

## SureClose – Add a New Individual 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 a New Individual Party to a File

An individual is a single user that does not already exist in the Global Directory. Once the individual is added they become a Contact. You can add any number of new users as parties to a file. To prevent duplicate entries, you are prompted to search for each new user 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 an individual as a party to the file, select **Individual**.
3. Before you can add an individual as a party to a file, you must first search for the individual to ensure that they do not already exist in the Global Directory. Complete some or all of these fields to search for the individual: **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**.
  - If the search criteria does not return results, continue on to the next step. SureClose will automatically create a new party contact.
  - If the search criteria returns results and the party is not found, double-click **<Add New Individual>**.
6. Under **Personal Information**, complete these fields:
  - **First Name \*** —Type the party's first name.
  - **Last Name \*** —Type the party's last name.
  - **Default Role \*** —Select a default role for the party you are adding to the file. Your selection will automatically populate the **Role** field in **Step 9**.
  - **Company**—Defaults to **<Not Specified>**. 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.
7. 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**.

8. Under **Notification Preferences**, keep the default selections.
9. Under **File Permissions**, complete the fields to set permissions that define what this party can do with this file.

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

- **Role \*** —Defaults to the **Default Role** selected in **Step 6**. Accept the default or select another option to identify the role the party will play in the transaction.
  - **File Security Profile \*** —Determine which security profile best describes the level of access the party needs to have to work with this file, and then select it from the list.
10. Under **Application Permissions**, complete the fields to set permissions that define what the party can do in SureClose Advantage.
    - **Application Security Profile \***—Determine which security profile best describes the level of access the party should have when working in SureClose Advantage.
    - **Allow Login**—Select this option if the party will be allowed to log in.
  11. When finished, click **Save**.

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