AIM+ 9.0

Release Notes
August 20, 2021

Table of Contents

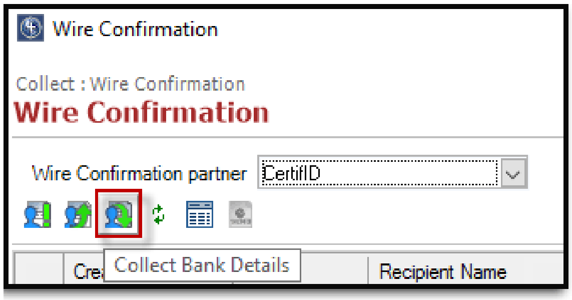
AIM+ 9.0 Release Notes

AIM+ 9.0 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.

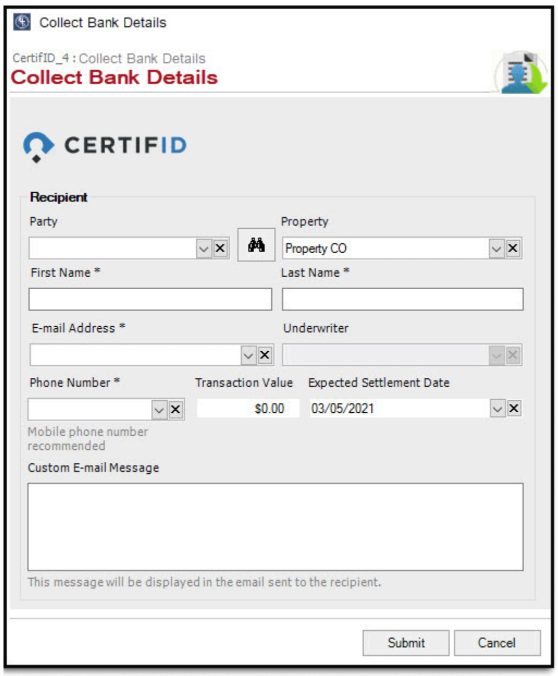
Deployment Date: August 20, 2021

Collecting Bank Details

A new **Collect Bank Details** button has been added to the **Wire Confirmation** screen.



A new screen has been added to the **Wire Confirmation** module for **Collect Bank Details**, allowing you to collect your party's bank details or request recipient details.



To use the **Collect Bank Details** feature, you will be required to have an existing **AIM+** account setup with **CertifID Account**.

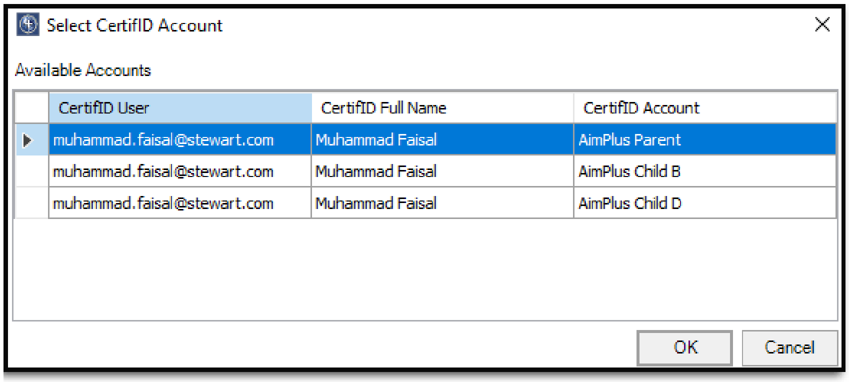
Use this request type to securely collect bank account details needed to complete a wire transfer.

Follow the steps below to view or collect bank details for a selected wire with CertifID.

Steps

1. From *AIM+*, after creating a new order, or opening an existing order in AIM+, click the **Disbursements** module.
2. From *Disbursements*, click **Wire Confirmation**. The **Wire Confirmation** screen displays.
3. From the *Wire Confirmation* screen, click the **Collect Bank Details** button. The **Collect Bank Details** screen displays the file's transaction details with CertifID.

If you have multiple active **CertifID** accounts configured in **AIM+** Setup, the following pop-up displays after clicking the *Wire Confirmation* screen, asking you to make an account selection prior to opening the **Collect Bank Details** screen:



Collect Wiring Info (TWP & SWP)

You can now receive collection request statuses from **CertifID** and store the received information into the database. If the received request status displays as **CertifID** (Completed), the received **CertifID** documents of request will be uploaded to ECM.

