

Create a SureClose File from Inbox


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If you send an AIM+ order to your SureClose Inbox, use the following steps to create the new file:


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

Steps

1. On the navigation pane, click Messages.
2. From the Messages page, click Files To Import. Available AIM orders display.
3. If multiple files are listed, confirm the correct file is selected and click New File from the menu bar. The new file is being created with information entered in AIM+.



4. Complete the following:
 - **Select Templates** – select the applicable templates for First Template, Parties, Documents, and Tasks.



- **File Details** – confirm the information is correct and add information as needed.

- 5. When finished, click Create File.

Notes:

Notes Continued:
