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SureClose – Add and Existing Contact Party to a File

Most of your parties will be added to your file from information imported from AIM. There are several ways to add an individual to a file.

Add an Existing Contact Party to a File

An existing contact is a user that already exists in the Global Directory. You can add any number of existing contacts as parties to a file. However, to prevent duplicate entries, you are prompted to search for each contact prior to adding them as a party to the file.

Note: A red asterisk (*) indicates a required field must be completed to continue.

Steps

1. From the file summary page, click **Add Party**.

2. To add the contact as a party to the file, select **Individual**.
3. Search for the contact by completing these fields: **First Name** *, **Last Name** *, **Email**, **Company Name**, **City**, and **State**.

Note: An email address must be a valid email address or the following message will display: **The format of the Email field is invalid. Please update the field.**

4. Select to filter the display results by **All Contacts**. *
5. Click **Search**.
6. From the search results, select the party to add.
   - If unsure, single-click a party to display detailed party information. When ready, double-click the party to add the party to the file.
7. Under **Personal Information**, verify the party's personal information, or edit if needed.

Note: Existing party information is automatically added to the file.

   - **First Name** *—Defaults the party's first name. If this is incorrect, change it.
   - **Last Name** *—Defaults to the party's last name. If this is incorrect, change it.
   - **Default Role** *—Defaults to the role assigned when the user was added as a Contact. The default role can be changed, if you have permission to edit contacts. This selection automatically populates the Role field in Step 9.
   - **Company**—Select the name of the company the party is associated with from the selection list. You can also search for companies in the Global Directory. If the Company you are looking for does not exist, then select **<Add New Company>** to add a new company to the list.

8. Under **Individual Contact Information**, complete these fields: **Address Line 1**, **Address Line 2**, **Zip Code**, **City**, **State**, **Office Phone**, **Home Phone**, **Cell Phone**, **Email**, **Email 2**, and **Fax**.
9. Under **File Permissions**, verify the party's file permissions that define what the party can do with the file, or edit if needed.

Note: These permissions apply to this file only. The same party can be added to numerous files with different permissions.

   - **Role** * —This field defaults to the Default Role selected in Step 7. Accept the default or select another option to identify the role the party will play in the transaction.
   - **File Security Profile** * —Confirm or select the security profile that best describes the level of access the party needs to have to work with this file.

10. Under **Application Permissions**, verify the party's application permissions that define what the party can do in SureClose.
   - **Application Security Profile** *—Determine which security profile best describes the level of access the party should have when working in SureClose.
   - **Allow Login**—Select this option if the party will be allowed to log in.

11. When finished, click **Save**.

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