Document Editor Toolbar and Keyboard Shortcut Keys

Common Toolbar Buttons

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⏮ ◀ 2 of 4 ▶ ⏭	Navigates to records (or to rows)
	Adds new party or record
💾	Saves the file, order, document, or invoice
✗	Deletes documents, elements, or parties
📌	Expands or collapses the navigation panel
🔍	Hides all data panels except the current panel
⌃	Collapses a single data entry panel
⌄	Expands a single data entry panel
	Collapses all panels within the data entry panel
	Expands all panels within the data entry panel

AIM+ Toolbar

	Opens File Tracking
	Opens a new file in Quick Data Entry
	Opens a new file in File Data Entry
	Opens File Summary / File Notes
	Opens Files Search
	Opens the Log Viewer
	Opens Escrow Accounting
	Opens Management Reports
	Opens 1099-S Reporting
	Opens Invoicing
	Opens WIMS
	Opens Setup
MP	Opens Master Project Files
	Exports real estate excise tax data

Properties Toolbar

	Add multiple sales price amounts
	View the auto-generated legal description

Parties Toolbar

👓	Finds and adds party from Party Setup
	Performs a Patriot Act Search for all parties
	Copies buyer or seller party to new party
	Opens Company Mgmt

File Tracking Toolbar

	Opens the selected file in File Data Entry
	Opens a new file in Quick Data Entry
	Opens a new file in File Data Entry
	Selects all files
	Unselects all files
🌐	Order Stewart Products and Services
	Refreshes files in select Tracking location

Keystrokes and Shortcut Keys

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Alt+Underlined Letter Tab	Selects the menu item or other label with the underlined letter
Alt+F12	Sends the TDI Commitment to the TDI FTP site as a consolidated set which is merged into one PDF file.
Ctrl+A	Copies property or party address to a party
Ctrl+C	Copies selected text to the clipboard
Ctrl+D	Delete
Ctrl+M	Opens Master Project Files
Ctrl+N	Opens a new file in File Data Entry
Ctrl+Q	Opens a new file in Quick Data Entry
Ctrl+R	Copies buyer or seller party to another party on the same order
Ctrl+V	Inserts a copy of the clipboard contents at the insertion point
Ctrl+X	Cuts selected text and places it on the clipboard
Ctrl+Z	Undo
F1	Opens Help Contents in a browser
F2	Opens File Tracking
F4	Opens Invoicing
F5	Calculates title insurance premiums and closing fees
F7	Opens File Summary/File Notes
F9	Opens Escrow Accounting
F10	Opens Policy Transmittal
F11	Opens File Search
F12	Opens Setup
Shift+Tab	Moves cursor backward to an adjacent field, button, or check box
Tab	Moves cursor forward to an adjacent field, button, or check box. Or select an option from a dropdown list

Shortcut Keys for Date Fields

+/=	Adds one day
-/_	Subtracts one day
]	Adds one month
[	Subtracts one month
T	Current date
Y	First day of current year
R	Last day of current year
M	First day of current month
H	Last day of current month

Document Editor Toolbar and Keyboard Shortcut Keys

Documents Toolbar

|	
📂	Opens selected documents in the AIM+ Document Editor
🖨	Prints the selected document
🖨	Prints all documents in the Selected Documents list
✉	Sends the selected documents as attachments in an e-mail
SEND	Electronically sends the selected documents to SureClose
PDF	Saves the selected documents in PDF file
TDI	Sends the TDI Commitment to the TDI FTP site in one PDF file
🔄	Replaces template for selected documents with most recent template from the AIM+ Template Library

Formatting Keyboard Shortcuts

Ctrl+[	Decreases size of selected text
Ctrl+]	Increases size of selected text
Ctrl+B	Applies bold formatting
Ctrl+C	Copies selected text or object
Ctrl+I	Applies italics formatting
Ctrl+Shift+T	Removes a hanging indent
Ctrl+Spacebar	Removes paragraph or character formatting
Ctrl+T	Creates hanging indent
Ctrl+U	Applies underline formatting
Ctrl+X	Cuts text or object
Ctrl+V	Pastes text or object
PB	Inserts a page break

Boilerplate Keyboard Shortcuts

Alt+B	Opens boilerplate list from within a placeholder
F3	Inserts boilerplate for code typed in placeholder
F9	Inserts degree sign within a placeholder
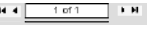
Placeholder Keyboard Shortcuts

Ctrl+Tab+Tab	Increases the indent level of text within placeholders
Ctrl+Tab	Decreases the indent level of text within placeholders
F6	Advances through custom elements, asterisks, and smart tags within placeholders