Status Update for Collect Wiring Info

Prerequisites: At least one **CertifID** Collect request from **AIM+** needs to be submitted to **CertifID** through **AIM**

Once the package is created and submitted to **CertifID** from **AIM+**, **CertifID** verify their identity and then ask them for their account information. Once they have provided their account information it will be available for you to view in your **Wire Confirmation** screen.

Send Collect Wiring Info Documents to SureClose

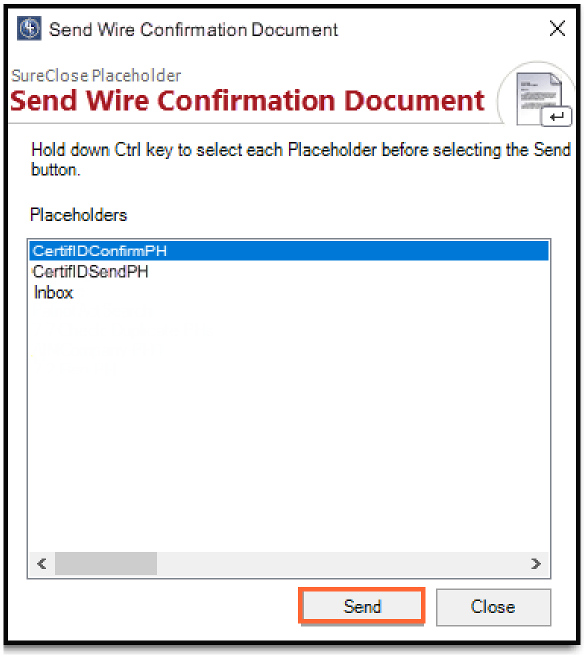
Prerequisites: You will need to access the **Wire Confirmation Setup** module and the **Wire Confirmation** button on the Disbursements screen. The **CertifID** placeholder should be configured. At least one collect request should be selectable with the **CertifID** status on UI where **CertifID** request are listed.

A new **Send Document to SureClose** button is enabled once the existing collect request is selected with the *CertifID* status. After clicking the **Send to SureClose** button, the **Send Wire Confirmation Document** pop-up displays. All configured placeholders on the **Wire Confirmation Setup** screen display on the pop-up.

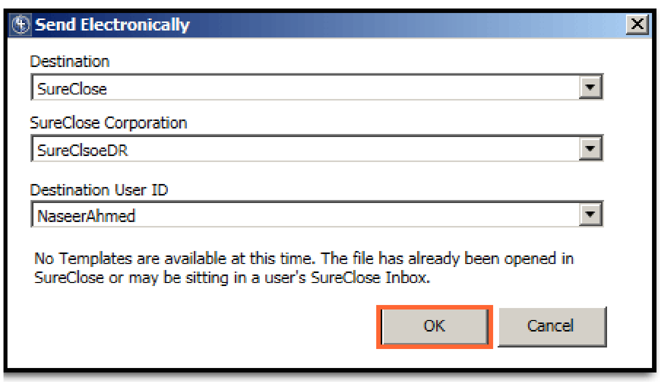
Follow the steps below to send wire confirmation documents to SureClose from AIM+.

Steps

1. From *Disbursements*, click **Wire Confirmation**.
2. From the Wire Confirmation screen, click Send to SureClose. A pop-up displays, with all SureClose placeholders.
3. From the **Send Wire Confirmation Document** pop-up, select the SureClose placeholder to send the document to.



4. After selecting the placeholder(s), a pop-up displays for you to select the destination. Use the drop-down arrows to select the destination and other required values.

