

Real partners. Real possibilities.™

SureClose - Contacts

Add an Individual as a Contact

Using the Contacts tab, you can add individuals such as realtors, lenders, title agents or other persons to your Personal or Company contacts list.

- On the navigation pane, click Contacts.
- 2. From the Contacts page, click Add.
- Under Add a:, select Individual.
- Enter the individual's first and last name to see if the contact is already listed in SureClose.
- 5. Click Search to continue.
- Double-click <Add New Individual>.
- 7. Complete the following:
 - Personal Information add the individual's personal information such as first and last name.
 - Individual Contact Information add the individual's contact information such as address and phone numbers.
 - Notification Preferences define the individual's notification preferences; for example, do they want to be notified about new files and tasks.
 - Application Permissions select the application permission that best defines what you want the individual to be able to do in SureClose Advantage and whether they will be allowed to log into the application.
- When finished, click Save. The individual is added as a contact and displays on the Contacts page.



Import Contacts

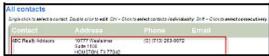
You can import contacts from Microsoft Outlook. As a prerequisite, the import process requires the export file created in Microsoft Outlook to be in the format used in the 2003 version.

If you do not have Microsoft Outlook 2003 installed, you can still create the export file. However, you must modify the file format to match that of the 2003 version. Refer to Online Help for more information about importing contacts from Microsoft Outlook into SureClose Advantage.

Add a Company as a Contact

Using the Contacts tab, you can add individuals such as realtors, lenders, title agents or other persons to your Personal or Corporate contacts list.

- 1. From the Contacts page, click Add.
- 2. Under Add a:, select Company.
- Enter the company's name to see if the contact is already listed in SureClose.
- Click Search to continue.
- Complete the following information:
 Company Information add the company's information such as company name, Web site address, location and phone numbers.
- When finished, click Save. The contact is added to the Contacts page.



Edit a Contact

Once an individual or company has been added as a Contact their information can be edited as needed.

- From the Contacts page, locate the contact you want to work with
- 2. Double-click the contact you want to edit. Edit tabs display.



- Edit the information needed.
- When finished, click Save.



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Search for a Contact

If needed, you can search for Personal, Corporate or Both types of contacts at once. Use the options within the Contacts drop-down to make your selection.

- 1. On the navigation pane, click Contacts.
- Under Contacts, select the option that best describes the contact list you want to search.



- Select the radio button that best describes the type of contact you want to search for.
- Use the Filter drop-down list to refine your search options.
- When finished, click Search. Search results include a total count, but display only 150 items at once.

Notes:	