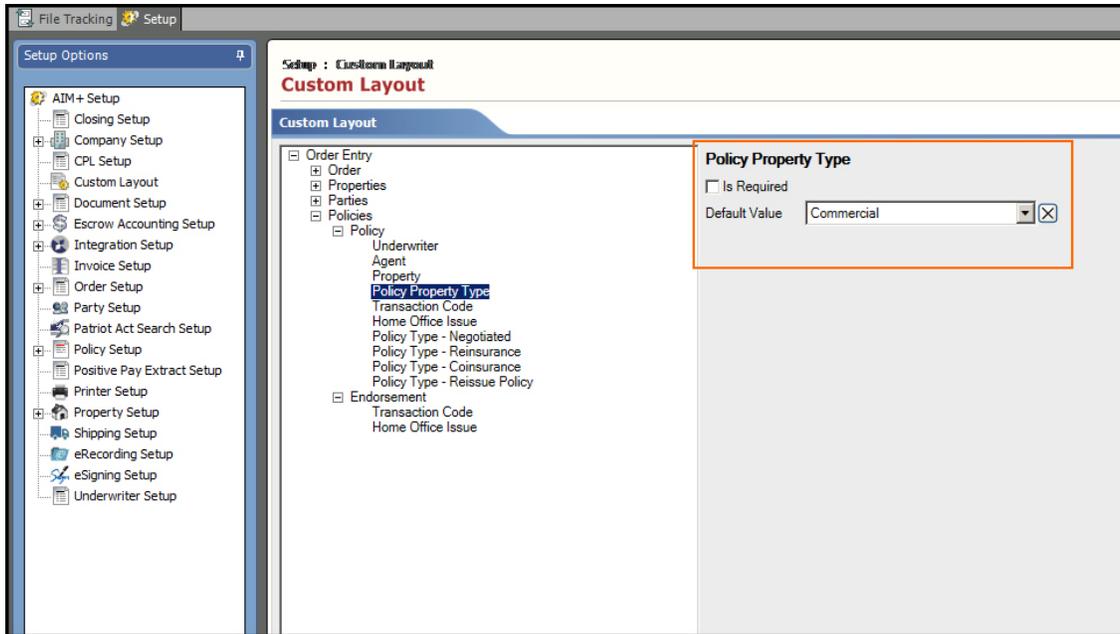
Code Description

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

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.



Quick Tip

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 customer care@stewart.com.
- **Agency Users:** Please contact the **Agency Support Center** by phone at (844) 835-1200 or by email at customer care@stewart.com.