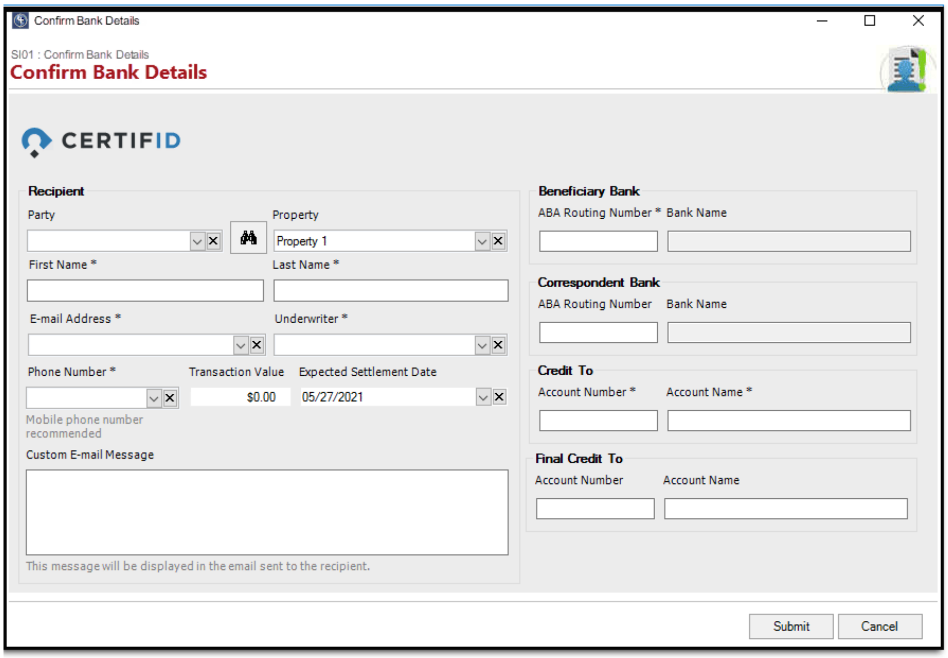


5. Click **OK** to proceed with transmitting **CertifID** document to **SureClose** file process.

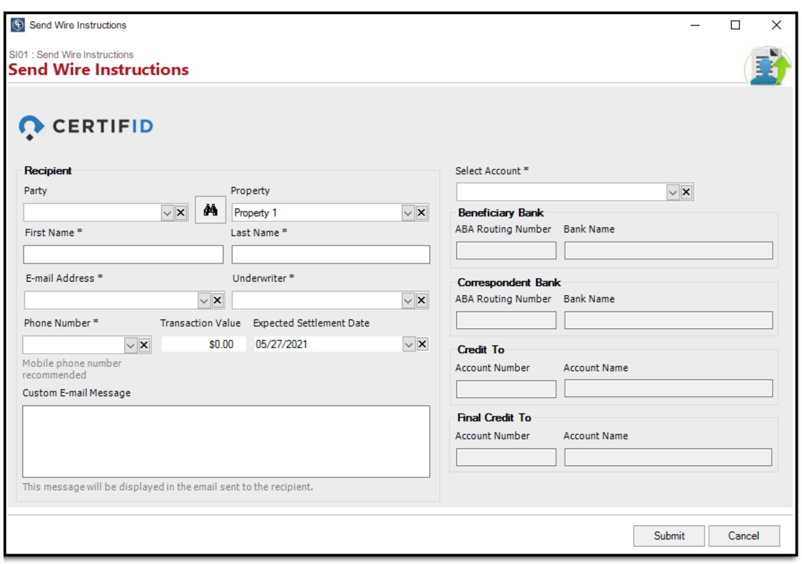
Renamed Screens and Tooltips on CertifID Portal

Several labels were updated and renamed on the CertifID screens within the **Wire Confirmation** module.

The **Confirm Wiring Info** screen and tooltip have been renamed, **Confirm Bank Details**.



Additionally, the **Send Wiring Info** screen and tooltip have been renamed, **Send Wire Instructions**.



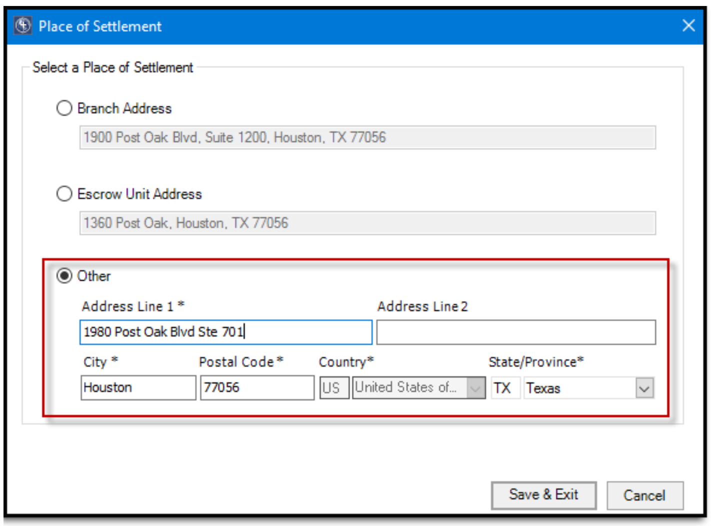
New Fields on Place of Settlement for ALTA Statements