Document Editor Toolbar

💾	Saves the active document
✂	Cuts text or object
📋	Copies selected text or object
📋	Pastes text or object
↩	Removes the last action that you took
↪	Replaces the last action that you removed
Arial ▾	Changes the font type
10 ▾	Changes the font size
B	Applies bold formatting
I	Applies italics formatting
U	Applies underline formatting
T̶	Applies strike through formatting
☰	Applies bullet format to the selected text within placeholders
☰	Applies numbering format to the selected text within placeholders
☰	Increases the indent level of the paragraph
☰	Decreases the indent level of the paragraph
☰	Aligns text to the left
☰	Centers text
☰	Aligns text to the right
☰	Aligns text to both the left and right margin
🖼	Inserts an image, such as a signature, within placeholders
🔗	Inserts a hyperlink to a document in placeholders
BP	Opens the boilerplate screen to insert a boilerplate in placeholders
GRP	Groups selected text. Selected text does not break between pages

Document Editor Toolbar and Keyboard Shortcut Keys

Closing Toolbar

Icon	Description
	Clears all the information from the HUD Line and removes all related sublines
	Inserts a blank HUD Line on Page 2 or 3 after the last HUD Line shown
	Deletes blank HUD lines (except preprinted blank lines) or any HUD line inserted
	Prints the HUD Settlement Statement, HUD-1A, any attachment(s), and Closing Statements
	Displays the HUD Settlement Statement, HUD-1A and/or attachment(s) prior to printing
	View and update Closing, Proration and Disbursement Dates
	Opens the Closing Property Description screen
	Select the settlement location
	Change buyer and seller name and address on the Closing Statements

Closing Detail Screen Toolbar

Icon	Description
1 of 1	Shows the active subline record and navigates through the sublines of the selected HUD Line number
	Creates a new subline number
	Saves all subline information
	Deletes the current subline number
	Calculates title insurance premiums and closing fees with an external pricing program
	Opens the Find Party screen to search from Party Setup
	Performs a Patriot Act Search for the payee or remitter name
Jump	Press **Alt+J** to move the cursor to the Jump field

Closing Shortcut Keys

Key	Description
Enter	Highlight the HUD Line and press **Enter** to open the detail screen
Ctrl+Tab	Moves focus forward to the next HUD tab
Ctrl+Shift+Tab	Moves focus backward to the next HUD tab
Up or Down Arrow	Scroll up or down the selected HUD page
Left or Right Arrow	Move left or right on the selected HUD page

Disbursements Toolbar

Icon	Description
	Combines one or more receipts or disbursements with another receipt or disbursement group
	Separates an item from any group that includes more than one item
	Splits a single item by a fixed amount or percentage
	Removes any split that was previously made
	Prints the Disbursement Worksheet
	Displays the Disbursement Worksheet prior to printing
	Exports data from the Disbursement Worksheet into either a Quicken® or QuickBooks® file
	Prints a check for the selected payee and posts it to Escrow Accounting
	Writes an outgoing wire for the selected payee and posts it to Escrow Accounting
	Prints a receipt for the selected remitter and posts it to Escrow Accounting
	Writes an incoming wire for the selected remitter and posts it to Escrow Accounting
	Prints checks for all undisbursed items and posts the items to Escrow Accounting
	Records a manual transaction
	Creates a fee transfer
	Opens Wire Information Management System
	Places an item on hold or removes a hold
	Cancels the selected transaction
	Opens the file ledger for this file
	Recreates the disbursement worksheet directly from the HUD

Escrow Accounting Toolbar

Icon	Description
	Adds a new batch
	Removes the most current changes
	Deletes a batch
	Opens the Find Party screen to search for a party from the list of parties in Party Setup
Print	Prints the selected Escrow Accounting report
Preview	Displays the selected Escrow Accounting report prior to printing
	Exports report to Excel

Document Editor Toolbar and Keyboard Shortcut Keys

Policies Toolbar

P	Adds new Policy
E	Adds new Endorsement
	Saves policy information
	Finds policy for an agent
	Shows policy image
	Unlocks record in case of policy transmittal error
	Retransmits the policy
	Retrieves content from Title Charges and Closing
✕	Deletes the policy

Revenue Reporter Toolbar

	Saves all order data
	Prints revenue reporter details
	Shows the date the report was last revised

1099-S Toolbar

	Adds seller
✕	Deletes seller
	Saves 1099-S information
	Resets 1099-S information
	Splits reportable amounts evenly

Title Charges Toolbar

	Clears all the information from the HUD Line and removes all related sublines

Split Calculations Toolbar

	Prints split calculations
	Sends split calculations via email
	Sends split calculations electronically
	Saves split calculations as PDF

Notes

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