

## 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.

1. On the navigation pane, click **Contacts**.
2. From the Contacts page, click **Add**.
3. Under **Add as:**, select **Individual**.
4. Enter the individual's first and last name to see if the contact is already listed in SureClose.
5. Click **Search** to continue.
6. 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.
8. When finished, click **Save**. The individual is added as a contact and displays on the Contacts page.

Contact	Address	Phone	Email
Helen Hill			

### 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 as:**, select **Company**.
3. Enter the company's name to see if the contact is already listed in SureClose.
4. Click **Search** to continue.
5. Complete the following information:
  - **Company Information** – add the company's information such as company name, Web site address, location and phone numbers.
6. When finished, click **Save**. The contact is added to the Contacts page.

Contact	Address	Phone	Email
ABC Realty Advisors	10777 Walkstone Suite 1100 4400 170th, TX 77059	(01)713-263-9972	

### Edit a Contact

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

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

3. Edit the information needed.
4. When finished, click **Save**.

