



SureClose Advantage[®] 4.8

Release Notes

September 22, 2018

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SureClose Advantage 4.8 Release Notes

SureClose Advantage 4.8 includes enhanced login access security, product enhancements, and defect corrections. This document provides a brief explanation of what has been updated, as well as an introduction to new features implemented within this release.

For more information about any of the new features, refer to SureClose Advantage Online Help and search for the specific topic.

Deployment Date: September 22, 2016

Post-Installation Considerations

After the new version has been deployed and prior to logging in, it is recommended that you complete the following post-installation tasks:

- Delete Temporary Internet Files
- Delete Cookies

Deleting Temporary Internet Files

(MS Article ID: 260897)

The **Temporary Internet Files** (or cache) folder contains web page content that is stored on your hard disk for quick viewing. This cache permits Internet or MSN® Explorer to download only the content that has changed since you last viewed a web page instead of downloading all the content for the page every time it is displayed.

Administrators can customize **Temporary Internet File** settings to prevent modifications. Contact your System Administrator if you cannot access the **Internet Options** dialog box or the **General** tab.

Steps

1. Close **Internet Explorer**® and any instances of **Windows**® **Explorer**.
2. From the **Start** menu, point to **Control Panel** and then select **Internet Options**. The Internet Options dialog box displays.
3. On the **General** tab, locate **Temporary Internet Files** and then click **Delete Files**. The Delete Files dialog box displays.
4. If available, select the **Delete All Offline Content** check box and then click **OK**. A confirmation message displays asking if you are sure you want to complete the delete process.
5. To confirm, click **OK**.



Note

Be patient when performing this task. If the *Temporary Internet Files* folder contains a significant amount of web page content, then this process may take several minutes to complete.

Deleting Cookie Files

(MS Article ID: 278835)

Files starting with the word *Cookie* may remain in the Temporary Internet Files folder even after opting to delete them. You can delete these files; however, it is recommended that you make a backup copy of cookies prior to deleting them because these files may contain information for a customized web page or login information for a website that you do not want to lose. If needed, contact your System Administrator for assistance or refer to *MS Article ID: 221523*.

Steps

1. Close **Internet Explorer** and any instances of **Windows Explorer**.
2. From the **Start** menu, point to **Control Panel** and then select **Internet Options**. The Internet Options dialog box displays.
3. On the **General** tab, locate **Temporary Internet Files** and then click **Delete Cookies**. The Delete Cookies dialog box displays. A confirmation message displays asking if you are sure you want to complete the delete process.
4. To confirm, click **OK**.

Welcome

Logging into SureClose Advantage

The SureClose Advantage login screen has been enhanced to make it easier for you to login, even if you forget your login credentials. You can now save time by resetting your own password.

A new link, **Forgot Login**, has been added to the *SureClose Advantage Login* screen to help you reset your own password.



Note

To reset your password, you must know your account Username. You can attempt to enter your password up to 10 times before your profile is locked. If your profile is locked, [Contact Us](#).

Retrieving Your Username

Follow the steps below to retrieve your Username.

Steps

1. From the *SureClose Advantage Homepage*, click the **Request Password** link. The Request Username field displays.
2. From the *Request Username* field, enter the email address (*that is not @mysureclose.com*) associated with your SureClose Advantage account.
3. Click the **Submit** button. Your Username will be sent to the email address associated with your SureClose Advantage account.

Resetting Your Password

Follow the steps below to retrieve your Password.

Steps

1. From the *SureClose Advantage Homepage*, click the **Forgot Login** link. The Forgot Login screen displays.



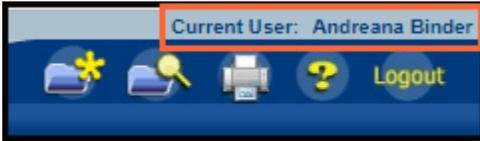
2. From the *Forgot Login* screen, enter your Username and email address (*that is not @mysureclose.com*) associated with your SureClose Advantage account.
3. Click the **Submit** button. A temporary password will be sent to the email address associated with your SureClose Advantage account.
4. From the SureClose Advantage Login screen, enter your Username and temporary password. A message displays, prompting you to change your temporary password.