New fields have been added in **Place of Settlement** to enter address information. Previously, a single-line textbox was used to gather address information in **Place of Settlement**, which caused printing layout issues. Now, individual fields such as **Address** lines, **Postal Code**, **City** and **State** have been added to avoid printing layout issues with the **ALTA** statements.

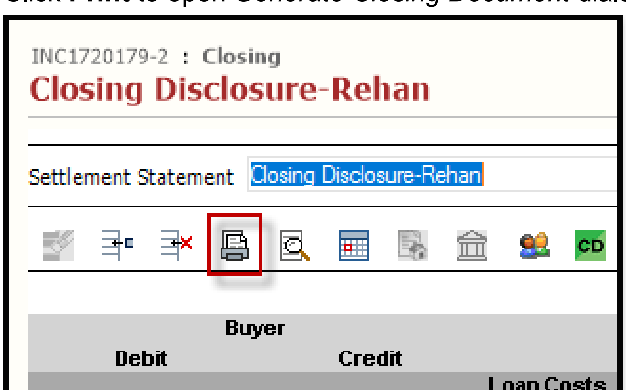
Note: At this time, the new fields added to Place of Settlement for physical address are only available on **Closing Settlement Statements**.

Steps

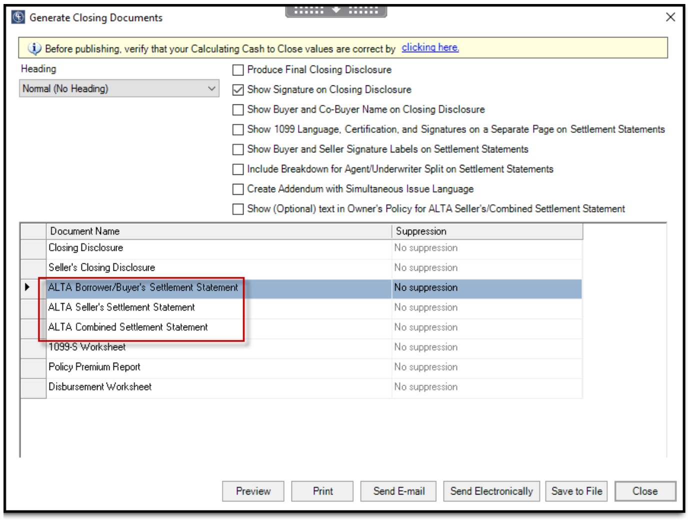
1. From AIM+ Closing, select **Closing Disclosure** as the Settlement Statement.
2. Click on button to open **Place of Settlement** dialog box.
3. Select the *Other* option in Place of Settlement and provide all required address information in the new address fields.
4. Save your changes in dialog box.



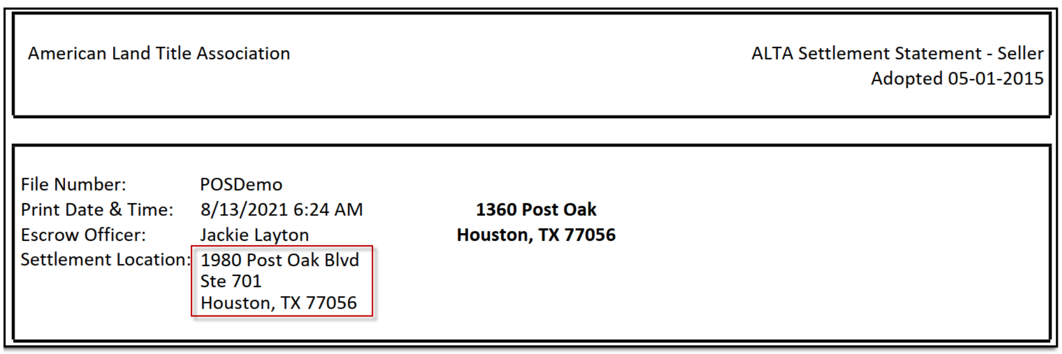
5. Click **Print** to open *Generate Closing Document* dialog box.



