

Associating AIM+ Parties with SureClose Contacts

This document walks you through associating new and existing AIM+ parties and contacts using AIM+ Party Setup.

Associating New AIM+ Parties and Contacts

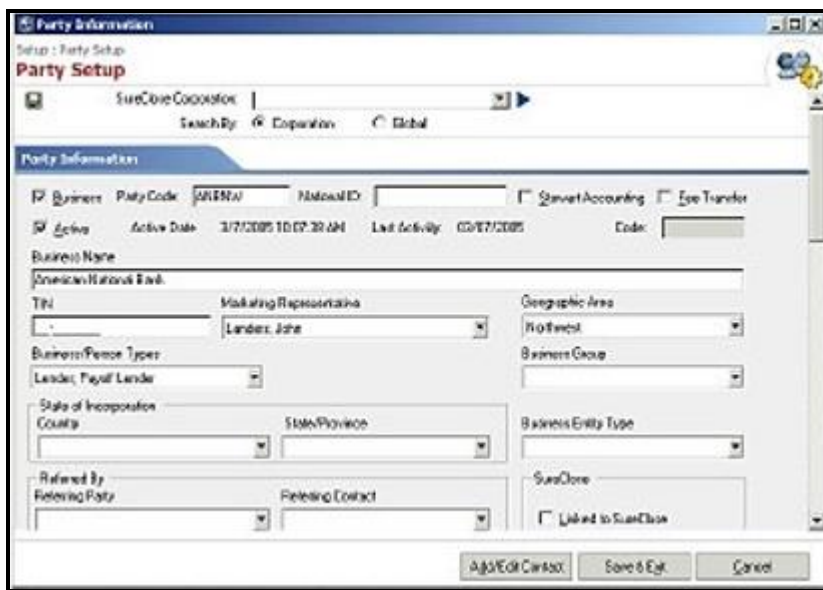
Complete these steps to associate SureClose contacts to new AIM+ parties and contacts in AIM+ Party Setup.

Steps

1. Navigate to **Party Setup** in AIM+.
2. Click the **Add new record** button. The *Party Information* screen displays.
3. Complete the information for the party.
4. From the **SureClose Corporation** list, select the SureClose Corporation that you want your party or contact link to be associated with.

Tip: By default, your search is based at the **Corporation** level. If you want to conduct a global search for this party, select the **Global** option.

5. Click the **Search SureClose** button. If the SureClose party or contact exists, the results display.
6. Select the SureClose contact that you want to link with the AIM+ party or contact. Once the association is created, the **Linked to SureClose** check box is automatically marked.



The screenshot shows the 'Party Information' screen in the AIM+ Party Setup application. The window title is 'Party Information' and the subtitle is 'Setup: Party Setup'. The main heading is 'Party Setup'. There is a search bar for 'SureClose Corporation' with a search button and radio buttons for 'Corporation' (selected) and 'Global'. Below this is the 'Party Information' section with various fields: 'Business' (checked), 'Party Code' (AMENW), 'National ID' (empty), 'Smart Accounting' (unchecked), and 'Evo Transfer' (unchecked). There are also fields for 'Active' (checked), 'Active Date' (3/7/2005 10:07:30 AM), 'Last Activity' (03/07/2005), and 'Code' (empty). The 'Business Name' field contains 'American National Bank'. Other fields include 'Title' (Marketing Representative), 'Geographic Area' (Fla Beach), 'Business/Person Type' (Lender, Payoff Lender), 'Business Group' (empty), 'State of Incorporation' (empty), 'State/Province' (empty), 'Business Entity Type' (empty), 'Referred By' (empty), 'Referring Party' (empty), 'Referring Contact' (empty), and 'SureClose' (checked, Linked to SureClose). At the bottom, there are buttons for 'Add/Edit Contact', 'Save & Exit', and 'Cancel'.

Associating AIM+ Parties with SureClose Contacts

Associating Existing AIM+ Parties and Contacts

Complete these steps to associate SureClose contacts to existing AIM+ parties and contacts in AIM+ Party Setup.

Steps

1. Navigate to Party Setup in AIM+.
2. Enter the search criteria for the party.
3. Click **Find**.
4. From the *Results* panel, double-click the party you want to link with SureClose. The *Party Information* screen displays.
5. From the **SureClose Corporation** list, select the SureClose Corporation that you want your party or contact link to be associated with.

Tip: By default, your search is based at the **Corporation** level. If you want to conduct a global search for this party, select the **Global** option.

6. Click the **Search SureClose** button. If the SureClose party or contact exists, the results display.
7. Select the SureClose contact that you want to link with the AIM+ party or contact. Once the association is created, the **Linked to SureClose** check box is automatically marked.
8. If duplicate contact information is copied into the party's record, delete the duplicate information.

Tip: If the association between the AIM+ party or contact and the SureClose contact needs to be removed, clear the **Linked to SureClose** check box within the AIM+ party or contact setup screens.