Business Services

AAR Quick Reference Guide SureClose® Advantage View for Administrators

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Preface

The Arizona Association of REALTORS® Business Services team is here to assist you with any questions that you might have regarding SureClose®. However, you should always ask your company's SureClose® Site Administrator first. If they don't have the answer, then we will be happy to help.

Business Services Team

Nick Catanesi – Director of Business Services

Dan Howells – Business Application Specialist

Diane Martin – Business Application Specialist

Niki Burridge – Business Application Specialist

Susan Carroll-Hamblen – Business Application Specialist

Hours

We are available Monday through Friday from 8 a.m. to 5 p.m. to answer your questions. You can use the following methods to contact us:

- Local Support Hotline: 480.304.8930
- Toll Free Support Hotline: 866.833.7357
- Email: support@aaronline.com

NOTE: The Arizona Association of REALTORS® is closed on the following holidays: New Years Day, Martin Luther King Day, President's Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Veteran's Day, Thanksgiving, the Friday after Thanksgiving, and Christmas.

Reference Information

Our website (www.aaronline.com/tm) contains the following information:

- Tutorial Videos
- Handouts for you to download
- Links to download the printer driver

SureClose® Process

Every office has its own process for using SureClose®, but the basic steps are just about the same for every company:

1. An agent obtains a listing or an accepted contract.
2. The agent fills out a New File Request and forwards it to their office.
3. An office employee creates the appropriate file in SureClose®. SureClose® automatically sends an email to the agent letting them know the file has been created.
4. The agent uploads their documents. An email is automatically sent to the broker letting them know there are documents to review.
5. The broker or designated reviewer logs in to the Document Review Tool and searches for all new documents to be reviewed.
6. The broker completes a review of each new file or document, and sends emails to the agent to let them know what is missing or needs to be fixed.
7. The office employee (or broker) reviews the file in SureClose® to delete any unnecessary placeholders or add additional placeholders that might be needed. They also delete any tasks that do not apply to the transaction.
8. The agent sends messages to their client through SureClose® to maintain a record of the messages within the file and keep the file current.
9. The agent continues to upload executed documents as they receive them until the listing expires or the transaction closes escrow.
10. The office employee completes a final check of the file when the transaction is finished and then archives the file.

Arizona Department of Real Estate Information

The Arizona Department of Real Estate (ADRE) requires brokers to maintain written policies, procedures, and systems for their firms. In many cases, the brokers' staff will continue the same roles and responsibilities after starting with transaction management (TM) as they did before. However, ADRE holds brokers directly responsible for who handles real estate documents, what they do with those documents, how they are compensated, etc. **We strongly recommend that brokers using AAR TM review their policy manuals to ensure they are within ADRE compliance.** AAR will make suggestions and recommendations regarding AAR TM/SureClose® use, however it is ultimately the broker's responsibility to know and follow ADRE guidelines regarding transactions and files.

Brokers should make themselves familiar with the following Substantive Policy Statements (http://www.azre.gov/LawBook/SubstantivePolicyStatements.aspx):

- SPS 2005.04
- SPS 2005.10
- SPS 2010.01

Brokers should also review Commissioner's Rule R4-28-1103 (http://www.azsos.gov/public_services/Title_04/4-28.htm).

Direct any specific questions regarding any issue regarding compliance or adherence to ADRE guidelines to Robin King, Senior Investigator / Manager Auditing & Investigations Division. Her email address is rking@azre.gov.

You can also call the Legal Hotline with questions. You must have a Legal Hotline personal identification number to access the hotline. If you are a Designated Broker and do not have a personal identification number, go to http://www.aaronline.com/documents/LH and click on the Legal Hotline Access Process hyperlink to fill out the appropriate forms.

Table of Contents

Chapter 1. Overview

Welcome to SureClose® Advantage for administrators. You can use SureClose® Advantage from either a Windows or a Mac computer. You can use any of the following browsers to access SureClose® Advantage:

- Internet Explorer
- Mozilla Firefox
- Safari
- Google Chrome (with the IE Tabs add-on installed)

Go to https://sureclosetm.com to log in using the User ID and password assigned to you.

This chapter covers the following topics:

- Layout of SureClose® Advantage
- Home page
- Messages page
- Contacts page
- Calendar page

Layout of SureClose® Advantage

The frame of SureClose® Advantage is the same on every page. You see the **Navigation Pane** on the left side of your screen and **Action** buttons on the upper right side of your screen (Figure 1).

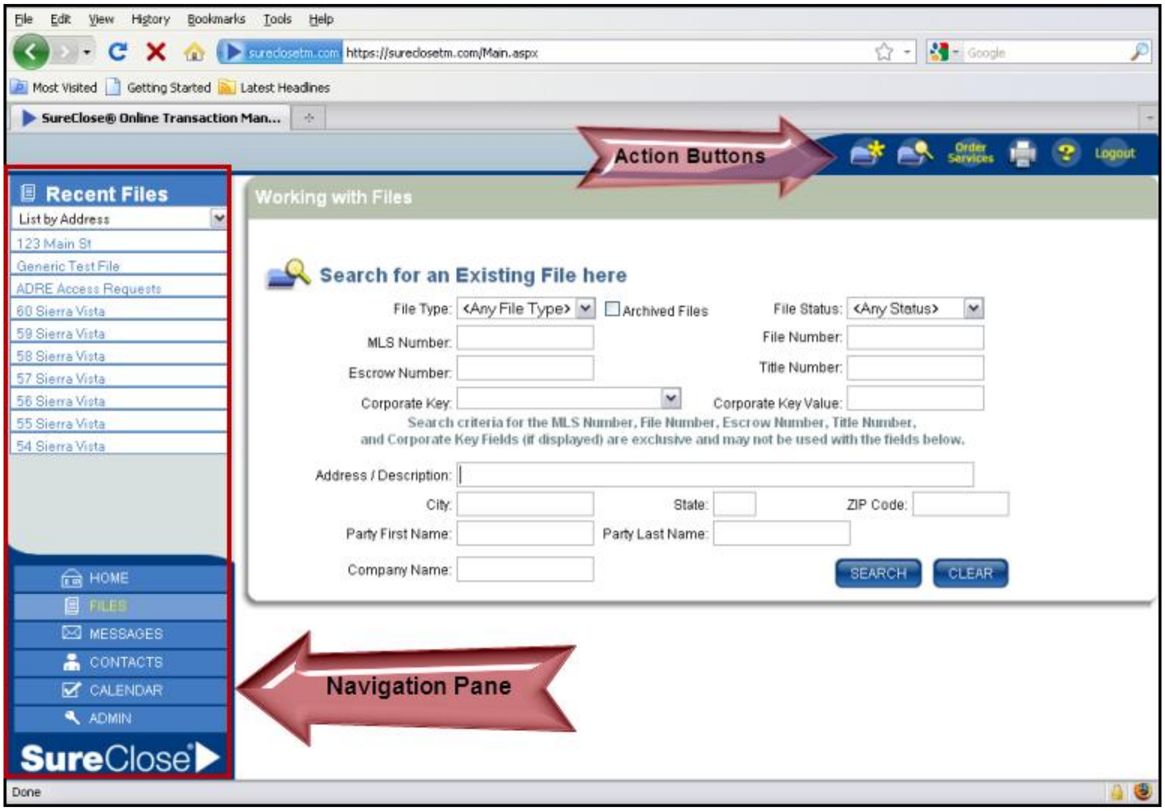


Figure 1

The **Navigation Pane** contains tabs at the bottom of the pane that enable you to move to the different pages in SureClose® Advantage. Your current tab is always displayed at the top of the **Navigation Pane**.

The tabs are:

- **Home** – takes you to the **Home** page with general information about SureClose®. There are two sub-tabs under the Home tab:
    - **Profile** – enables you to change your personal profile within SureClose®.
    - **MLS Integrations** – enables you to set up integrations with your MLS systems.
- **Files** – takes you to the **Files** page. The last file you accessed in SureClose® automatically opens to the **Summary** page.
- **Messages** – takes you to the **Messages** page where you can access messages sent to your SureClose® email address. You can also upload documents to your SureClose® files from the inbox.

- **Contacts** – takes you to the **Contacts** page where you find your personal and your company's contacts within SureClose®.
- **Calendar** – takes you to the **Calendar** page where you can see a calendar view of the tasks you need to complete for all your files within SureClose®.

You also see **Action** buttons on the upper right side of the screen. They are:


File Create – takes you to the **Create File** page.


File Search – takes you to the **Search Files** page.


Print – prints the current screen.


Help – shows a list of help topics.

Logout – ends your session and logs you out of SureClose® Advantage. You must always use this button when you are done with your session. Do not log out by closing your browser!

Home Page

The first time you log in to SureClose® Advantage, you see the **Home** page (figure 2). The **Home** page gives you general information about SureClose® Advantage.

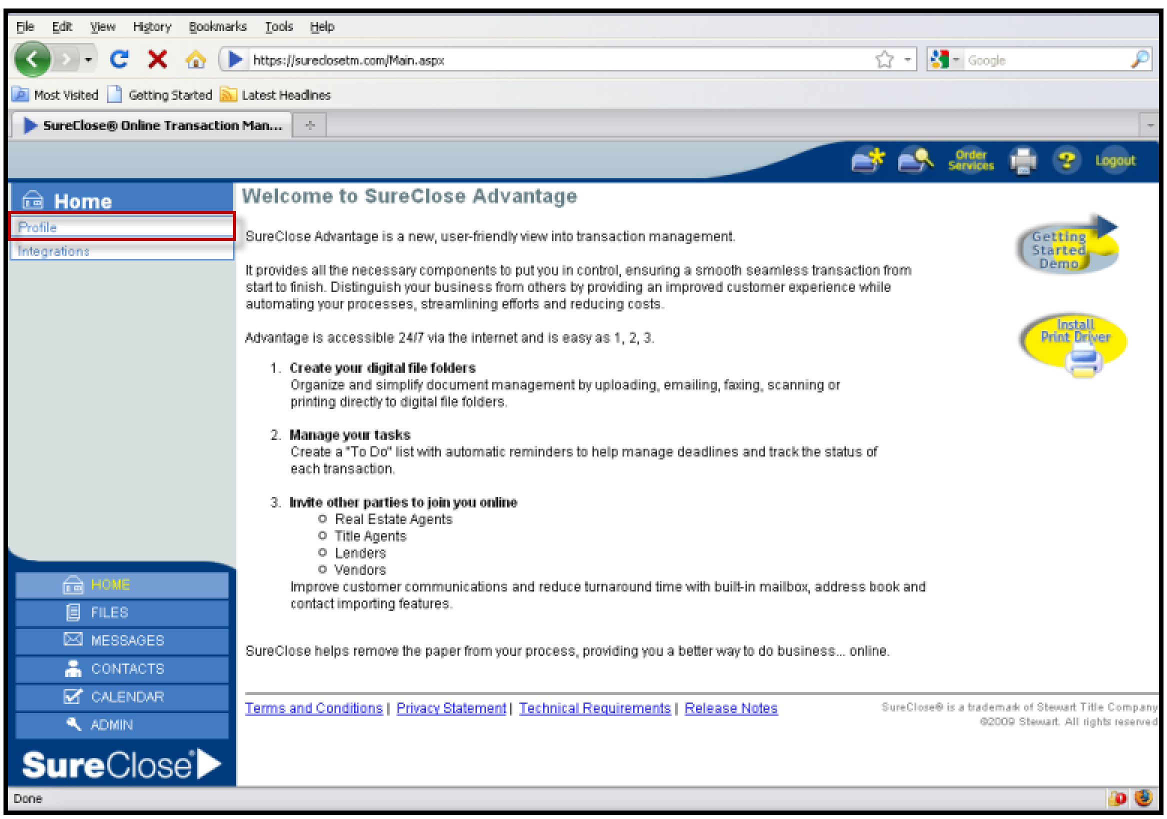


Figure 2

Directly under the **Home** tab is the **Profile** tab which takes you to the **Profile** page.

Profile Page

The **Profile** page (Figure 3) enables you to update your information in SureClose®. The initial information entered for agents in SureClose® comes from their local board and the company to which they are affiliated. Information for administrators who are not agents is added directly into SureClose® when a corporation is set up. The **Profile** page is divided into the following sections:

- Personal Information
- Contact Information
- Preferences
- Message Settings
- Security Settings

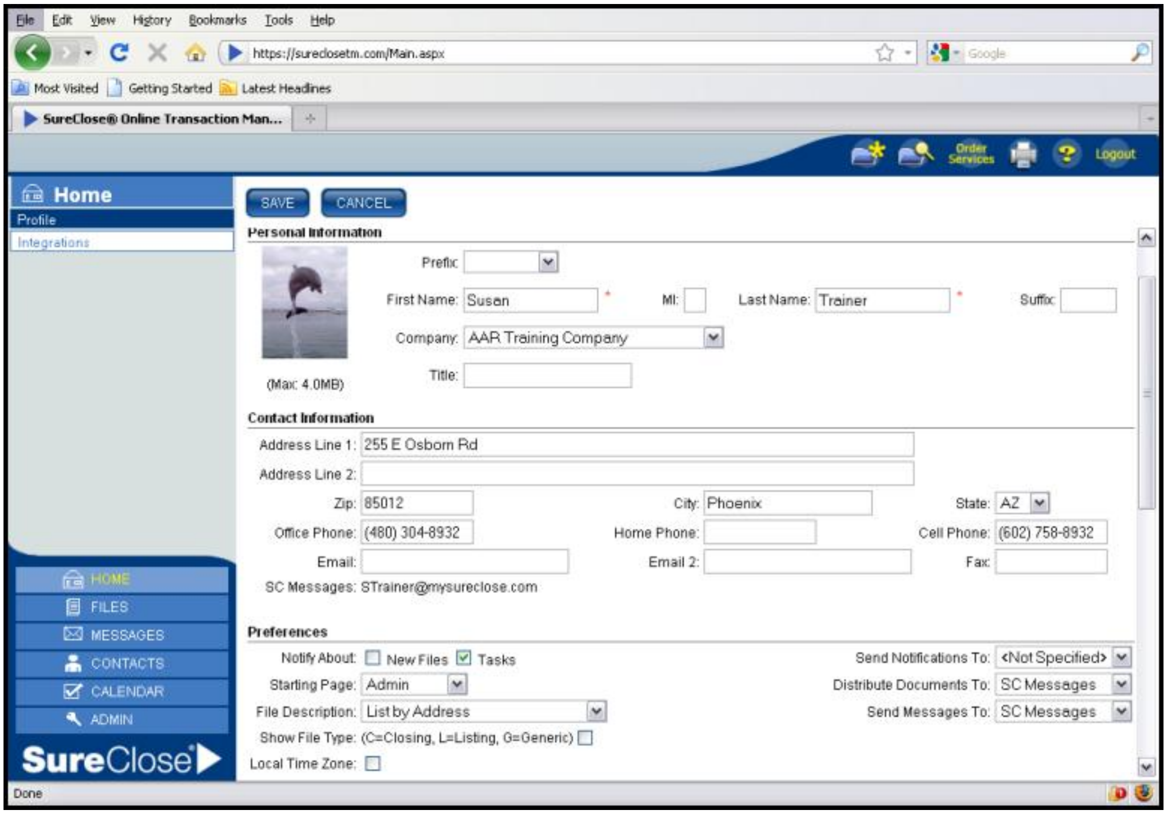


Figure 3

Personal Information

The *Personal Information* section (Figure 4) contains your name (including prefix and suffix), your company, your title, and your picture.

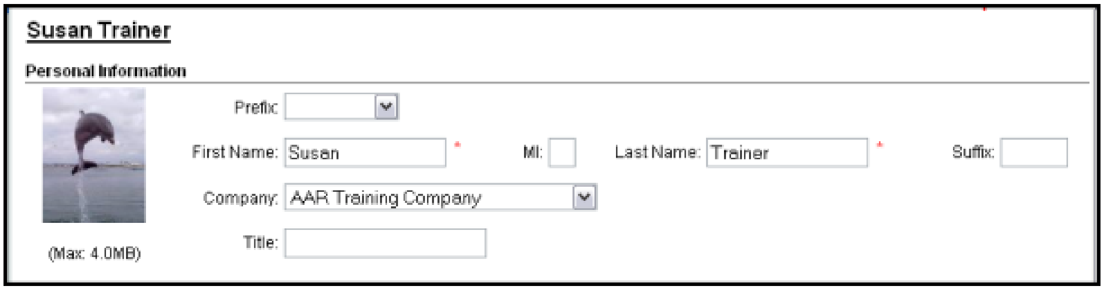


Figure 4

You can change or update your name by typing over the information in the *First Name*, *MI*, *Last Name*, or *Suffix* fields. You can add a prefix to your name by selecting the correct prefix in the *Prefix* drop-down menu. Click the **Save** button at the upper left side of the screen to save your changes.

Use the following steps to add your picture to your profile:

1. Click on the Add Photo hyperlink in the photo box to see a **Browse** window.
2. Find your photo on your computer.
3. Select the photo you want to upload and click the **Open** button. The photo uploads to your profile.

NOTE: The photo must be no larger than 4.0 MB.

4. Click the Resize hyperlink to resize your photo to fit the space. You see Figure 5. You can either shrink or crop the photo to make it fit the space correctly.

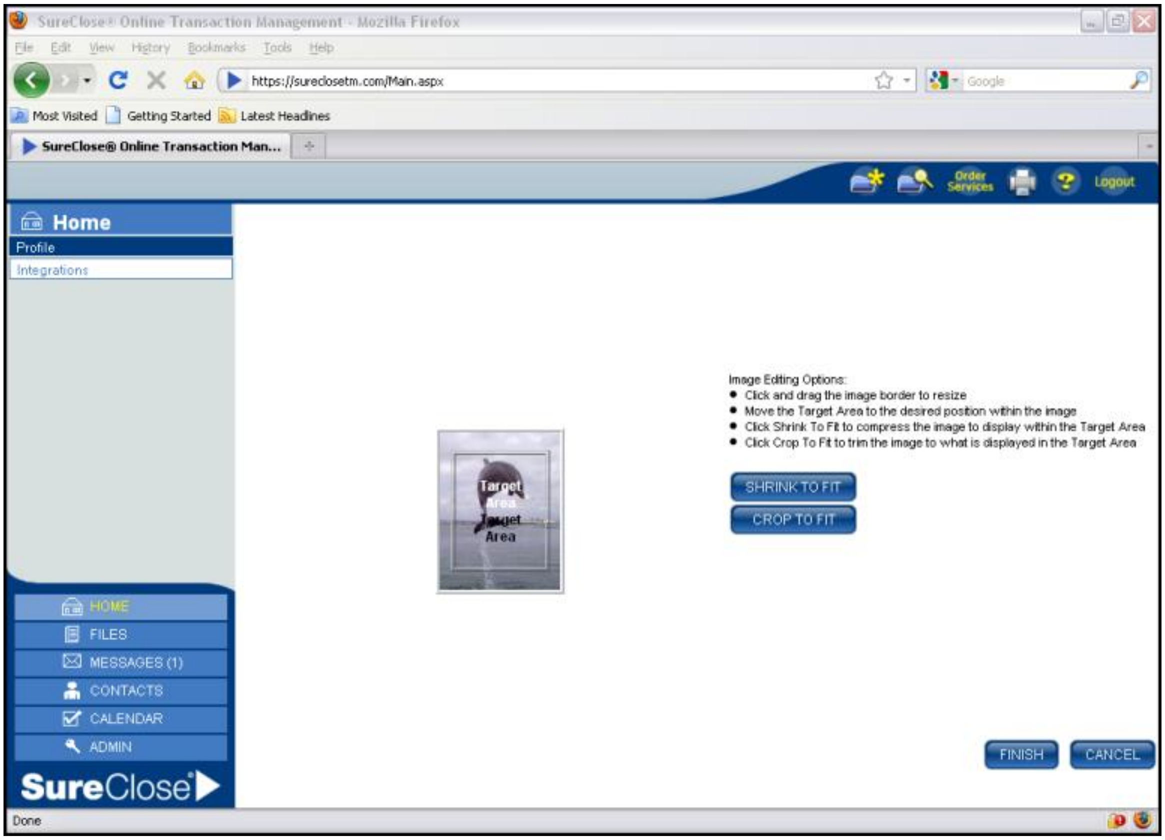


Figure 5

5. Click the **Save** button to save your changes and return to the *Personal Information* section.

Contact Information

The *Contact Information* section (Figure 6) includes your company address, telephone numbers, and email addresses. The address and office telephone are controlled by the company with which you are affiliated.

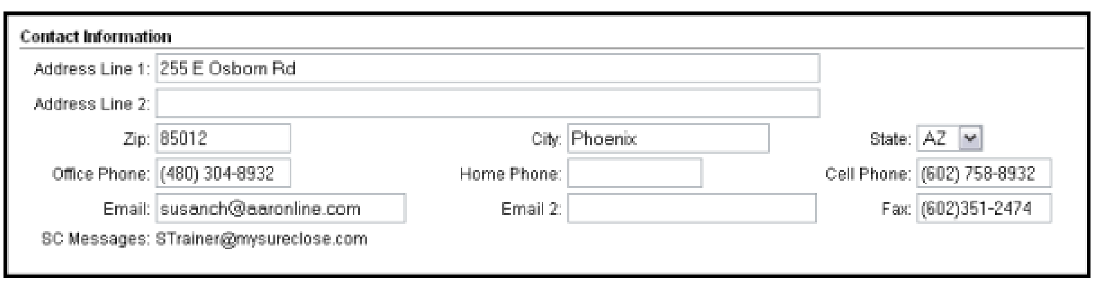


Figure 6

You can add an additional email address, your cell phone number, and a fax number to this section. Be sure to click the **Save** button on the upper left side of the screen when you have finished making your changes.

NOTE: You do not need to enter parentheses or dashes when entering a telephone number, SureClose® enters those for you automatically.

Preferences

The *Preferences* section (Figure 7) enables you to specify the following information:

- The first page you want to see when you log in to SureClose® Advantage.
- Where you want to receive task notifications, document notifications, and messages.
- How you want your files listed.

Figure 7

Use the following steps to make changes to your preferences:

1. Select the appropriate page you want to see when you log in to SureClose® from the *Starting Tab* drop-down menu. The **Files** page is recommended.
2. Select the appropriate format for how you want your files listed from the *File Description* drop-down menu. The choices are:
   - List by Address
   - List by Buyer/Seller
   - List by File Number
   - List by File Number/Address
   - List by File Number/Buyer/Seller
   - List by MLS Number/Address
   - List by MLS/File Number
   - List by Seller/Buyer
3. Click the *Show File Type* check box to see the type of file to the left of the address when displaying a list of your files.
4. Select the email address to which you want notifications, documents, and messages sent from the *Send Notifications To*, *Distribute Documents To*, and *Send Messages To* drop-down menus, respectively.
5. Click the *Local Time Zone* check box if you want to have times recorded using your local time zone.
6. Click the **Save** button at the top left side of the screen to save your changes.

Message Settings

The *Message Settings* section (Figure 8) enables you to set SureClose® to send auto-replies when you are out of the office. These replies are sent in response to any emails sent to your SureClose® email address.

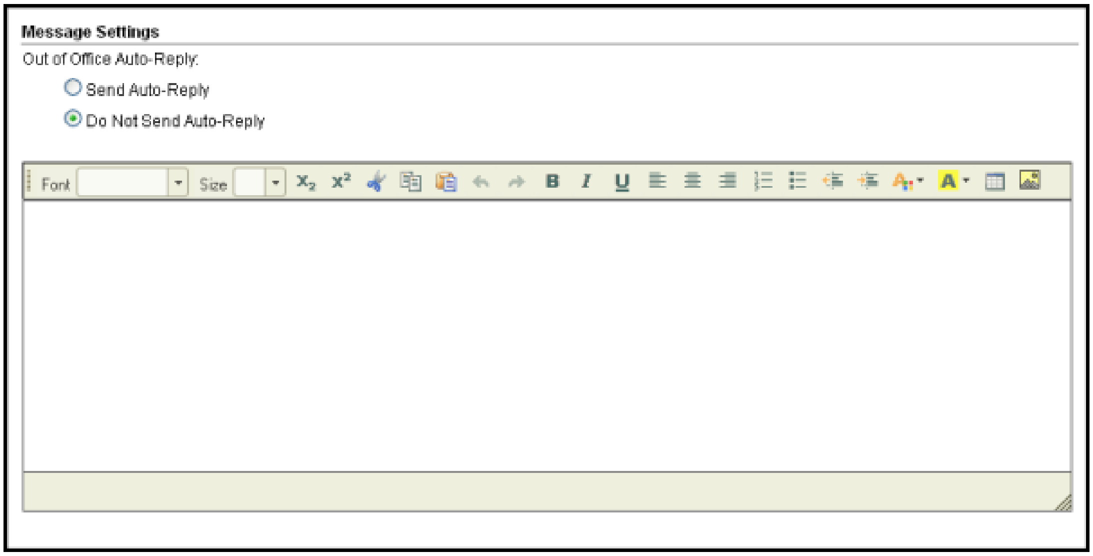


Figure 8

Click the *Send Auto-Reply* check box and type your message in the *Message* field. Click the **Save** button at the upper left side of the screen to save your changes.

Security Settings

The *Security Settings* section (Figure 9) enables you to change your user name or your password.

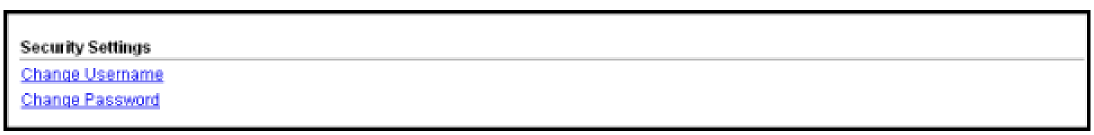


Figure 9

You can change your SureClose® username by clicking on the Change Username hyperlink to see Figure 10. Enter a new username and your current password and click the **Save** button on the upper left side of the screen to save your changes.

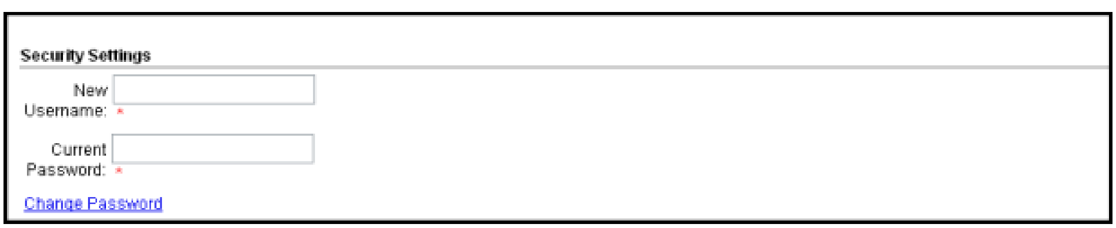


Figure 10

NOTE: Changing your username also changes your SureClose® email address.

If your chosen username has already been assigned, you receive a message asking to enter a different user name (Figure 11).

Figure 11

You can change your SureClose® password by clicking on the Change Password hyperlink to see Figure 12. Enter your current password, your new password, and re-enter your new password. Click the **Save** button at the upper left side of the screen to save your changes.

Figure 12

NOTE: Your password must be at least 8 characters in length, contain at least one letter or number, and cannot contain your first or last name, or the word password.

Integrations

The **Integrations** tab takes you to the **Integration Settings** page. Select MLS from the *Integrator* drop-down menu to see the **MLS Integration** page (Figure 13).

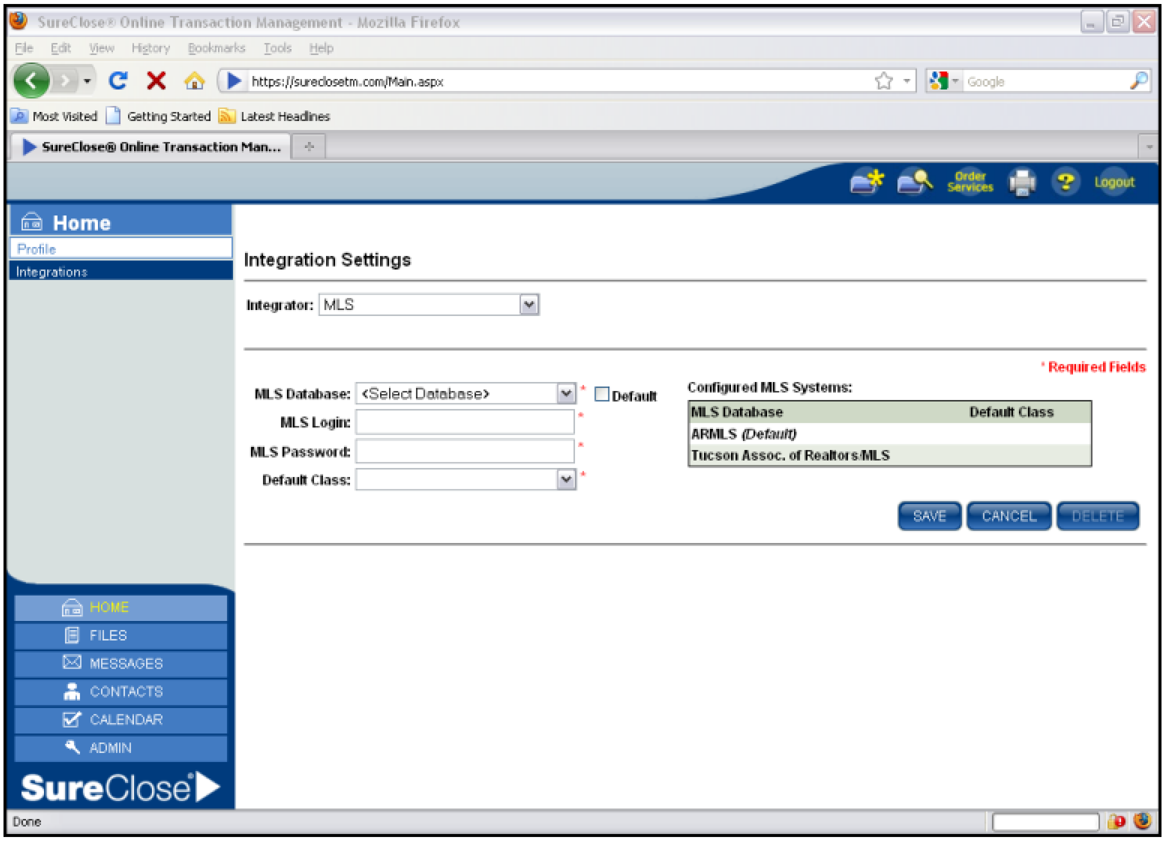


Figure 13

Before setting up your MLS integration, you need to determine whether your MLS database requires a special RETS password to transfer data. The following table lists the Arizona MLS databases and the password requirements for SureClose®.

MLS Name in SureClose	Vendor	Login ID / Password Needed
ARMLS	FlexMLS	Special RETS password created in Preferences>My Profile.
Central Arizona	Paragon 4	Use regular password.
Green Valley/Sahuarita	Paragon 1 & Voyager 2	Use regular password.
Northern Arizona	Rapattoni	Use regular password.
Prescott Area	Innovia	Broker needs to contact the Prescott Board to fill out a special form for a RETS ID and password. All Administrative staff use that one ID and password.
Santa Cruz County (flexmls)	FlexMLS	Special RETS password created in Preferences>My Profile.
Sedona Verde Valley	Rapattoni	Use regular password.

MLS Name in SureClose	Vendor	Login ID / Password Needed
Tucson	FlexMLS	Everyone uses an ID of Tucson and a password of tucson (all lower case).
Southeast Arizona MLS	Paragon 4	Everyone uses an ID of samls and a password of samls.
WARDEX	Innovia	Broker needs to contact the WARDEX to fill out a special form for a RETS ID and password. Each person needs their own RETS ID and password.
White Mountain Association	Paragon 3 or 4	Use regular password.
Yuma Arizona	Paragon 4	Use regular password.

Use the following steps to set up your MLS integration:

1. Select your MLS database from the *MLS Database* drop-down menu.
2. Check the *Default* check box if this database is your primary MLS system.
3. Type your administrator MLS login ID in the *MLS Login* field.
4. Type the appropriate password (based on the table above) in the *MLS Password* field.
5. Choose the class you use most often when creating files from the *Default Class* drop-down menu.
6. Click the **Save** button to save your integration.

A list of your configured MLS databases displays in the *Configured MLS Systems* field.

Messages Page

The **Messages** tab takes you to the **Messages** page (Figure 14). The **Messages** tab has five sub-tabs:

- **Email** – shows emails or documents that have been sent to your SureClose® email address. You can upload these items into transaction files from the **Email** page. Your email address for SureClose® is *userid*@mysureclose.com.
- **Fax** (not used)
- **Uploaded Documents** – shows any documents that have been uploaded using the **Basic** tab of the SureClose® Printer Driver.
- **Notifications** – shows any notifications that have been sent to your SureClose® email address.

NOTE: You must have your profile set to send notifications to your SC Inbox to receive notifications in SureClose®.

- Files to Import (not used)

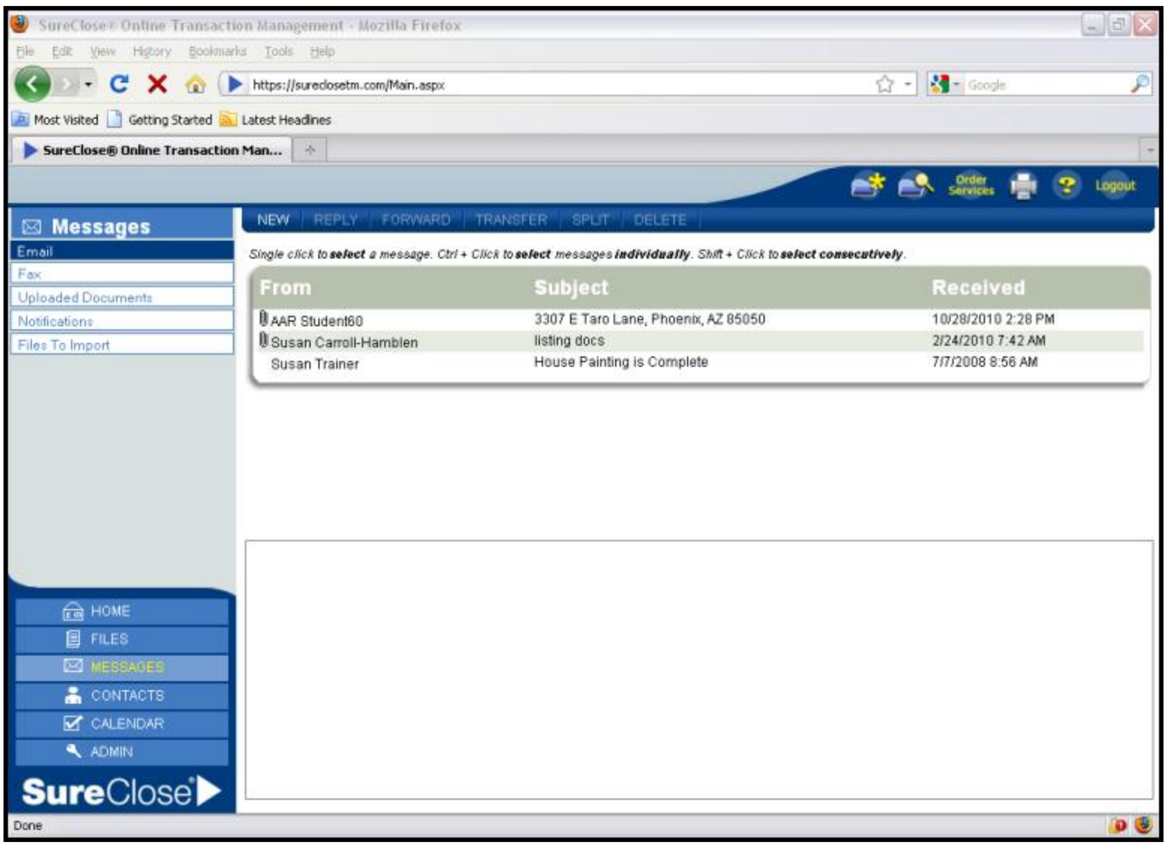


Figure 14

You can perform the following functions from the **Messages** page:

- Send an email using the **New** button.
- Reply to a message using the **Reply** button.
- Forward a message using the **Forward** button.

- Move a message from the **Messages** page to a file's **Activity Log** page using the **Transfer** button.
- Split a document into multiple placeholders on a file's **Documents** page using the **Split** button. See *Uploading Documents Using the Split Button on the Messages Page* on page 60.
- Delete a message using the **Delete** button.

Contacts Page

The **Contacts** tab takes you to the **Contacts** page (Figure 15). This page enables you to see either personal or company contacts. You can perform the following functions on this page:

- Add a new contact to the list.
- Search for a personal or company contact.
- Edit the information of a particular contact.
- Import your list of contacts from an Outlook file.

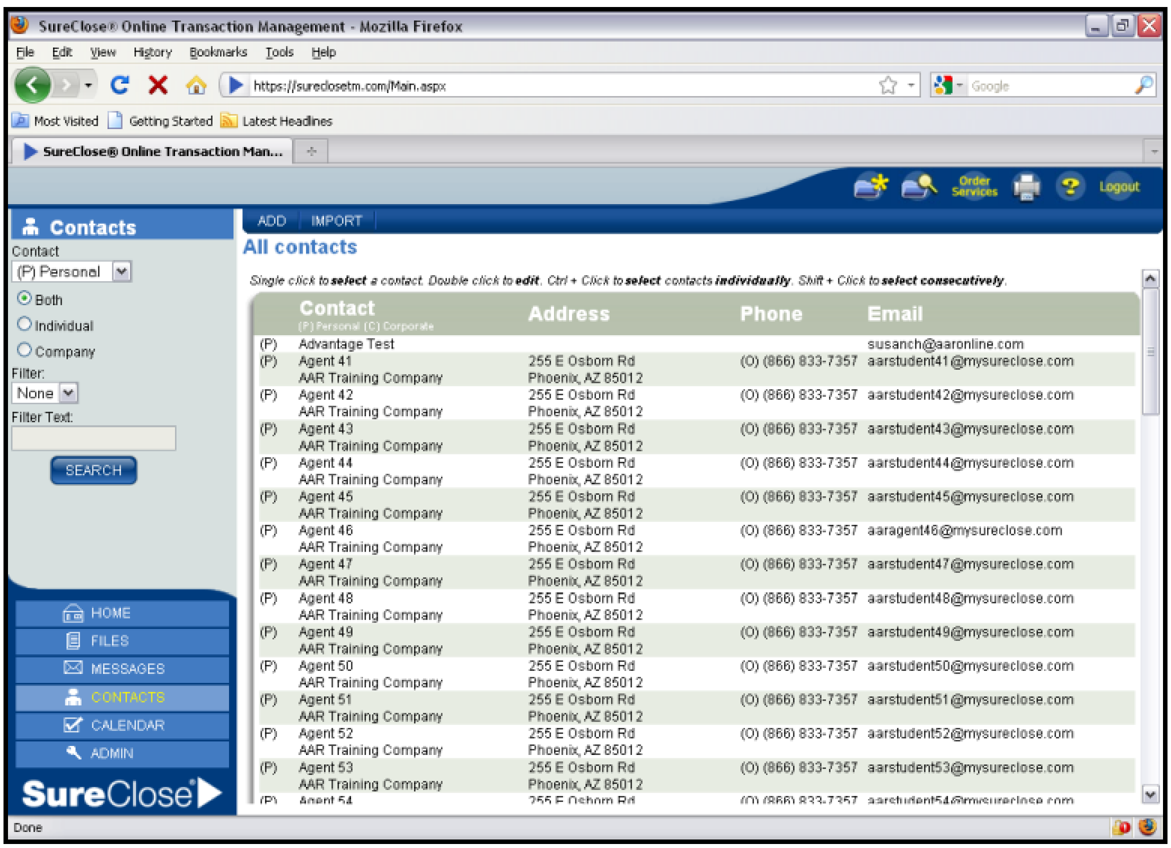


Figure 15

Add a Contact

The **Add** button enables you to add a contact to your corporation's database as well as your personal contacts, your company contacts, or both.

Use the following steps to add an individual contact to your database from the **Contacts** page (Figure 15):

1. Click the **Add** button to see Figure 16.

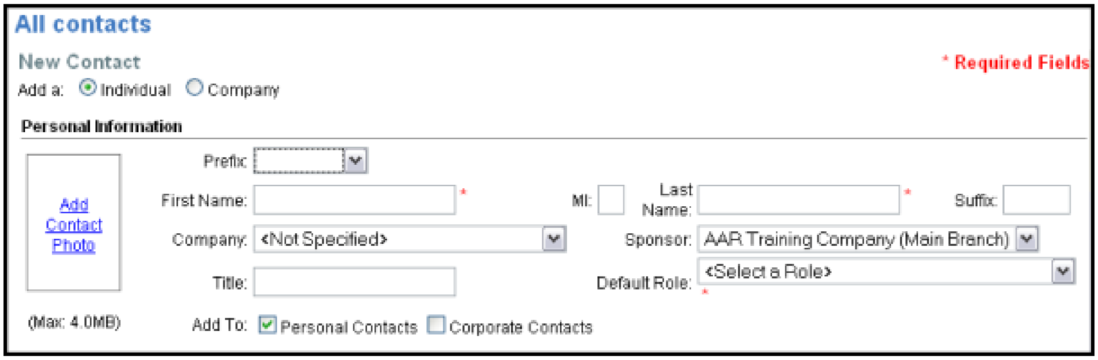


Figure 16

2. Click the **Individual** radio button.
3. Type the person's first and last names in the *First Name* and *Last Name* fields. These fields are required.
4. Add a prefix, middle initial, and/or suffix for the person in the *Prefix*, *MI*, and *Suffix* field, if necessary.
5. Select the appropriate company for the person from the *Company* drop-down menu (if necessary). If the company does not appear in the list, you can search for the appropriate company by selecting <Search Global Directory> from the list.
6. Select the default role for the person from the *Default Role* drop-down menu. This is a required field.
7. Click the check boxes to add the person to your personal and company contacts lists, if necessary.
8. Type the person's address in the *Address* fields as shown in Figure 17. If you have selected a company for this person, the address fills in automatically.

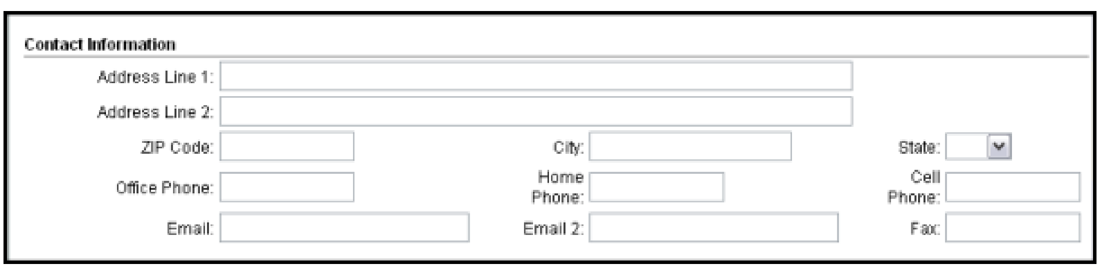


Figure 17

9. Type the office phone, home phone, and cell phone for the person in the *Office Phone*, *Home Phone*, and *Cell Phone* fields, if necessary.

10. Type the person’s email address in the *Email* field and their fax number in the *Fax* field.

NOTE: ***You must have an email address on file for the person for them to use SureClose.***

11. Click the check boxes for *New Files* and *Tasks* if you want this person to receive notifications as shown in Figure 18.

Figure 18

12. Choose the email address to which to send notifications from the *Send notifications to* drop-down menu.
13. Choose the email address to which to send documents from the *Distribute documents to* drop-down menu.
14. Choose the email address to which to send messages from the *Send messages to* drop-down menu.
15. Select a general security profile (the profile that determines the view and overall permissions for the user) from the *Application Security Profile* drop-down menu as shown in Figure 19.

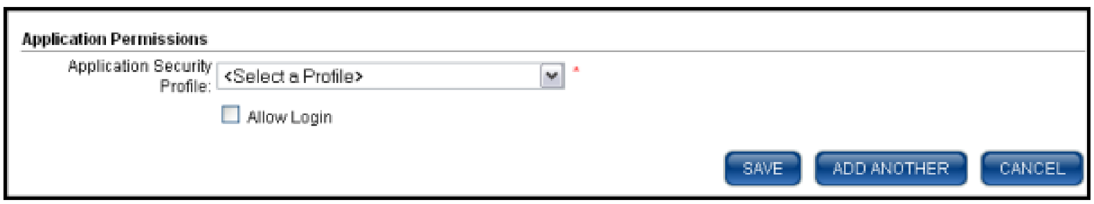


Figure 19

The security profiles are:

- Agent – Access: This is not used in Arizona.
- General Access: This profile provides full access to all features, except for the system administration functions. You should limit this profile to internal office staff.
- Guest – Affiliate: This profile enables escrow officers and other affiliated organizations to view the files to which they have been added as a party.
- Guest – Agent: This profile enables agents to view their files.
- Guest – Agent – Pro: This is not used in Arizona.
- Guest – Agent w/Upload and DocuSign: This profile enables an agent to view their files and upload documents to the file.
- Guest – Agent with Upload: This profile enables an agent to view their files and upload documents to the file. When your corporation was created and your agents were uploaded to your system, they were given this General Security profile. You can also assign this profile to Escrow Officers and Loan Officers if you want them to be able to upload documents to your transaction files.
- Guest – Consumer: This profile enables sellers and buyers to view their files.

- Guest – Consumer – Pro: This is not used in Arizona.
- Guest – Lender: This profile enables lenders to view the files to which they have been added as a party.
- SC Archive Admin (Professional): This is not used in Arizona.
- SC Archive Guest (Professional): This is not used in Arizona.
- SC Archive User (Professional): This is not used in Arizona.
- Site Admin: This profile provides full access to all features, including system administration functions. You should limit this profile to a few key employees within your corporation, such as your office managers.

16. Click the *Allow Login* checkbox to enable this person to log in to SureClose®.
17. Click the **Save** button to add this person to your database or click the **Add Another** button to save the current user and immediately see the page to add another user.

Calendar Page

The **Calendar** tab takes you to the **Calendar** page (Figure 20). This page enables you to see your tasks in a list or calendar view for the current week or month.

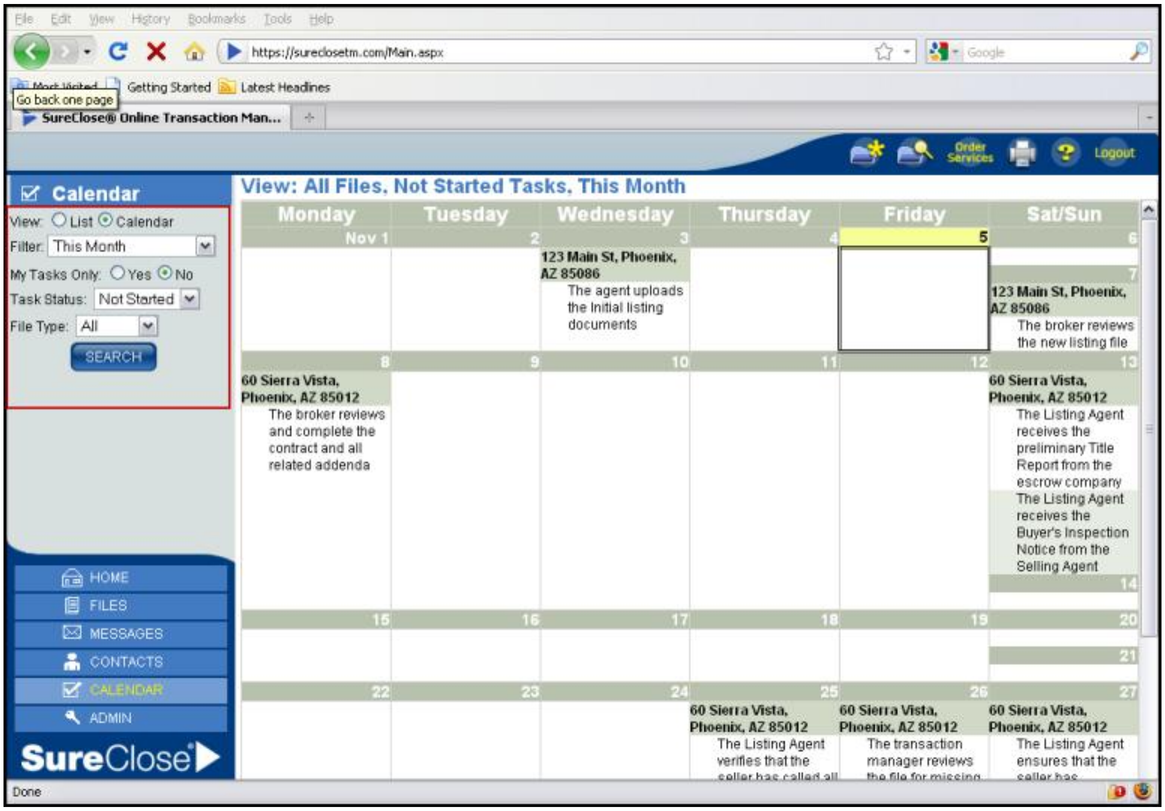


Figure 20

You can change the view for your calendar by using the following steps:

1. Click the *List* radio button in the **Navigation** pane to see your calendar in a list view or click the *Calendar* radio button to see your calendar in calendar view.
2. Choose the span of time for the calendar from the *Filter* drop-down menu. Your choices are:
   - Today
   - This week
   - This business week
   - This month
   - Up to today
   - Custom (choose your own date span)
3. Click the *Yes* radio button to see only your tasks or click the *No* radio button to see tasks for all roles on a file.

4. Choose the status of the tasks you want to see from the *Task Status* drop-down menu. The choices are:
    - All
    - Not started
    - In progress
    - Completed
5. Choose the types of files you want displayed from the *File Type* drop-down menu. The choices are:
    - All
    - Closing
    - Generic
    - Listing
6. Click the **Search** button to display your calendar.

Chapter 2. Creating a Listing File

You start the process to create a listing file by clicking on the **Create File** () button on the upper right side of your screen. The **Create File** page displays (Figure 21).

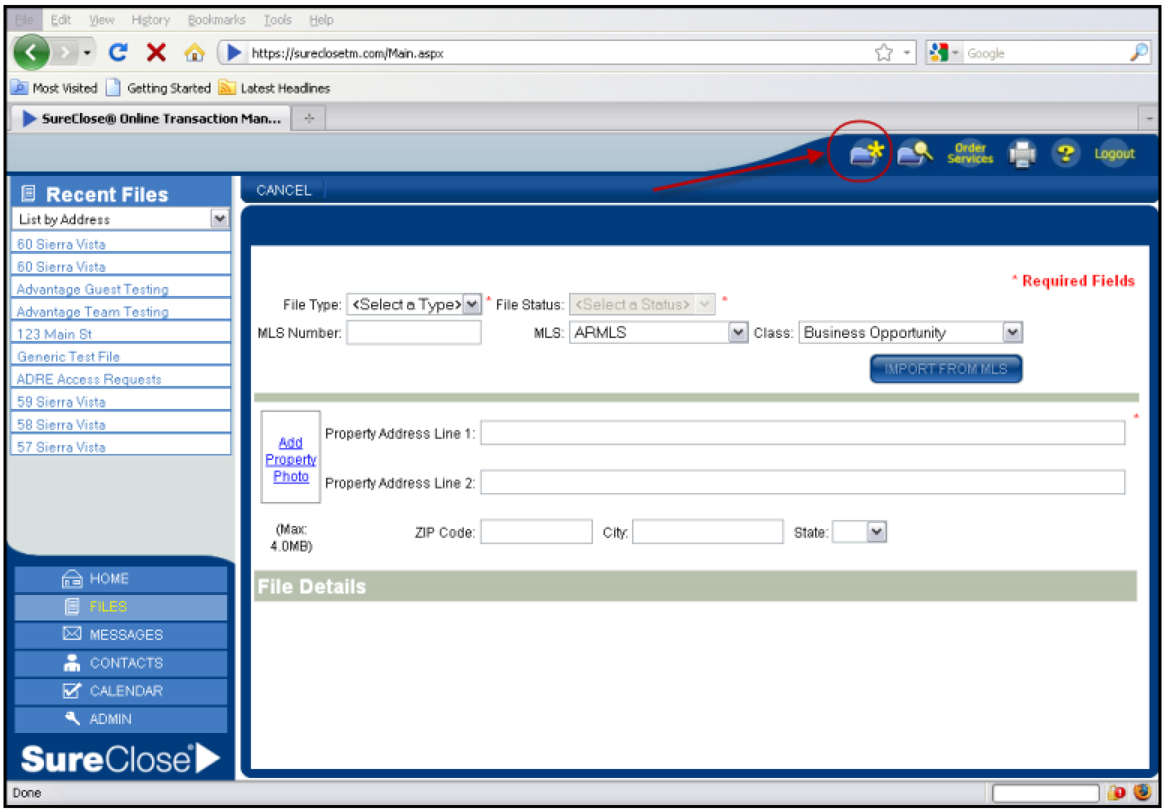


Figure 21

Use the following steps to create a listing file:

1. Select Listing from the *File Type* drop-down menu. The other choices are:
   - Closing
   - Generic
2. Select the status for the listing file from the *File Status* drop-down menu. The available statuses are:
   - Active (default)
   - Cancelled
   - Closed
   - Expired

- On Hold
- Pending
- Withdrawn

3. Type your MLS number in the *MLS Number* field.
4. Select your MLS database from the *MLS* drop-down menu, if necessary.
5. Select the class of the listing from the *Class* drop-down menu, if necessary.
6. Click the **Import From MLS** button to import basic property information from the MLS database (Figure 22).

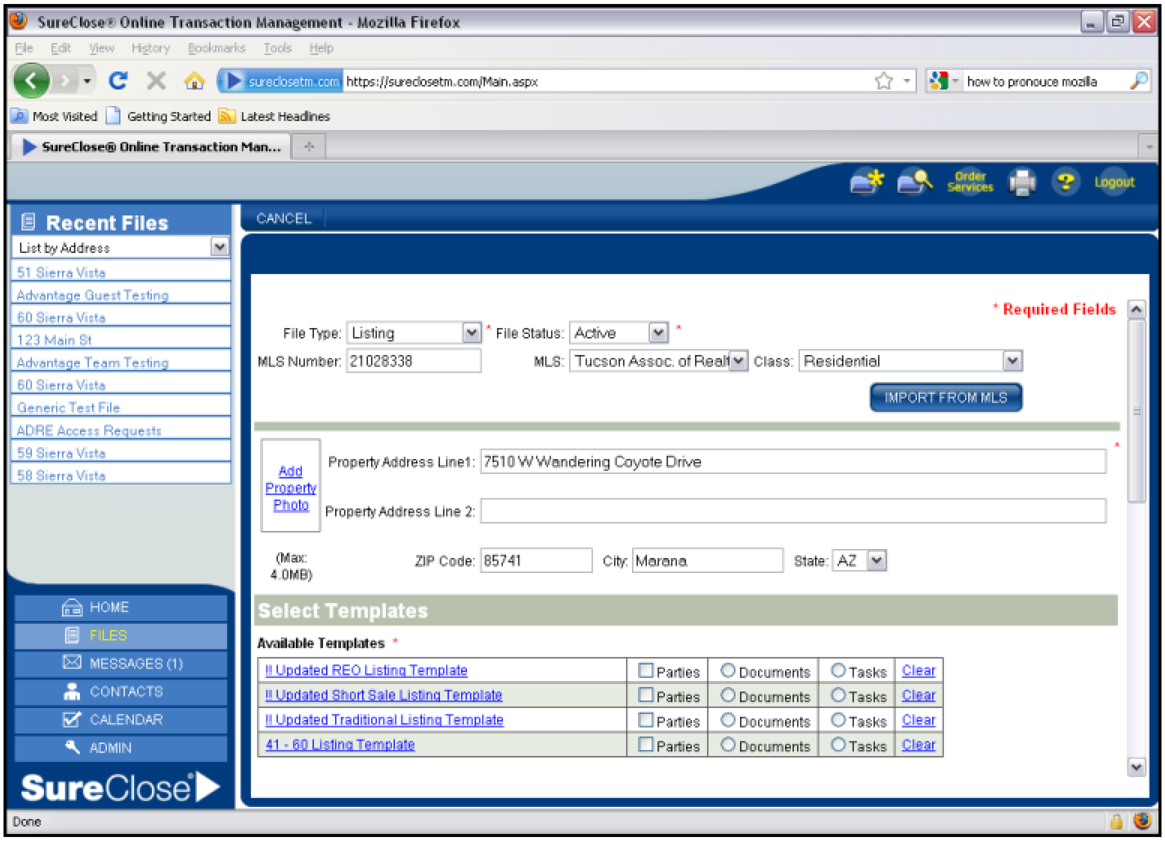


Figure 22

7. Click on the name of the template you want to apply to the file from the *Available Templates* list. You see the check boxes fill in for Parties, Documents, and Tasks for the template you selected.

NOTE: You can choose a first template to add your parties to a file and then choose a second template to add your tasks and documents to the file.

8. Scroll down to the *File Details* section. The *File Start Date* field fills in automatically with the current date. The *Listing Price* field also fills in automatically with the listing price as shown in Figure 23.

Figure 23

9. Verify that the date in the *Listing Start Date* field is the date the Listing Agreement was signed.

10. Choose the expiration date from the calendar to the right of the *Listing Expire Date* field.

11. Fill in the fields in the *Property* section as shown in Figure 24, if necessary.

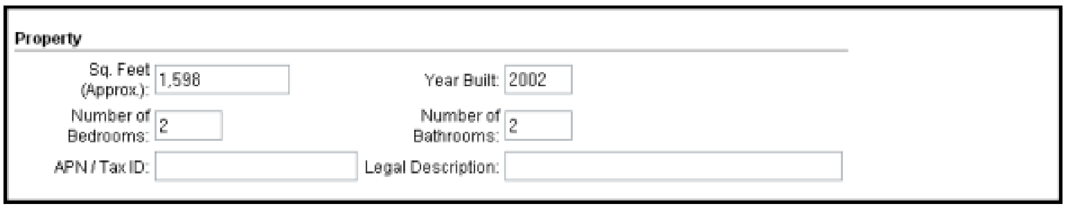


Figure 24

12. Assign a file number to the file in the *File Number* field as shown in Figure 25. Alternatively, you can assign the file number in the *Log Number* field.

Figure 25

13. Ensure that the *Enable Notifications* and *Enable Reminders* check boxes are checked as shown in Figure 26 so the parties on the file receive any notifications and reminders set on the file.

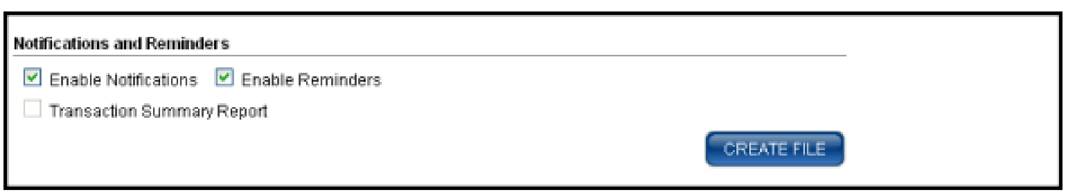


Figure 26

14. Click the **Create File** button to create your transaction file. You receive a message that your file has been successfully created and the **Summary** page of the file displays (Figure 27).

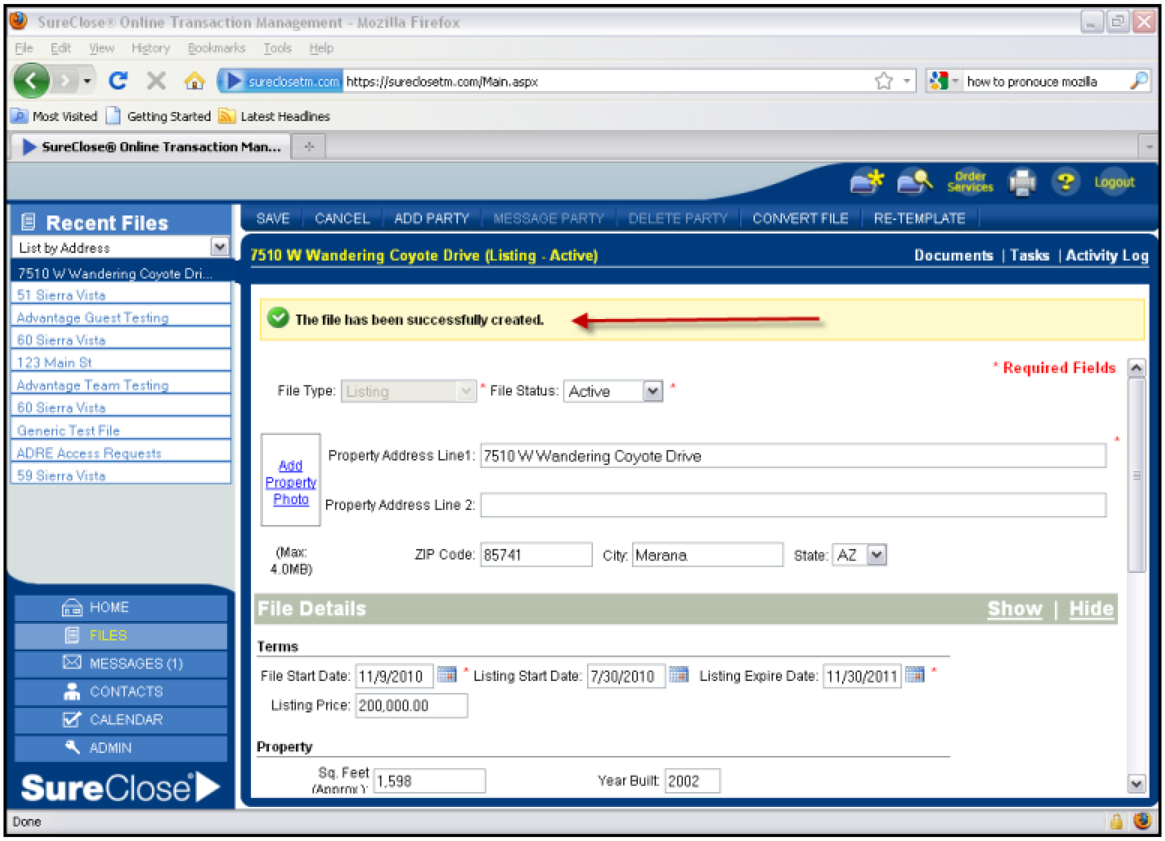


Figure 27

Chapter 3. Creating a Closing File

You start the process to create a closing file by clicking on the **Create File** ( ) button on the upper right side of your screen. The **Create File** page displays (Figure 28).

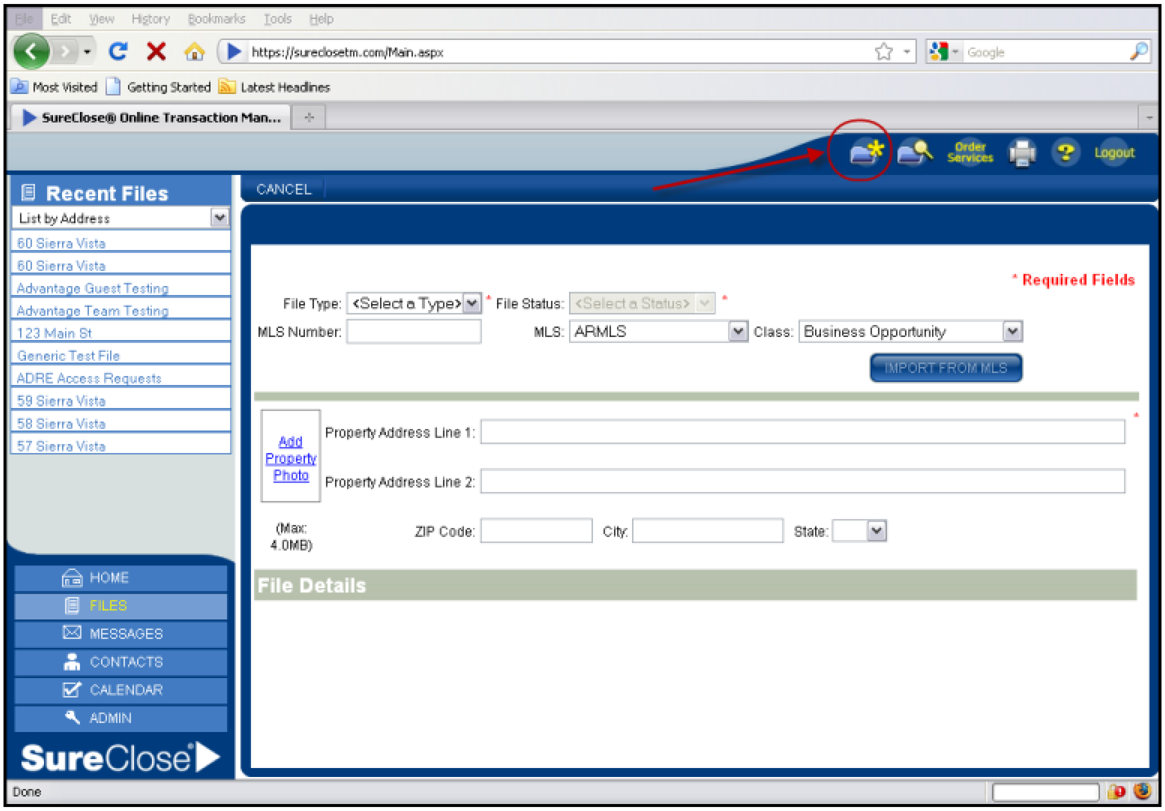


Figure 28

Use the following steps to create a closing file:

1. Select Closing from the *File Type* drop-down menu. The other choices are:
   - Generic
   - Listing
2. Select the status for the closing file from the *File Status* drop-down menu. The available statuses are:
   - Cancelled
   - Closed
   - On Hold
   - Open (default)
3. Type your MLS number in the *MLS Number* field.

4. Select your MLS database from the *MLS* drop-down menu, if necessary.
5. Select the class of the closing from the *Class* drop-down menu, if necessary.
6. Click the **Import From MLS** button to import basic property information from the MLS database (Figure 29).

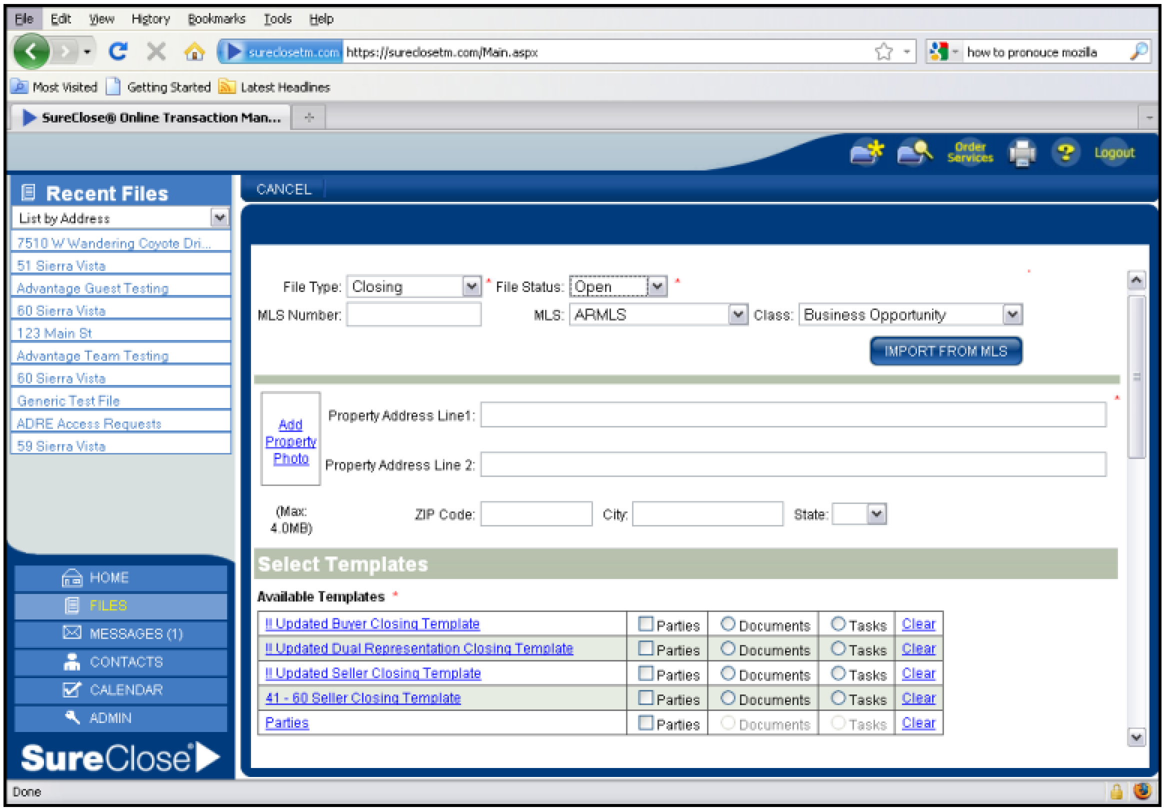


Figure 29

7. Click on the name of the template you want to apply to the file from the *Available Templates* list. You see the check boxes fill in for Parties, Documents, and Tasks for the template you selected.

NOTE: You can choose a first template to add your parties to a file and then choose a second template to add your tasks and documents to the file.

8. Scroll down to the *Terms* section (Figure 30). The *File Start Date* field fills in automatically with the current date.

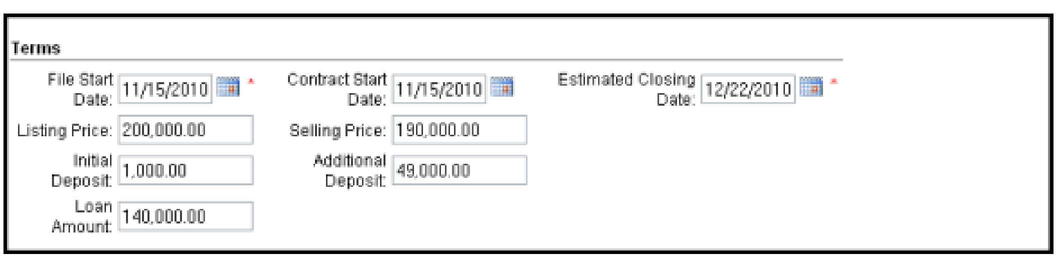


Figure 30

9. Choose the contract acceptance date from the calendar to the right of the *Contract Start Date* field.

10. Choose the close of escrow date from the calendar to the right of the *Estimated Closing Date* field.
11. Fill in the rest of the fields in the *Terms* section, if necessary.
12. Fill in the fields in the *Property* section (Figure 31), if necessary.

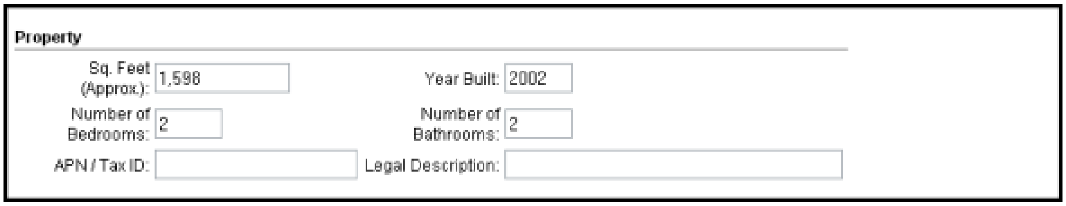


Figure 31

13. Type the escrow number in the *Escrow Number* field as shown in Figure 32.

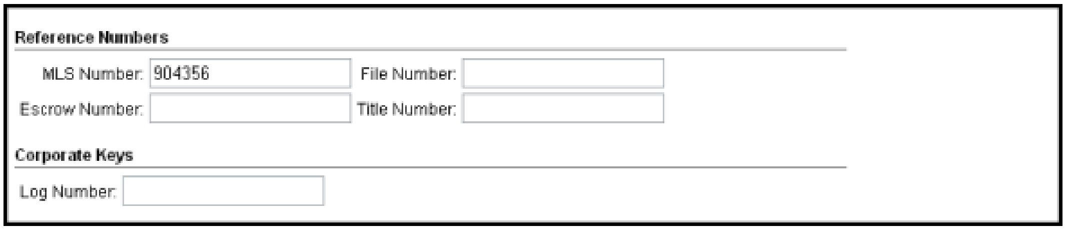


Figure 32

14. Assign a file number to the file in the *File Number* field.

NOTE: The Log Number field is not used.