Linking Multiple Email Addresses to a SureClose Advantage Account

Follow the steps below to add more than one email address associated with a SureClose Advantage account.

Steps

1. Log into SureClose Advantage.
2. From the *Home* screen, click your Username. The *User Account* screen displays.



3. From the *User Account* screen, under **Contact Information**, use the Communication Method drop-down to select a contact field, such as Email 2, or Email 3.
4. Click the **Add** link.

A screenshot of the 'Contact Information' form. The 'Communication Method' dropdown menu is set to 'Email 3' and the 'Add' link is highlighted with a red box. Below the dropdown are fields for Office Phone, Home Phone, Email (andreana.binder@stewar), and Email 2 (abinder@stewart.com).

5. The additional field for an email address displays.

A screenshot of the 'Contact Information' form. The 'Communication Method' dropdown menu is now empty. The 'Email 3' field is highlighted with a red box. Below the form, it says 'SC Messages: AndreanaBinder@mysureclose.com'.

6. Enter the email address into the new field.
7. Click the **Save** button at the top of the screen.

Admin Module

Several enhancements have been added to the Admin module in SureClose Advantage.



Note

You must have **Admin rights** to use features available in the *Admin* module of SureClose Advantage. Users who do not have Admin rights will not see or have access to the Admin module in the SureClose Advantage Navigation menu.

Searching for User Reports

For users with Admin Access only

Additional search fields have been added to the **Search** screen, including exact matches to email addresses. Follow the steps below to search for a contact.

Steps

1. From the *SureClose Advantage Navigation* menu, click the **Admin** module. The *Admin* screen displays.
2. From the *Admin* screen, under **Reports**, click the **User Report** link. The *Search* screen displays.



3. From the *Search* screen, enter the fields. Be sure the **Global Search** check box is selected to search for users outside, who are logged into the user's corporation.

4. Click the **Search** button. The search results display.



Note

When searching for a contact by First Name and Last Name only, you must enter at least the **first two characters of the First Name, and Last Name** to perform the search. Enter the email address entirely so that an exact match can be found within SureClose Advantage.

SureClose Administration

The **SureClose Administration** section in the *Admin* module of SureClose Advantage for users with Master Admin permissions only. If you do not have Master Admin access, you will not see the SureClose Administration section on the Admin screen.

Changing a User's Corporation

For users with Master Admin Access only

A new, **mandatory** field, **Corporation**, have been added to *Security Settings*. Use the **Corporation** drop-down to allow the corporation's global and custom security profiles to be selected, or to change a user's corporation.



Security Settings

Corporation: Placer Title Company - Alameda County *

Application Security Profile: ListingAgent / Realtor *

Allow Login

To change a user's corporation, follow the steps below:

Steps

1. From the *SureClose Advantage Navigation* menu, click the **Admin** module. The *Admin* screen displays.
2. From the *Admin* screen, under **Set Up**, click the **User Reports** link. The *Search for Existing Corporations* screen displays.



3. From the *Search for Existing Corporations* screen, enter the Corporation name.
4. Click **Search**. The search results display.



NEW CLOSE SECURITY HISTORY DELETE

Search By: User Search Scope: All Users Global Search

First Name: ABC Last Name: Company Company: Email: Login: **SEARCH**

Select number of records per page 50

Single click to **select** a user. Double click to **edit**. Ctrl + Click to **select** users *individually*. Shift + Click to **select** *consecutively*.

Name	User ID	Company	Owner	Corporation	Sponsor	Allow	Online	First	Last
Company, ABC Construction				Stewart Title of California, Inc - Major Accounts Division	Stewart Title of California, Inc. (Anaheim Major Accounts)	No	No		
Company, ABC Mortgage				Flagler Title Company	Flagler Title Company (West Palm Beach)	No	No		

- From the search results, double-click to open a corporation. The *Contact Information* screen displays.
- From the *Contact Information* screen, under *Security Settings*, use the **Corporation** drop-down to change the corporation assigned to the account.

- Click the **Save** button at the top of the *Contact Information* screen.

