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# Adding and Removing Escrow Officers

Did you know that if you have access to *Party Setup* in AIM+, you can add or remove escrow officers from the **Escrow Officer** drop-down field in *Order Entry*? You can also use these steps to add a Business Development Officer (BDO) or add a Title Officer.

### **Adding Escrow Officers**

Follow the simple steps below to add an Escrow Officer, BDO or Title Officer:

#### Steps

- 1. From Party Setup, click the  $\frac{1}{2}$  icon to add a new party. The Party Information pop-up displays.
- 2. Complete the fields on the **Party Setup** screen, making sure to select **Escrow Officer** (or BDO or Title Officer) in the **Role** drop-down.

Role				
Escrow Officer	•			
SCOFF	Escrow Officer			
Party Information				
Setup : Party Setup Party Setup				02
SureClose Corporation: Search By:  Corporation C Global Party Information				
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3. Click Save & Exit. The party displays in the appropriate drop-down field in the Order screen.



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## Adding and Removing Escrow Officers

## **Removing Escrow Officers**

You can follow these same steps to remove a BDO or Title Officer from the Role drop-down. Follow the steps below to remove an Escrow Officer:

#### Steps

- 1. From *Party Setup*, enter search criteria for the party, and click **Find**.
- 2. From the *Party Setup* grid, double-click the party. The *Party Information* pop-up displays.
- 3. From the Party Information pop-up, click the Role drop-down to expose the menu selections.
- 4. Scroll to Escrow Officer and unselect the Escrow Officer checkbox.

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Escrow Officer

If the party is no longer needed for any role, uncheck the **Active** checkbox in the upper left corner of the screen and click **Save & Exit**.



You will need to exit AIM+ and reopen to see these changes.

If you use SureClose and need assistance linking this party to SureClose, please contact the Agency Support Center for assistance.