AIM+® 8.3

Release Notes

November 15, 2019

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AIM+ 8.3 Release Notes

AIM+ 8.3 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.

Deployment Date: November 15, 2019

Prerequisites

Tasks Required to Use DocuSign Features in AIM+

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

Steps

1. Create an account with DocuSign.
2. If you do not have access to the AIM+ *Admin Tool*, contact Stewart Customer Care to help you enable DocuSign features for your Company.

Note: If the above prerequisite is not met, your Company will not see the **Create eSigning Package field** and **eSigning Packages** tab in the *Documents* module of Data Entry Groups in AIM+.

3. After your Company has been enabled to use DocuSign features, you will need to set up your DocuSign accounts in *eSigining Setup*. If you do not have access to Setup, contact Stewart Customer Care.

Setup

eSigning Setup for Electronic Signatures

A new node, **eSigning Setup**, has been added to the AIM+ Setup module so that you can set up accounts for **DocuSign**. Using the eSigning service, **DocuSign**, in AIM+, your Company can submit documents to DocuSign for electronic signature. In addition, your company will be able to view the latest updates on sent document packages within AIM+. **eSigning** gives users the ability to send individual buyers and sellers to DocuSign, along with documents for electronic signature.

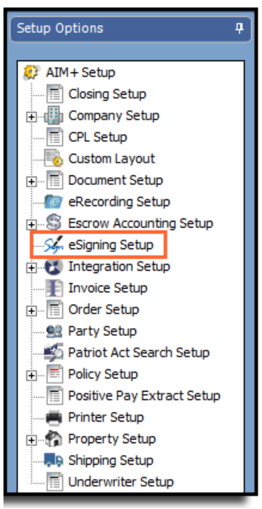
To use eSigning with DocuSign in AIM+, you must first set up the account.

IMPORTANT NOTE: If you have permissions to Setup in AIM+, and do not see eSigning Setup, please refer to the Prerequisites section to be sure you have all requirements fulfilled before attempting to set up eSigning in AIM+.

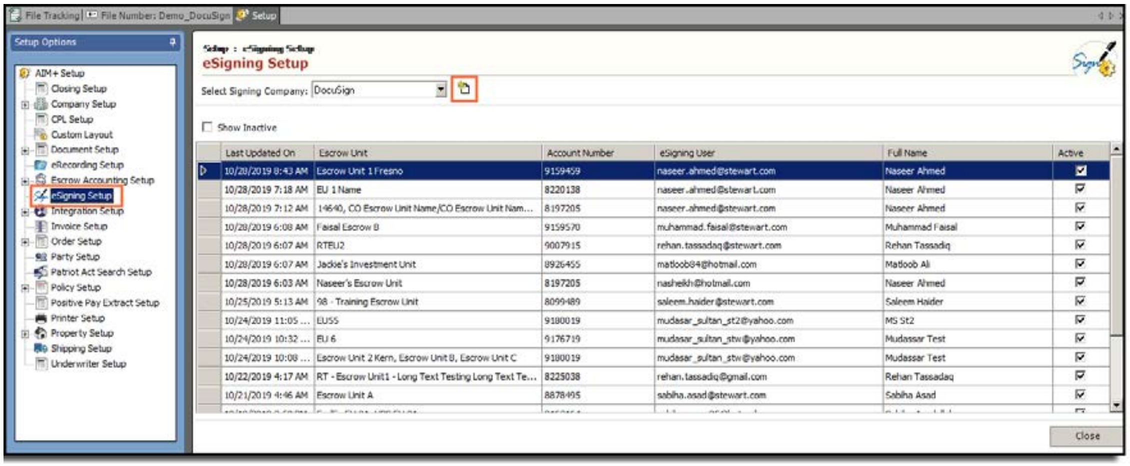
Only 1 DocuSign account can be setup per Escrow Unit.

