

# 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*, rightclick on the file, and select **Send File** from the menu, The *Send Electronically* dialog box opens.

Send Electronical	ly			
Destination				
SureClose				•
SureClose Corporatio	n			
PIC Support SureCle	ose			•
Destination User ID				
aimpluspicsupp				•
C Send to SureClo	se Inbox			
	- File - Coloct To	mplata(c) -		
Create Surecius	e nie - Select re	inplace(s)		
Branch/Unit Cor	tact Template			
Parties *				•
Parties				<u> </u>
File Process Ten	nplate			
Parties				•
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- 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.

🛃 File Tracking 🔎 File Number: TRHC9									
Data Entry Groups 🛛 🕂	TRHC9 : Closing								
· Order	The closing Disclosure								
	Settlement Statement HAC Closing Disclosure								
🚽 🚮 Title Charges									
- E Documents									
Closing									

- 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.





## Sending Orders and Documents to SureClose

#### 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 in 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.

AIM+	X
06 STG Commitment.pdf: Su	uccessfully transmitted.
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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.

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Set	Document Name Policy Number			Available Placeholders
Warranty Deed			Task 11 Document Transfer from Messages	
06 STG Comm	Comm STG06 Com Jacket			Task 11 Document Split from Messages
06 STG Comm	06 STG Comm STG06 Com Sch A			Task 19 Linked Task Notification - Attach Option
06 STG Comm STG06 Com Sch B I				Task 20 PDF Combine 1 (PDF)
06 STG Comm STG06 Com Sch B II				Task 20 PDF Combine 2 (TIFF)
06 STG Comm STG Privacy Notice 1 Opt Out r 11 19 13				Task 20 PDF Combine 3 (PDF)
06 STG Comm STG Privacy Policy Notice 2 rev 1-26-09				Task 22 AIM+ Docs (SureCloseTest Docs in AIM+)

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.

