stewart

Real partners. Real possibilities.™

Adding and Removing Escrow Officers

Did you know that if you have access to *Party Setup* in AIM+, you can add or remove escrow officers from the **Escrow Officer** drop-down field in *Order Entry*? You can also use these steps to add a Business Development Officer (BDO) or add a Title Officer.

Adding Escrow Officers

Follow the simple steps below to add an Escrow Officer, BDO or Title Officer:

Steps

1. From *Party Setup*, click the ⭐ icon to add a new party. The *Party Information* pop-up displays.
2. Complete the fields on the **Party Setup** screen, making sure to select **Escrow Officer** (or BDO or Title Officer) in the **Role** drop-down.
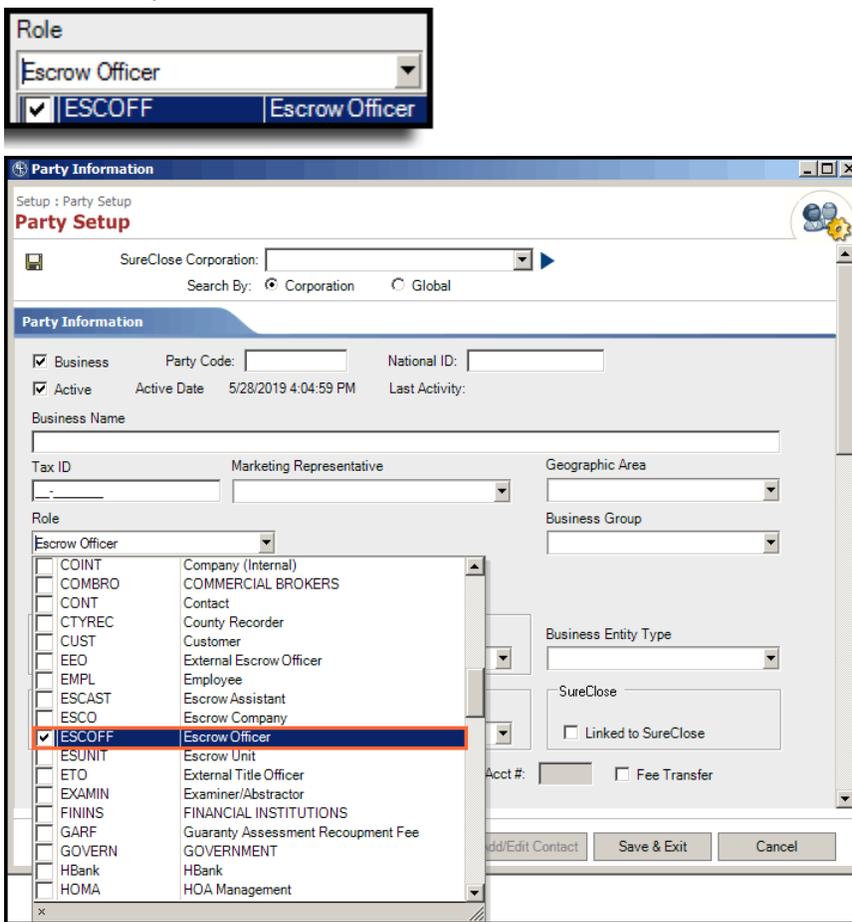
3. Click **Save & Exit**. The party displays in the appropriate drop-down field in the *Order* screen.

Adding and Removing Escrow Officers

Removing Escrow Officers

You can follow these same steps to remove a BDO or Title Officer from the Role drop-down. Follow the steps below to remove an Escrow Officer:

Steps

1. From *Party Setup*, enter search criteria for the party, and click **Find**.
2. From the *Party Setup* grid, double-click the party. The *Party Information* pop-up displays.
3. From the *Party Information* pop-up, click the **Role** drop-down to expose the menu selections.
4. Scroll to Escrow Officer and unselect the **Escrow Officer** checkbox.
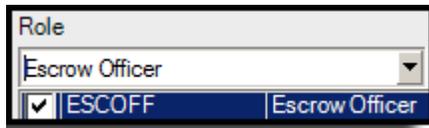
If the party is no longer needed for any role, uncheck the **Active** checkbox in the upper left corner of the screen and click **Save & Exit**.

 Tip

You will need to exit AIM+ and reopen to see these changes.

If you use SureClose and need assistance linking this party to SureClose, please contact the Agency Support Center for assistance.