Steps

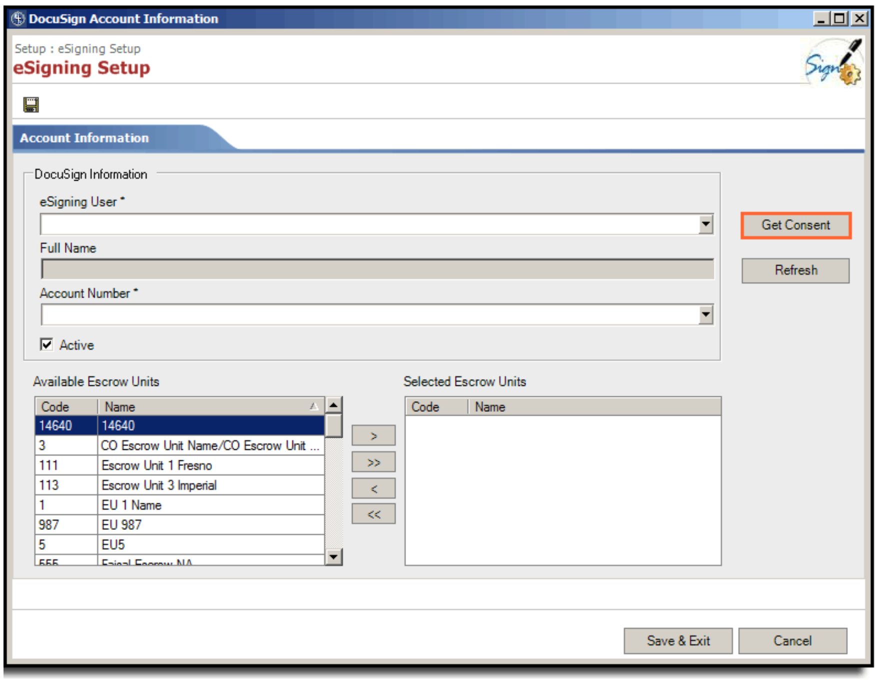
1. From *AIM+ Setup*, click **eSigning Setup**. The *eSigning Setup* screen displays.



2. From the *eSigning Setup* screen, **DocuSign** will be selected by default from the **Select Signing Company** drop-down.
3. Click the **Add New Account** icon. The *eSigning Setup* pop-up displays.

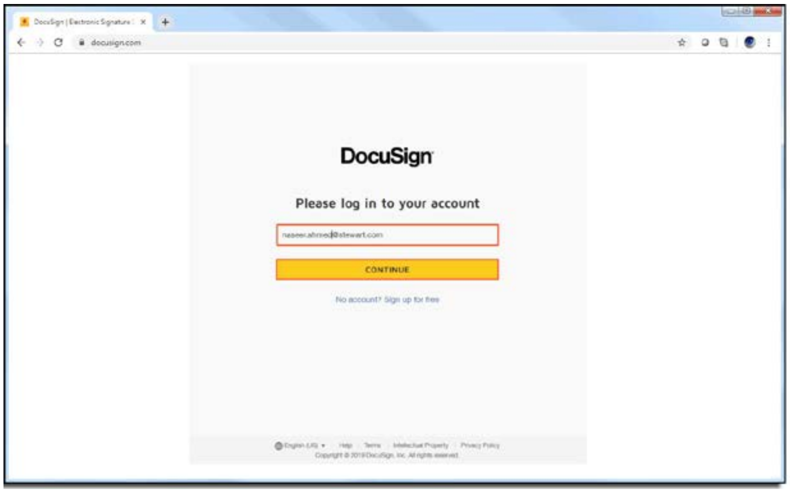


4. From the *eSigning Setup* pop-up, click the **Get Consent** button.

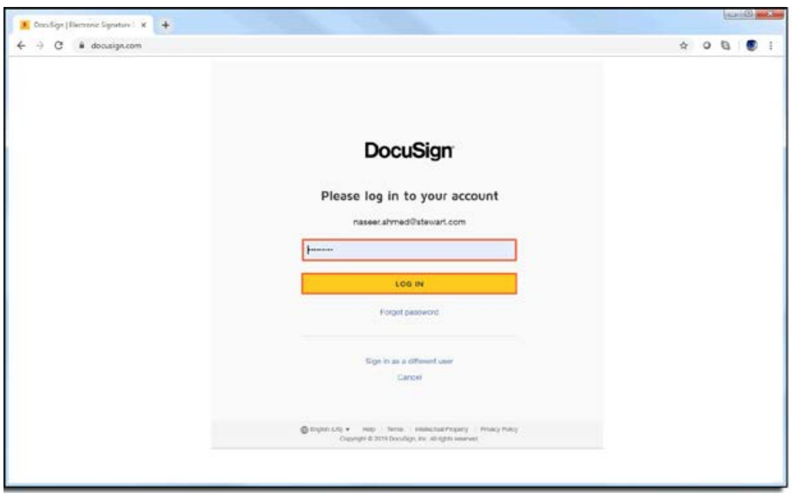


Your default browser window displays the DocuSign consent login page.