Viewing Companies from the New Affiliation Screen

For users with Master Admin Access only

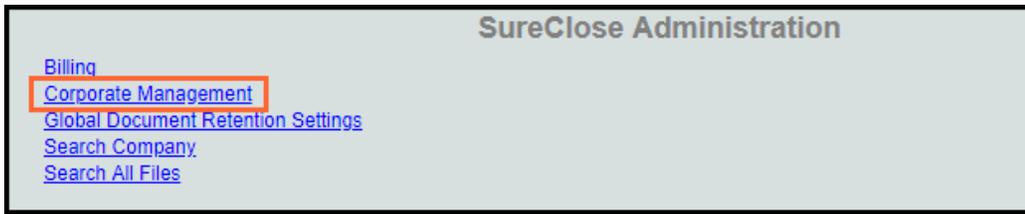
A new screen, **Affiliation**, has been added to the **SureClose Administration** section of the *Admin* module.

You can access the *Affiliation* screen by selecting a contact and clicking the new **Affiliation** button to view an existing company in edit mode.

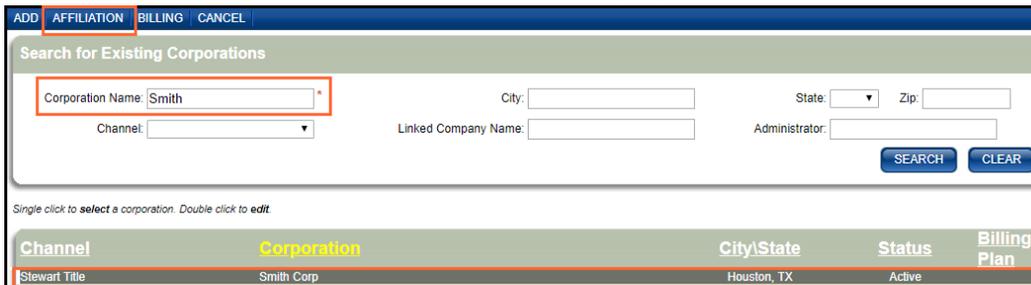
Follow the steps below to view existing companies from the *Affiliation* screen.

Steps

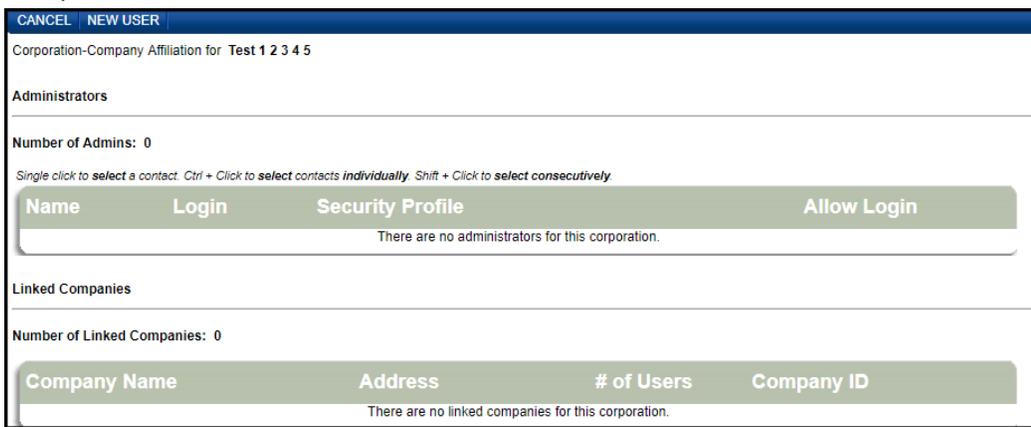
- From the *SureClose Advantage Navigation* menu, click the **Admin** module. The *Admin* screen displays.
- From the *Admin* screen, under **SureClose Administration**, click the **Corporate Management** link. The *Search for Existing Corporations* screen displays.



3. From the *Search for Existing Corporations* screen, enter the **Corporation Name**, and any other fields to narrow the search results.
4. Click the **Search** button. The search results display.
5. Click to select the Corporation. The *Affiliation* button becomes enabled.
6. Click the **Affiliation** button. The *Affiliation* screen displays.