15. Ensure that the *Enable Notifications* and *Enable Reminders* check boxes are checked (Figure 33) so that the parties on the file receive any notifications and reminders set on the file.

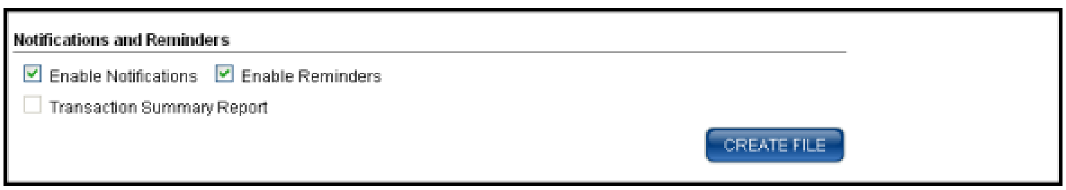


Figure 33

16. Click the **Create File** button to create your closing file. You receive a message that your file has been successfully created and the **Summary** page of the file displays (Figure 34).

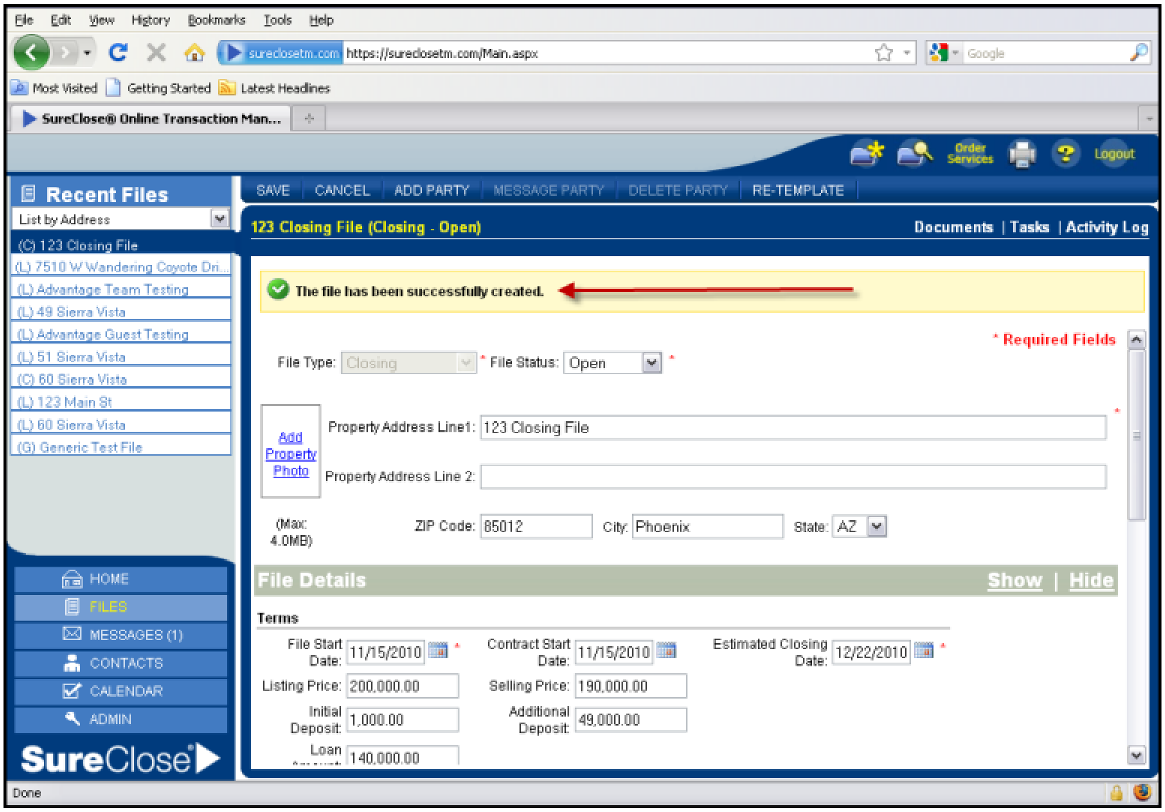


Figure 34

Chapter 4. Converting a Listing File to a Closing File

You start the process to convert a listing file to a closing file by opening the listing file to the **Summary** page.

Use the following steps to convert the listing file to a closing file:

1. Click on the **Convert File** button. You see the **Convert File** page (Figure 35).

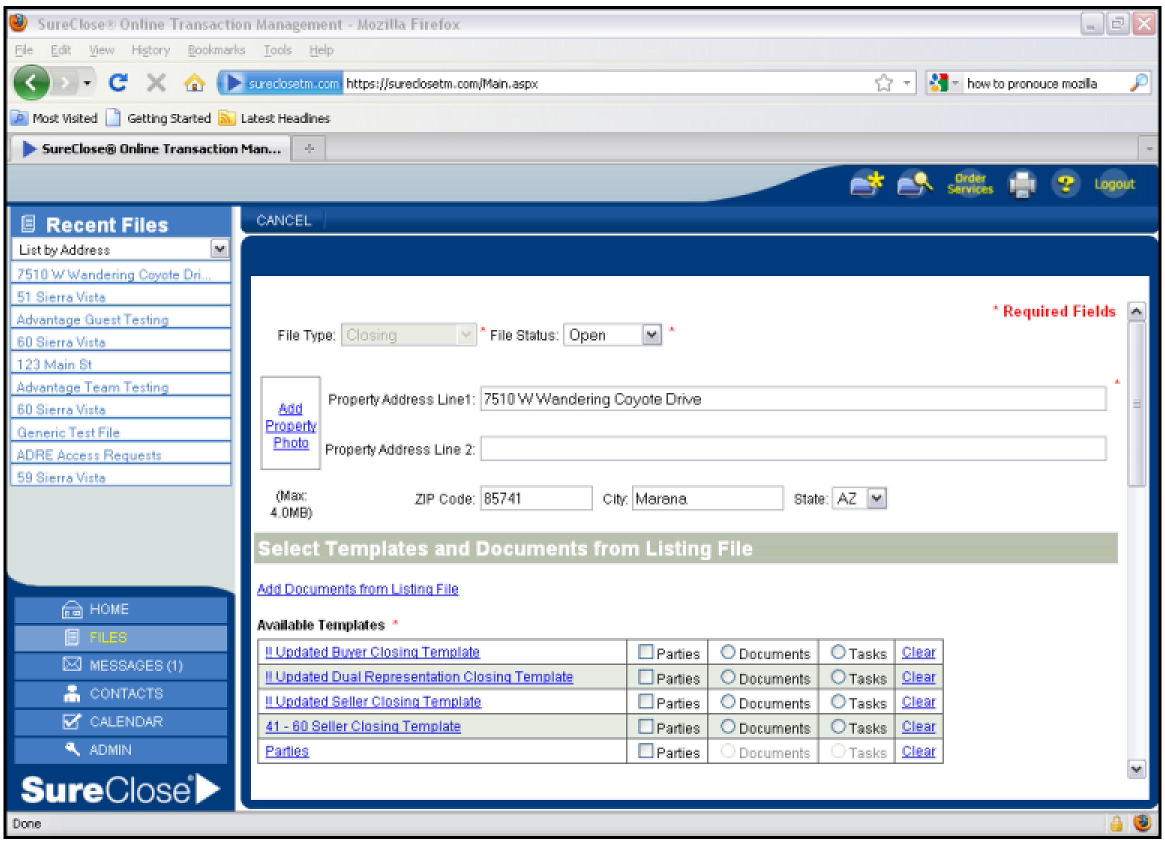


Figure 35

2. Select the status for the closing file from the *File Status* drop-down menu. The available statuses are:
   - Cancelled
   - Closed
   - On Hold
   - Open (default)

3. Click on the Add Documents from Listing File hyperlink if you want to transfer documents from the listing file to the closing file. You see Figure 36.

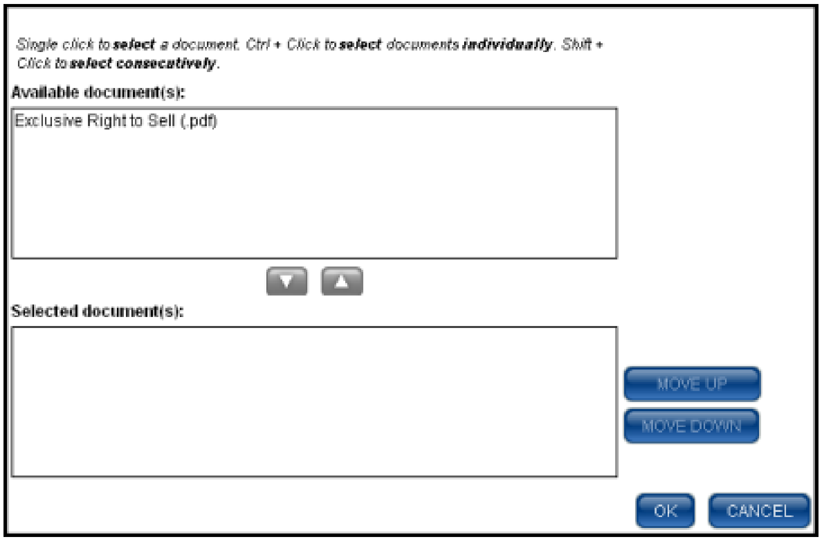


Figure 36

4. Click on the documents in the upper window that you want to transfer and click the **Down Arrow** button.
5. Click the **OK** button to transfer the documents when the closing file is created.
6. Click on the name of the template you want to apply to the file from the *Available Templates* list (Figure 35). You see the check boxes fill in for Parties, Documents, and Tasks for the template you selected.

NOTE: You can choose a first template to add your parties to a file and then choose a second template to add your tasks and documents to the file.

7. Scroll down to the *Terms* section (Figure 37). The *File Start Date* field fills in automatically with the current date.

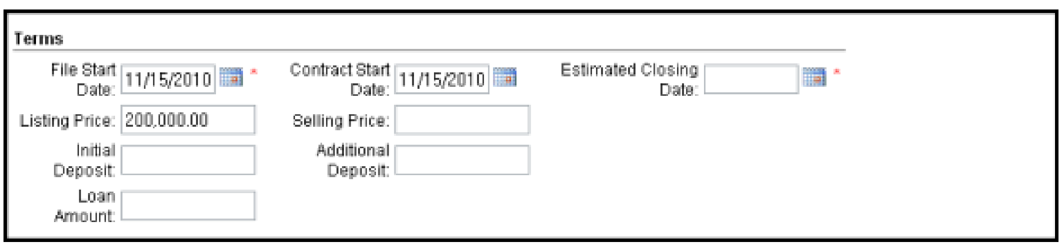


Figure 37

8. Choose the contract acceptance date from the calendar to the right of the *Contract Start Date* field.
9. Choose the close of escrow date from the calendar to the right of the *Estimated Closing Date* field.
10. Fill in the rest of the fields in the *Terms* section, if necessary. The fields in the *Property* section fill in with the information from the original listing file.

11. Type the escrow number in the *Escrow Number* field as shown in Figure 38.

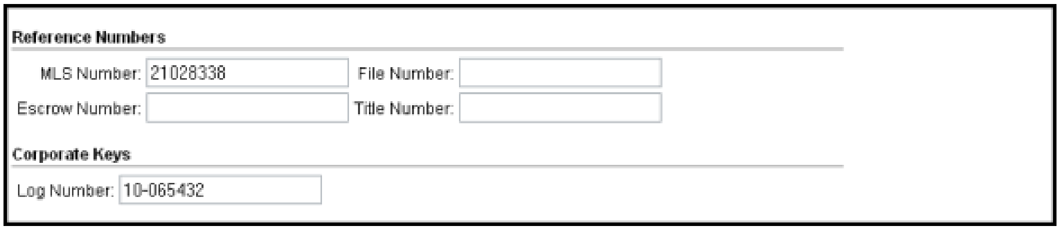


Figure 38

12. Assign a file number to the file in the *File Number* field.

NOTE: You can use the Log Number field to store the original listing file number.

13. Ensure that the *Enable Notifications* and *Enable Reminders* check boxes (Figure 39) are checked so that the parties on the file receive any notifications and reminders set on the file.

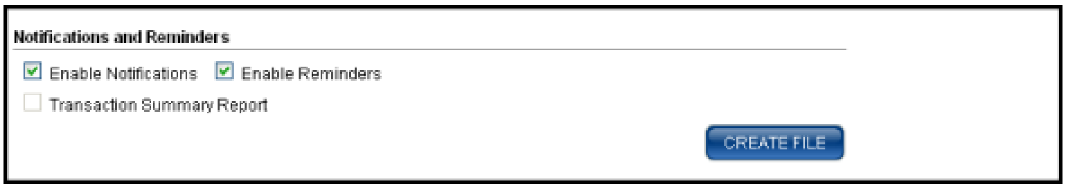


Figure 39

14. Click the **Create File** button to create your closing file. You receive a message that your closing file has been successfully created and the **Summary** page of the closing file displays (Figure 40). The parties from the listing file automatically transfer to the closing file.

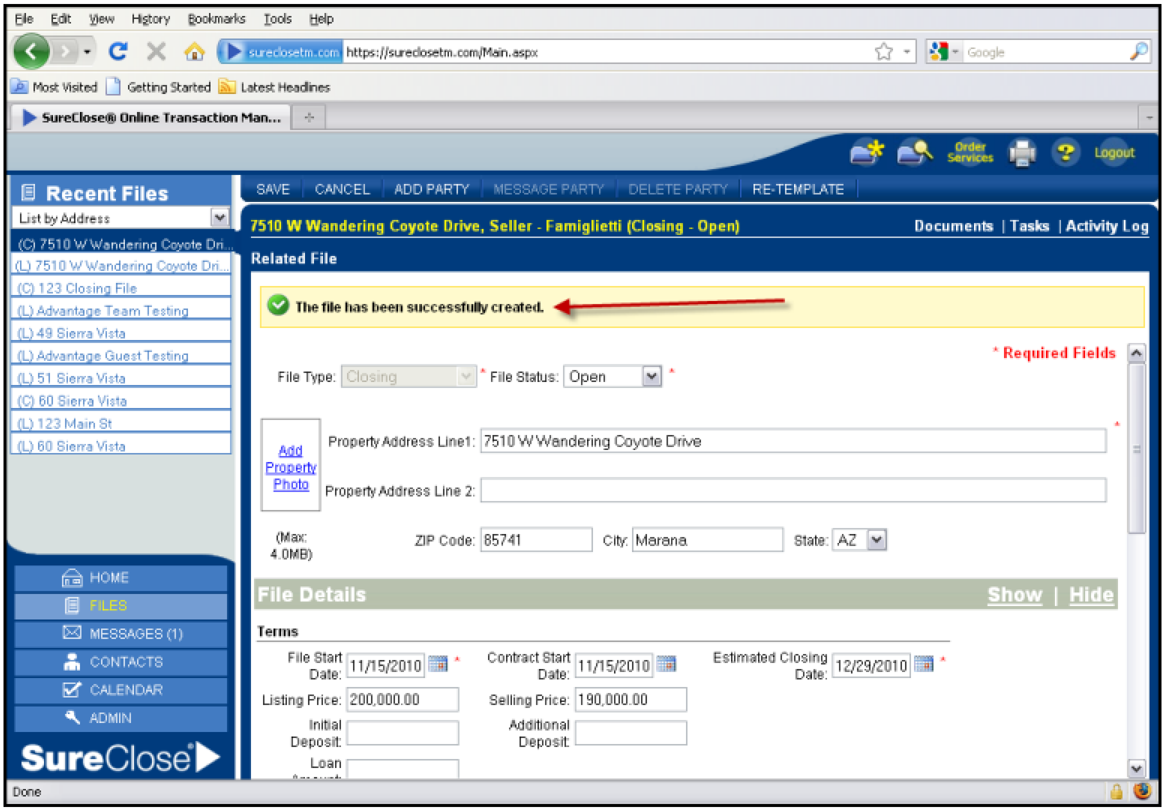


Figure 40

Chapter 5. Creating a Generic File

You start the process to create a generic file by clicking on the **Create File** () button on the upper right side of your screen. The **Create File** page displays (Figure 41).

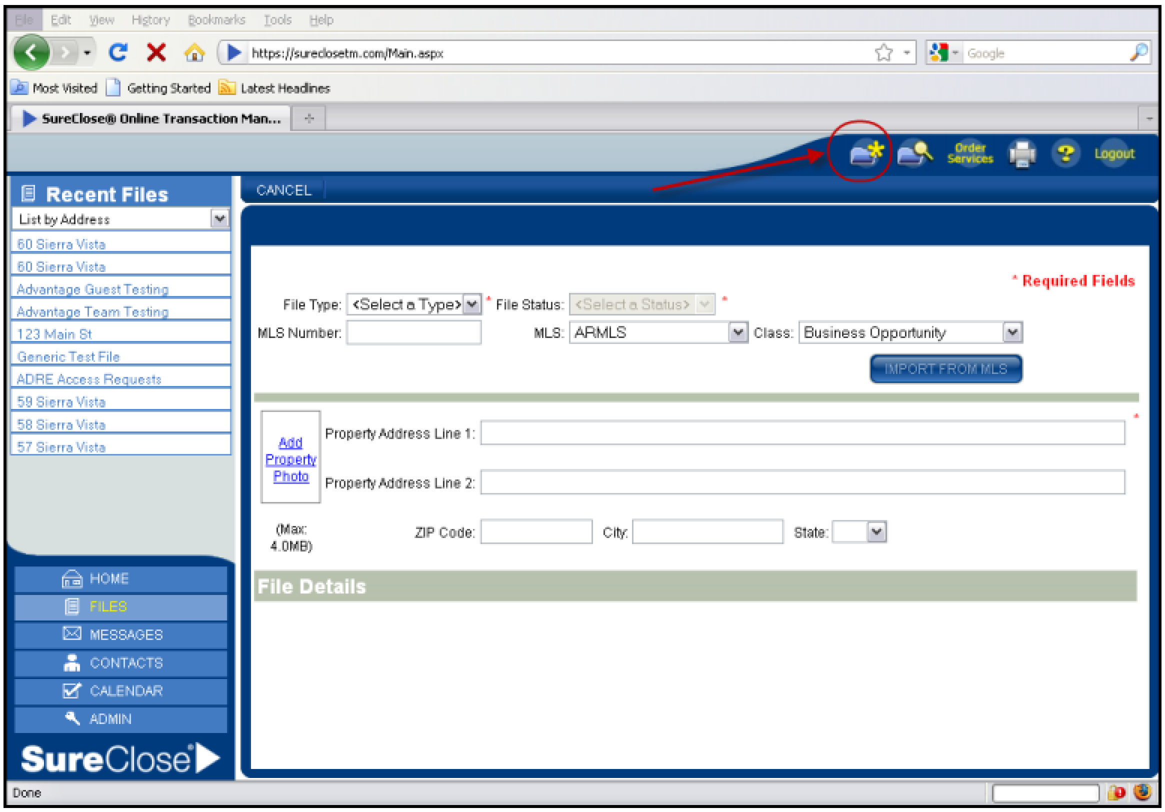


Figure 41

Use the following steps to create a generic file:

1. Select Generic from the *File Type* drop-down menu. The other choices are:
    - Closing
    - Listing
2. Select the status for the generic file from the *File Status* drop-down menu. The available statuses are:
    - Active (default)
    - Closed
    - On Hold

3. Type the name of the file in the *Description* field as shown in Figure 42.

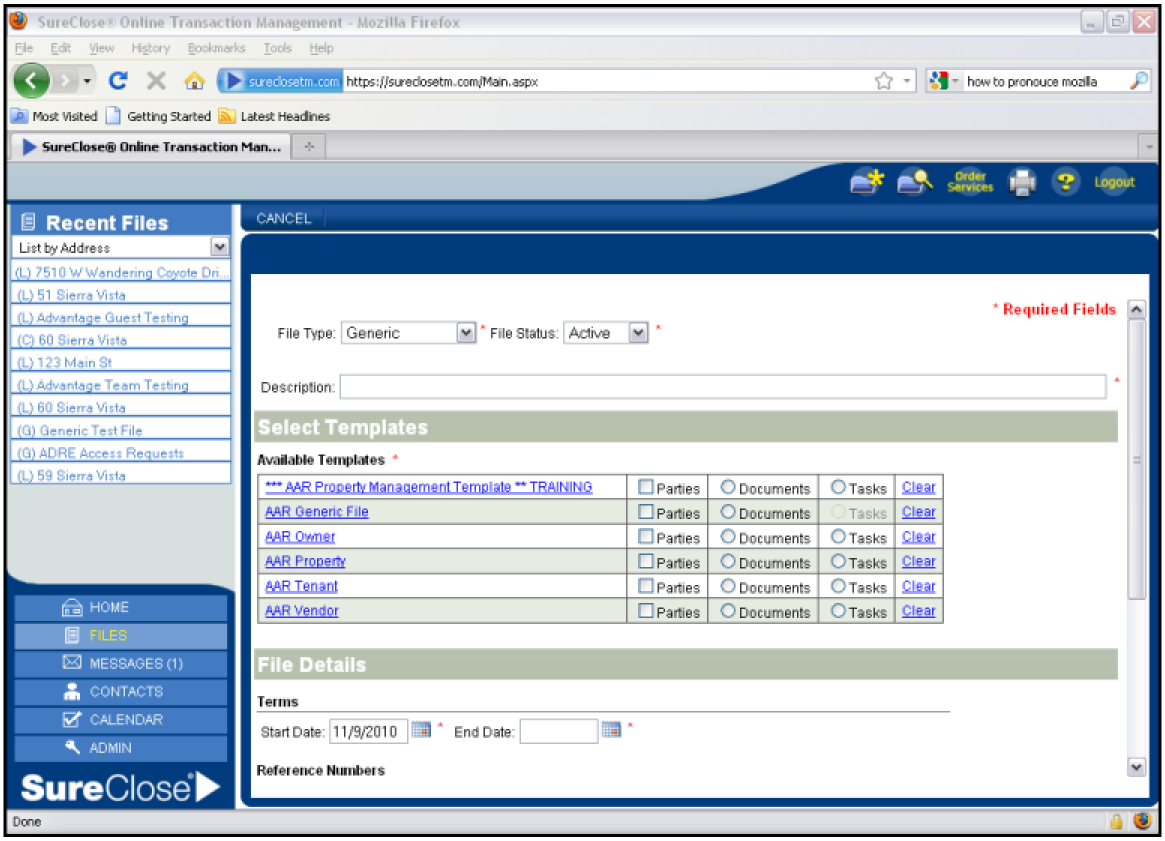


Figure 42

4. Click on the name of the template you want to apply to the file from the *Available Templates* list. You see the check boxes fill in for Parties, Documents, and Tasks for the template you selected.

> ***NOTE: You can choose a first template to add your parties to a file and then choose a second template to add your tasks and documents to the file.***

5. Scroll down to the *File Details* section (Figure 43). The *File Start Date* field fills in automatically with the current date.

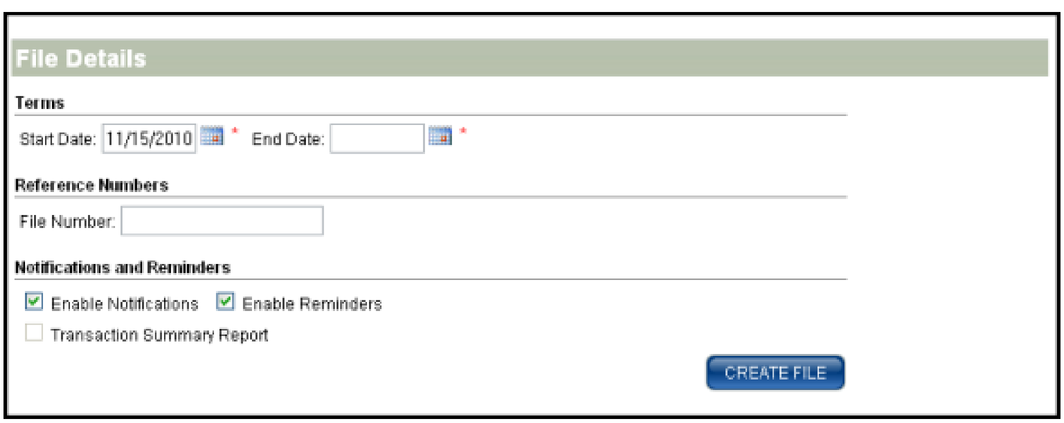


Figure 43

6. Choose the end date for the file from the calendar to the right of the *End Date* field.

7. Type a file number in the File Number field, if necessary.
8. Ensure that the *Enable Notifications* and *Enable Reminders* check boxes (Figure 43) are checked so that the parties on the file receive any notifications and reminders set up on the file.
9. Click the **Create File** button to create your generic file. You receive a message that your generic file has been successfully created and the **Summary** page of the file displays (Figure 44).

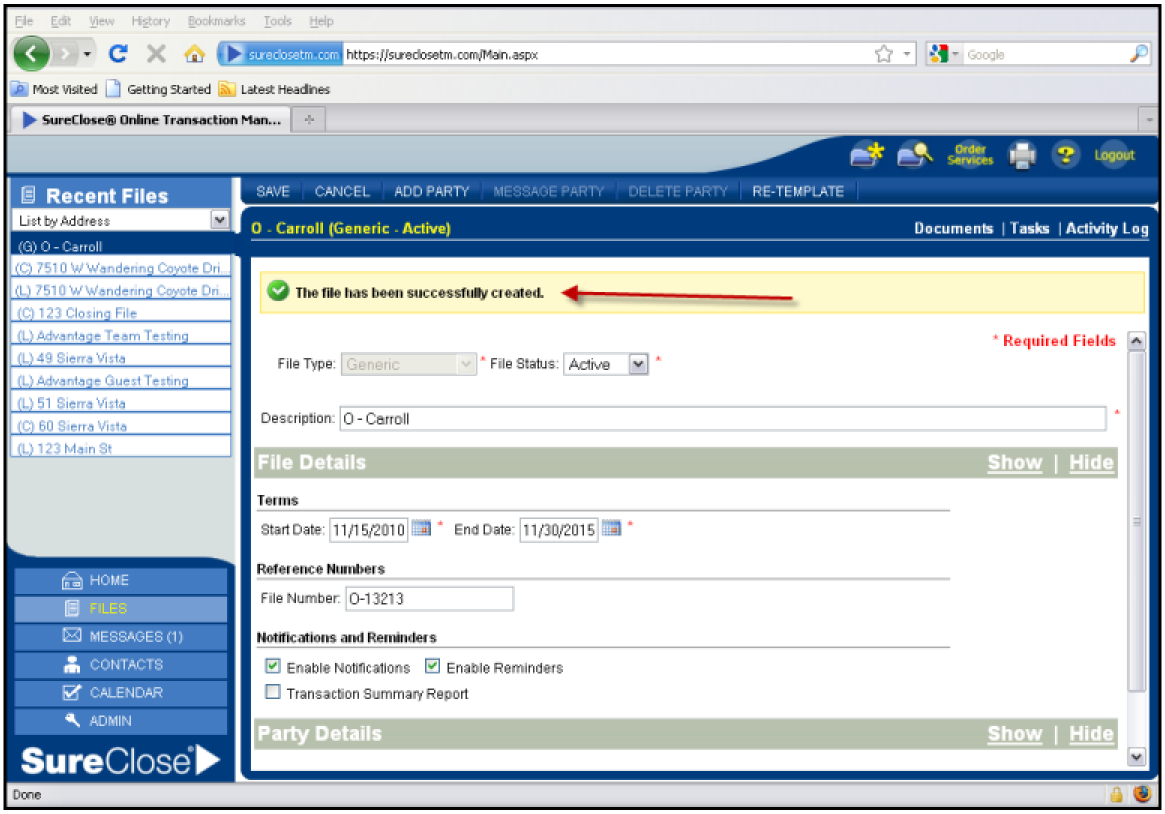


Figure 44

Chapter 6. Add Parties to a File

Once you have created a file, you see the *Party Details* section at the bottom of the **Summary** page. Click on the Show hyperlink to see the parties who are on the file (Figure 45).

Figure 45

Adding a New Party to a File

Use the following steps to add a new party to a file:

1. Click the **Add Party** button at the top of the screen. The **Add Party** page displays (Figure 46).

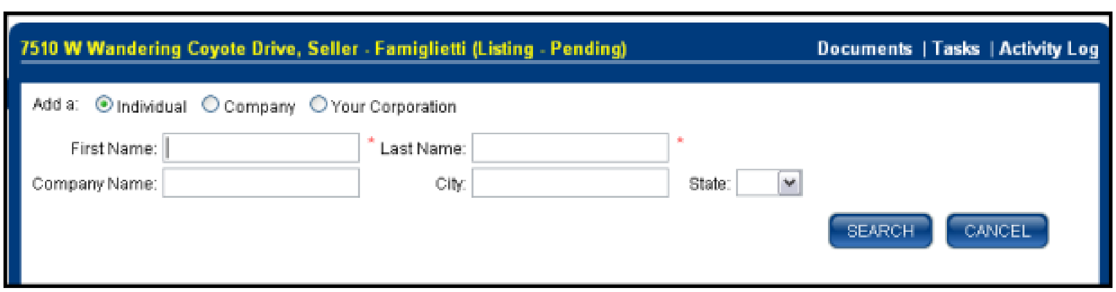


Figure 46

2. Click the appropriate radio button for the entity you are adding. The choices are:
   - Individual (for a single person or a couple)
   - Company (for a company such as a bank)
   - Your Corporation (adds your entire corporation to the file – not used when in a transaction file)
3. Type the first name of the person in the *First Name* field, the last name in the *Last Name* field, choose the state in which the person resides from the *State* drop-down menu, and click the **Search** button. SureClose® searches to see if the person already exists in the global database.

If a person with a similar name already exists in the database, you see a screen similar to Figure 47. If the person displayed is not the correct person, double-click on <Add New Individual> to see the **New Party** screen (Figure 48).

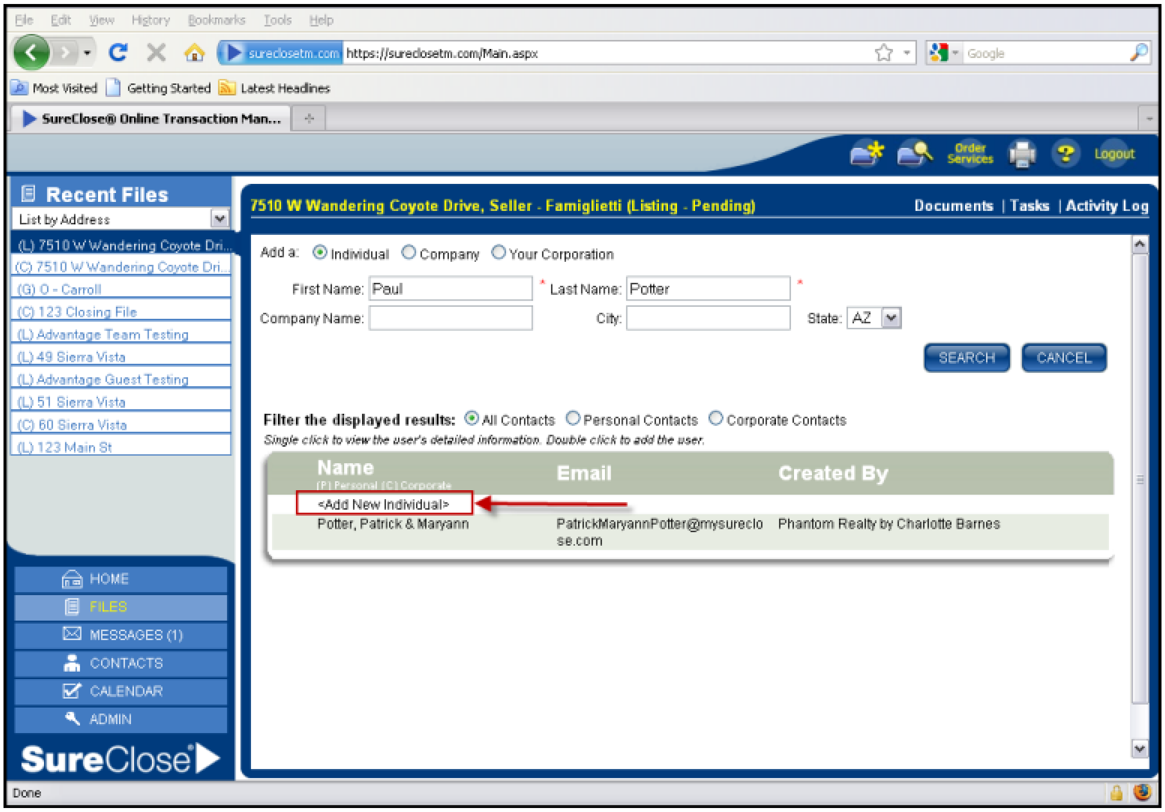


Figure 47

If the person does not exist in the global database, you see the **New Party** screen (Figure 48).

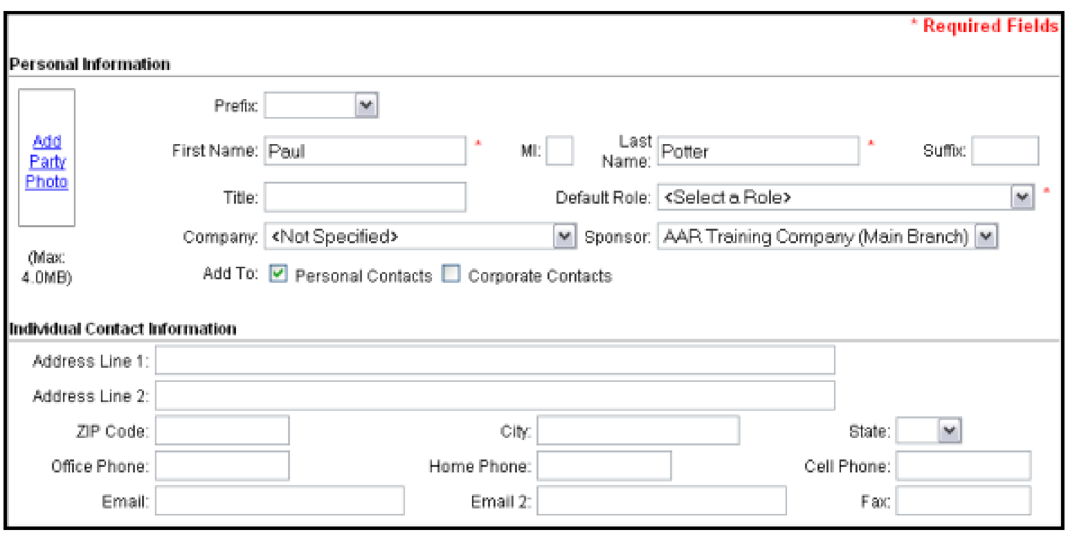


Figure 48

4. Add a prefix, middle initial, or suffix for the person in the appropriate fields, as necessary.

5. Select the appropriate company for the person from the *Company* drop-down menu, if necessary. If the company does not appear in the list, search for the appropriate company by selecting <Search Global Directory> from the list.

6. Select the default role for the person from the *Default Role* drop-down menu (Figure 48). This is a required field.

7. Click the check boxes to add the person to your personal and company contacts lists, if necessary.

8. Type the person's address in the *Address* fields (Figure 48). If you have selected a company for this person, the address fills in automatically.

9. Type the office phone, home phone, and cell phone for the person in the *Office Phone*, *Home Phone*, and *Cell Phone* fields (Figure 48), if necessary.

10. Type the person's email address in the *Email* field and their fax number in the *Fax* field (Figure 48).

NOTE: You must have an email address on file for the person for them to use SureClose.

11. Click the check boxes for *New Files* and *Tasks* if you want this person to receive notifications and reminders as shown in Figure 49.

