Sending Orders and Documents to SureClose

Overview

Use this document to send Orders and Documents to SureClose.

Sending AIM+ Orders to SureClose

After entering a new AIM+ order, you can send the order to SureClose.

Steps

1. After entering the order, while it is still open, click the *File* menu and select **Send File**. Or from *File Tracking*, right-click on the file, and select **Send File** from the menu, The *Send Electronically* dialog box opens.
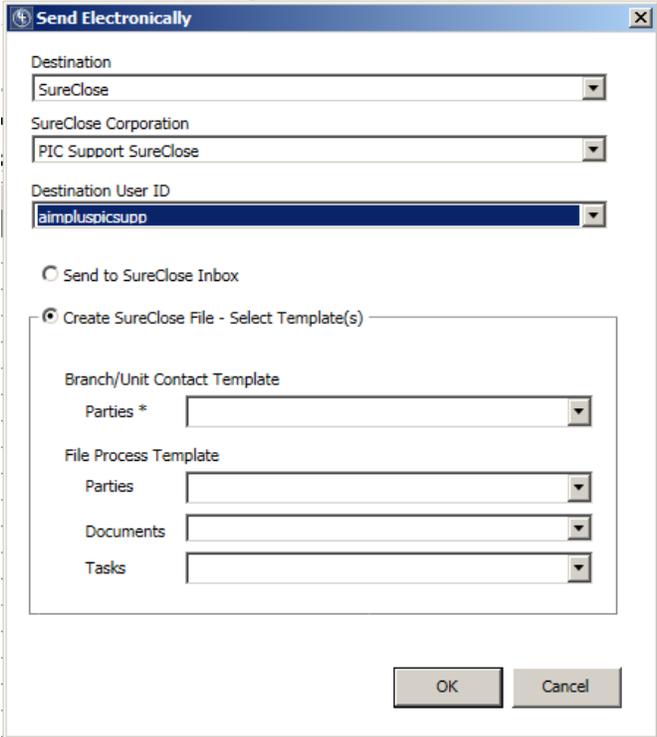
2. From the *Send Electronically* dialog box, complete the following:

   - **Destination**-Defaults to SureClose.
   - **SureClose Corporation**- If your company has only one SureClose Corporation, that corporation defaults. If the default is incorrect or your company is associated with more than one SureClose Corporation, select a different corporation.
   - **Destination User ID-** Defaults to the SureClose Destination ID that is defined in setup for the selected SureClose Corporation. If you need to send this file to a different SureClose Destination ID, select a different ID.
   - **Send to SureClose Inbox**- Select this option to send the file to the SureClose inbox.
   - **Create SureClose File-Select Template(s)**- If you want to select the SureClose template for your file from within AIM+ rather than sending the file to the SureClose inbox, select this option.

3. Under the **Branch/Unit Contact Template** section, complete this field:

   - **Parties***- From the available template list (based on the selected Destination User ID), select the Parties template that identifies how the file is billed and tracked as well as adds the applicable internal staff.

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4. Under the **File Process Template** section, complete the applicable fields:
   - **Parties-** From the available template list (based on the selected Destination User ID), select the Parties template that you want to use for this SureClose file. When you select the Parties template, the Documents and Tasks Options default If they are created for the selected party template.
   - **Documents**- The documents option defaults if it exists for the selected party template. If you need a different document template, change it.
   - **Tasks**- The tasks option defaults If it exists for the selected party template. If you need a different task template, change it.
5. Click **OK**. A successful transmission message displays.
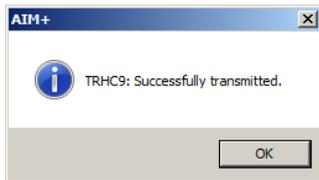
Sending AIM+ Closing Documents to SureClose

After you send the AIM+ order to SureClose, you can then send Closing documents to SureClose.

Steps

1. From the *Closing* node in the file, click the Printer icon.
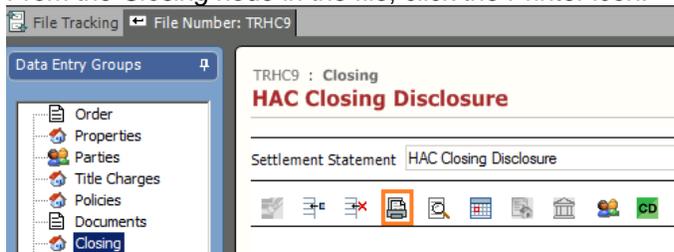
2. The *Generate Closing Documents* window will display. Select the document to send to SureClose and click the **Send Electronically** button. The *Send Documents* window opens.
3. From the *Send Documents* window, select the desired placeholder(s) to file the document in SureClose.
4. Click **SEND**.
5. The *Send Electronically* window will display. Make any necessary changes to the SureClose Corporation or Destination User ID if needed. Then click **OK**.
6. A successful transmission message will appear in a yellow box at the top of the Generate Closing Documents window.
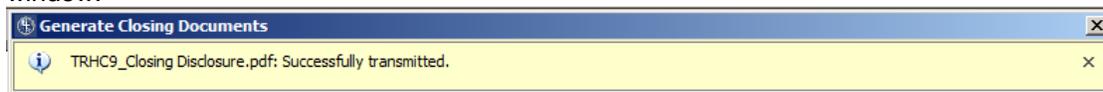
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Sending AIM+ Title & Escrow Documents to SureClose

After you send the AIM+ order to SureClose, you can then send Title & Escrow documents to SureClose. You can do this by using the **Send Electronically** icon or by dragging and dropping documents directly into the SureClose placeholder(s).

Steps

1. From the *Documents* node of the file, highlight the documents under *Selected Documents* and click the **Send Electronically** icon ![icon] or open the documents and click the **Send Electronically** icon in the *Document Editor* window. The *Send Documents* window will display.

2. From the *Send Documents* window, select the desired placeholder(s) to file the document in SureClose.

3. Click **SEND**.

4. The *Send Electronically* window will display. Make any necessary changes to the SureClose Corporation or Destination User ID if needed. Then click **OK**.

5. A successful transmittal message will appear.
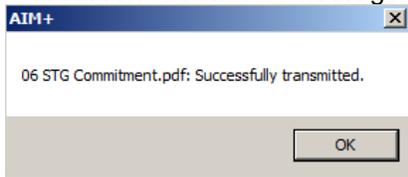
6. If you prefer, you can highlight a document or consolidated set under *Selected Documents* and then drag and drop it into one of the *SureClose Available Placeholders* listed on the right side of the screen.

7. A message will appear in a yellow box at the top of the screen notifying you that the document has been successfully uploaded to the SureClose Placeholder.