7. From the *Affiliation* screen, you can view information on the company, such as assigned Administrators, and Linked Companies.



Creating a New User from the New Affiliation Screen

For users with Master Admin Access only

A new screen, **Affiliation**, has been added to the **SureClose Administration** section of the *Admin* module. You can use the *Affiliation* screen by clicking the new **Affiliation** button to create a new user or view an existing company in edit mode.

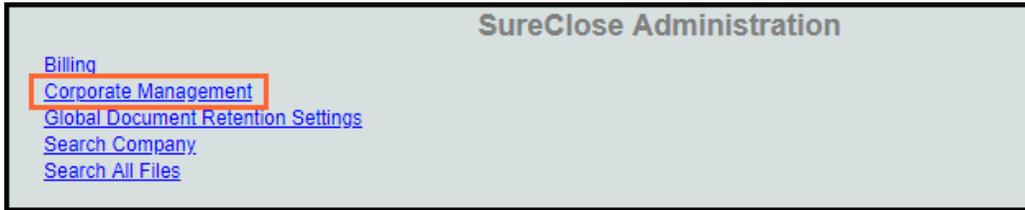


Follow the steps below to view existing companies, and to create a new user from the *Affiliation* screen.

Steps

1. From the *SureClose Advantage Navigation* menu, click the **Admin** module. The *Admin* screen displays.

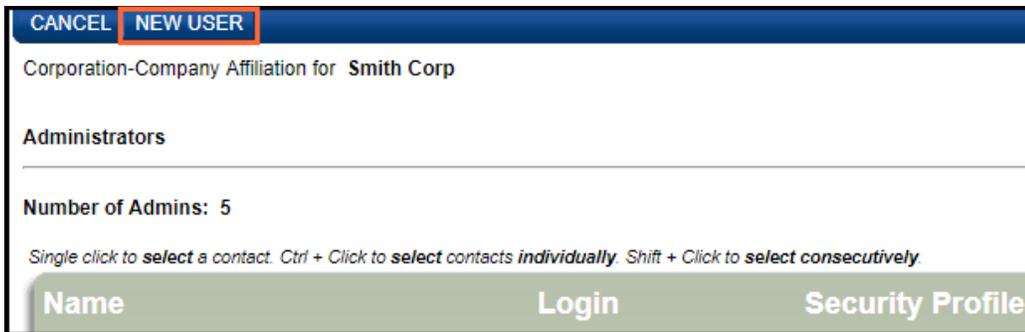
- From the *Admin* screen, under **SureClose Administration**, click the **Corporate Management** link. The *Search for Existing Corporations* screen displays.



- From the *Search for Existing Corporations* screen, enter the **Corporation Name**, and any other fields to narrow the search results.
- Click the **Search** button. The search results display.
- Click to select the Corporation. The Affiliation button becomes enabled.
- Click the **Affiliation** button. The *Affiliation* screen displays.



- From the *Affiliation* screen, click the **New User** button. The *Search* screen displays.



- From the *Affiliation* screen, enter the search criteria for the user, and click **Search** to search for an existing account. The search results display.
- To create a new user, click **<Add New Individual>**. The *Personal Information* screen displays.
- Enter the new user criteria and click **Save**.

Searching for All Company Reports

For users with Master Admin Access only

A new link, **Search Company**, has been added to the **SureClose Administration** section of the *Admin* module. Click the **Company Search** link to search for all companies within SureClose Advantage.

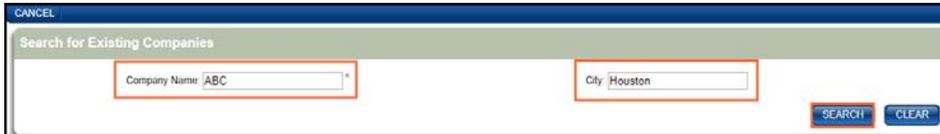
Steps

- From the *SureClose Advantage Navigation* menu, click the **Admin** module. The *Admin* screen displays.

- From the *Admin* screen, under **SureClose Administration**, click the **Search Company** link. The *Search for Existing Companies* screen displays.



- From the *Search for Existing Companies* screen, enter the **Company Name** and **City**.