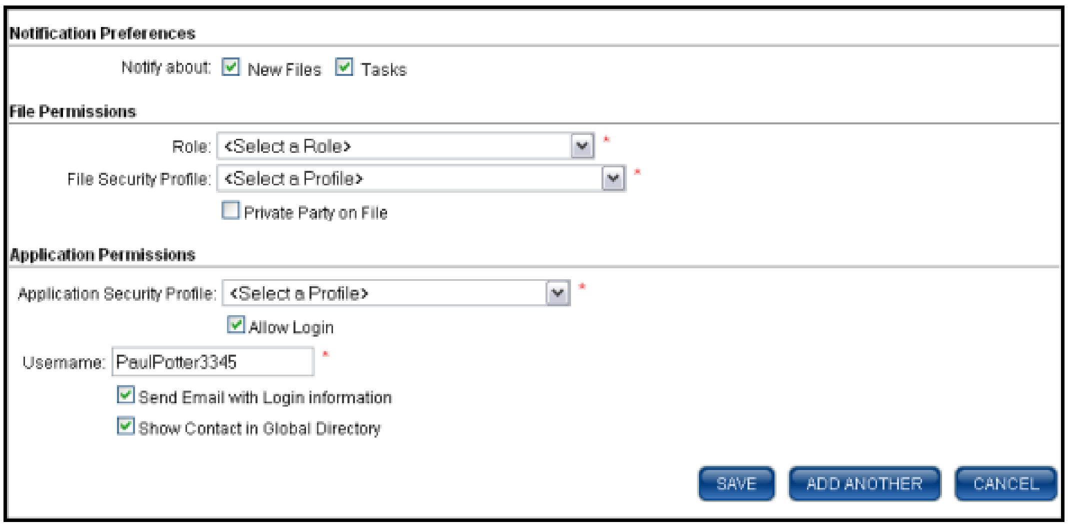


Figure 49

12. Select the role for the person for the file from the *Role* drop-down menu. This is a required field.

13. Select a file security profile for the person from the *File Security Profile* drop-down menu. This is a required field.

NOTE: The Site Administrator of your corporation can pre-set file security profiles for the common roles on a file.

14. Click the *Private Party on File* check box if you do not want this person to be seen by guests to the file.

15. Select a general security profile (the profile that determines the view and overall permissions for the user) from the *Application Security Profile* drop-down menu. This is a required field.

16. Click the *Allow Login* checkbox to enable this person to log in to SureClose®.

17. Leave the *Send Email with Login Information* check box checked if you are inviting this person to log in to SureClose®.
18. Uncheck the *Show Contact in Global Directory* check box if this person is your client. Leaving the check box checked enables any user of SureClose® to see the person's contact information.
19. Click the **Save** button to add this person to your database or click the **Add Another** button to save the current user and immediately see the page to add another party to the file.
20. Repeat the process until you have all your parties on the file.

Adding an Existing User to a File

Use the following steps to add an existing user to a file:

1. Click the **Add Party** button at the top of the screen. The **Add Party** page displays (Figure 50).

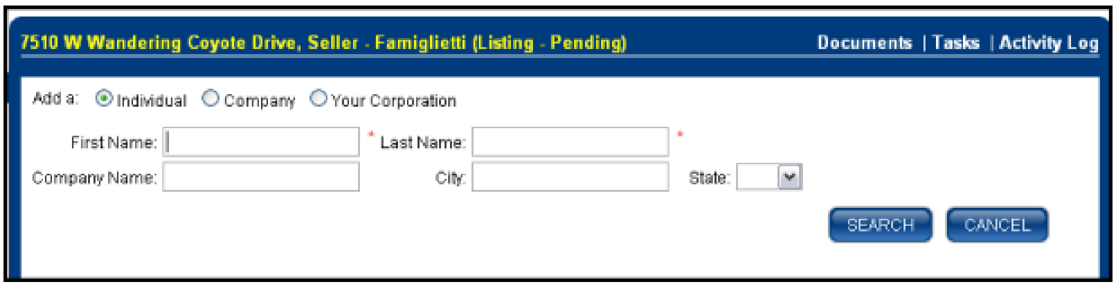


Figure 50

2. Click the appropriate radio button for the entity you are adding. The choices are:
   - Individual (for a single person or a couple)
   - Company (for a company such as a bank)
   - Your Corporation (adds your entire corporation to the file – not used when in a transaction file)

3. Type the first name of the person in the *First Name* field, the last name in the *Last Name* field, choose the state in which the person resides from the *State* drop-down menu, and click the **Search** button. SureClose® searches to see if the person already exists in the global database. If a person with a similar name already exists in the database, you see a screen similar to Figure 51.

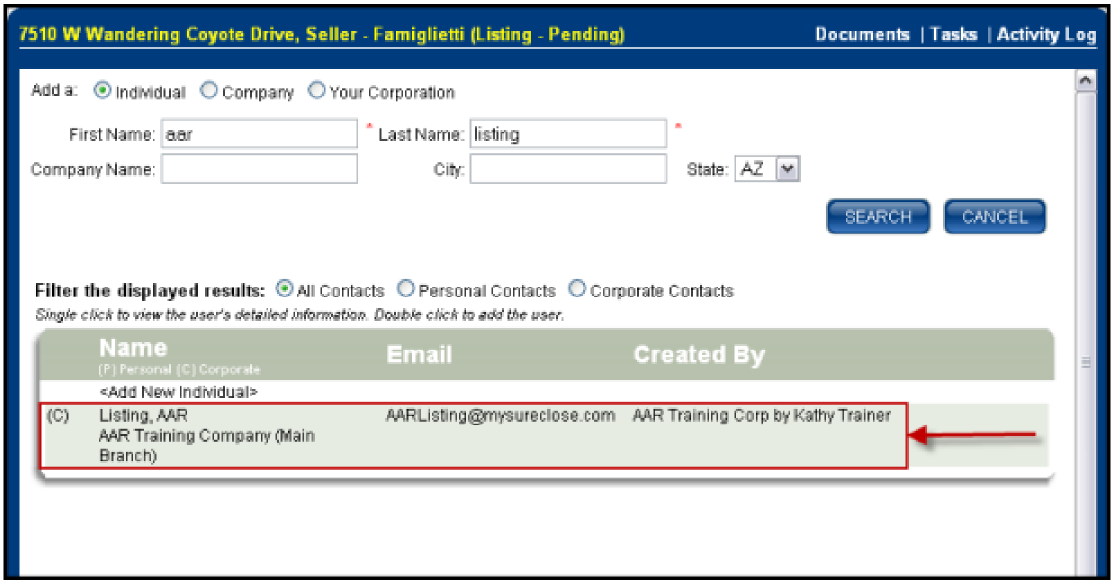


Figure 51

4. Double click on the name of the person to add them to the file. Their profile opens (Figure 52) so you can modify their *File Permissions* section (Figure 53).

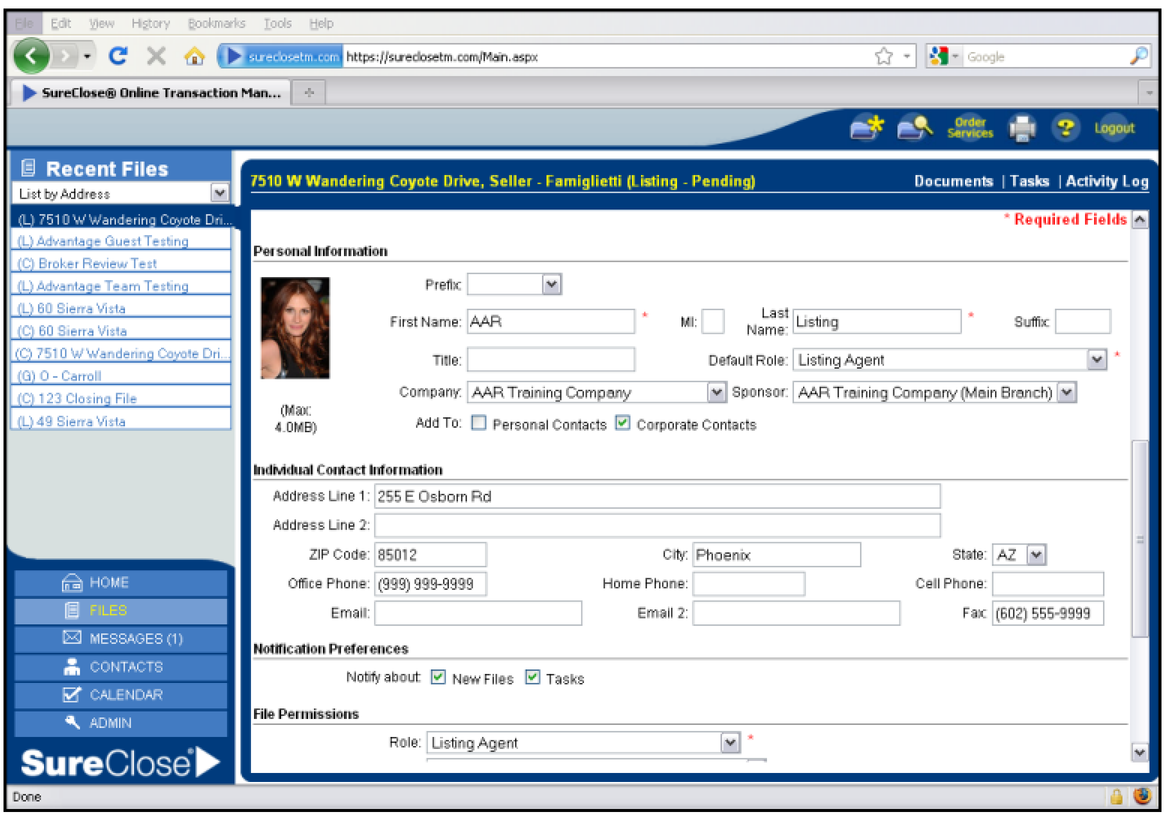


Figure 52

NOTE: If the person was created by your corporation, you can modify their information. If the contact was created by another corporation, you can only modify their file permissions.

5. Select the role for the person for the file from the *Role* drop-down menu (Figure 53). This is a required field.

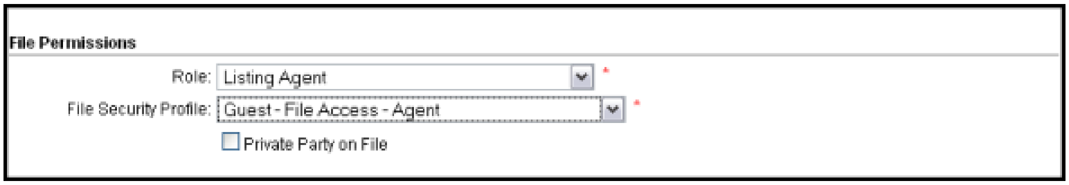


Figure 53

6. Select a file security profile for the person from the *File Security Profile* drop-down menu. This is a required field.

NOTE: The Site Administrator of your corporation can pre-set file security profiles for the common roles on a file.

7. Click the *Private Party on File* check box if you do not want this person to be seen by guests to the file.
8. Click the **Save** button to add this person to your file. You receive a message stating that the party has been successfully created.

Chapter 7. Files Page

The **Files** page enables you to search for and open your files within SureClose® Advantage. When you click on the **Files** tab, you see the **Summary** page of the last file you accessed. You also see a list of the ten most recent files you have opened in the **Navigation Pane**. You have the ability to sort this list by a number of different criteria. They are:

- Address
- Buyer/Seller
- File Number
- File Number/Address
- File Number/Buyer/Seller
- MLS Number/Address
- MLS/File Number
- Seller/Buyer

You can search for any existing file by clicking the **Search File** button ( ) on the upper right side of your screen. The **Search File** screen displays (Figure 54).

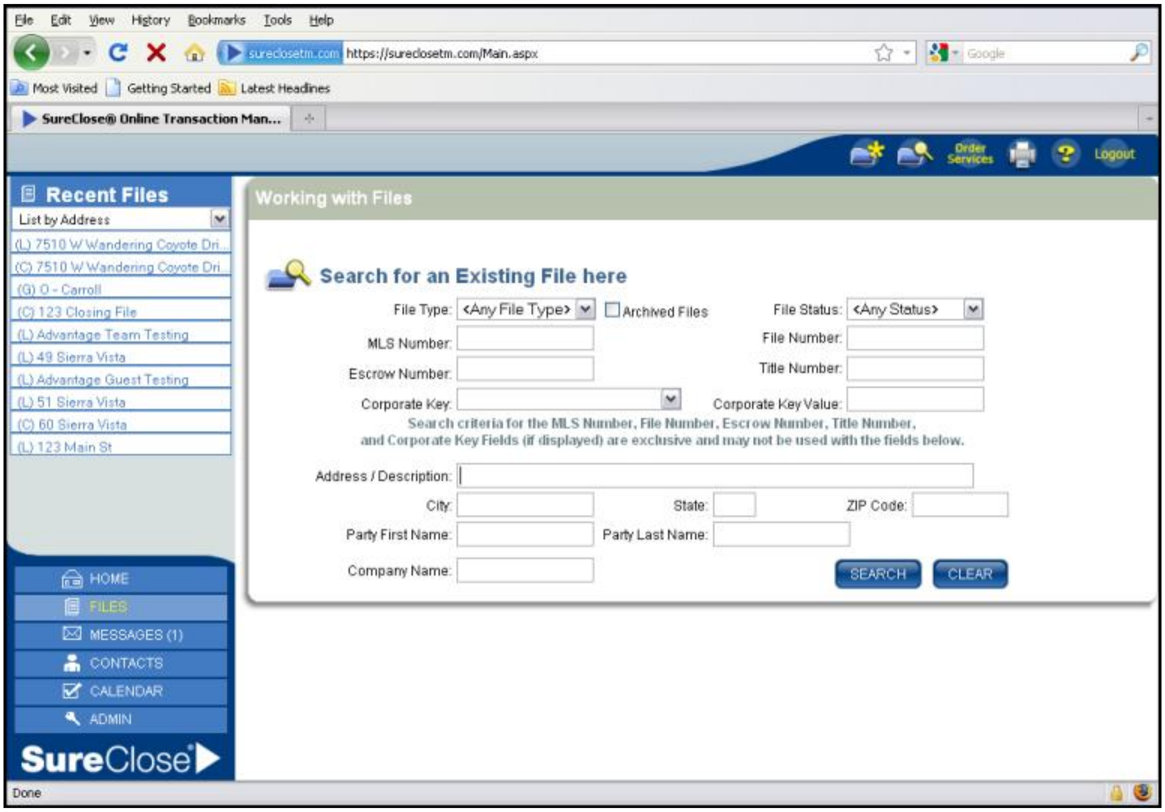
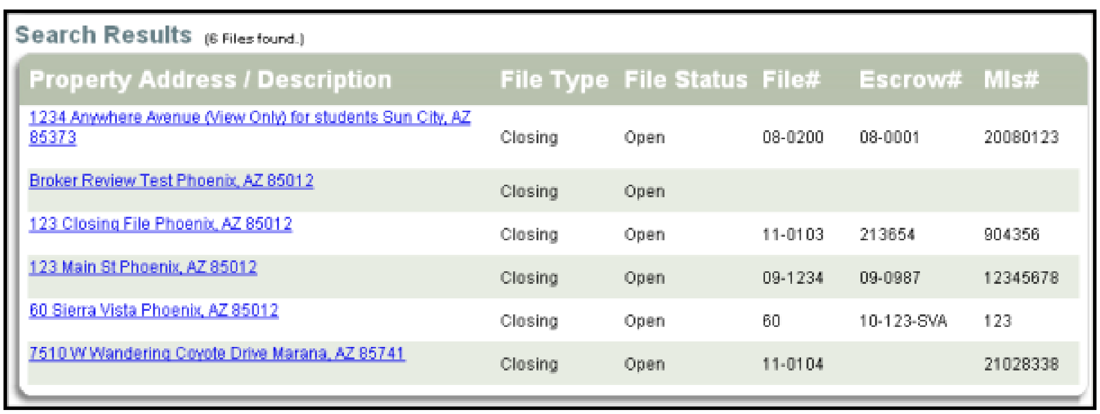


Figure 54

You can limit the search by any of the criteria on the screen (for example, MLS number). Click the **Search** button to see a list of your files (Figure 55).



Search Results (6 Files found.)

Property Address / Description	File Type	File Status	File#	Escrow#	Mls#
1234 Anywhere Avenue (View Only) for students Sun City, AZ 85373	Closing	Open	08-0200	08-0001	20080123
Broker Review Test Phoenix, AZ 85012	Closing	Open			
123 Closing File Phoenix, AZ 85012	Closing	Open	11-0103	213654	904356
123 Main St Phoenix, AZ 85012	Closing	Open	09-1234	09-0987	12345678
60 Sierra Vista Phoenix, AZ 85012	Closing	Open	60	10-123-SVA	123
7510 W Wandering Coyote Drive Marana, AZ 85741	Closing	Open	11-0104		21028338

Figure 55

You open a file in the list by clicking on the address. The file opens to the **Summary** page (Figure 56).

Summary Page

The **Summary** page (Figure 56) is separated into three sections:

- General – includes the property address, the file type, and the file status.
- File Details – includes the pertinent dates of the file, the property description, reference numbers, and whether notifications and reminders are enabled.
- Party Details – shows other parties on the file and their roles.

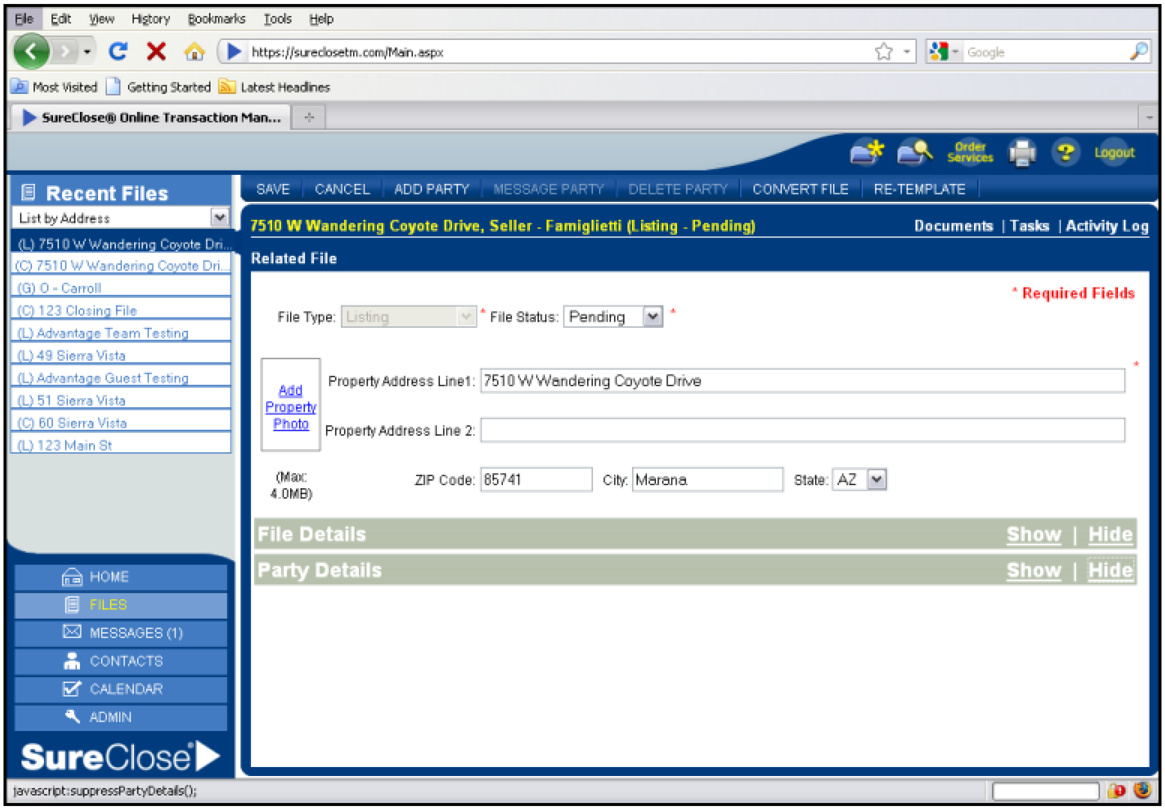


Figure 56

You can view and modify the information on the **Summary** page. When you change any of the general or file detail information, be sure to click the **Save** button at the top of the page.

There are three hyperlinks on the upper right side of page that you can use to go to the **Documents**, **Tasks**, or **Activity Log** pages. You can also hover your mouse over the address in the *Recent Files* list in the **Navigation** pane to see the same hyperlinks.

Transaction Summary Report

The Transaction Summary Report provides a quick look at tasks and documents completed within the last week. The report also includes general transaction information as well as comments, contact information, and a link to log into SureClose. The report is generated every Wednesday evening at 9:00 pm CST.

The report displays a list of up to 10 completed tasks and 10 completed documents. The recipient can also view custom comments that have been added to the file.

NOTE: If more than 10 tasks or 10 documents have been completed, the report contains a link for the recipient to be able to log in to SureClose® Advantage and view their transaction online.

Use the following steps to configure the report:

1. Click the Show hyperlink on the *File Details* header to see the details of the file.
2. Click the *Transaction Summary Report* check box in the *Notifications and Reminders* section. The **Transaction Summary Report Configuration** window displays (Figure 57).

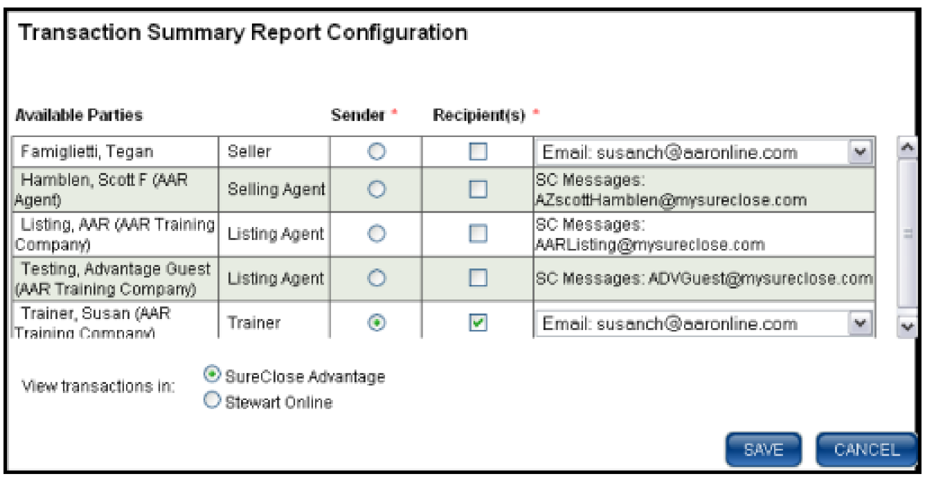


Figure 57

3. Click the *Sender* radio button to the right of the party who will send the report.
4. Click the *Recipient* check boxes to the right of the parties who will receive the report.
5. Choose the appropriate email address to which to send the report from the *Email Address* drop-down menu, if necessary.
6. Leave the *SureClose Advantage* radio button checked.
7. Click the **Save** button to save your changes and close the window. You see a Configure Transaction Summary Report hyperlink to the right of the *Transaction Summary Report* check box.
8. Click the **Save** button on the upper left side of the Summary page to save the change to the file.

Re-Templating a File

You can re-template your file from the **Summary** page. When you re-template a file, you can:

- Add parties from the template you choose.
- Add placeholders from the template you choose. You can choose to add all placeholders or specific placeholders.
- Delete documents that have been uploaded to the file.
- Add tasks from the template you choose.
- Delete tasks that already exist in the file.

Use the following steps to re-template a file:

1. Click the **Re-Template** button to see the *Re-Template* screen (Figure 58).

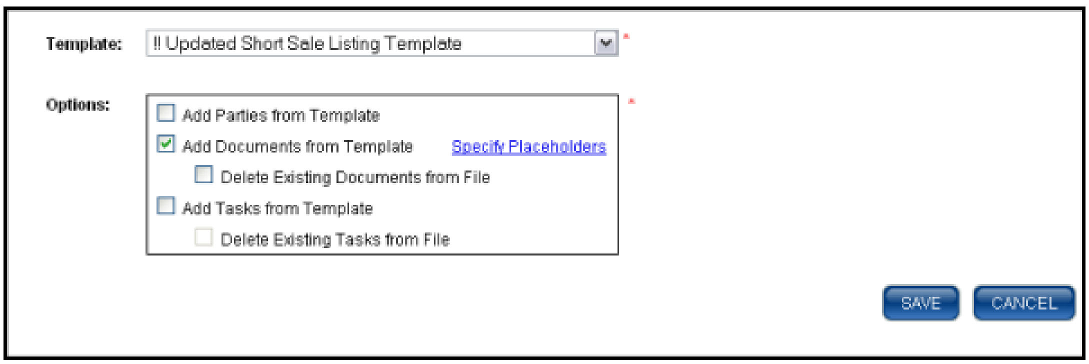


Figure 58

2. Choose a template from the *Template* drop-down menu.
3. Click on the appropriate options in the *Options* field. The options are:
   - Add Parties from Template.
   - Add Documents from Template. If you select this option, you can select the following sub-options:
     - Choose Specific Placeholders.
     - Delete Existing Documents from File.
   - Add Tasks from Template. If you select this option, you can select the following sub-option:
     - Delete Existing Tasks from File.

4. Click on the Specify Placeholders hyperlink to select specific placeholders to add to the file if you have chosen to add documents from the template. You see the *Available placeholders* screen (Figure 59).

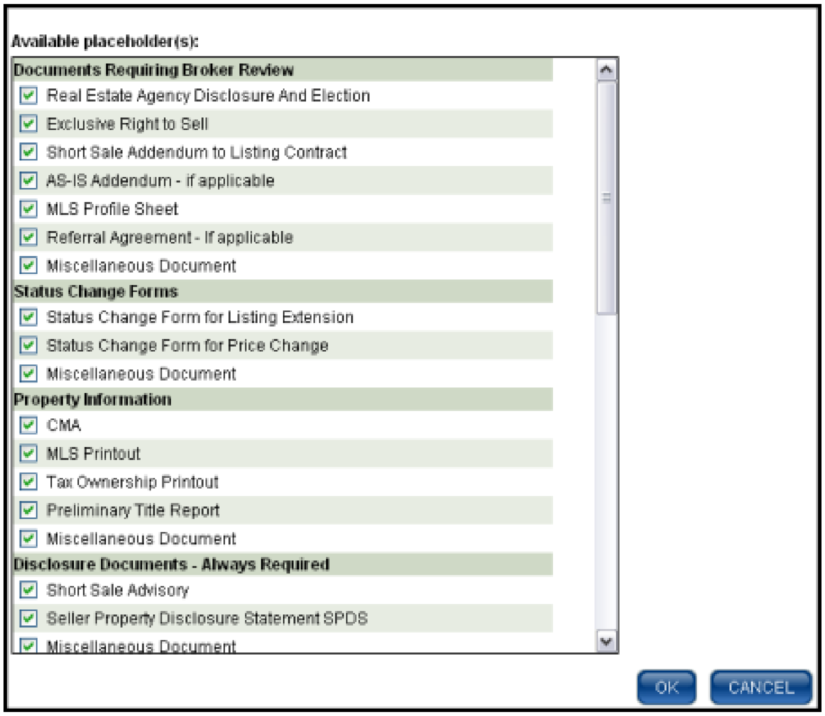


Figure 59

5. Uncheck the placeholders that you do not want transferred to the file and click the **OK** button.

6. Click the **Save** button to add the new options to your file. You receive a message stating that the file has been successfully re-templated (Figure 60).

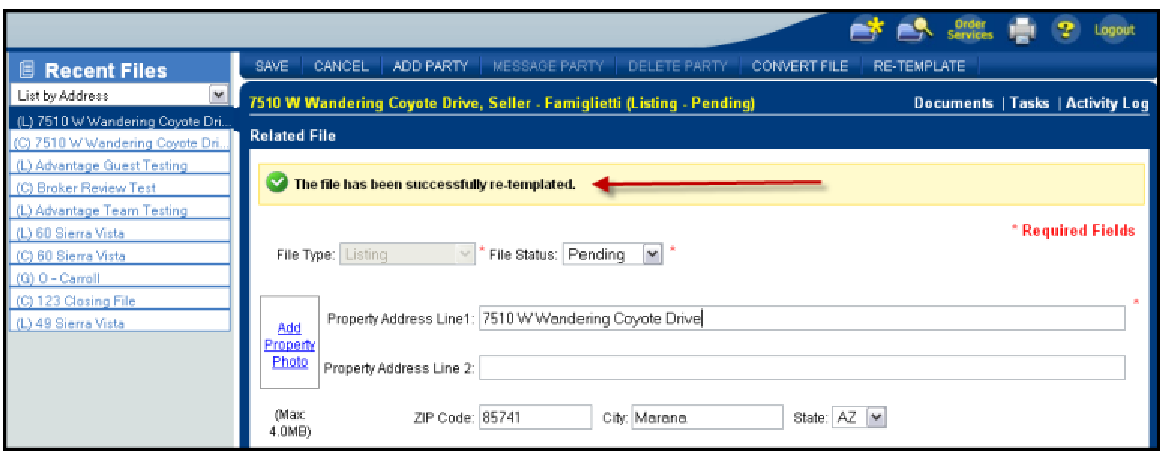


Figure 60

Viewing and Modifying Party Information

You can view the following information for each party on a file:

- Personal Information – includes the person's name, title, and role.
- Contact Information – includes the person's address, phone numbers, and email addresses.
- Preferences – includes whether they want to be notified about new files or tasks.
- Permissions – includes their role on the file and their security access for the file.

Use the following steps to modify a party's information if they were created by your corporation:

1. Double click on the party's name to open the **Edit Party** window (Figure 61).

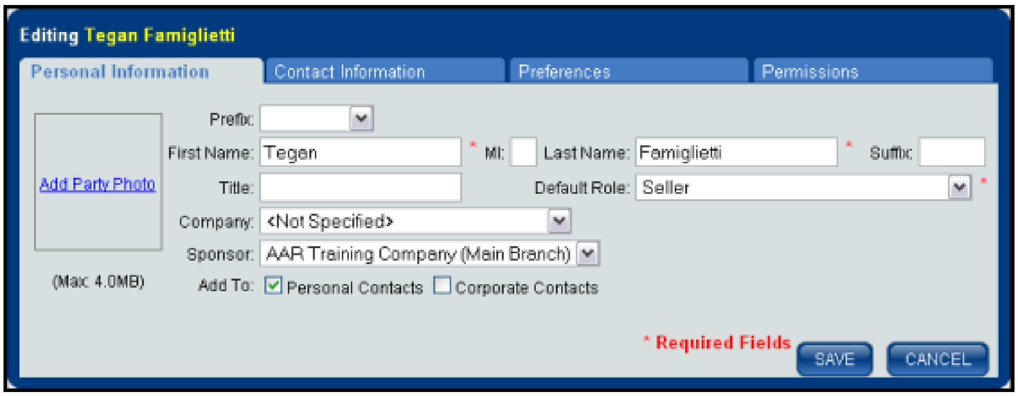


Figure 61

2. Click on the appropriate tab to display the information you need to modify.
3. Make the necessary changes.
4. Click the **Save** button to save the changes.

NOTE: You cannot modify information if the party was created by another corporation (for example, an agent from another company).

Sending Messages

You can send a message to any party by using the following steps:

1. Highlight the party by clicking on their name.
2. Click the **Message Party** button at the top of the page. You see the **Message** screen (Figure 62).

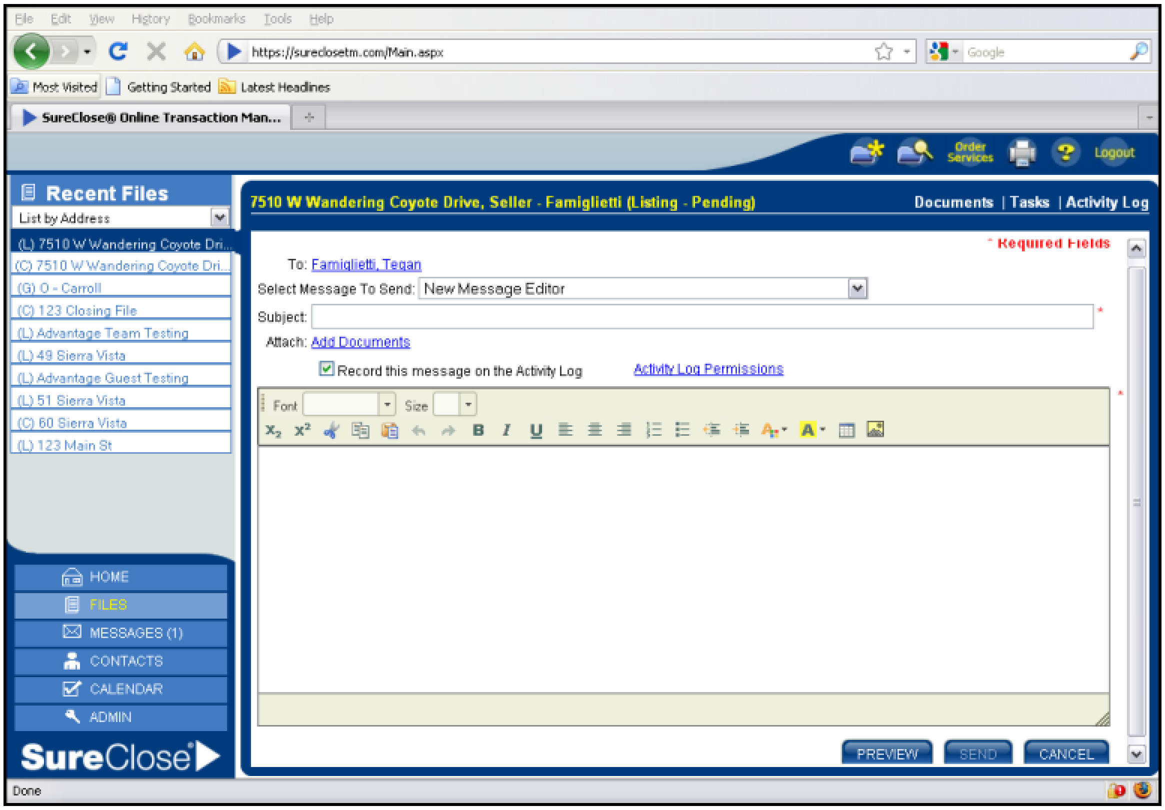


Figure 62

3. Choose a pre-written message from the *Select Message to Send* drop-down menu or select New Message Editor from the list to write your own message.
4. Click the Add Documents hyperlink to add documents from the file to the message:
   a. Select a document and click the **Down Arrow** button to add it to the email.
   b. Click the **OK** button when you are finished.
5. Check the check box to the left of *Record this message on the Activity Log* to save the message in the history of the file.
6. Write your message.
7. Click the **Send** button on the lower right side of the screen to send the message. You return to the **Summary** page of the file.

Documents Page

The **Documents** page (Figure 63) is separated into logical areas with folders (in bold lettering, bordered in pale green). Under each folder are placeholders. There is a placeholder for each document you need to add to the transaction file. When a placeholder has been filled, you see a paper clip icon to the left of the placeholder name.