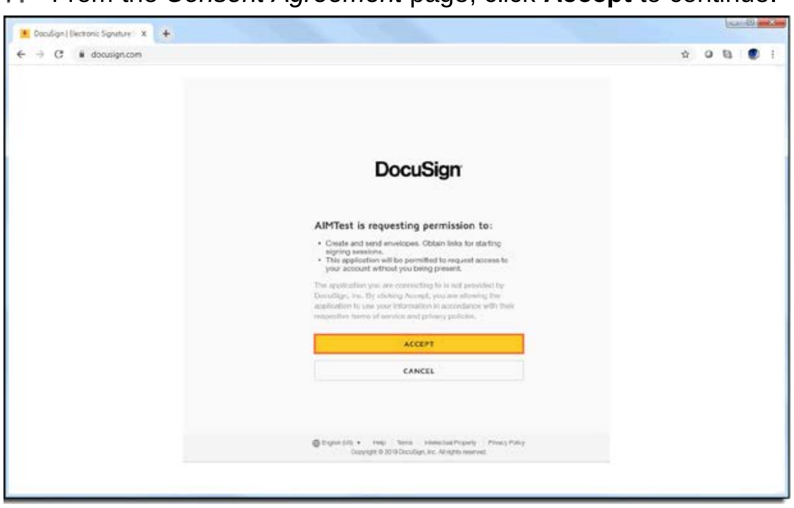
5. Enter your DocuSign username and click **Continue**.



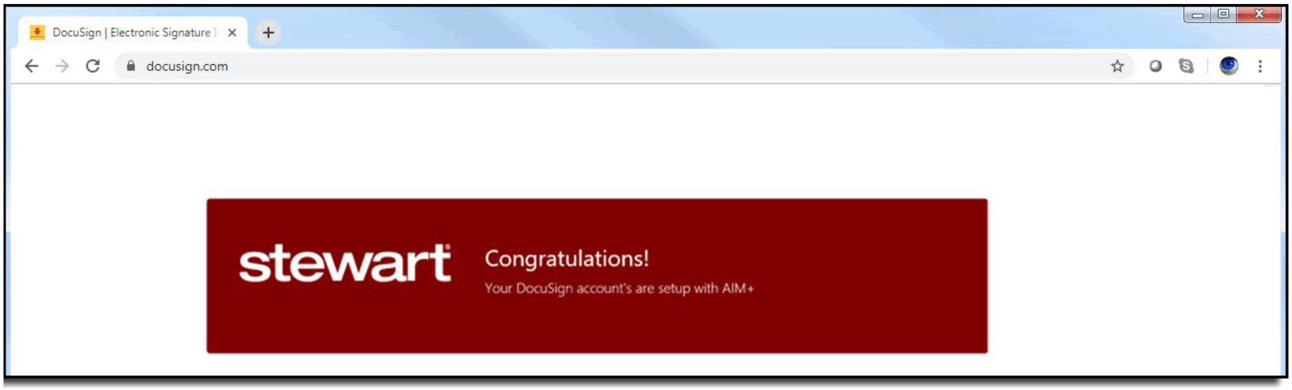
6. Enter your DocuSign password and click the **Log In** button. The *Consent Agreement* page displays.



7. From the *Consent Agreement* page, click **Accept** to continue.



A confirmation displays, showing that the consent process was successful.