- Click **Search**. The *Search* results display.

Searching for Parties on All Files

For users with Master Admin Access only

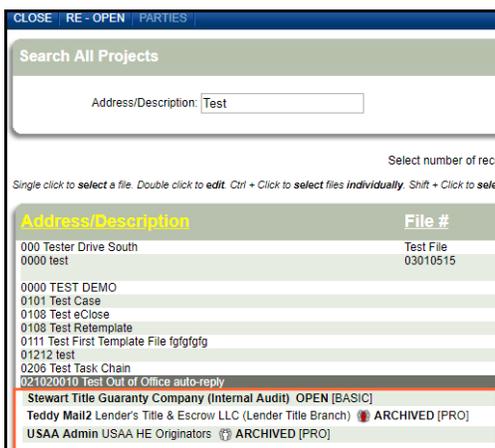
You can now search for all files, templates, archived and deleted projects in SureClose Advantage. In addition, a new button, **Parties**, has been added to the *Search All Projects* screen to view a list of parties on a selected file or template.

Steps

- From the *SureClose Advantage Navigation* menu, click the **Admin** module. The *Admin* screen displays.
- From the *Admin* screen, under **SureClose Administration**, click the **Search All Files** link. The *Search All Projects* screen displays.
- From the *Search All Projects* screen, enter the **Address/Description** and **File Number**.
- Click the **Search** button. The search results display.
- Select one project from the search results. The **Parties** button becomes enabled.
- Click the **Parties** button.



All parties on the file display underneath the selected project.



Searching for Corporations

For users with Master Admin Access only

Follow the steps below to search for Corporations in SureClose Advantage.

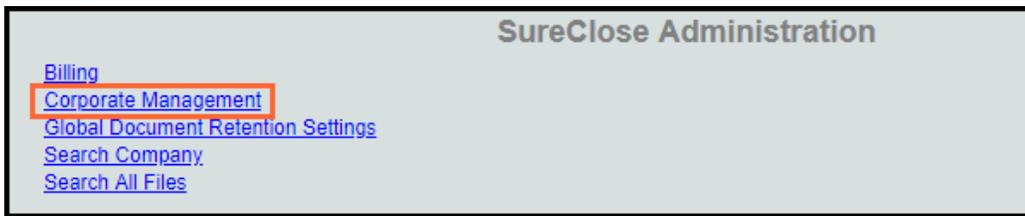


Note

Selection from the **Channel** drop-down is no longer required when searching for corporations.

Steps

1. From the *SureClose Advantage Navigation* menu, click the **Admin** module. The *Admin* screen displays.
2. From the *Admin* screen, under **SureClose Administration**, click the **Corporate Management** link. The *Search for Existing Corporations* screen displays.



3. From the *Search for Existing Corporations* screen, enter the **Corporation Name**. To narrow your search results, complete the other fields on the screen.

ADD | AFFILIATION | BILLING | CANCEL

Search for Existing Corporations

Corporation Name: City: State: Zip:

Channel: Linked Company Name: Administrator:

SEARCH CLEAR

4. Click the **Search** button. The search results display.

Defects

The following defects were addressed in **SureClose Advantage 4.8**:

Closing Reports

- Performance enhancements have been added when running a Closing Report, resolving the previous time out issue.

Documents

- When splitting a document, shortly after moving a placeholder or divider, an error message no longer displays on the SureClose Documents screen.

Admin – User Report

- When searching for reports, an error no longer displays when selecting the **Send Email with Login Information** check box under *Security Settings* and clicking **Save**.
- When using *Global Search*, Corporation no longer display with duplicate User IDs. The correct Owner Corporation now displays with only one User ID.
- When searching for reports, an error no longer displays for the User Security Profile. This error occurred when updating the user information without updating the security profile under *Security Settings* and clicking **Save**. This issued has been resolved.

Additional Information

Training

Through SureClose Advantage Online Help, you can access an online library of interactive tutorials and quick reference cards by clicking the **Additional Learning Resources** link or navigate to: the [SureClose Advantage Training Center](#).

Technical Support

For technical support, contact Stewart Customer Care Center at 1.877.800.3132 or CustomerCare@stewart.com.