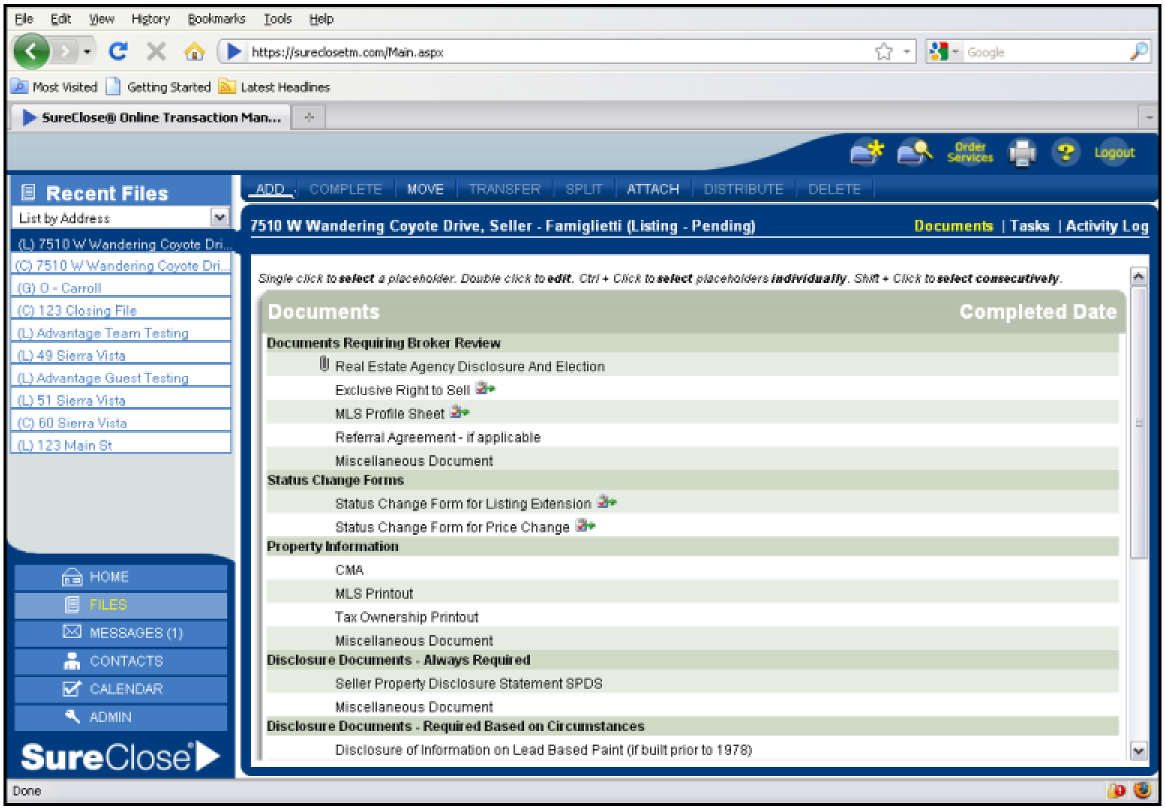


Figure 63

If you see a clipboard with red checkmark icon to the right of a document, the placeholder is linked to a task. You can hover your mouse over the clipboard to see the details of the link.

There are three ways to upload documents to a SureClose® file when using Advantage:

- Using the **Attach** button on the **Documents** page.
- Using the **Split** button on the **Messages** page.
- Using the SureClose® Printer Driver (not available on Mac computers).

Uploading Documents Using the Attach Button

You can use the **Attach** button to upload a single document to a placeholder. The document can be stored on your computer, attached to a message on your **Messages** page, or stored in another file in SureClose®.

Use the following steps to upload a document using the **Attach** button:

1. Highlight the placeholder by clicking on the placeholder name and click the **Attach** button. You see the **Attach** screen (Figure 64).

Figure 64

2. Choose to attach the document from one of the following sources:
   - My computer (most common)
   - Messages
   - File
   - Forms (not used)
3. Click the **Browse** button to search your computer for the document. Your computer opens up a second window (Figure 65) for you to find the document.

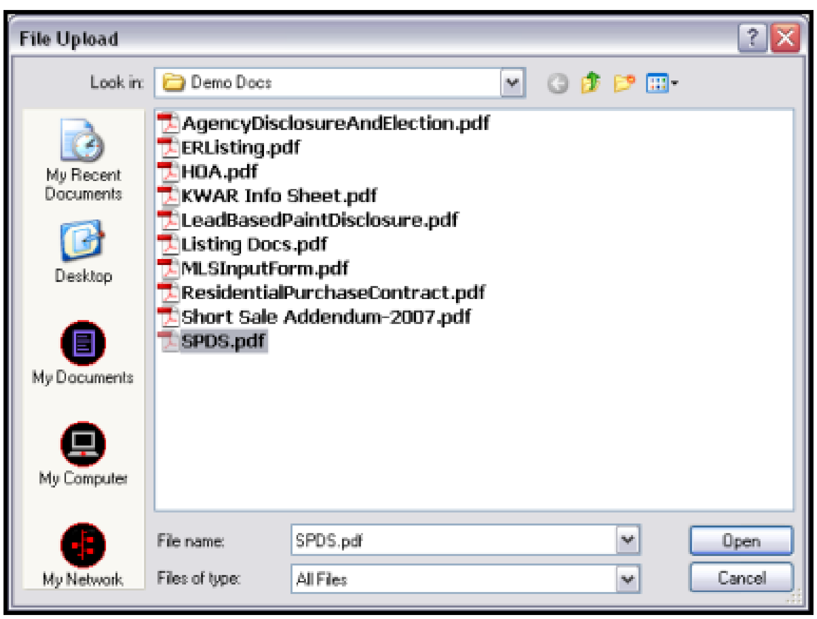


Figure 65

4. Select the appropriate document and click the **Open** button.

5. Click the **Save** button to upload the document to your file. You receive a message stating that your document has been successfully uploaded to the file (Figure 66). You also see a paper clip to the left of the placeholder.

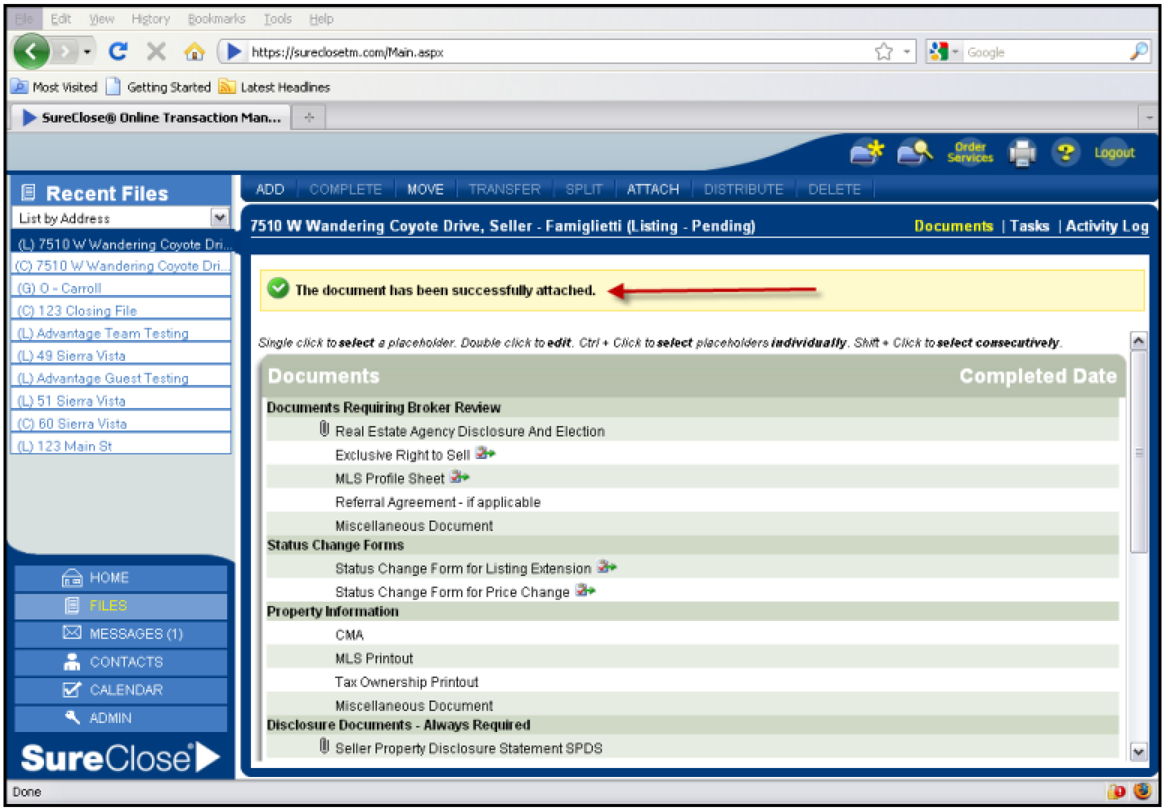


Figure 66

You can select a placeholder that is already filled with a document. SureClose® adds an additional placeholder for the new document and appends it with the date and time of import.

Uploading Documents Using the Split Button on the Messages Page

You can use the **Split** button to upload documents to your transaction file when you have multiple documents scanned together. The **Split** button enables you to split the documents into their correct placeholders. You must get the document into your **Messages** page (Figure 67) before you can split it.

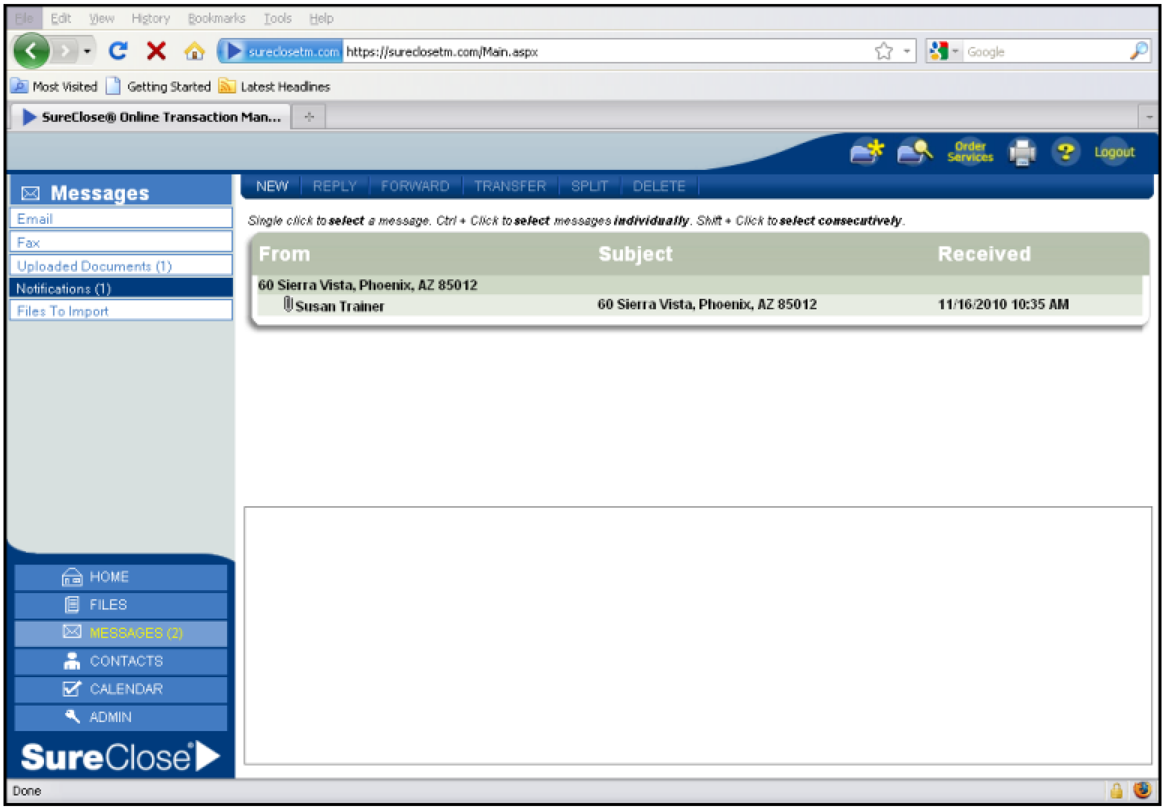


Figure 67

You can upload your documents to your **Messages** page using one of the following methods:

- Use the **Basic** tab on the SureClose® Printer Driver to upload a copy of your document to the **Messages** page. You see the document when you click on the **Uploaded Documents** sub-tab.
- Forward an email with the document attached to your SureClose® email address (*userid*@mysureclose.com). You see the document when you click on the **Email** sub-tab.

Use the following steps to split a document to its correct placeholders:

1. Highlight the email containing the document or the uploaded document.
2. Click the **Split** button. Your screen splits into two sections (Figure 68). The pages of the document are on the left and on the right you have a **File Search** screen.

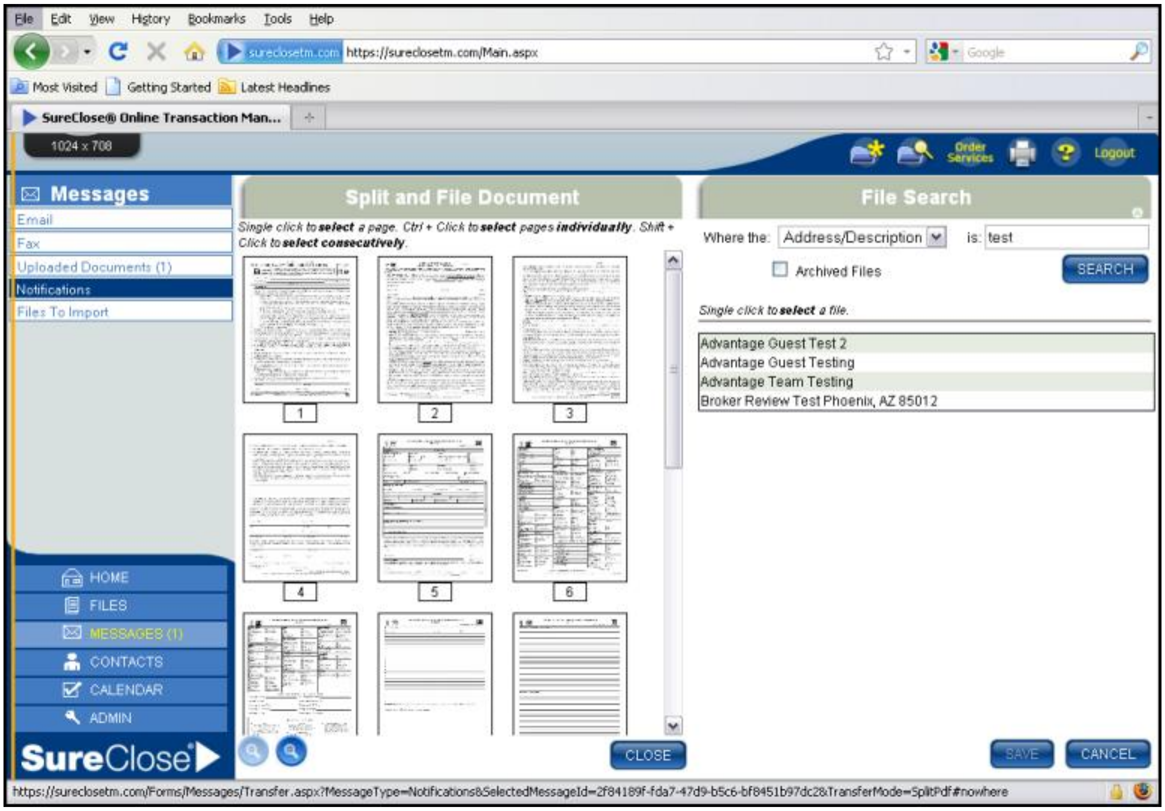


Figure 68

3. Search and find your file by the file number or the property address.

4. Click on the address of the property to select the file. The file opens to the **Documents** page and you see your dividers and placeholders (Figure 69).

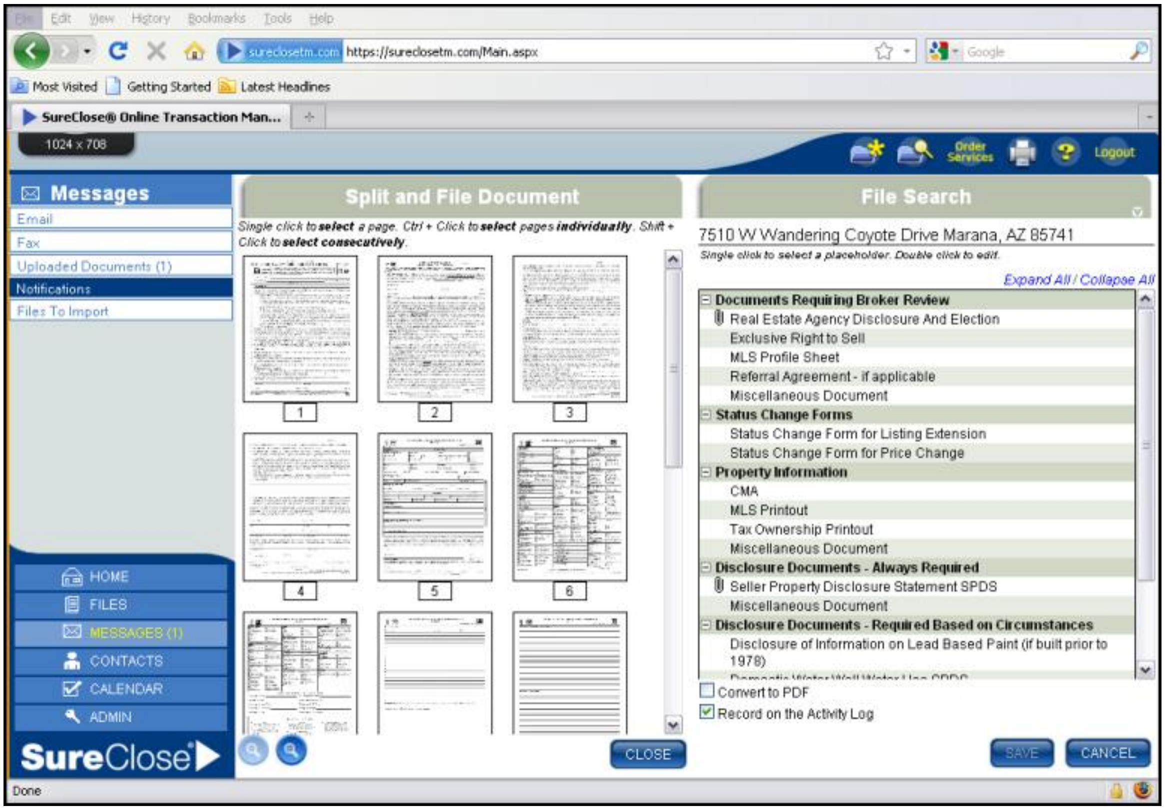


Figure 69

5. Highlight the range of pages to upload to your first placeholder by clicking the first page while holding down the Shift key and then clicking the last page of the range (Figure 70).

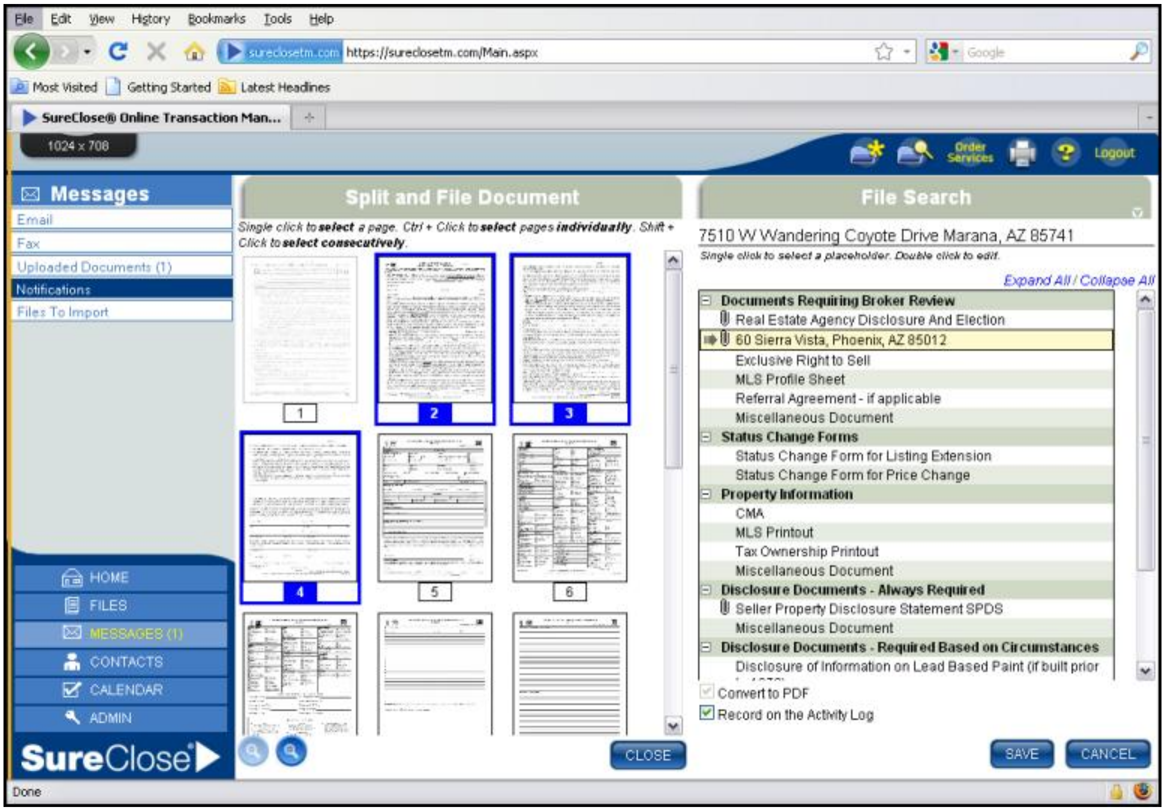


Figure 70

6. Click the appropriate placeholder on the right side of the page. The placeholder highlights in yellow (Figure 71).

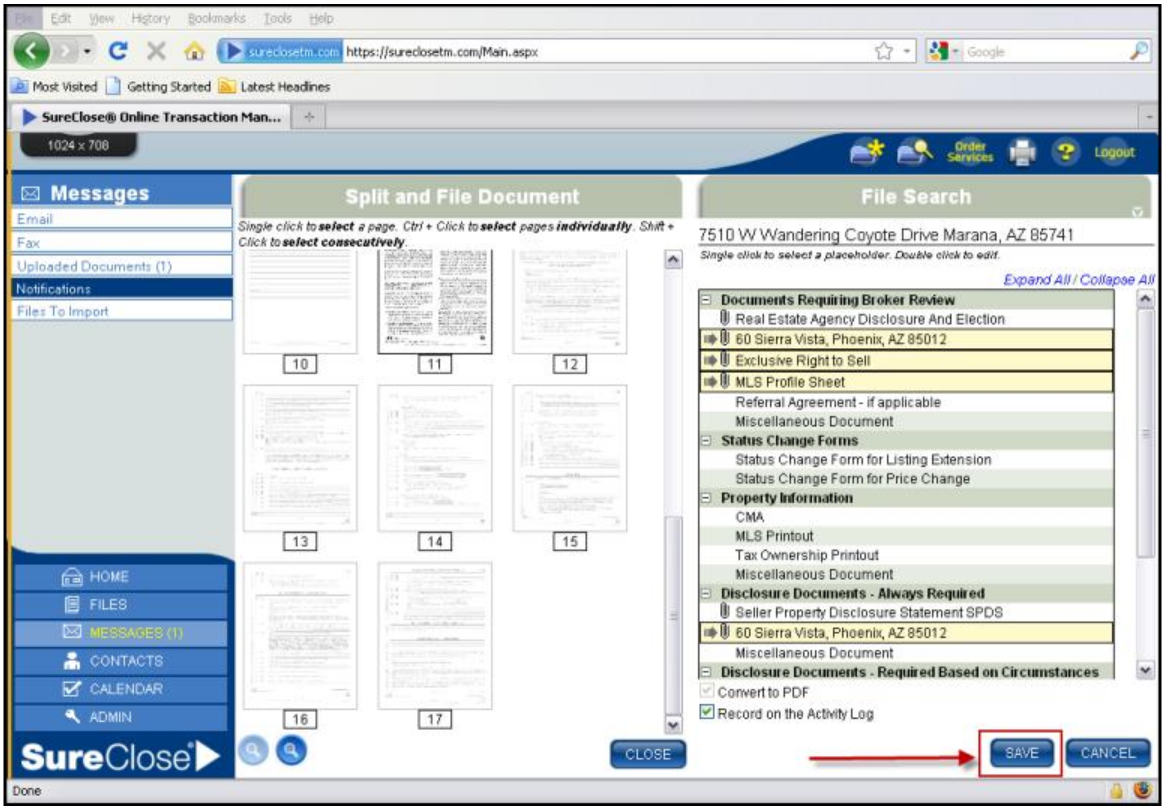


Figure 71

7. Repeat steps 5 and 6 until you have split the entire document and then click the **Save** button (Figure 71). You receive a message stating that your changes have been saved (Figure 72).

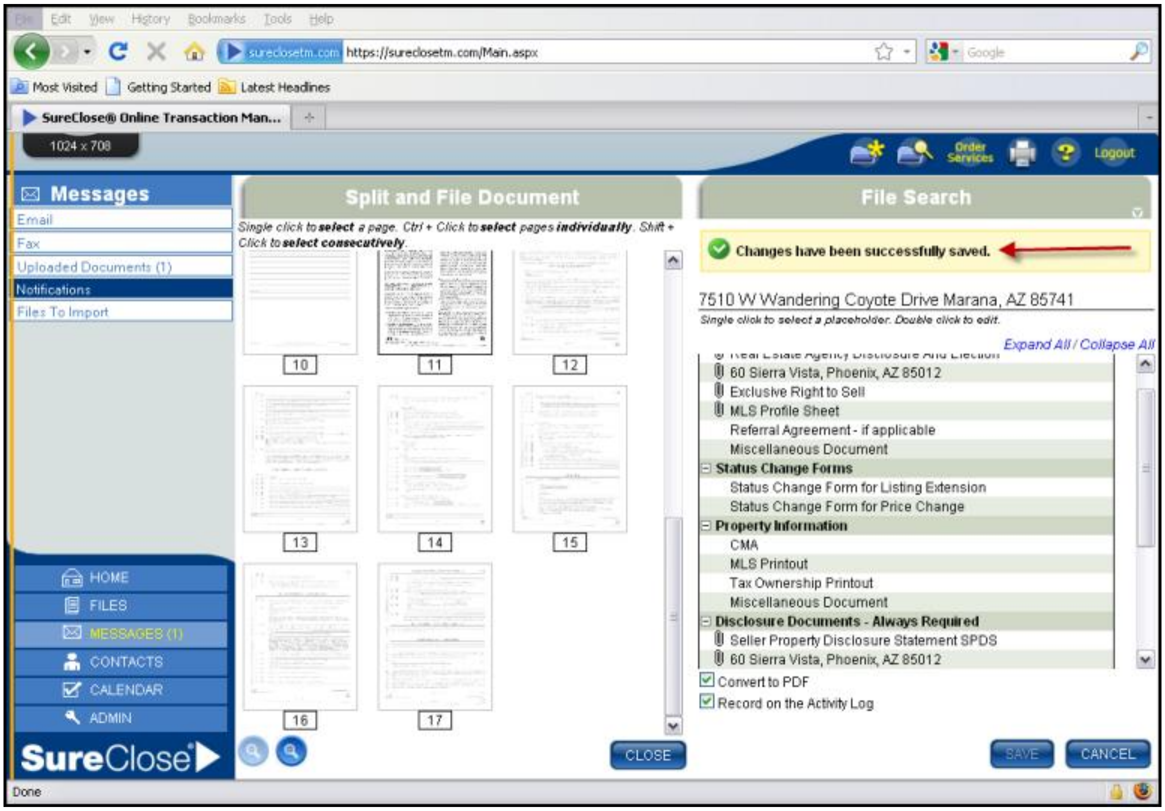


Figure 72

Using the Printer Driver (Cannot be used with Mac Computers)

You can use the Advanced tab of the SureClose® printer driver to upload any document directly into a placeholder in SureClose®.

Use the following steps for the **Advanced** tab on the printer driver:

1. Open the document you want to upload and click the **Print** icon.
2. Select *SureClose Upload* from your list of printers (Figure 73).

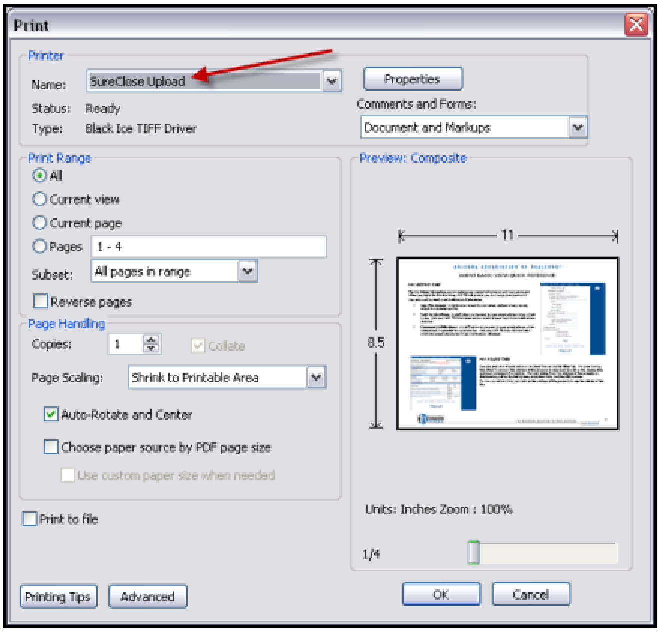


Figure 73

3. Click the **OK** button. The **SureClose® Print Driver** window displays (Figure 74).

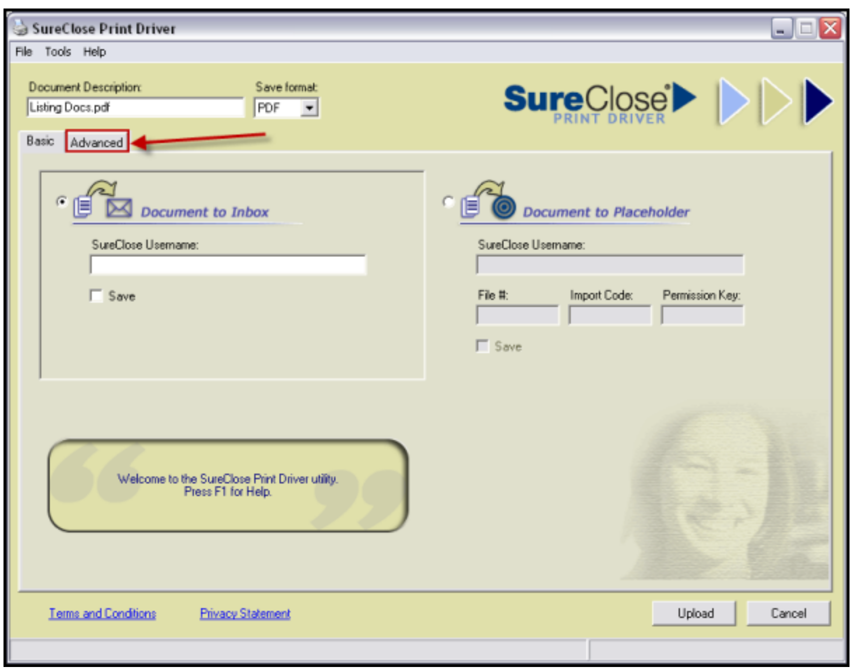


Figure 74

4. Select the **Advanced** tab on the **SureClose® Print Driver** window as shown in Figure 74.
5. Type your SureClose® ID and password in the **Login Details** screen (Figure 75) and click the **OK** button.

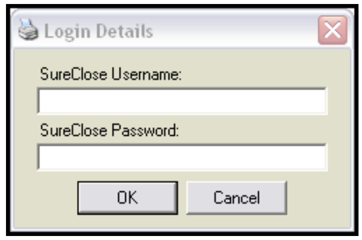


Figure 75

NOTE: Once you have logged in, the SureClose® print driver leaves you logged in for two hours after your last upload.

6. Click the **Search** button to display a list of your files in the **Files** window (Figure 76). You can narrow the search by entering specific criteria in any of the search fields.

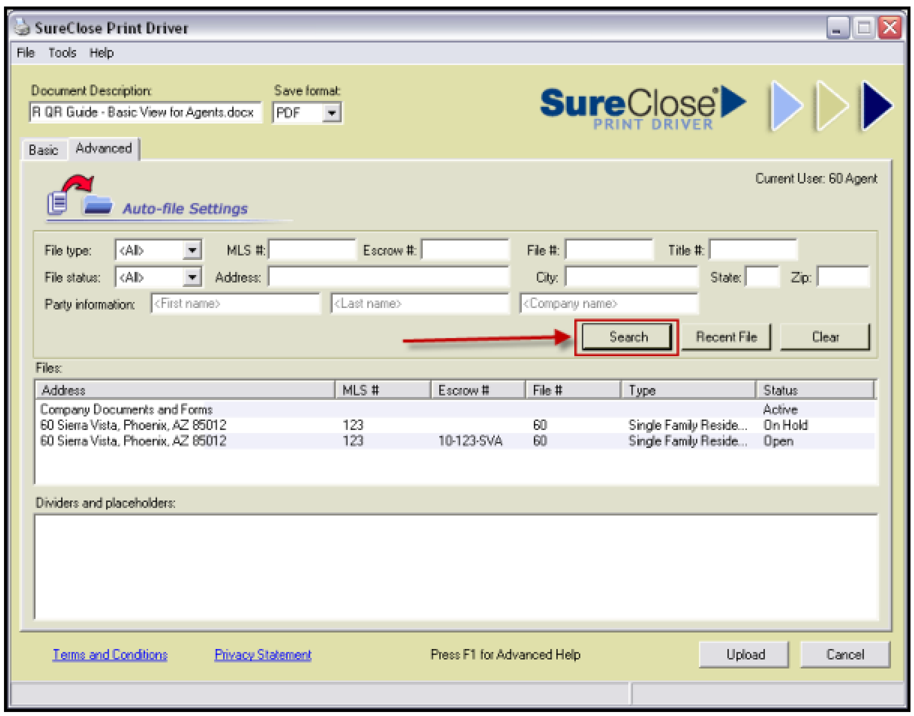


Figure 76

7. Highlight the file to which you want to upload the documents by clicking on the address of the file in the *Files* field (Figure 77). You see the dividers for the file in the *Dividers and placeholders* field.

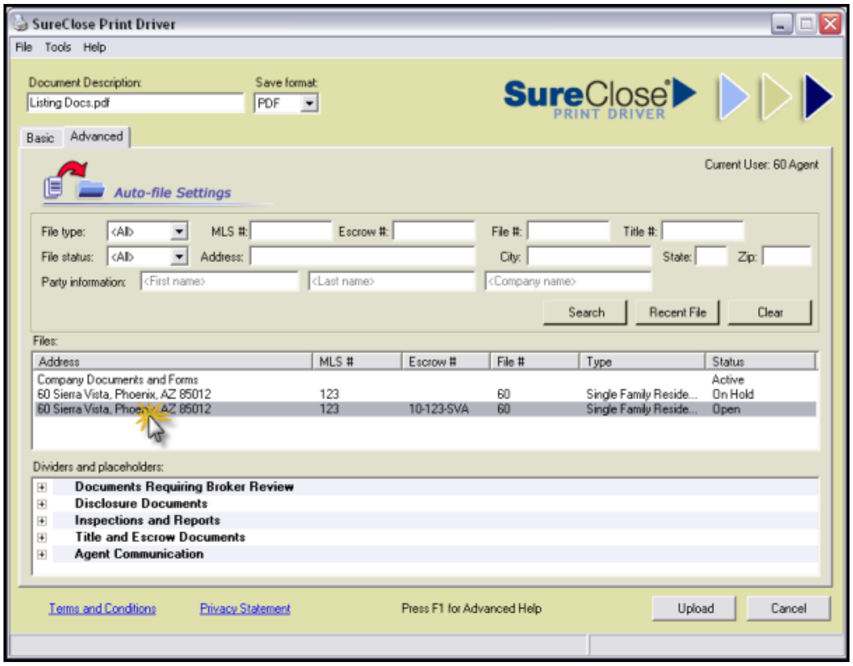


Figure 77

8. Expand the divider in the *Dividers and placeholders* field by clicking on the plus sign to the left of the divider to see the placeholders or by double clicking on the name of the divider (Figure 78).