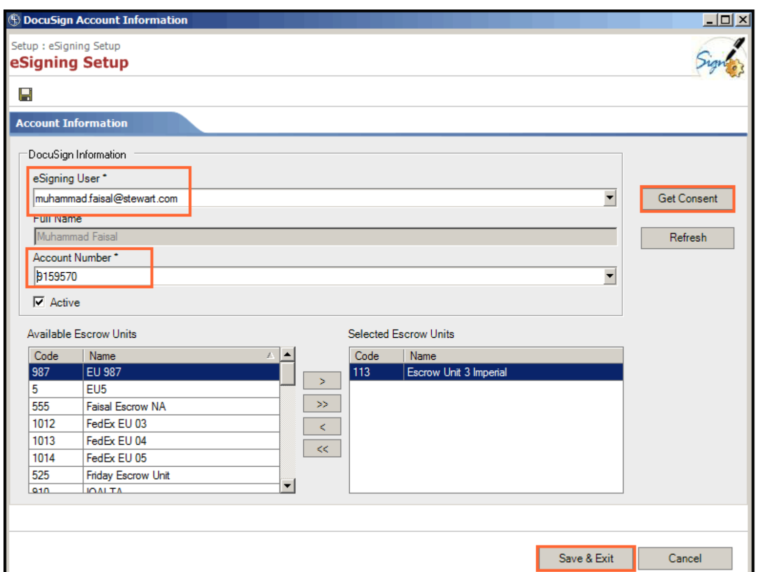


Note: In case of any error, run the consent process again by closing the Consent browser window, and clicking the Get Consent button once again from the *AIM+ eSigning Setup* pop-up or contact Stewart Customer Care.

8. Close the browser window.
9. Click the **Refresh** button so that the username displays in the eSigning User drop-down of the *AIM+ eSigning Setup* pop-up.
10. From the *eSigning Setup* pop-up, select the values from the required fields below:
    - **eSigning User** – Use the *eSigning User* drop-down to locate the authorized eSigning user email address. The eSigning User's name displays in the *Full Name* field.
    - **Account Number** – Use the Account Number drop-down to select the corresponding account number for the authorized eSigning user.

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

11. Under *Available Escrow Units*, select the **Escrow Unit** to link the DocuSign account.



12. Click **Save & Exit**.The new eSigning account displays in the grid of the *eSigning Setup* screen.

Documents

eSigning Overview

AIM+ 8.3 brings to **eSigning**, which gives you the ability to send individual buyers and sellers to **DocuSign**, along with documents for electronic signature.

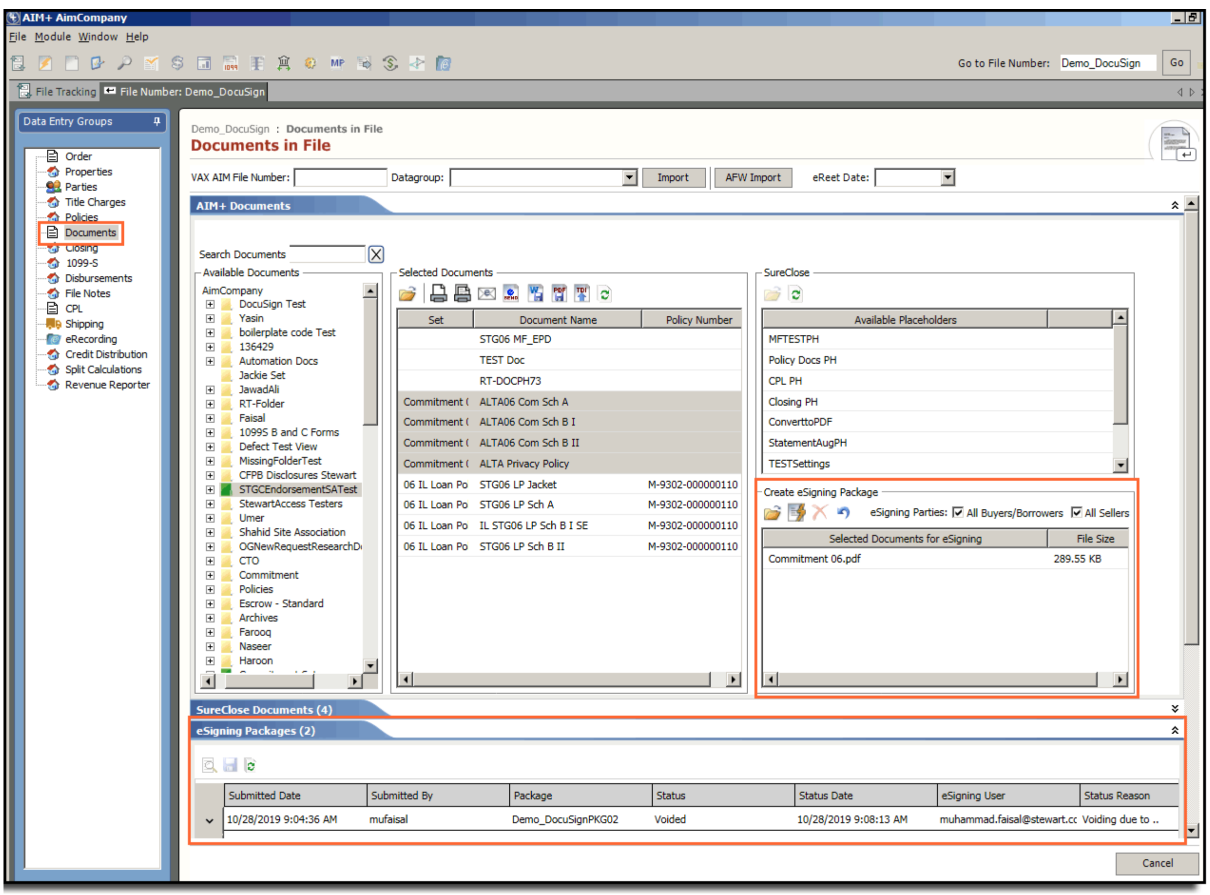
Using the new eSigning features in AIM+ give you the ability to:

- **Setup one DocuSign** account per Escrow Unit.
- **Attach documents** from AIM+, SureClose or your computer to your eSigning packages, and send them to DocuSign for **electronic signature**.
- **Individual Buyer and Sellers** are sent to DocuSign to give you a head start on preparing the eSign document.
- **Track the status** of your eSigning packages directly from AIM+.
- **Save** the signed & sent PDF's directly to your AIM+ file, with the option to save them on your computer.
- **Save Completed packages** to your computer, also viewable in your AIM+ file.

Note: Currently, **DocuSign** is the only available eSigning service integrated with AIM+.

In this release of AIM+, two eSigning sections have been added to the *Documents* screen:

- **Create eSigning Package** – Use the Create eSigning Package field to add documents in AIM+ to an eSigning package that can be sent to a eSigning service such as DocuSign.
- **eSigning Packages** tab – Use the eSigning Packages tab to view the status of sent eSigning packages and view/save signed documents.



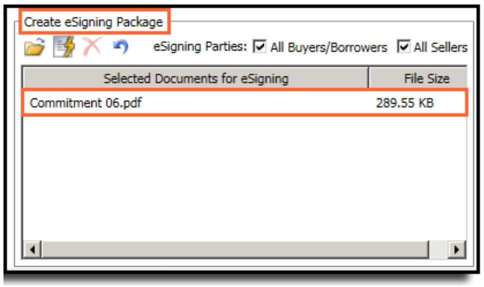
Creating an eSigning Package

Creating an eSigning package in AIM+ gives you the ability to gather and send documents from AIM+ to an eSigning service, such as DocuSign. Once the package has been sent to DocuSign, you can open your DocuSign package to add electronic signatures, and send documentation electronically.

Note: If you have not enabled eSigning for your Company in the **Admin Tool**, or logged in user does not have the permissions you will not see the new eSigning sections on the *Documents* screen.

The New Create eSigning Package Field

Use the new **Create eSigning Package** field located on the *Documents* screen to open and select documents for signature.



From the Create eSigning Package field, several icons gives you options for adding or clearing documents from your package.

Note: If there are no documents added to the Create eSigning Package field, all icons, except for **Add File From Local System**, are disabled. Adding one more more documents to the Create eSigning Package field will enable the other icons.

- **Add File From Local System**—Click this button to add documents from your computer to your eSigning package.
- **Submit Package to eSigning Service**—Click this button to send your documents added to the Create eSigning Package field to a designated eSigning service, such as DocuSign.
- **Delete Document**—Click this button to remove one document at a time from the Create eSigning Package field.
- **Reset All**—Click this button to remove all documents from the Create eSigning Package field.
- **eSigning Parties (All Buyers/Borrowers and All Sellers)**—Select the check boxes to choose the parties whose eSignatures are required for the selected eSigning package. By selecting these checkboxes, AIM+ will pull (from the *Party Information* tab in AIM+ *Parties* module) the First and Last names of the Buyers/Borrowers and/or Sellers, and Email (email address 1 or email address 2). These names then display in DocuSign, on the documents sent with the eSigning package. You can then click to add their electronic signatures from DocuSign. In this release of AIM+, only individual Buyer/Borrower and Seller **parties** can be sent to DocuSign via AIM+. At this time, Business **party** cannot be sent to DocuSign.

