AIM+ 9.3

Release Notes
June 10, 2022

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AIM+ 9.3 Release Notes

AIM+ 9.3 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: June 10, 2022

AIM+ Setup

New! Additional Type of Funds

In **AIM+** File, under *Disbursements*, users are now able to provide **Type of Funds** if receipt transaction type is selected on either the *Record a Manual Transaction* or the *Record and Post a Manual Transaction to Escrow Accounting* screens. After creating a manual transaction, the provided Type of Fund will be displayed with posted transaction on *Disbursement's* screen and Disbursement Worksheet.

Steps

1. Login to **Citrix**.
2. Open the **AIM+** File.
3. Go to **Disbursements** Module**.**
4. Select a non-posted line item from the **Receipts** list and click **Record a Manual Transaction** or **Record and Post a Manual Transaction to Escrow Accounting** icon from the menu bar.
5. Select "**RC**" in the Transaction Type to display the *Type of Funds* dropdown.
6. Select any following options from *Type of Funds* dropdown:
   - Cash
   - Cashier's Check
   - Company Check
   - Money Order
   - Personal Check
   - Traveler's Check
   - Official Check
   - Other

7. After creating the transaction, the provided *Type of Funds* will be displayed with created transaction on the *Disbursements/Receipt* section.

8. On the Disbursement Worksheet, similar information will be displayed.

9. Similar steps can be performed for "*Record and Post a Manual Transaction to Escrow Accounting*".

New! Ability to Consume Data for Settlement Lines Related to Property Tax

New shipped elements are available for each field of **Settlement Lines** for City or County Property Tax including Seller Debit and Credit in **AIM+** Setup/Document/Elements.

Each set of elements will only display the data for relevant Settlement Line, such as 406 – City Property Tax – Seller Credit, 407 – County Property Tax – Seller Credit, 510 – City Property Tax - Seller Debit, and 511 – County Property Tax – Seller Debit.

Steps

1. Login to **Citrix**.
2. Open the **AIM+ Setup/Document Setup/Document Templates**
3. Either create a new document or open an existing document.
4. On Document or Setup Boilerplate, click **Insert Element** and select new elements which are related to Property Tax.
5. Select the applicable element for the relevant Settlement line as mentioned below:

Settlement Line Number	Settlement Line Title	New Elements
406	City Property Tax – Seller Credit	ClosingCityPropTaxSellCrBaseAmount ClosingCityPropTaxSellCrFromDate ClosingCityPropTaxSellCrToDate ClosingCityPropTaxSellCrProrateForDays ClosingCityPropTaxSellCrPerDiemAmount ClosingCityPropTaxSellCrLineAmount
407	Country Property Tax – Seller Credit	ClosingCountyPropTaxSellCrBaseAmount ClosingCountyPropTaxSellCrFromDate ClosingCountyPropTaxSellCrToDate ClosingCountyPropTaxSellCrProrateForDays ClosingCountyPropTaxSellCrPerDiemAmount ClosingCountyPropTaxSellCrLineAmount
510	City Property Tax – Seller Debit	ClosingCityPropTaxSellDbBaseAmount ClosingCityPropTaxSellDbFromDate ClosingCityPropTaxSellDbToDate ClosingCityPropTaxSellDbProrateForDays ClosingCityPropTaxSellDbPerDiemAmount

Settlement Line Number	Settlement Line Title	New Elements
		ClosingCityPropTaxSellDbLineAmount
511	Country Property Tax – Seller Debit	ClosingCountyPropTaxSellDbBaseAmount
		ClosingCountyPropTaxSellDbFromDate
		ClosingCountyPropTaxSellDbToDate
		ClosingCountyPropTaxSellDbProrateForDays
		ClosingCountyPropTaxSellDbPerDiemAmount
		ClosingCountyPropTaxSellDbLineAmount

6. Save and publish the document or boilerplate.
7. Open the **AIM+** File
8. Create the *Settlement Line* as stated in above table according to requirement.
9. Go to the *documents* and open the document.
10. If Elements are placed in document, elements will be replaced with *Settlement Line Fields* value.
11. If Elements are placed in boilerplate, then enter boilerplate code in the *document* field. Once boilerplate code executes, in boilerplate content the elements will be replaced with Settlement Line Fields value.

Bug Fixes

The following **Bug Fixes** were resolved in **AIM+ 9.3**:

- **D2386568** – Users no longer receive an invalid access token error from **DocuSign** and system will automatically renew access token without any user indication until the Refresh token is valid. User must take reconsent if refresh token has expired which expires after several days of non-activity with **DocuSign**.

- **D2319947** – Seller tax credits percentage value no longer convert into decimal value.

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.