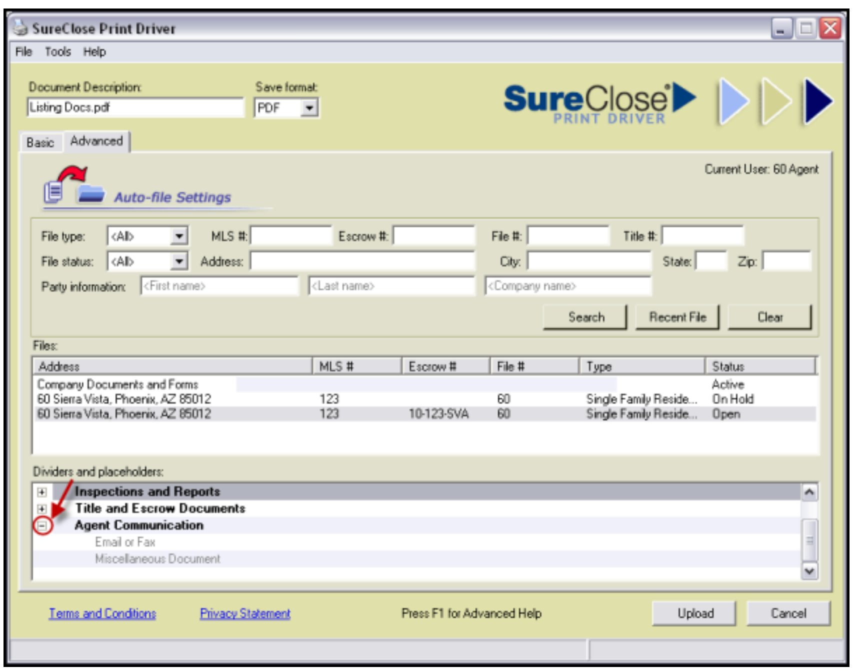


Figure 78

9. Highlight the placeholder to which you want to upload the document (Figure 79).

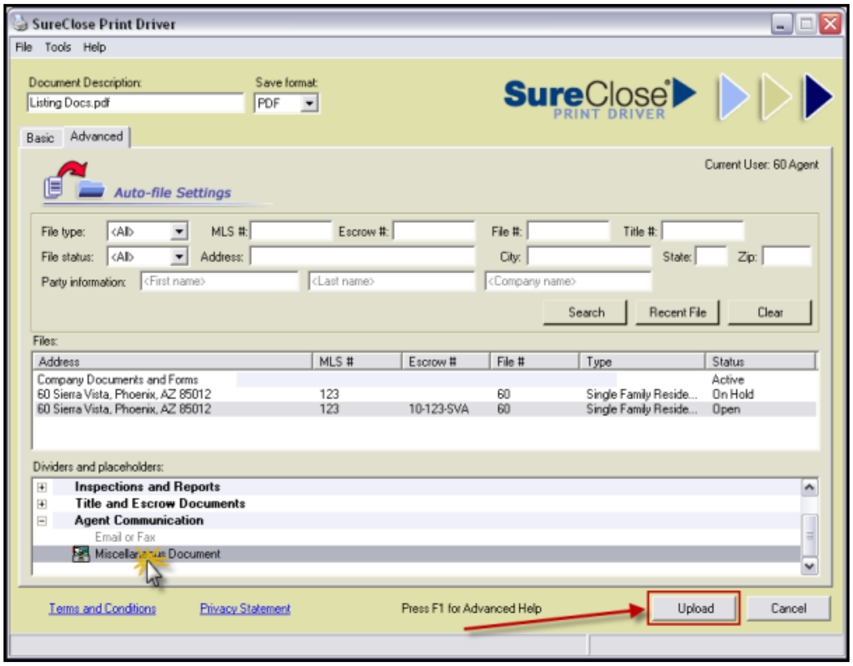


Figure 79

10. Click the **Upload** button to upload your document. You receive a message stating that your document has been uploaded and auto-filed (Figure 80).

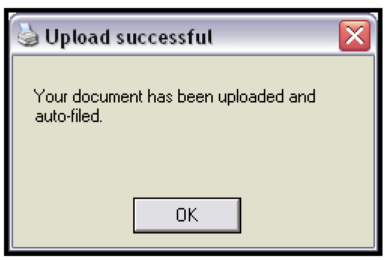


Figure 80

NOTE: It can take 30 seconds to a minute for a document to actually be filed in the transaction file.

If you choose a placeholder that already contains a document, SureClose® creates a new document placeholder directly below the original and appends the date and time of uploading to the new placeholder (Figure 81).

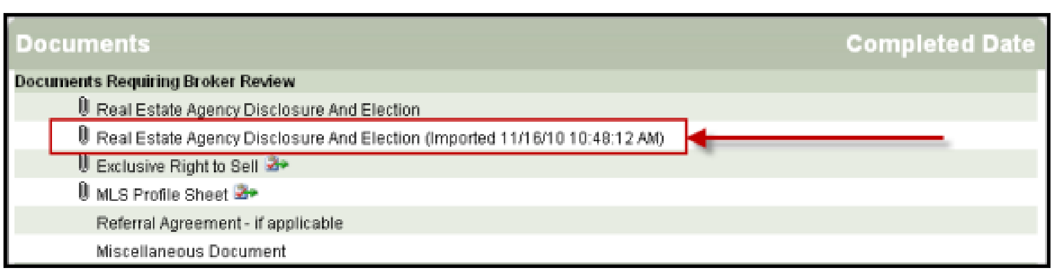


Figure 81

Action Buttons

There are six other buttons on the **Documents** page you can use:

- **Add** button
- **Complete** button
- **Move** button
- **Transfer** button
- **Distribute** button
- **Delete** button

Add Button

The **Add** button enables you to create a new placeholder if you have a document that needs to be uploaded, but you do not have a corresponding placeholder. Use the following steps to create a new placeholder:

1. Click the **Add** button to see the **New Document Placeholder Entry** screen (Figure 82).

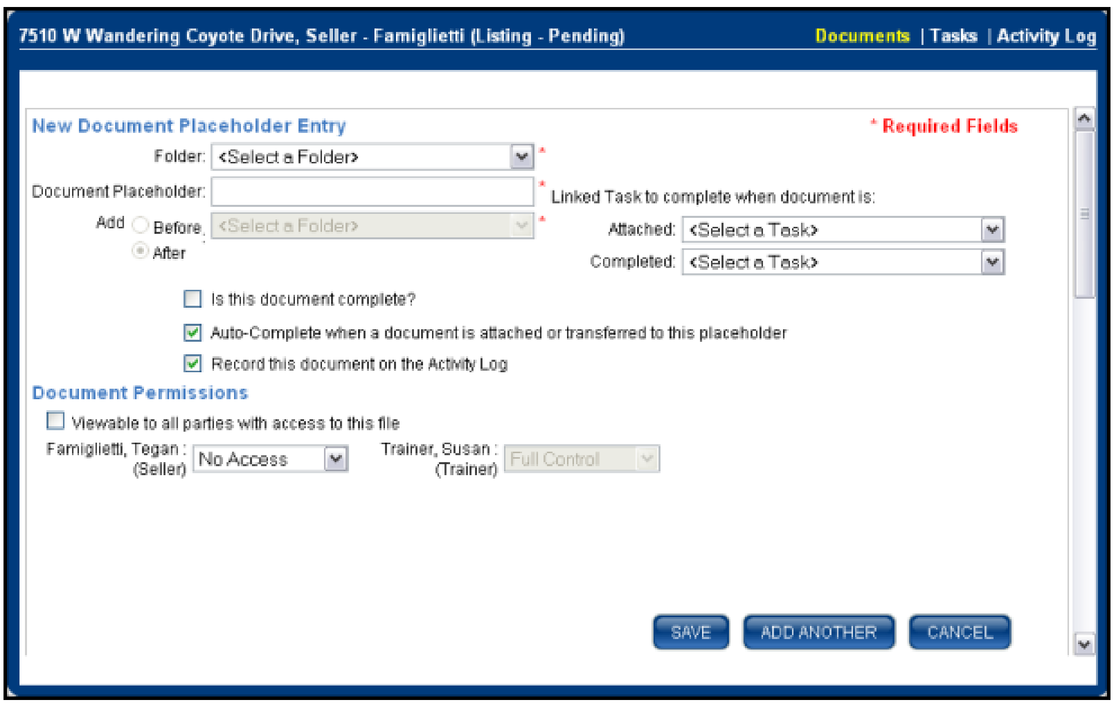


Figure 82

2. Select a folder in which to put the new placeholder from the *Folder* drop-down menu.
3. Type the name of the placeholder in the *Document Placeholder* field.
4. Select the placeholder after which you want to place the new placeholder in the *Add* field.
5. Select a task from the *Attached* drop-down menu if you want an associated task marked complete when a document is uploaded to the placeholder.

6. Select a task from the *Completed* drop-down menu if you want an associated task marked complete when the document is marked complete.
7. Uncheck the *Record this document on the Activity Log* check box.
8. Click the *Viewable to all parties with access to this file* check box if you want all the parties on the file to be able to see the placeholder.
9. Click the **Save** button to add your new placeholder to the file.

Complete Button

The **Complete** button enables you to mark a document complete. Use the following steps to complete a document:

1. Highlight the document you want to complete and click the **Complete** button. You see a **Complete Document** screen (Figure 83).

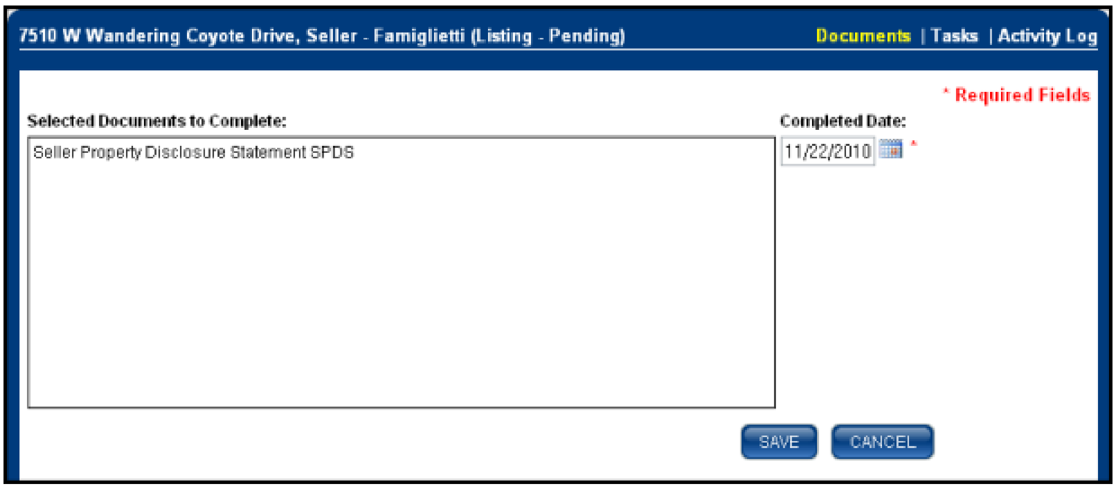


Figure 83

2. Choose the appropriate date from the calendar to the right of the *Completed Date* field.

3. Click the **Save** button to mark the document complete. You receive a message stating that your document has been marked complete and you see the date of completion in the *Completed Date* column (Figure 84).

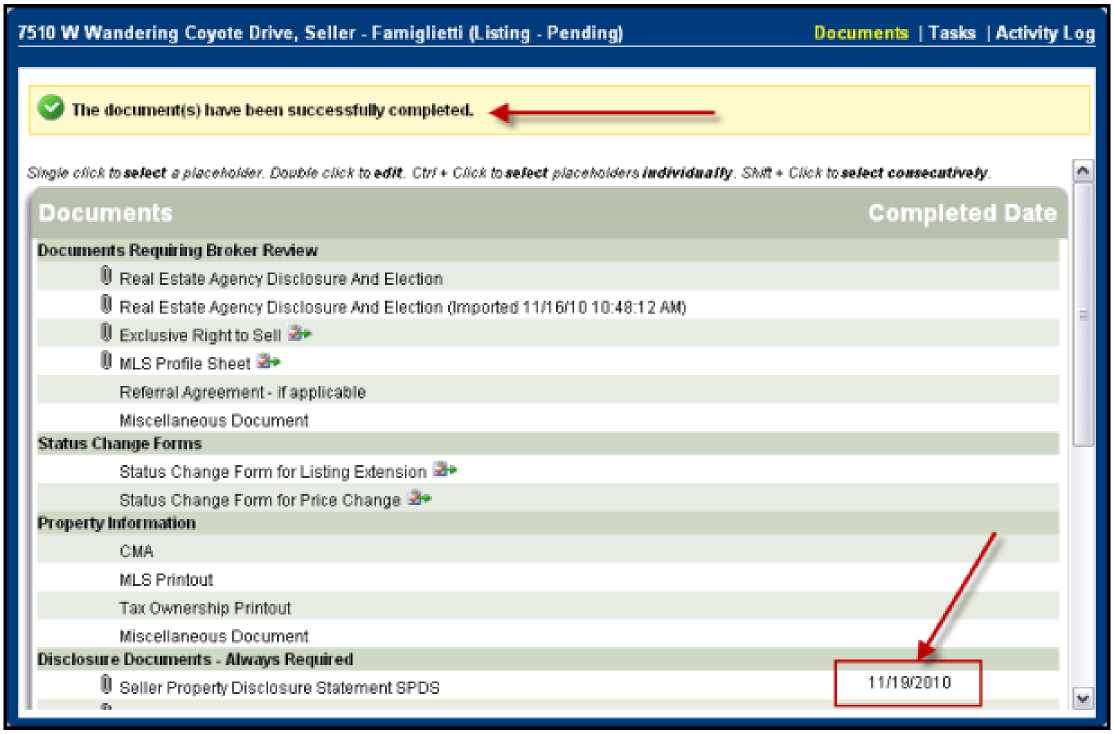


Figure 84

Move Button

The **Move** button enables you to move folders and placeholders within a file. Use the following steps to move a document within a file:

1. Click the **Move** button to see the **Move Placeholders or Folders** screen (Figure 85).

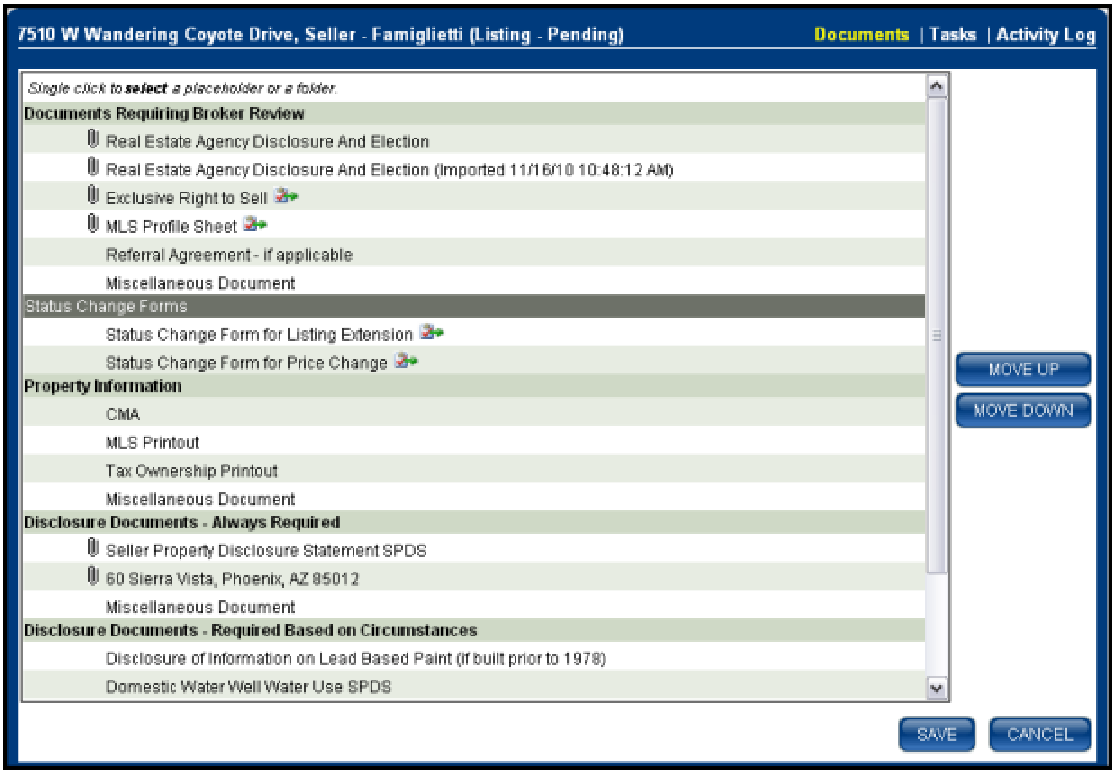


Figure 85

2. Highlight the placeholder you want to move.
3. Click the **Move Up** button to move the item up or click the **Move Down** button to move the item down.
4. Keep clicking the appropriate button until you have your document at the correct spot.
5. Click the **Save** button to save your changes. You receive a message stating that your documents have been moved (Figure 86).

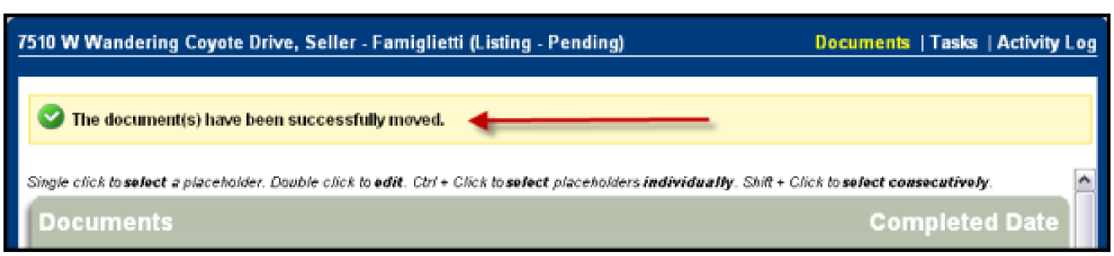


Figure 86

Transfer Button

The **Transfer** button enables you to transfer a document to another file. Use the following steps to transfer a document:

1. Highlight the document you want to transfer and click the **Transfer** button. You see a **Transfer Selected Document To** screen (Figure 87).

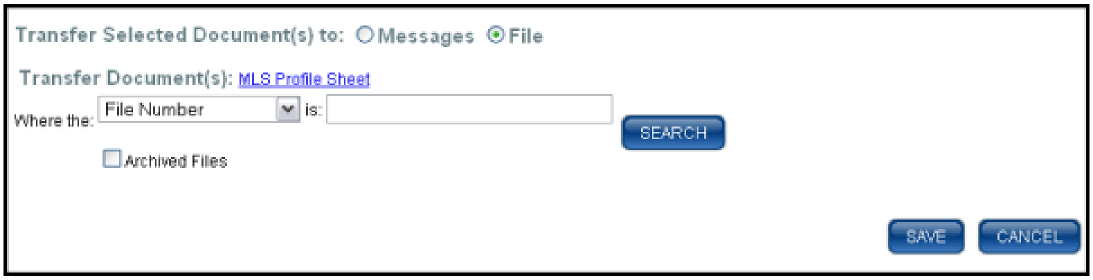


Figure 87

2. Choose whether to transfer your document to your **Messages** page or to a file.
3. Search for your file either by file number or by property address.
4. Highlight the divider under which you want to place the transferred document.
5. Click the **Save** button to complete the transfer. You receive a message letting you know that your document has been transferred.

Distribute Button

The **Distribute** button enables you to send one or multiple documents to another party or parties. Use the following steps to distribute a document:

1. Highlight the document or documents you want to distribute and click the **Distribute** button. You see a **Message** screen (Figure 88).

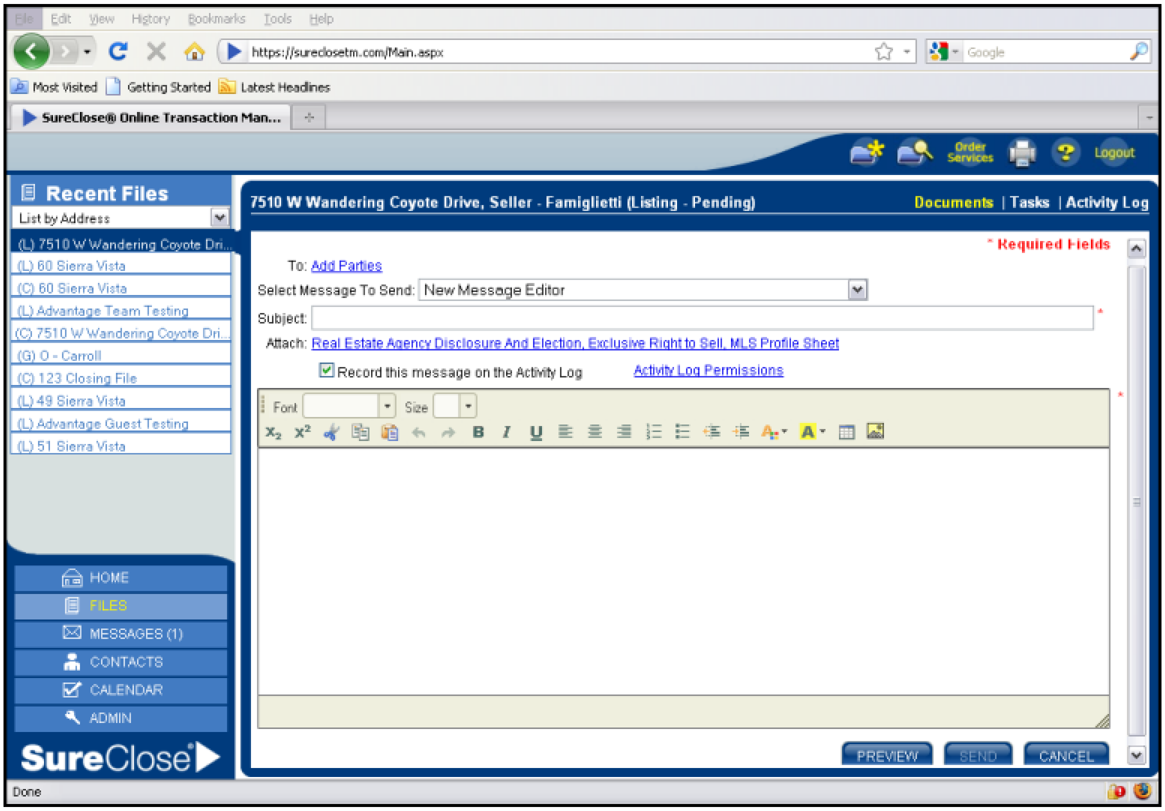


Figure 88

2. Click on the Add Parties hyperlink to see the list of parties on the file.
3. Highlight the party or parties to which you want to send the document and click the **Down Arrow** button to add them to the *Selected Parties* field.
4. Click the **OK** button to return to the **Message** screen.
5. Select a pre-written message for the *Select Message to Send* drop-down menu or write your subject and message in the *Subject* and *Message* fields.
6. Click the **Send** button to send the message with the document or documents attached.

Delete Button

The **Delete** button enables you to delete a placeholder or document from a file.

NOTE: You cannot retrieve deleted documents.

Use the following steps to delete a document:

1. Highlight the placeholder or document you want to delete and click the **Delete** button. You see the message in Figure 89.

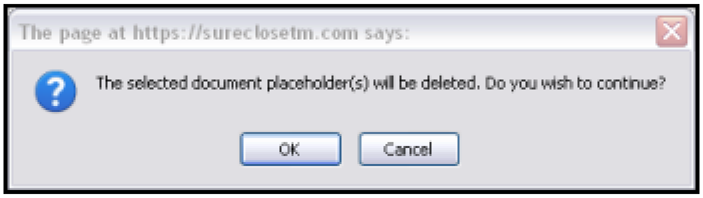


Figure 89

2. Click the **OK** button to delete the placeholder or document. You receive a message telling you that the placeholder or document has been deleted (Figure 90).

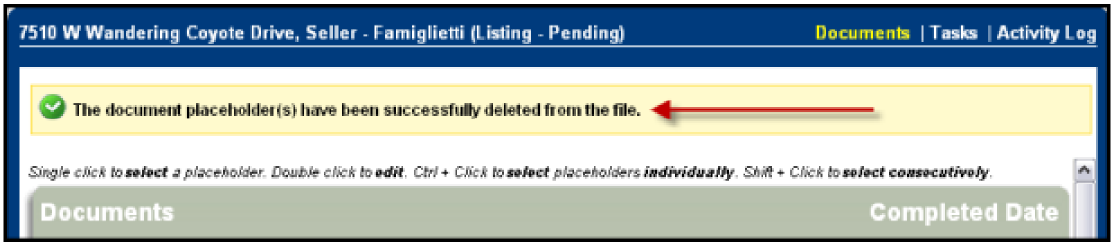


Figure 90

Tasks Page

The **Tasks** page (Figure 91) shows you a list of the tasks associated with the file and their respective due dates. The tasks are listed in order by responsible party and due date. A clipboard with a red checkmark icon to the right of a task means the task is linked to a document placeholder. You can hover your mouse over the clipboard to see the details of the link.

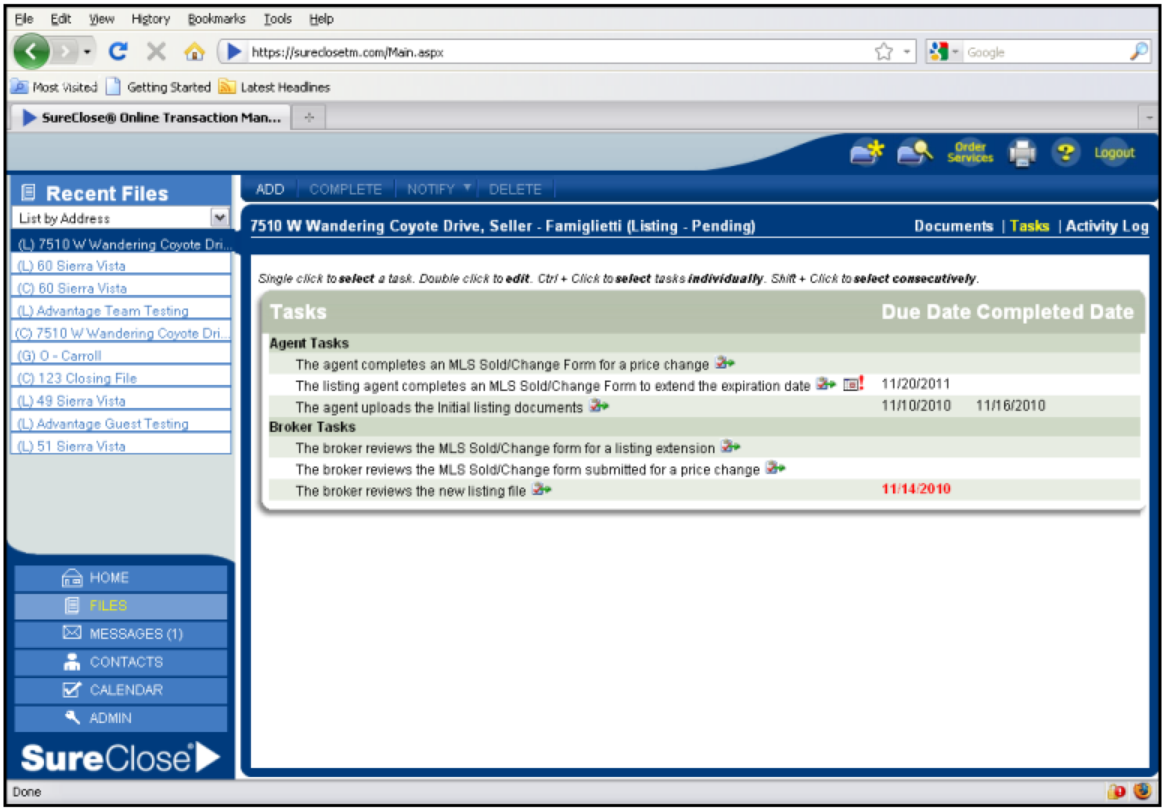


Figure 91

If your task is complete, you see the date of completion in the Completed Date column. If a task is overdue, its due date is highlighted in red.

You can complete a task by highlighting the task and clicking the **Complete** button.

Adding a Task

You can add a task to the file. Use the following steps to add a task to your file:

1. Click the **Add** button to see the **New Task Entry** screen (Figure 92).

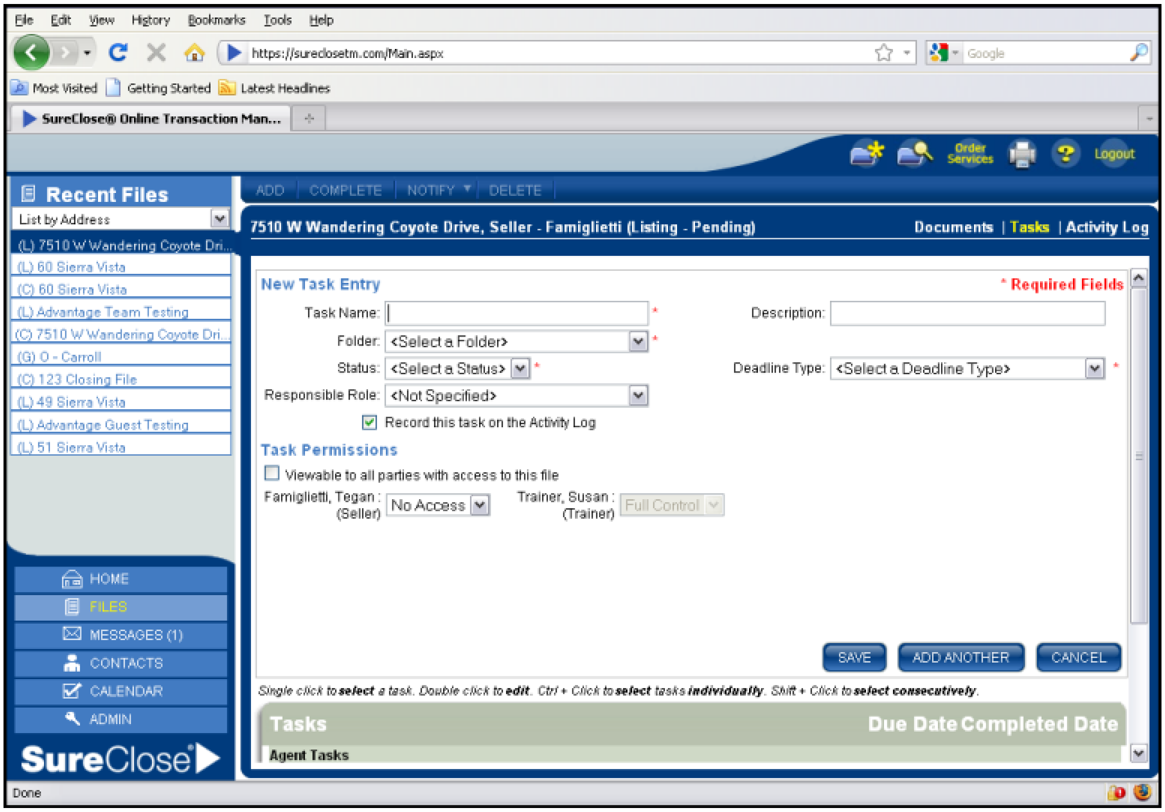


Figure 92

2. Type the task in the *Task Name* field.
3. Type a description of the task in the *Description* field (optional). The description could include specific instructions about how to complete the task.
4. Select the appropriate folder from the *Folder* drop-down menu.
5. Select the appropriate status from the *Status* drop-down menu. The statuses are:
   - Not started
   - In progress
   - Completed
6. Select the deadline type from the *Deadline Type* drop-down menu:
   - Relative to start date. This option requires you to enter the number of days after the start date for the task to be due.
   - Relative to end date. This option requires you to enter the number of days before the end date for the task to be due.
   - Relative to contract acceptance (for closing files only). This option requires you to enter the number of days after the contract acceptance date for the task to be due.

- Relative to another task's completion. This option requires you to choose a task and then enter the number of days after the chosen task for the new task to be due.
- Fixed deadline. This option requires you to pick a date and time for the task to be due.

7. Select the appropriate role on the file from the *Responsible Role* drop-down menu.
8. Ensure that the check box for *Record this task on the Activity Log* is unchecked.
9. Change the task permissions for the guest parties on the file if you want them to see the task in their view of SureClose®.
10. Click the **Save** button to add your task to the file.

Adding Comments to the Transaction Summary Report

You can add customized comments to the Transaction Summary Report by creating a **Weekly Summary Report Comments** task. The comments you make display in the Comments section of the report.

Use the following steps to add comments to the Transaction Summary Report:

1. Open your file to the **Tasks** page.
2. Click the **Add** button to add a task.
3. Create a new task called Weekly Summary Report Comments.

NOTE: The task name is not case-sensitive but it must be spelled correctly.

4. Double click on the task to open the **Edit Task** window (Figure 93).

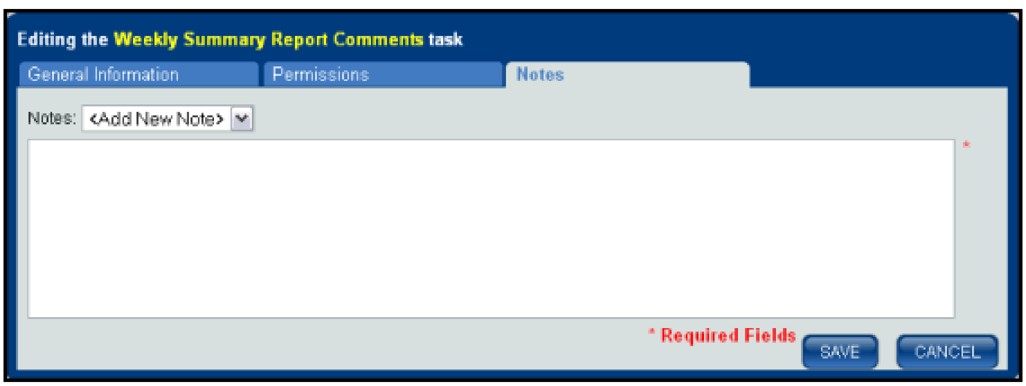


Figure 93

5. Click on the **Notes** tab.
6. Select <Add New Note> from the *Notes* drop-down menu.
7. Type the text of your note.
8. Click on the **Permissions** tab. Grant permission to the appropriate guests on the file for them to see the comments on their Transaction Summary Report.
9. Click the **Save** button to save the note.

You can add multiple notes to the Weekly Summary Report Comments task. The notes display as comments within the *Comments* section of the report.

Activity Log

The **Activity Log** page (Figure 94) shows all the activity for a file in chronological order. Some of the activities recorded are:

- Messages that are sent from the file.
- Notifications that the broker has reviewed documents.
- Documents that have been sent from the file or uploaded to the file.