Note: If the **Business** checkbox is selected on a party contact in *Parties* for any Buyer/Borrower or Seller, that respective party information <u>will not</u> be sent over to **DocuSign**.

Adding Documents to an eSigning Package

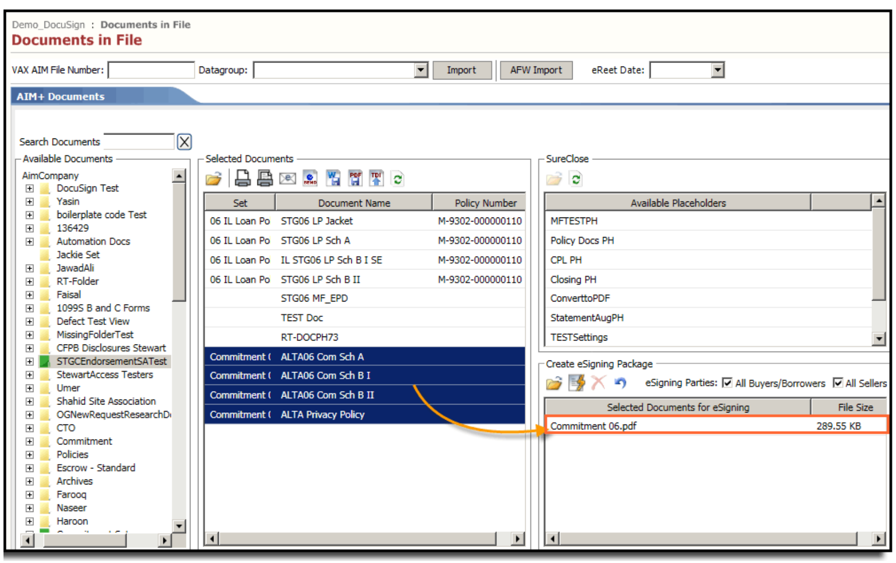
To create an eSigning package for use with the eSigning service, **DocuSign**, follow the steps below:

Steps

1. From *Data Entry Groups*, click the **Documents** module. The *Documents* screen displays.
2. From the *Documents* screen, locate the documents that need electronic signatures.
3. Add documents to the Create eSigning Package field in four different ways:
    - Drag and Drop from the *Selected Documents* section.
    - Drag and Drop from the *SureClose Documents* tab.
    - Drag and Drop from your *local computer*/network shared drives (Citrix Enviornment).
    - By clicking the **Add File from Local System** button on the Create eSigning Package field.

Note: If a set of documents is selected from the *Selected Documents* section of the Documents screen, all documents will combine into one PDF uner the Create eSigning Package field.

If you Drag and Drop from the *Selected Documents* section, the files display in PDF format in the *Create eSigning Package* field. However, if you Drag and Drop from the *SureClose Documents* tab or your *local drive/network shared drive*, four file types are allowed: **Word**, **Excel**, **Powerpoint** and **PDF** (.pdf, .doc, .docx, .xls, .xlsx, .ppt, and .pptx).

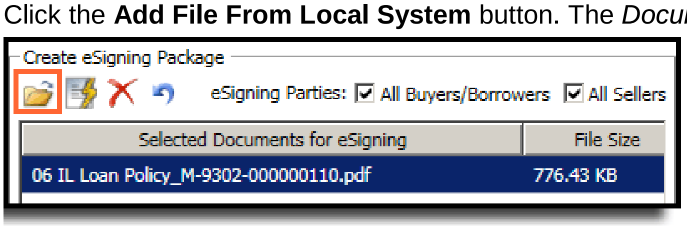


Adding Documents Using the Add File From Local Button

To add a document from your computer to an eSigning package, follow the steps below:

Steps

1. From *Data Entry Groups*, click the **Documents** module. The *Documents* screen displays.
2. From the *Documents* screen, locate the documents that need electronic signatures.
3. Click the **Add File From Local System** button. The *Documents Library* pop-up displays.



4. From the *Documents Library* pop-up, locate the file from your computer that you want to add to the eSigning package.

Note: Currently, you can only add the following file types to eSigning packages in AIM+: **Word, Excel, Powerpoint** and **PDF**.