6. Select any **ALTA** statement and hit **Preview** or any button to print the **ALTA** statement.



7. Once the **ALTA** statement is open for preview, the selected **Place of Settlement** address will print in front of the settlement location. This address information should print in the same format for each option in the Place of Settlement pop-up.



American Land Title Association

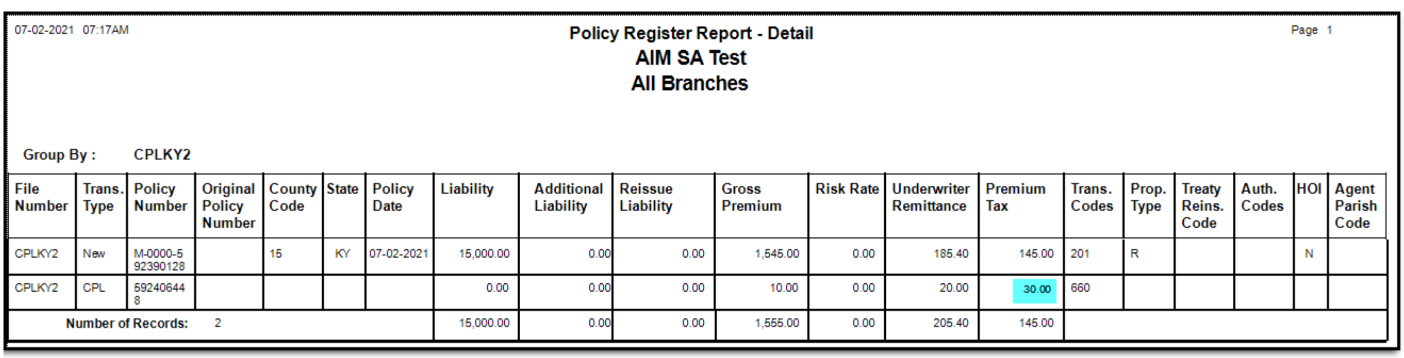
ALTA Settlement Statement - Seller
Adopted 05-01-2015

File Number: POSDemo
Print Date & Time: 8/13/2021 6:24 AM
Escrow Officer: Jackie Layton
Settlement Location: 1980 Post Oak Blvd
Ste 701
Houston, TX 77056

1360 Post Oak
Houston, TX 77056

CPL Premium Tax Displays on Policy Register Report

With this release of **AIM+**, the **CPL Premium Tax** now displays under the *Premium Tax* column on the **Policy Register Report**.



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Policy Register Report - Detail
AIM SA Test
All Branches

Page 1

Group By : **CPLKY2**

File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	Underwriter Remittance	Premium Tax	Trans. Codes	Prop. Type	Treaty Reins. Code	Auth. Codes	HOI	Agent Parish Code
CPLKY2	New	M-0000-5 92390128		15	KY	07-02-2021	15,000.00	0.00	0.00	1,545.00	0.00	185.40	145.00	201	R			N	
CPLKY2	CPL	59240644 8					0.00	0.00	0.00	10.00	0.00	20.00	30.00	660					
Number of Records:	2						15,000.00	0.00	0.00	1,555.00	0.00	205.40	145.00						

Fields No Longer in Use Hidden on Policies Screen

The following fields on the **Policies and Endorsements** screens have been hidden and are no longer in use, for all policies, including Stewart Access (SA) and Non-Stewart Access policies:

- Parish/Rate Code
- Agent Parish Code
- Treaty Reinsurance Code

Note: The fields listed above will only be hidden on the **Policies** and **Endorsements** screens. These fields will continue to display in Reports (i.e. **Policy Register Report** and **Transmittal Report**).

Bug Fixes

The following **Bug Fixes** were resolved in **AIM+ 9.0**:

- **D285046** - One to One mapping is now maintained between **AIM** user and **CertifID** user.

Additional Information

Accessing AIM+

If you access AIM+ through the *Citrix* environment, **AIM+** is automatically updated to the latest version when you log in 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.