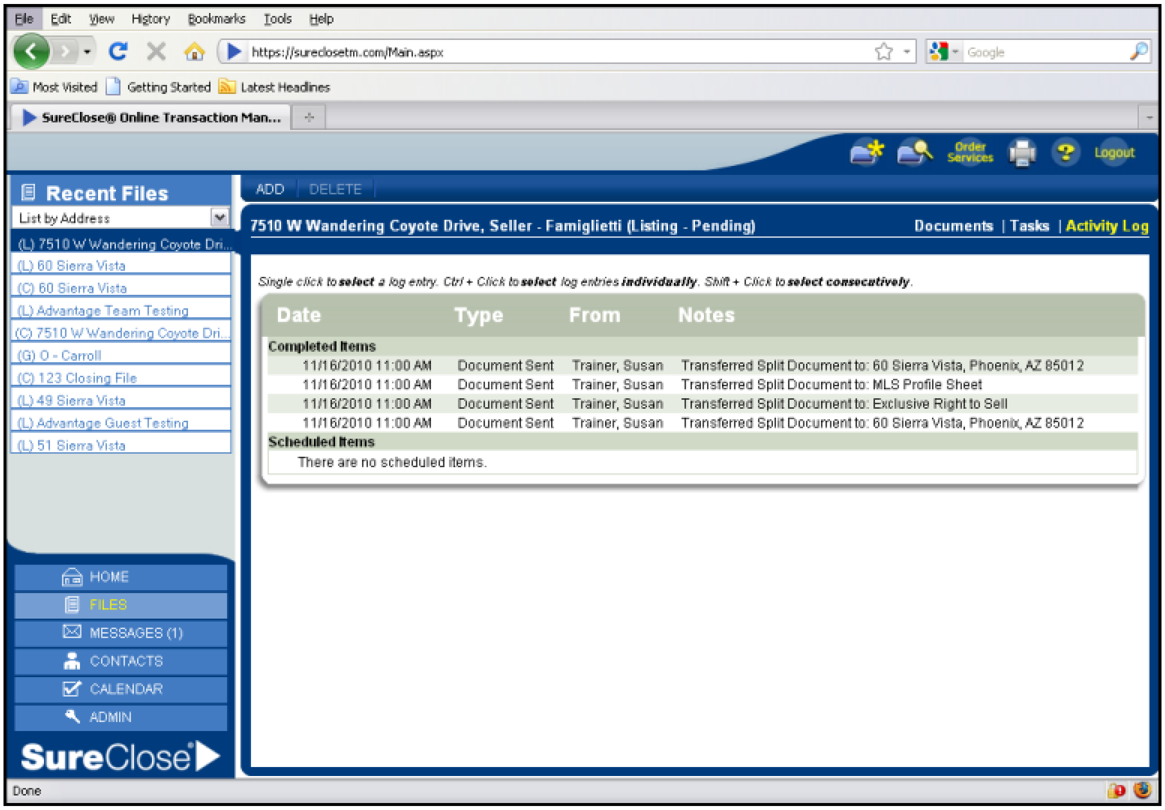


Figure 94

You can also add notes and records of phone calls to the **Activity Log**. Use the following steps to add an item to the **Activity Log**:

1. Click the **Add** button to see the **New Activity** screen (Figure 95).

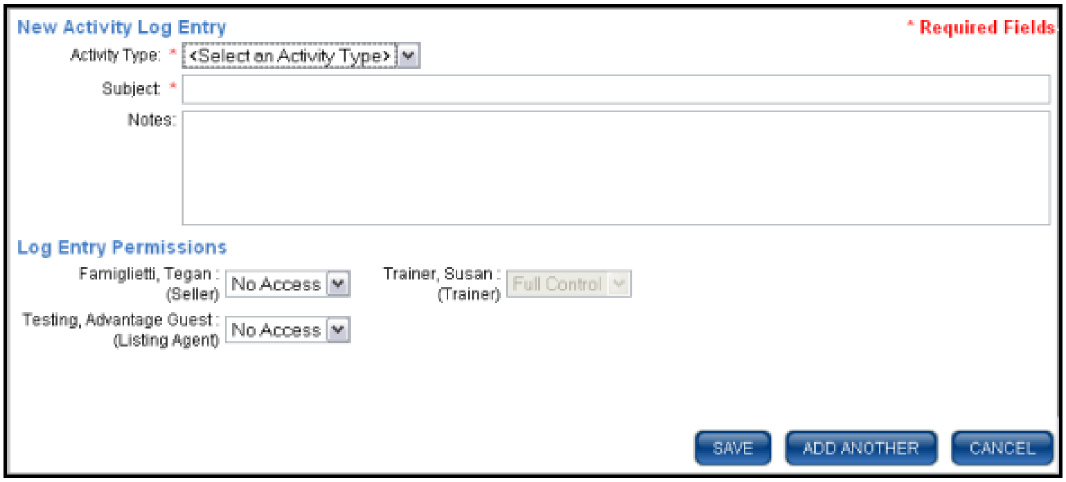


Figure 95

2. Select the type of Activity from the *Activity Type* drop-down menu. The types are:
   - Appointment
   - Comment
   - Document sent
   - Message sent
   - Phone call
3. Type the subject of the activity in the *Subject* field.
4. Type the information about the activity in the *Notes* field.
5. Change the permissions for the guest parties on the file if you want them to see the activity on their view of SureClose®.
6. Click the **Save** button to save your activity or click the **Add Another** button to add another activity.

Chapter 8. Admin Page

The **Admin** page (Figure 96) enables you to manage your company's version of SureClose®. The **Admin** page is divided into three sections:

- Notifications
- Templates
- Corporate Tools

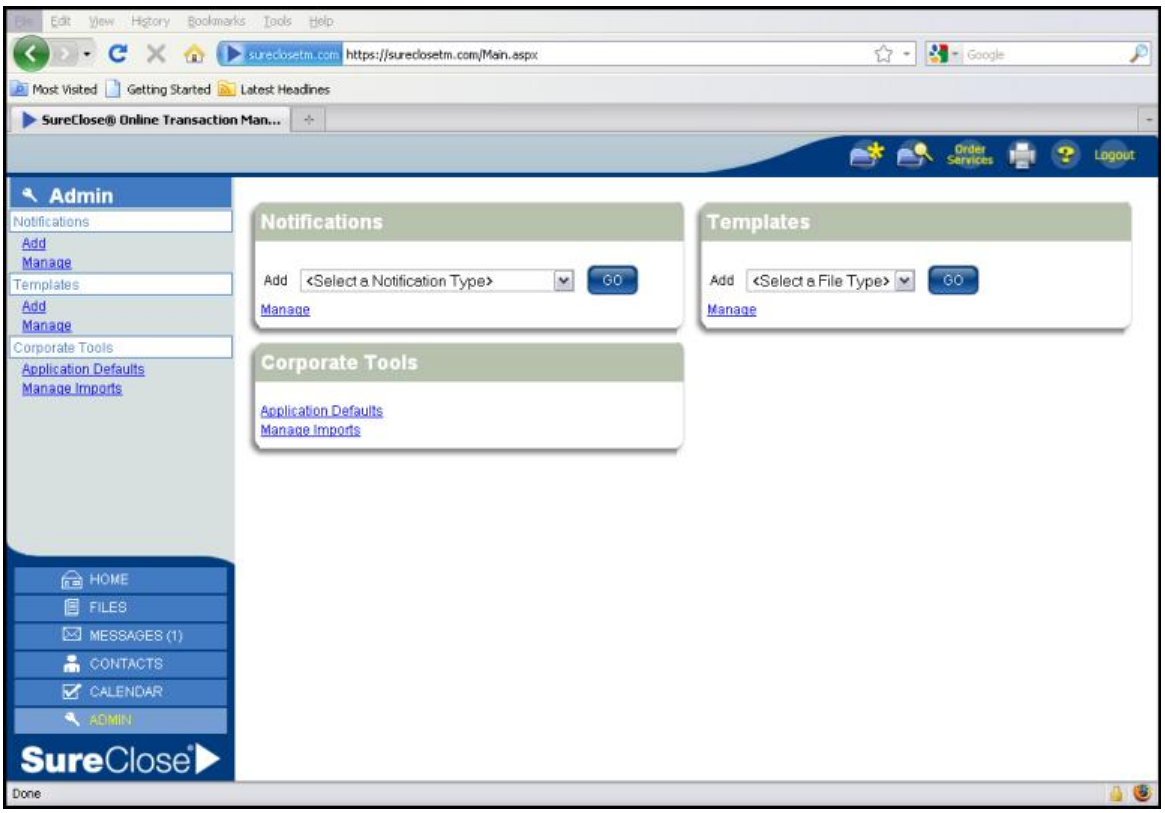


Figure 96

Notifications

The *Notifications* section enables you to add new customized messages to your version of SureClose®, as well as manage the messages you have already created.

Adding a New Notification

Use the following steps to add a new message:

1. Select the type of message you want to create from the *Add* drop-down menu. The choices are:
   - Document Distribute. These messages appear in the drop-down menu when you are sending documents from the **Documents** page of a file.
   - Message Party. These messages appear in the drop-down menu when you are sending a message from the **Summary** page of a file.
   - New File Notification. SureClose® sends this message automatically when you add a new party to a file.
   - New User Notification. SureClose® sends this message automatically when you add a new party to the system and choose to give them access to SureClose®.
   - Scheduled Reminder. These messages appear in the drop-down menu when you are adding a scheduled reminder to a task.
   - Task Completed Notification. These messages appear in the drop-down menu when you are adding a completed notification to a task.
   - Task Deadline Reached Notification. These messages appear in the drop-down menu when you are adding a deadline-reached notification to a task.

2. Click the **Go** button to see Figure 97.

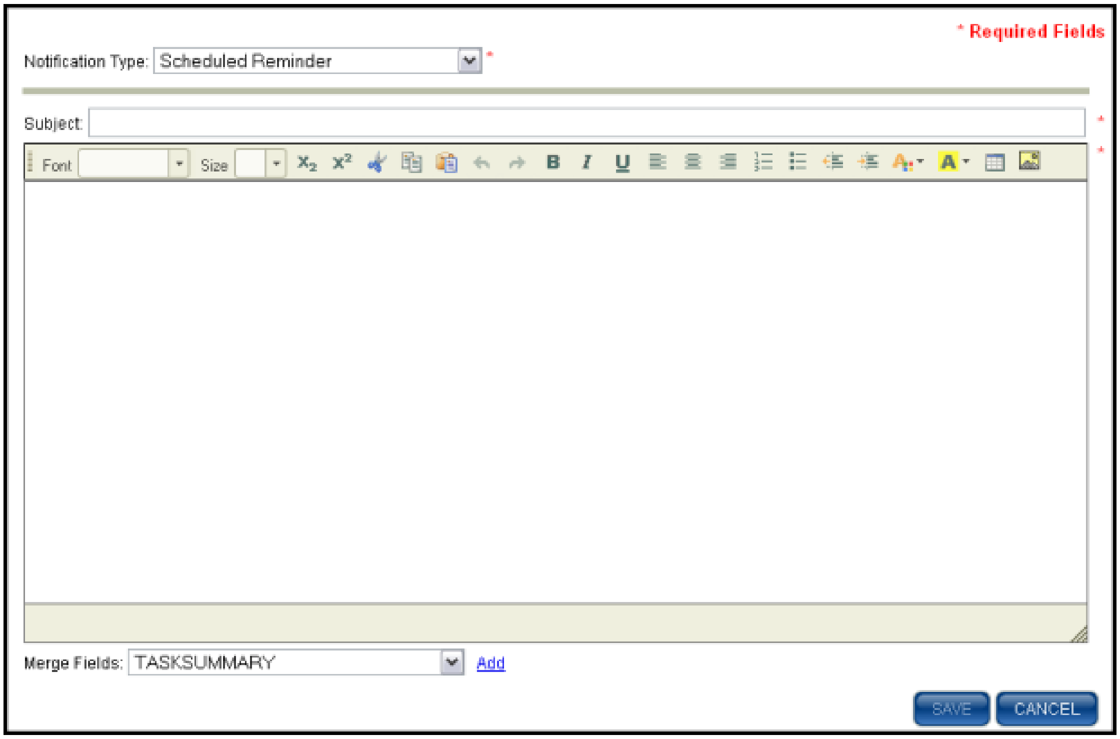


Figure 97

3. Type a subject for the message in the *Subject* field.
4. Type the message in the *Message* field. You can format your text using the icons in the toolbar.
5. Position your cursor at the appropriate spot in the message at which to insert a merge field.
6. Choose the merge field from the *Merge Fields* drop-down menu and click the Add hyperlink. The available merge fields and the data they pull in are defined in the following table.

Merge Field	Description
{ACCOUNTCREATOR}	The person who created the user's account.
{BRANDNAME}	The name of the brand under which the file was created.
{BUYERNAME}	The name of the buyer of the subject property.
{CLOSERCOMPANYNAME}	This field is not applicable.
{CLOSERNAME}	This field is not applicable.
{COMPANYNAME}	The company to which the user's account belongs.
{DOCUMENTSUMMARY}	The document placeholder name and the completion status.
{EXPIREDATE}	The expiration date of the listing file.
{EXPORTMSGBODY}	The body of the message indicating that the export will be expiring.

Merge Field	Description
{EXPORTURL}	The link to go to for downloading the exported files.
{LENDERCOMPANYNAME}	The company of the lender for the subject property.
{LENDERNAME}	The name of the lender for the subject property.
{LENDERPHONE}	The telephone number of the lender for the subject property.
{LISTINGAGENTCOMPANYNAME}	The name of the company of the listing agent.
{LISTINGAGENTNAME}	The name of the listing agent for the subject property.
{LISTINGDATE}	The acceptance date of a listing contract.
{LOGIN}	The login ID for the new user (only visible to the intended recipient).
{MYADDRESS1DIRECTION}	The street direction of the address of the user.
{MYADDRESS1NAME}	The street name of the address of the user.
{MYADDRESS1NUMBER}	The street number of the address of the user.
{MYADDRESS2}	The information listed in the *Line 2* field under the *Address* field for the user.
{MYBUSFAX}	The business fax telephone number of the user.
{MYBUSPHONE}	The business telephone number of the user.
{MYCITY}	The city of the address of the user.
{MYCOMPANYADDRESS1DIRECTION}	The street direction of the address of the branch.
{MYCOMPANYADDRESS1NAME}	The street name of the address of the branch.
{MYCOMPANYADDRESS1NUMBER}	The street number of the address of the branch.
{MYCOMPANYADDRESS2}	The information listed in the *Line 2* field under the *Address* field for the branch.
{MYCOMPANYBRANCHNAME}	The branch assigned to the user.
{MYCOMPANYCITY}	The city of the address of the branch.
{MYCOMPANYEMAIL}	The default email address of the branch.
{MYCOMPANYFAXNUMBER}	The fax telephone number of the branch.
{MYCOMPANYNAME}	The corporation assigned to the user.
{MYCOMPANYSTATE}	The state of the address of the branch.
{MYCOMPANYZIP}	The zip code of the address of the branch.
{MYEMAIL}	The personal email address of the user.
{MYFAXASSISTFAX}	The fax telephone number of the user’s assistant.
{MYFAXEFAX}	The eFax telephone number of the user.
{MYFAXNUMBER}	The personal fax telephone number of the user.

Merge Field	Description
{MYFAXOTHER}	An additional fax telephone number of the user.
{MYFIRSTNAME}	The first name of the user.
{MYHOMEPHONE}	The home telephone number of the user.
{MYLASTNAME}	The last name of the user.
{MYMIDDLEINITIAL}	The middle initial of the user.
{MYPREFIX}	The title of the user (Mr., Mrs., Ms., Miss)
{MYSTATE}	The state of the address of the user.
{MYSUFFIX}	The suffix of the user (Sr., Jr., III, MD. Etc)
{MYTITLE}	The default role of the user.
{MYZIP}	The zip code of the address of the user.
{NEWPARTY}	The name of the new party added to a file.
{OPERATIONTYPEDESCRIPTION}	The type of action that triggered the notification.
{PASSWORD}	The password for the new user (only visible to the intended recipient).
{PROCESS}	An indication that the notification was automatically generated by SureClose®.
{PROJECTADDRESS1DIRECTION}	The street direction of the subject property.
{PROJECTADDRESS1NAME}	The street name of the subject property.
{PROJECTADDRESS1NUMBER}	The street number of the subject property.
{PROJECTADDRESS2}	The information listed in the *Line 2* field under the *Address* field for the subject property.
{PROJECTCITY}	The city of the subject property.
{PROJECTDESCRIPTION}	The address of the subject property.
{PROJECTSTATE}	The state of the subject property.
{PROJECTTYPE}	The type of file that was created (closing, listing, generic, or buyer).
{PROJECTZIP}	The zip code of the subject property.
{RECIPIENTFIRSTNAME}	The first name of the user receiving the notification.
{RECIPIENTLASTNAME}	The last name of the user receiving the notification.
{RECIPIENTMIDDLENAME}	The middle name of the user receiving the notification.
{ROLECREATOR}	The person who added the party to the file.
{ROLENAME}	The role of the new party added to a file.
{SELLERNAME}	The name of the owner of the subject property.
{SELLINGAGENTCOMPANYNAME}	The name of the company of the selling agent.
{SELLINGAGENTNAME}	The name of the selling agent for the subject property.

Merge Field	Description
{SENDERFIRSTNAME}	The first name of the user sending the notification.
{SENDERLASTNAME}	The last name of the user sending the notification.
{SENDERMIDDLENAME}	The middle name of the user sending the notification.
{SITELINK}	The hyperlink to the SureClose® Login screen.
{SUPPORTEMAIL}	The SureClose® support email address.
{SUPPORTPHONE}	The SureClose® support telephone number.
{TARGETDESCRIPTION}	The method by which the document was auto-filed.
{TARGETYPEDESCRIPTION}	The action that has been completed.
{TASKSUMMARY}	The task name, completion status, due date, and subject property.
{TITLECOMPANYNAME}	The company of the title officer for the subject property.
{TITLEOFFICER}	The name of the title officer for the subject property.
{TRANSACTION NUMBER}	The file number for the transaction file.

7. Click the **Save** button to save your message. The message appears in your list of messages (Figure 98).

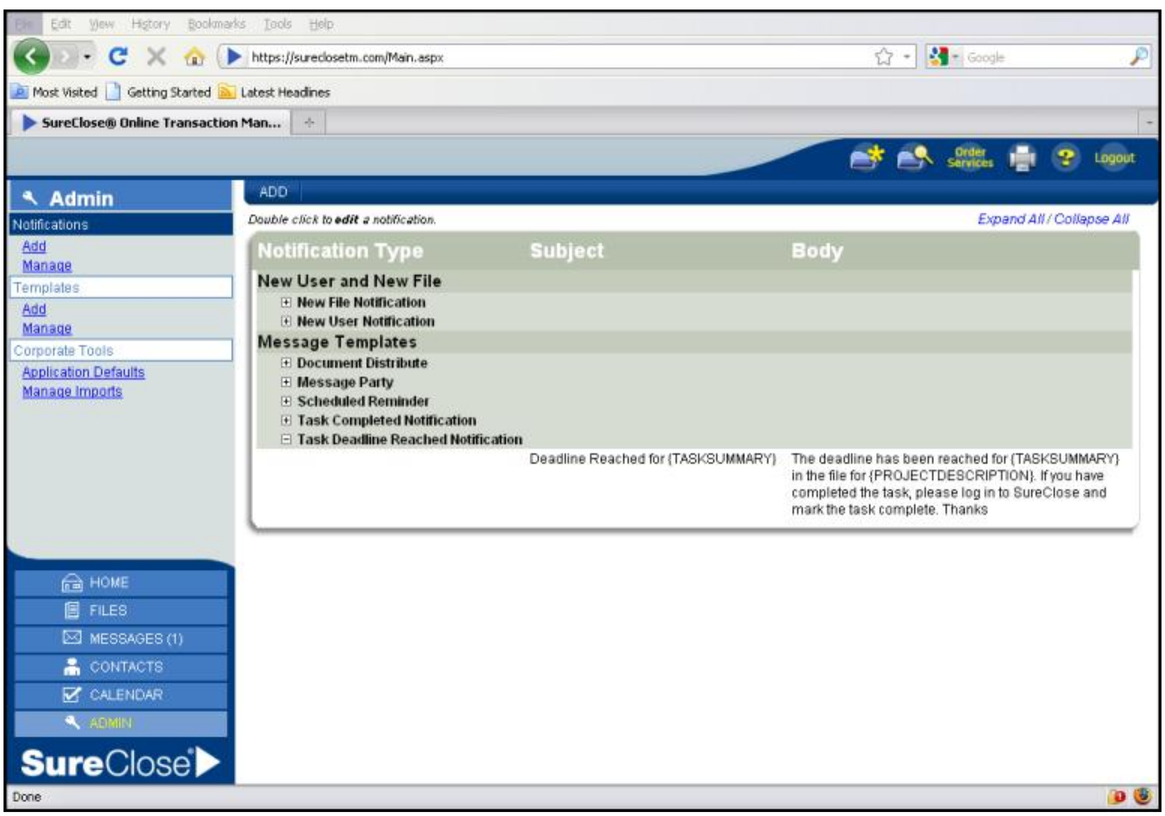


Figure 98

Modifying an Existing Notification

Use the following steps to modify a notification message that already exists in your corporation:

1. Click the Manage hyperlink to see a list of notification types (Figure 99).

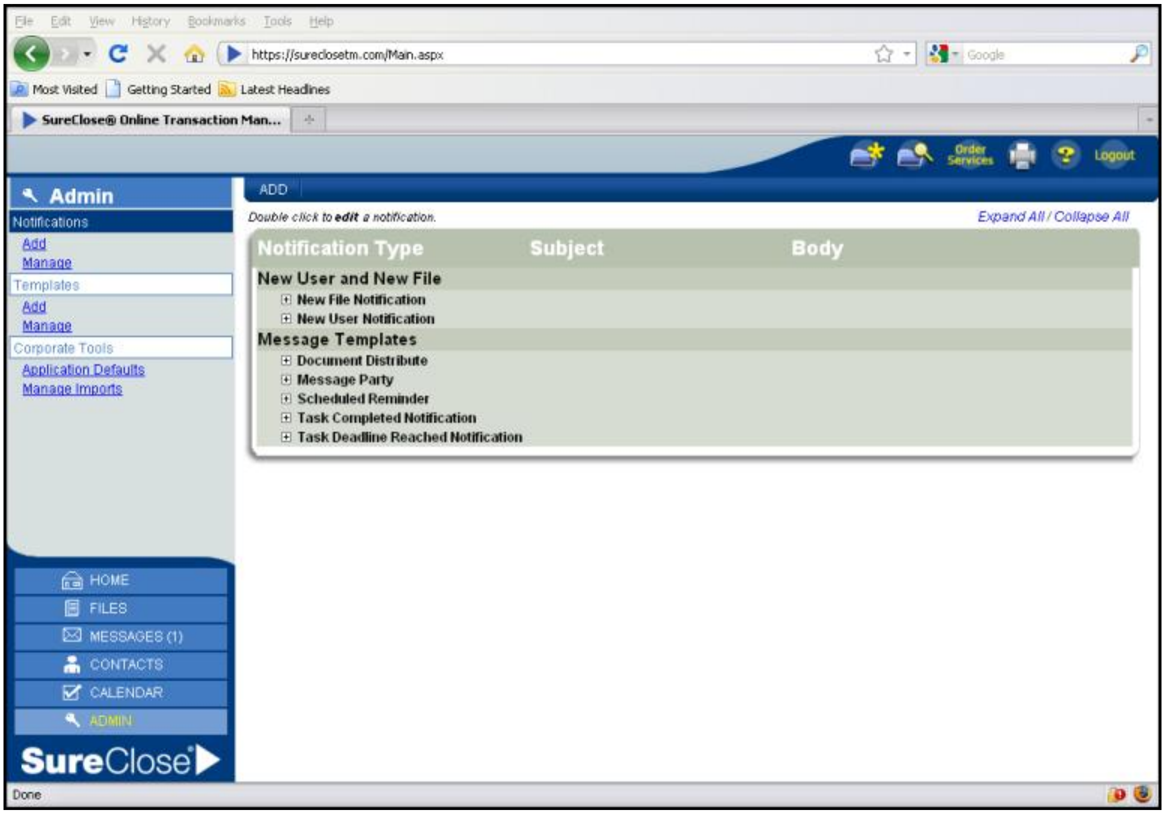


Figure 99

2. Expand the notification type by clicking on the plus sign icon to the left of the type. You see a list of messages similar to Figure 100.

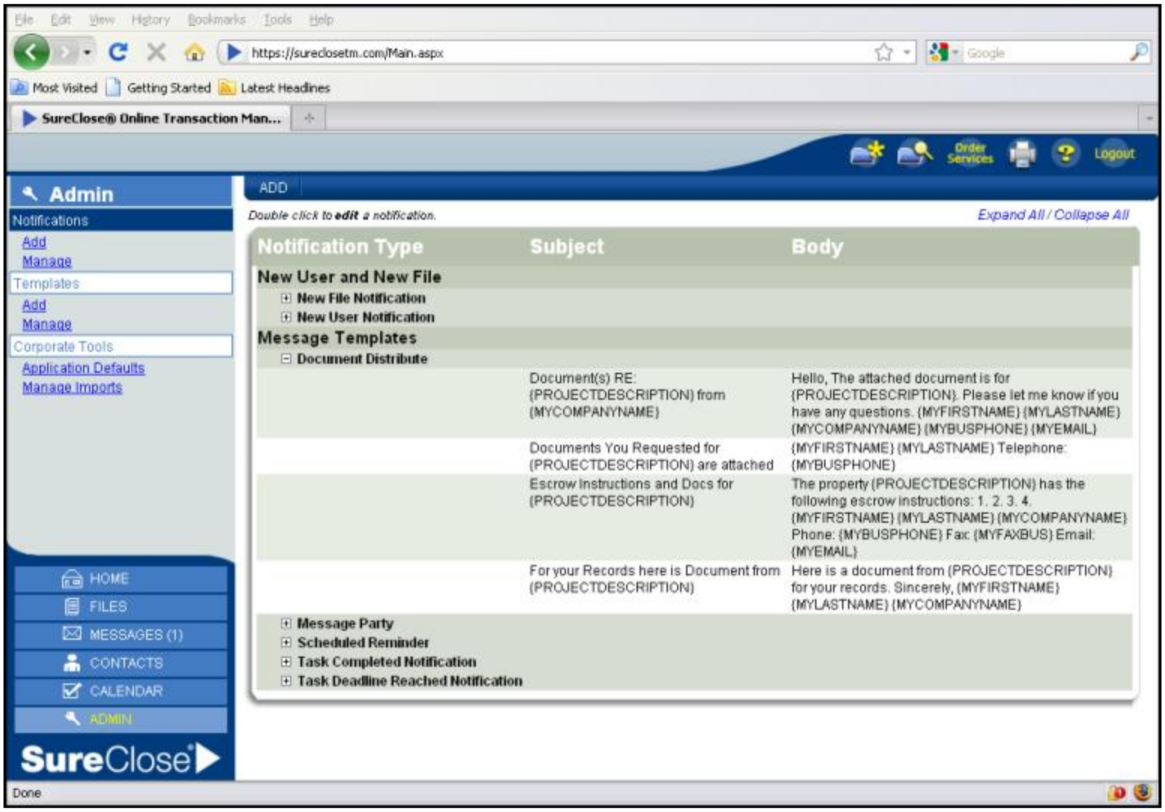


Figure 100

3. Double-click on the message you want to modify to see a screen similar to Figure 101.

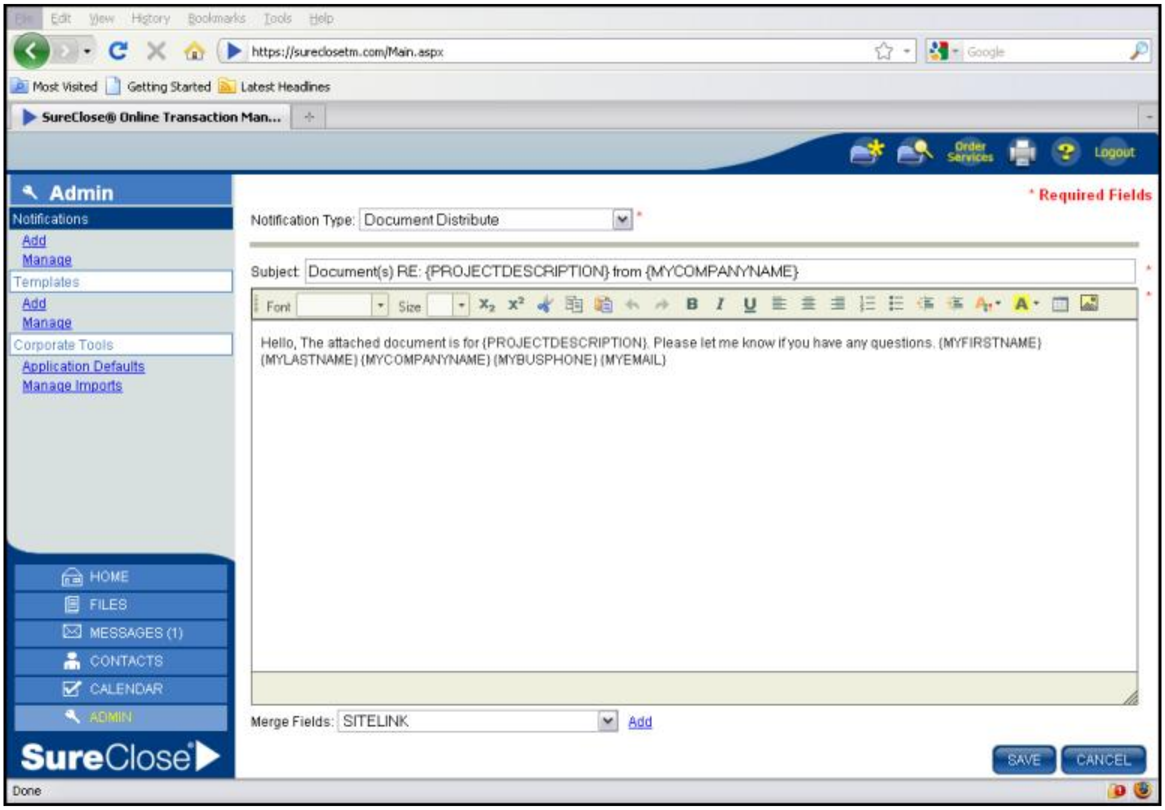


Figure 101

4. Make your changes to the subject and message.

5. Click the **Save** button to save your changes. You see a message stating that your message has been saved (Figure 102).

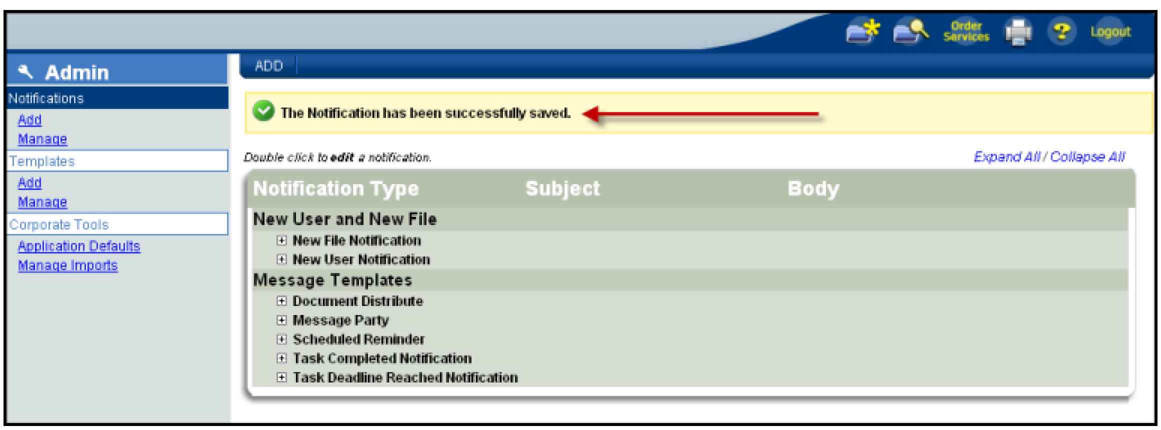


Figure 102

Templates

You use a template every time you create a transaction file in SureClose. The template contains parties, tasks, and document placeholders. The template contents are copied into each transaction file you create.

The *Templates* section enables you to add new templates to your system and manage the templates that already exist. There are three categories of templates:

- Closing Templates. You use these templates to create files for transactions for which you have an accepted contract.
- Generic Templates. You use these templates to create files for property management and miscellaneous files.
- Listing Templates. You use these templates to create files for which you have a signed listing agreement.

The components of a template are:

- Parties. The parties on a template are those staff members who need to be on every transaction file you create. For example, some typical parties who might be on every template are the designated broker, managing broker (if applicable), and office manager.
- Tasks. The tasks on a template are all the standard activities that must be performed for each type of transaction file. The tasks are assigned to brokers, agents, and support staff.
- Document Placeholders. The document placeholders on a template include all the typical documents you need to complete for each type of transaction file. They can include contract documents, disclosure documents, property information documents, and escrow documents.

When your corporation was created, eight pre-built templates were added to the corporation. The templates are:

- Buyer Closing Template
- Dual Representation Closing Template
- Seller Closing Template
- Generic Template
- Property Management Template
- REO Listing Template
- Short Sale Listing Template
- Traditional Listing Template

You can modify the pre-built templates to meet your specific needs. You can also create new templates such as lease listing and lease closing templates. There is no limit to the number of templates you can have in your corporation.

Creating a New Template

Use the following steps to create a new template for your corporation:

1. Select the type of template you want to create from the *Add* drop-down menu.
2. Click the **Go** button to see the **Create Template** screen (Figure 103).

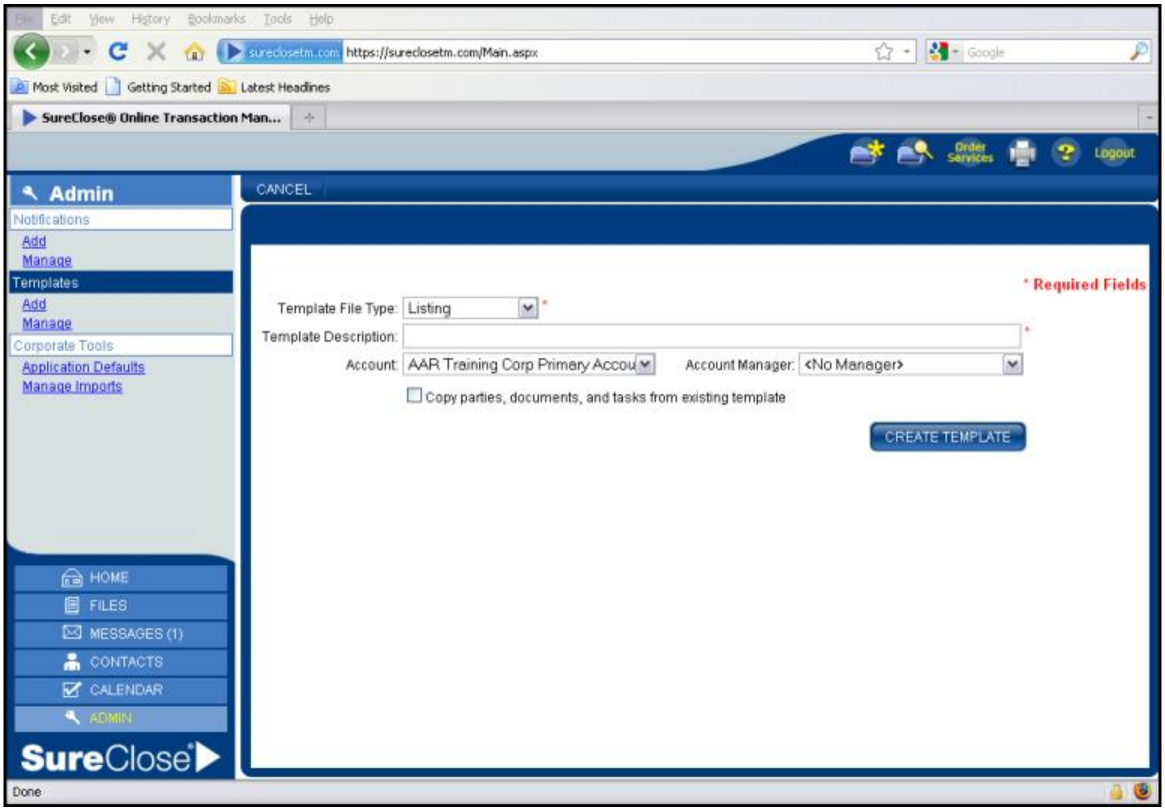


Figure 103

3. Type a name for the template in the *Template Description* field.
4. Choose the account to which to assign the template from the *Account* drop-down menu. If your corporation does not have accounts set up, SureClose® defaults to the primary account that was created when your corporation was created.
5. Select an account manager from the *Account Manager* drop-down menu. This step does not apply if your corporation does not have accounts set up.

6. Click the *Copy parties, documents, and tasks from existing template* check box to copy data from an existing template to your new template. You see a list of templates similar to Figure 104.

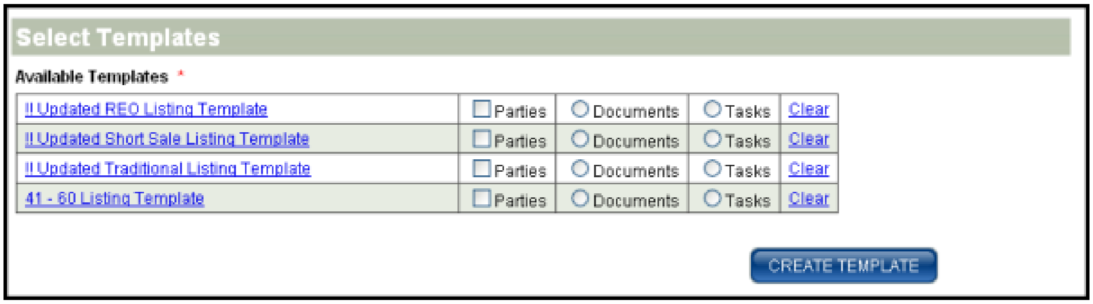


Figure 104

7. Click the name of the template to copy all the parties, documents, and tasks from that one template or choose parties from one or more templates, documents from another, and tasks from a third template.

NOTE: You can select to copy parties from multiple templates. You can only copy documents from a single template. You can only copy tasks from one template, but it can be a different template from which you copy the documents.

