

AIM+ Batch Tracking

Overview

You can move one or more files from one file tracking location to another, update file(s) status, and add file notes using Batch Tracking. When you move a file from one location to another, AIM+ records a file tracking history record for each file that was moved to the selected target tracking location.

Note: An asterisk (*) indicates a required field or selection.

Steps

1. From the *File* menu, click **Batch Tracking**. Or you can click the **Batch Tracking** icon ¹ from the *File Tracking* screen.

Note: You can also use Ctrl+B to access Batch Tracking.

- 2. On the File List section, you can use the following fields:
 - File Number— Enter a valid file number. You can add any number of files using the Add button.
 - Add— Adds the file number to the FileList.
 - Remove Selected—Removes selected files from the File List.
 - Clear List— Clears the File List.

Batch Tra	cking	
File List —		
File Numbe	91	
18001		Add
1417		
, Files: 1	Remove Selected	Clear List

3. Select the Update File Status check box to enable Update File Status drop-down.



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4. Choose the File Status from the drop-down.

File Status			
Update Files to Status		•	
	Addendum Requested		
- File Notes	Assigned to ECS		
The redes	Cancelled		
Add File Notes to Files	Certified by Appraiser		
	Closed		
	Closing Order Date		
	Complete		_
	CST On Hold	•	

5. Select the **Add File Notes to Files** check box to add file notes. Enter the notes in the **File Notes** text field Select the **Add File Notes to Files** check box to add file notes. Enter the notes in the **File Notes** text field.

File Notes	
Add File Notes to Files	
File moved to a different location.	A
	7

- 6. Select the Track Files to Tracking Location check box to enable File Tracking.
- 7. Select the file tracking location.

Track Files		
✓ Track Files to Tracking Location		
📮 🦢 Main Office		
Thuc		
SO Import		
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8. A message displays confirming if you want to continue. Click Yes.



9. The files are moved to a new location.

Note: You can use **Batch Tracking** to perform any of the action mentioned above. For example, you can add file notes without moving files.