5. Click **Open**. The file name displays in the Create eSigning Package field.

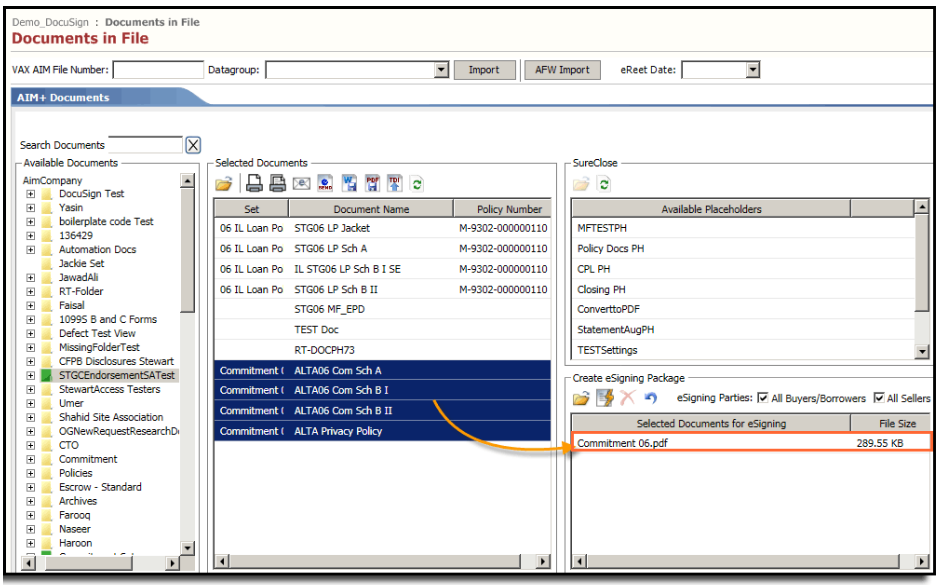
Note: Documents added to the Create eSigning Package field can be viewed by double clicking on the document name.

Adding Documents Using Drag and Drop

To Drag and Drop documents from the Documents screen to your eSigning package, follow the steps below:

Steps

1. From *Data Entry Groups*, click the **Documents** module. The *Documents* screen displays.
2. From the *Documents* screen, locate the documents that need electronic signatures.
3. Click to select your document from the *Selected Documents* section, the *SureClose Documents* tab, or from your local/network drive, **Drag and Drop** the document(s) into the **Create eSigning Package** field. The file name displays in the *Create eSigning Package* field.



Note: Currently, you can only add the following file types to eSigning packages in AIM+: **Word, Excel, Powerpoint** and **PDF**.

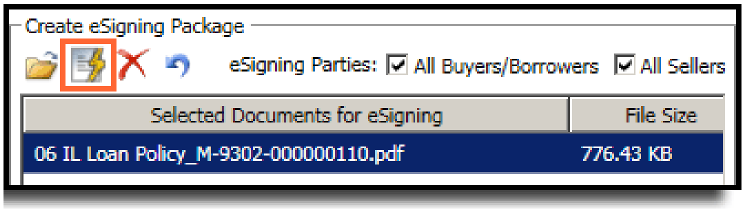
Documents added to the Create eSigning Package field can be viewed by double clicking on the document name.

Submitting an eSigning Package

After adding documents to your eSigning package, follow the steps below to submit the package to DocuSign.

Steps

1. Click the **Submit Package to eSigning Service** button. The *DocuSign* website displays, showing the package that has been submitted. A message also displays in AIM+, stating that the eSigning package was successfully submitted.



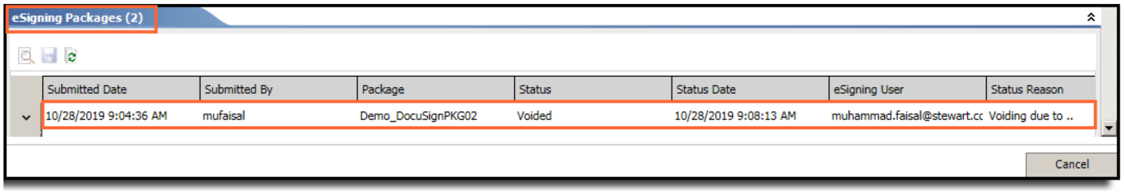
2. From *DocuSign*, add the required electronic signatures holder(s) and submit as you normally would with this eSigning Service. The status of your sent eSigning package displays in AIM+, on the eSigning Packages tab.

Note: An eSigning package submitted from AIM+ is in **Draft** mode. You can add/edit documents, recipients and signature holder(s) before submitting this package for signing on the DocuSign portal.

The total size of a package or a single document cannot be more than **25MB.**

Using the eSigning Packages Tab

Use the **eSigning Packages** tab to view the status of sent eSigning packages. You can also use this tab to click and save signed PDFs after they have been sent by DocuSign.

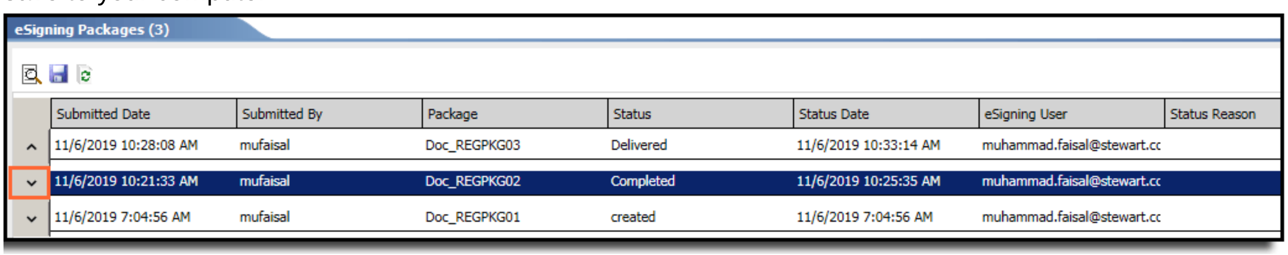


- **View Package in eSigning Portal**—Click this button to view the eSigning package on the *DocuSign* portal. If no package is selected, this button is disabled.
- **Save**— The Save button becomes enabled when you select a document package on the *eSigning Packages* tab. Click the Save button to save signed documents to your computer.
- **Refresh**— Click this button to receive the latest status of your sent eSigning packages.

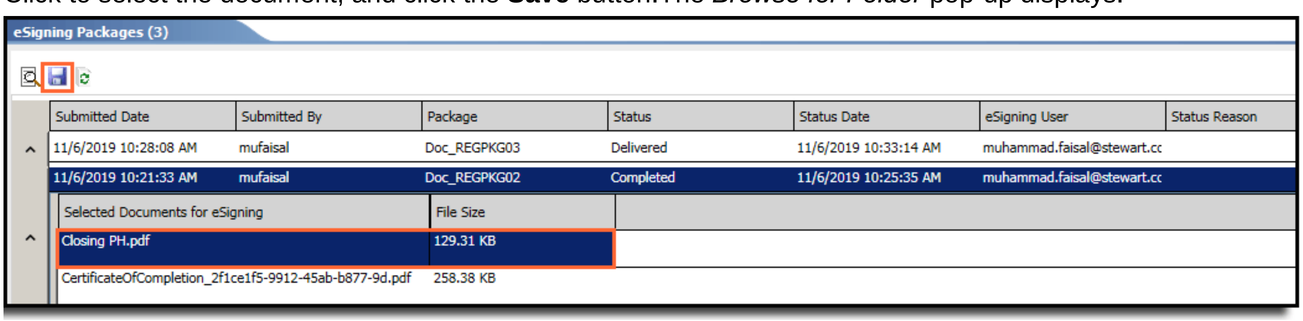
Saving PDFs from the eSigning Packages Tab

After sending an eSigning Package for electronic signature to DocuSign, and upon receiving confirmation that the eSigning package is **Completed**, you have the ability to save the sent eSigning Package with electronic signatures to your local/network drive.

1. From *Data Entry Groups*, click the **Documents** module. The *Documents* screen displays.
2. From the **eSigning Packages** tab, click to select the eSigning package (with a status of **Completed**) that you want to save to your computer.



3. Click the **downward arrow**. The signed documents display by file name.
4. Click to select the document, and click the **Save** button.The *Browse for Folder* pop-up displays.



5. From the *Browse for Folder* pop-up, navigate to the location to save your file and click **OK** when finished.
6. Double-click the document to view the signed documents from AIM+.

Defects

The following defects were addressed in **AIM+ 8.3**:

Stewart Access Policies

- The Policy Property Type is now enabled for Stewart Access-transmitted endorsements.

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.

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