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8. Click the **Create Template** button to create your template. The new template opens to the **Summary** page (Figure 105).

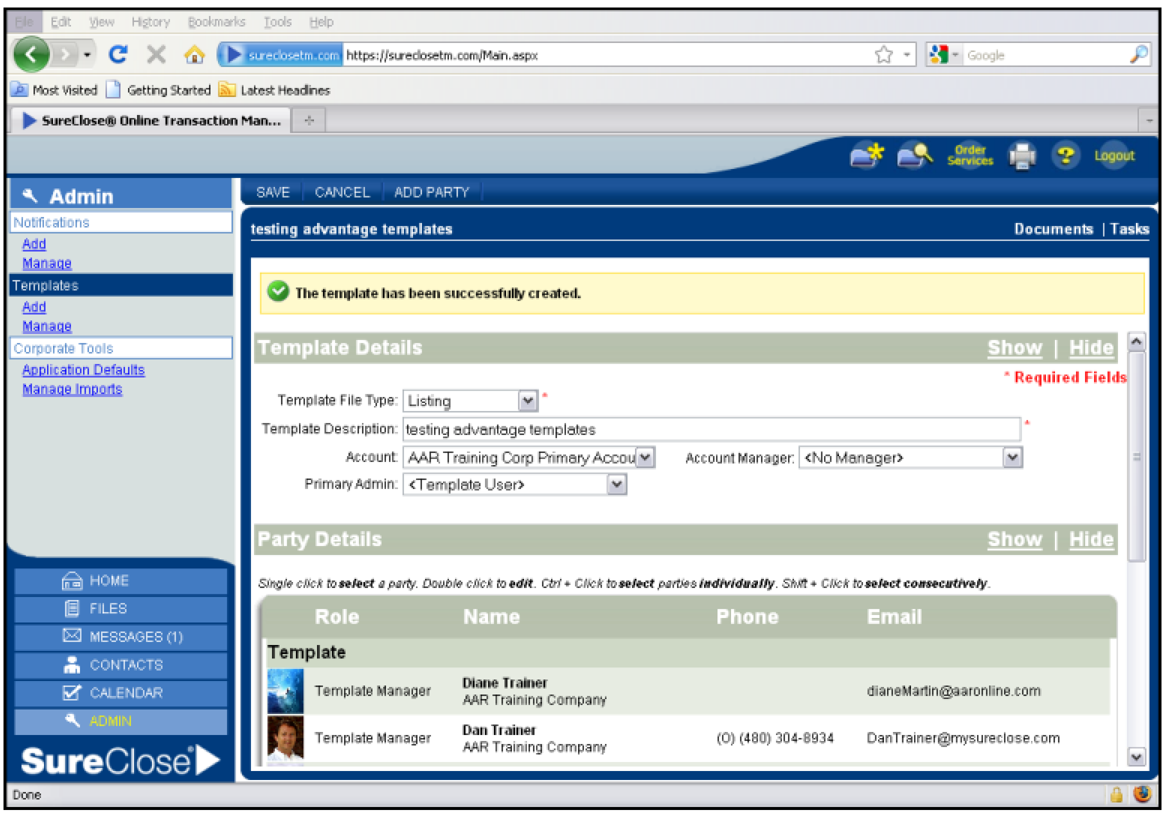

Figure 105

Modifying an Existing Template

Use the following steps to modify an existing template:

1. Click on the Manage hyperlink to see the **Templates** screen (Figure 106).

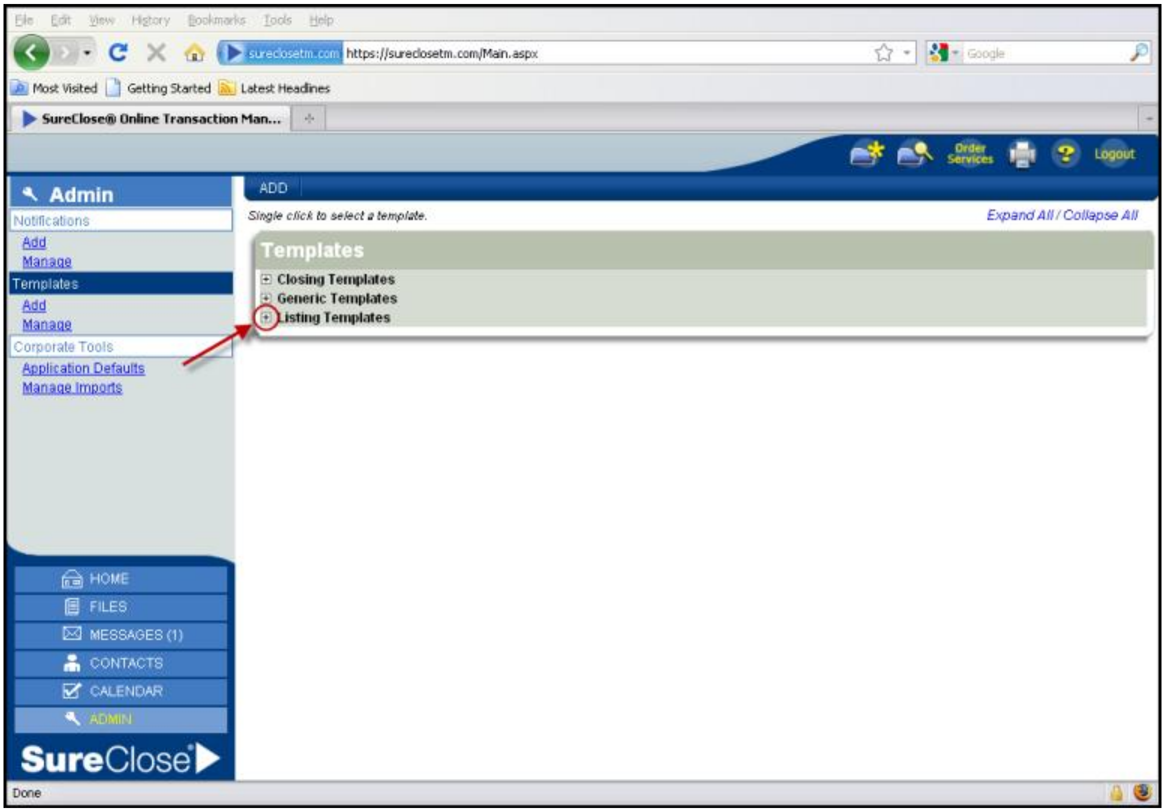

Figure 106

2. Click on the plus sign icon to the left of the template category to see a list of existing templates similar to Figure 107.

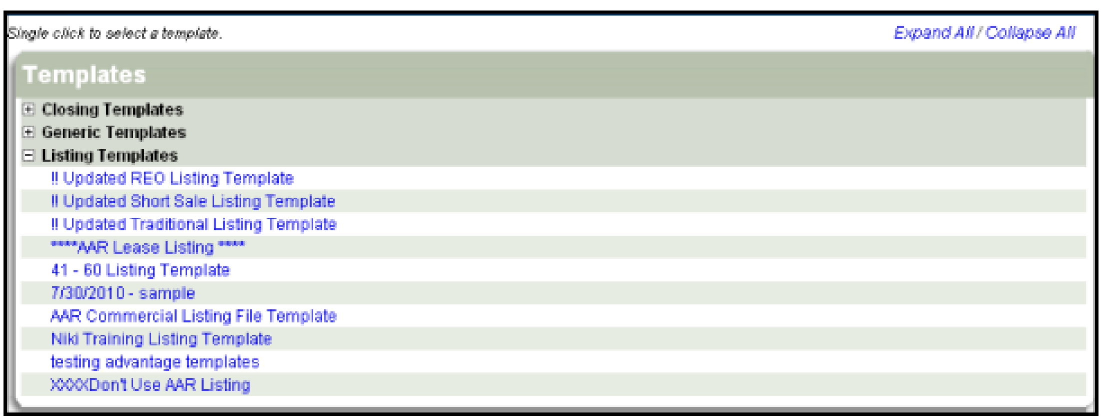

Figure 107

3. Click on the name of a template to open the template to the **Summary** page.
4. Make your changes to the template as detailed in the following pages.

Adding Parties to a Template

You can add parties to a template with three roles:

- Template Manager. The template managers have the ability to modify, edit, and assign access for the use of the template. You should limit the number of template managers on each template you create. The minimum number of template managers to have is two. When you create a transaction file, the template managers do not transfer to the file.
- Template User. The template users are allowed to use the template to create a transaction file. If you add your corporation as a template user, then any user in your corporation with the appropriate general security profile can use the template to create a transaction file. When you create a transaction file, the template users do not transfer to the file.
- Specific Role. This is a party who transfers from the template to the transaction file to ensure that they are on all files created from the template. By adding all your required parties to the template, you save time and keystrokes as these necessary parties do not need to be added separately to each transaction file you create.

NOTE: If a party has multiple functions on the template (for example the broker is added with a specific role and is also a template manager), you must follow the steps in this section twice to add them with both functions.

Adding a New Party to a Template

Use the following steps to add a new party to a template:

1. Click the **Add Party** button at the top of the screen. The **Add Party** page displays (Figure 108).

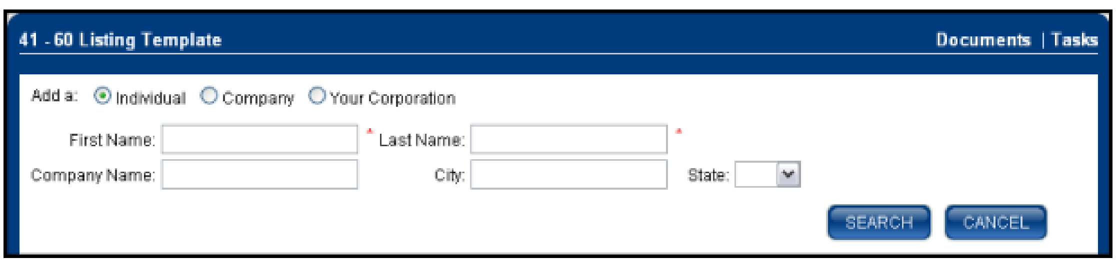

Figure 108

2. Click the appropriate radio button for the entity you are adding. The choices are:
   - Individual (for a single person)
   - Company (for a company such as a bank – not typically used in a template)
3. Type the first name of the person in the *First Name* field, the last name in the *Last Name* field, choose the state in which the person resides from the *State* drop-down menu, and click the **Search** button. SureClose® searches to see if the person already exists in the global database.

If a person with a similar name already exists in the database, you see a screen similar to Figure 109.

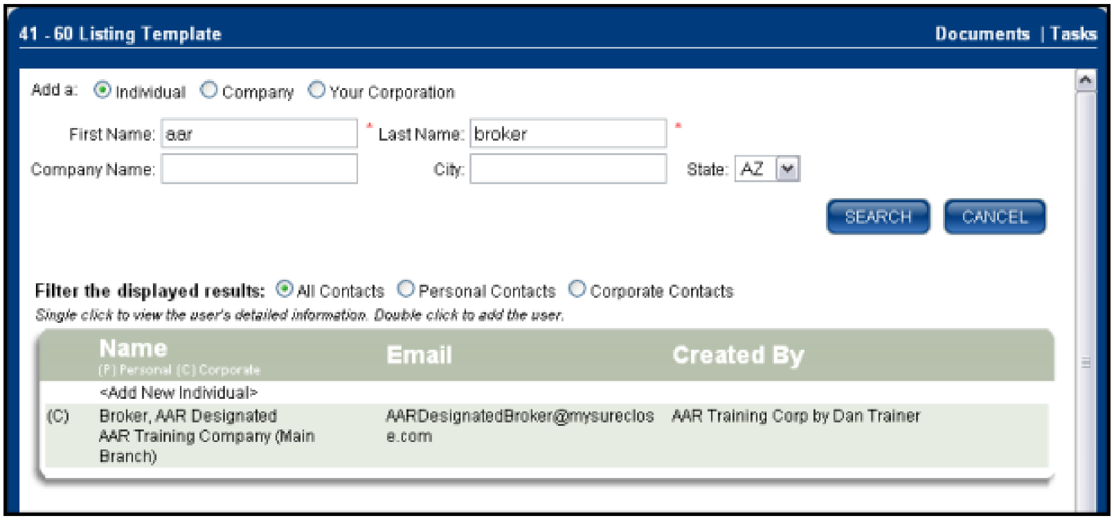

Figure 109

4. Double click on the name of the person to open their profile. You have the ability to modify the information in the *Personal Information*, *Individual Contact Information*, and *Notification Prefer*ences sections.

5. Scroll down to the *File Permissions* section (Figure 110).

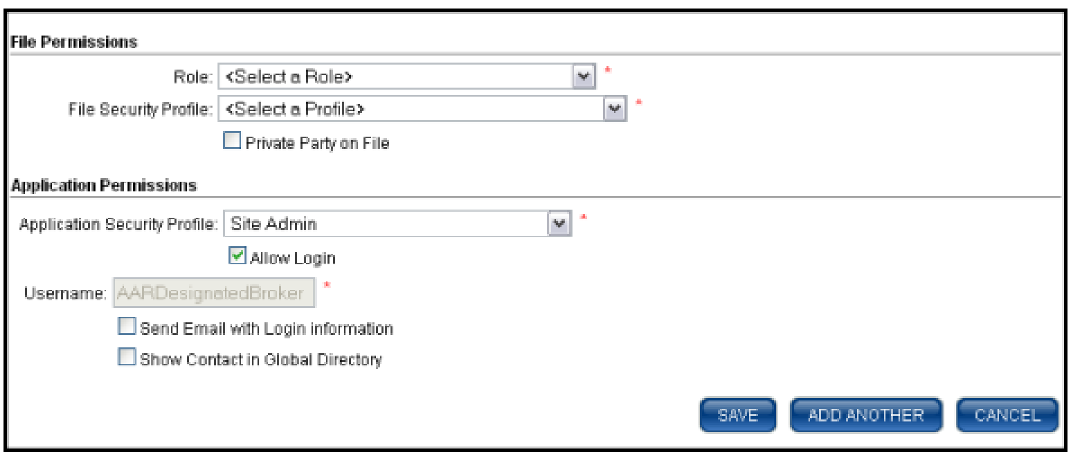

Figure 110

6. Select the role for the person for the template from the *Role* drop-down menu. This is a required field.

7. Select a file security profile for the person from the *File Security Profile* drop-down menu. This is a required field. Usually parties added at the template level have a file security profile of Full Access.

NOTE: The Site Administrator of your corporation can pre-set file security profiles for the common roles on a file.

8. Click the *Private Party on File* check box if you do not want this person to be seen by guests to a file. You can also modify the information in the *Application Permissions* section, if necessary.
9. Click the **Save** button to add this person to your template or click the **Add Another** button to save the current user and immediately see the page to add another party to the template.

Adding Your Corporation to a Template

Use the following steps to add your corporation to a template as a template user:

1. Click the **Add Party** button at the top of the screen. The **Add Party** page displays (Figure 111).

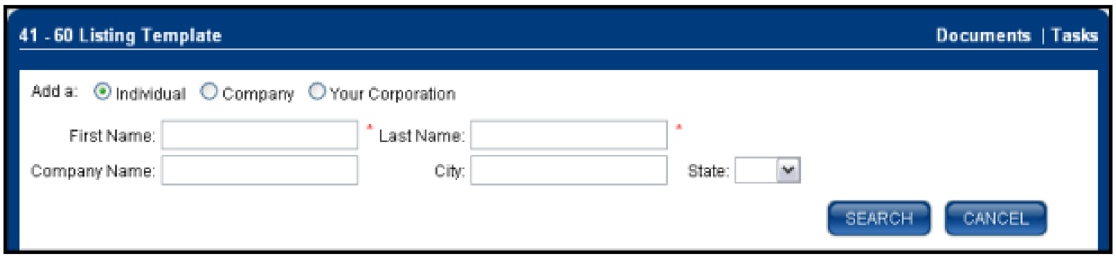

Figure 111

2. Click the *Your Corporation* radio button to see Figure 112.

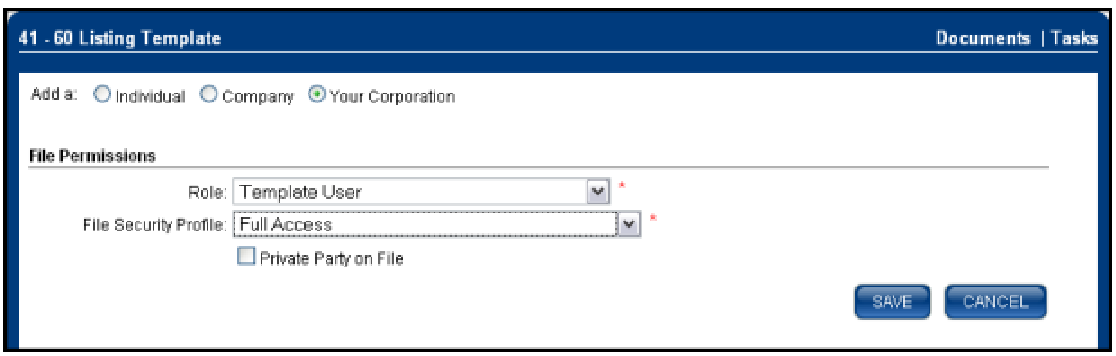

Figure 112

3. Select the role of Template User from the *Role* drop-down menu to add your entire corporation as a template user.
4. Select the file security profile of Full Access from the *File Security Profile* drop-down menu.
5. Click the **Save** button to add the corporation to the template.

Adding Tasks and Notifications to a Template

The pre-built templates come with a simple set of tasks to get you started. You can modify the **Tasks** page of each template to match your company's work flow.

You can create a task for every step of a transaction. For each task, you can specify the following:

- The role of the person to whom the task is assigned.
- The steps for completing the task.
- When the task is due.
- Which guests to the file can view or complete the task.

You organize your **Tasks** page using folders. SureClose® comes with 25 standard folders, but you can create folders specific to your business model and workflow. Task folders sort alphabetically and then numerically on your **Tasks** page.

Adding a Task

Use the following steps to add a task to a template:

1. Click the **Add** button on the **Tasks** page to see the **New Task Entry** screen (Figure 113).

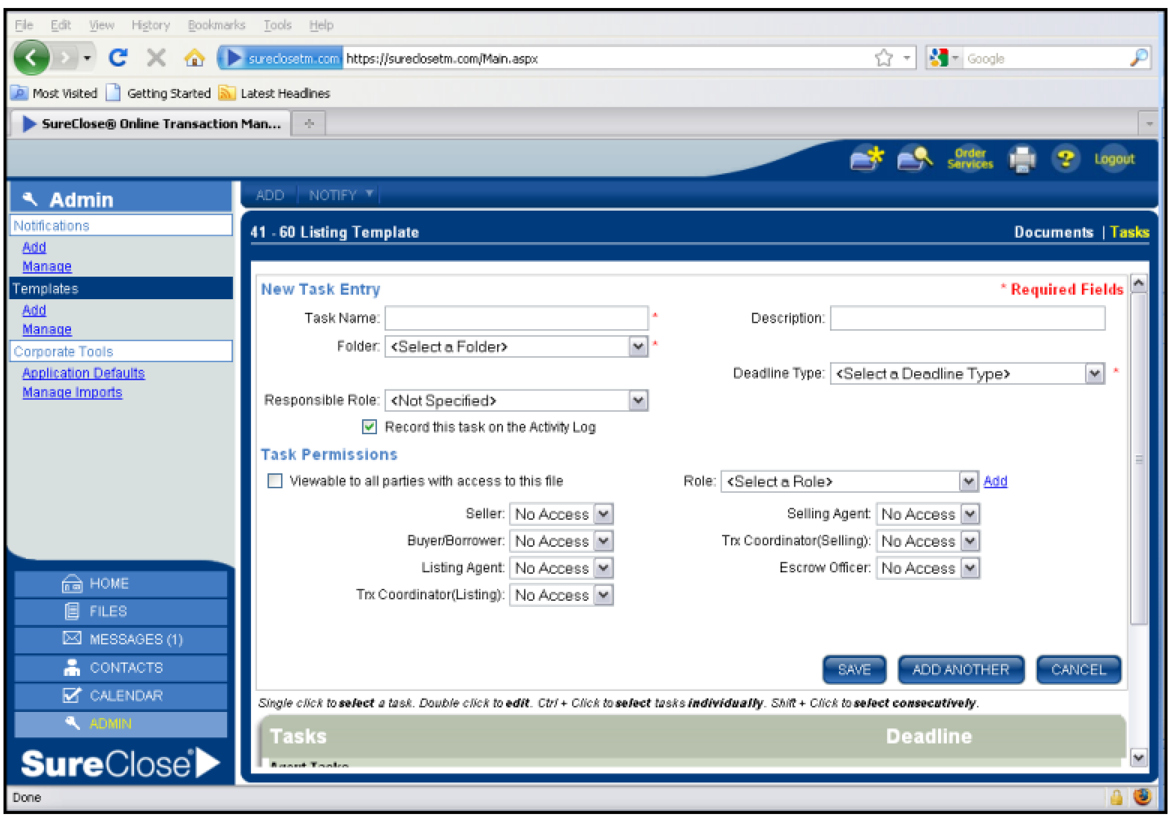

Figure 113

2. Type the task objective in the *Task Name* field.
3. Type a description of the task in the *Description* field (optional). The description could include specific instructions about how to complete the task.

4. Select the appropriate folder from the *Folder* drop-down menu.

5. Select the deadline type from the *Deadline Type* drop-down menu. The types are:

   - Relative to start date. This option requires you to enter the number of days after the start date for the task to be due.
   - Relative to end date. This option requires you to enter the number of days before the end date for the task to be due.
   - Relative to contract acceptance (for closing files only). This option requires you to enter the number of days after the contract acceptance date for the task to be due.
   - Relative to another task's completion. This option requires you to choose a task and then enter the number of days after the chosen task for the new task to be due.
   - No deadline. The task does not have a deadline.

6. Select the appropriate role for the task from the *Responsible Role* drop-down menu.

7. Ensure that the check box for *Record this task on the Activity Log* is unchecked.

8. Select the appropriate permission for each guest role from the *Permission* drop-down menu to allow access to the task. The choices are:

   - No access. The guest cannot see the task.
   - View only. The guest is allowed to view the task.
   - Edit only. The guest is allowed to complete the task.
   - Full control. The guest is allowed to complete the task.

9. Click the **Save** button to add your task to the template. You receive a message stating that your task has been created (Figure 114).

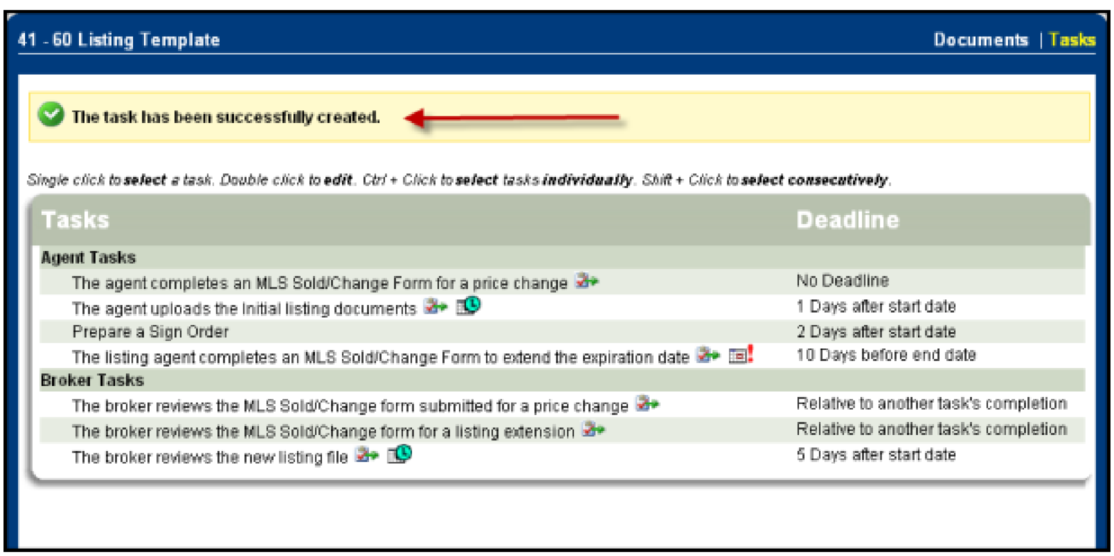

Figure 114

Adding a Notification

You can set up auto-notifications or scheduled reminders on your tasks. An auto-notification is triggered when a task is completed or has reached its deadline. A scheduled reminder is sent out a specified number of hours or days before or after a task's deadline.

Adding an Auto-Notification

Use the following steps to add an auto-notification to a task:

1. Click on the task to which you want to add the notification to highlight it.
2. Click the **Notify>Auto-Notification** button to see the **New Auto-Notification** screen (Figure 115).

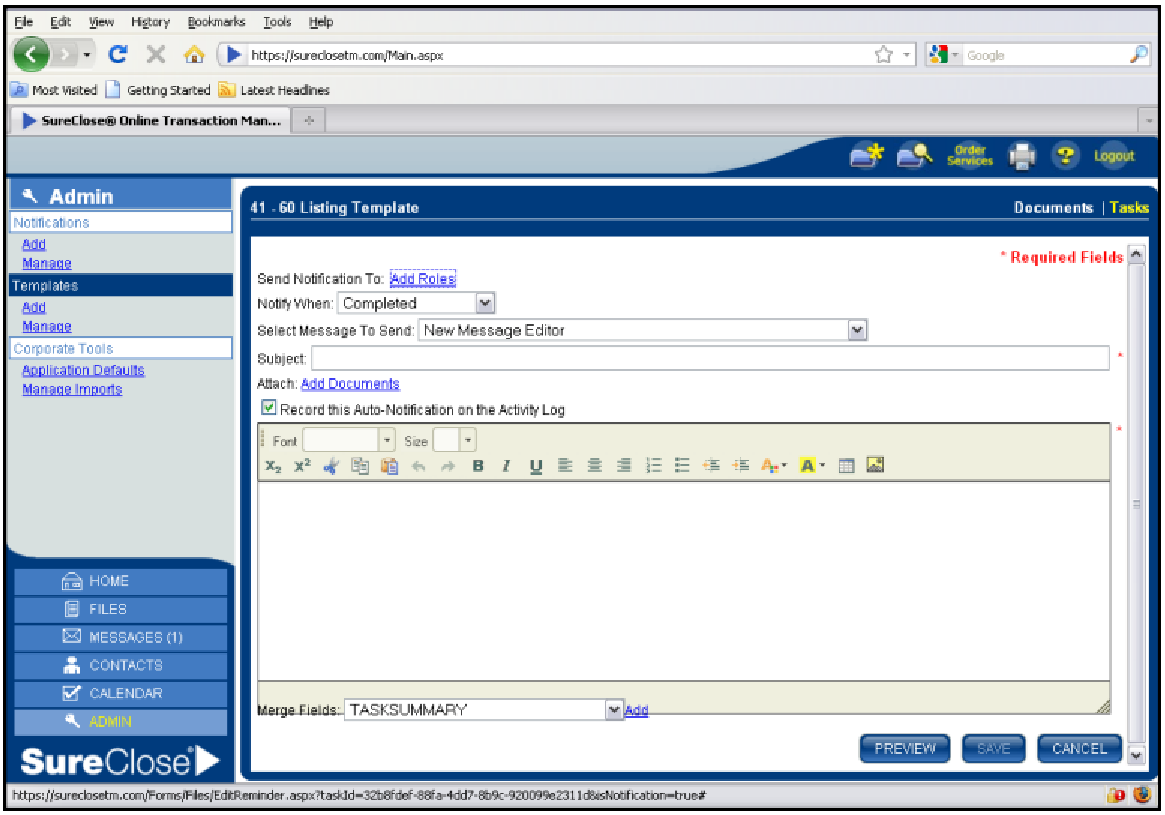

Figure 115

3. Click the Add Roles hyperlink to choose the party or parties to which the notification should be sent. You see Figure 116.

Figure 116

4. Choose the parties by clicking on the role and then clicking the **Down** button to add them to the *Selected Roles* field.
5. Click the **OK** button to return to the **New Auto-Notification** screen.
6. Choose a message to send from the *Select Message To Send* drop-down menu or choose New Message Editor to compose a message.
7. Type the subject of the message in the *Subject* field.
8. Click the Add Documents hyperlink if you want to attach a document from the transaction file to the message when it is sent. You see Figure 117.

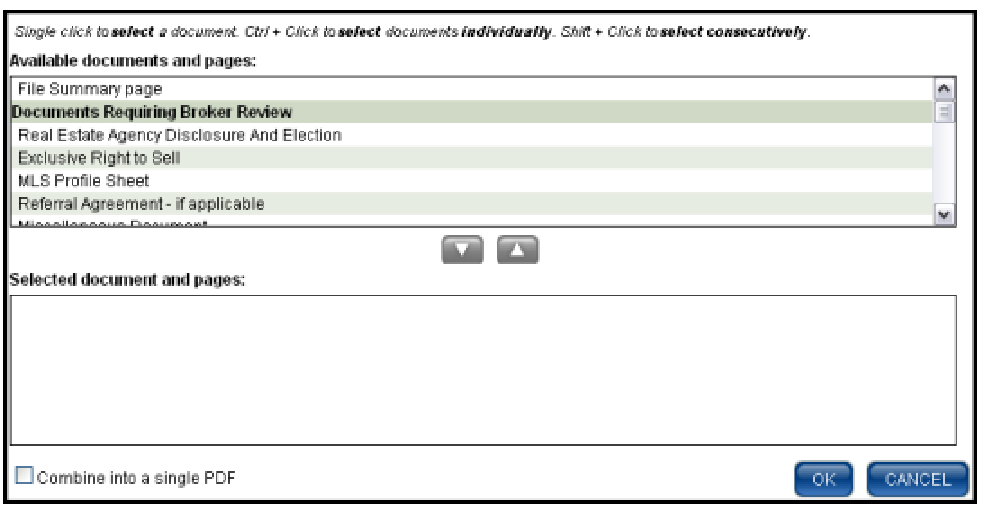

Figure 117

9. Choose the documents by clicking on the placeholder name and then clicking the **Down** button to add them to the *Selected document and pages* field.
10. Click the **OK** button to return to the **New Auto-Notification** screen.
11. Ensure that the *Record this reminder on the Activity Log* check box is checked.

12. Compose the message in the *Message* field.

13. Click the **Save** button to add the auto-notification to the file. You receive a message stating that the auto-notification has been saved and you see a calendar icon to the right of the task (Figure 118).

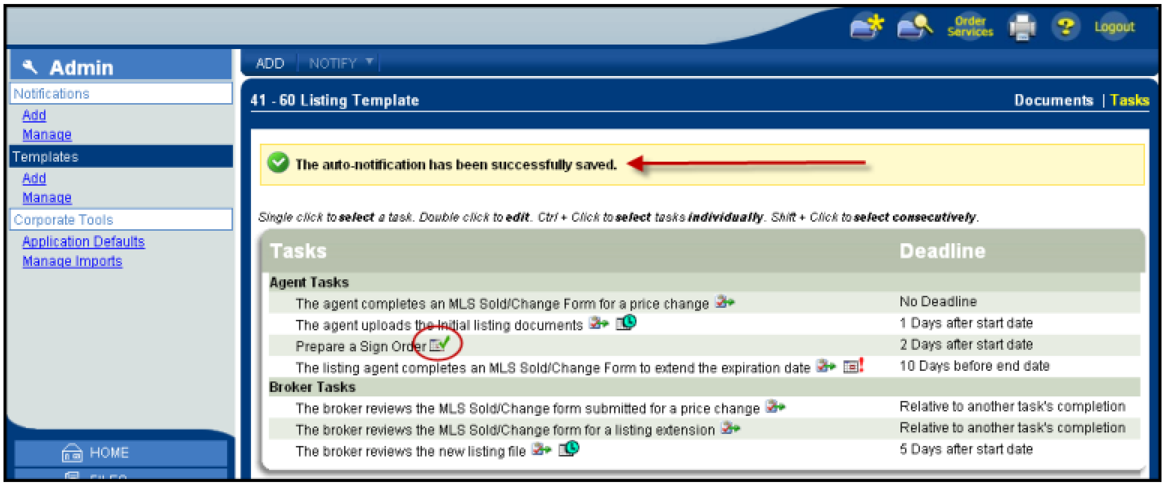

Figure 118

Adding a Task Reminder

Use the following steps to add a reminder to a task:

1. Click on the task to which you want to add the reminder to highlight it.

2. Click the **Notify>Task Reminder** button to see the **New Task Reminder** screen (Figure 119).

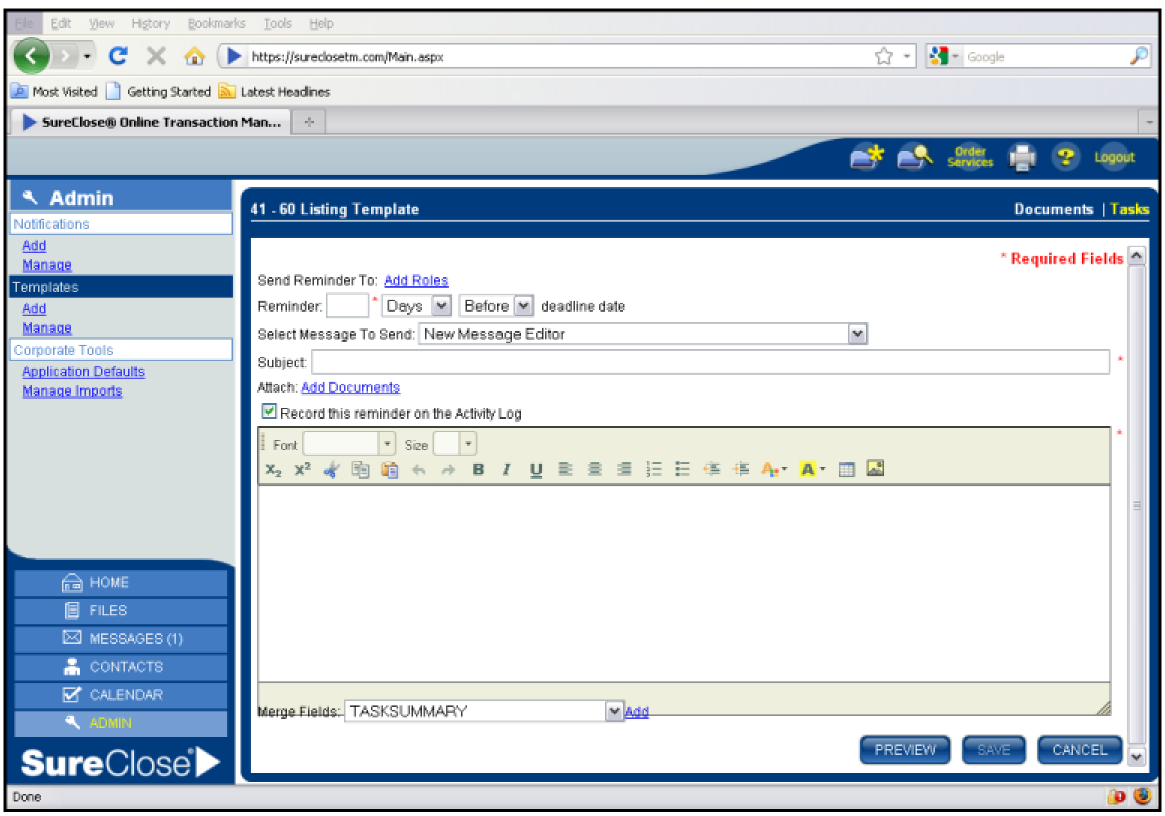

Figure 119

3. Click the Add Roles hyperlink to choose the party or parties to which the reminder should be sent. You see Figure 120.

Figure 120

4. Choose the parties by clicking on the role and then clicking the **Down** button to add them to the *Selected Roles* field.
5. Click the **OK** button to return to the **New Task Reminder** screen.
6. Type the number of days or hours before or after the deadline date for the reminder to be sent in the *Reminder* field.
7. Choose a message to send from the *Select Message To Send* drop-down menu or choose New Message Editor to compose a message.
8. Type the subject of the message in the *Subject* field.
9. Click the Add Documents hyperlink if you want to attach a document from the transaction file to the message when it is sent. You see Figure 121.

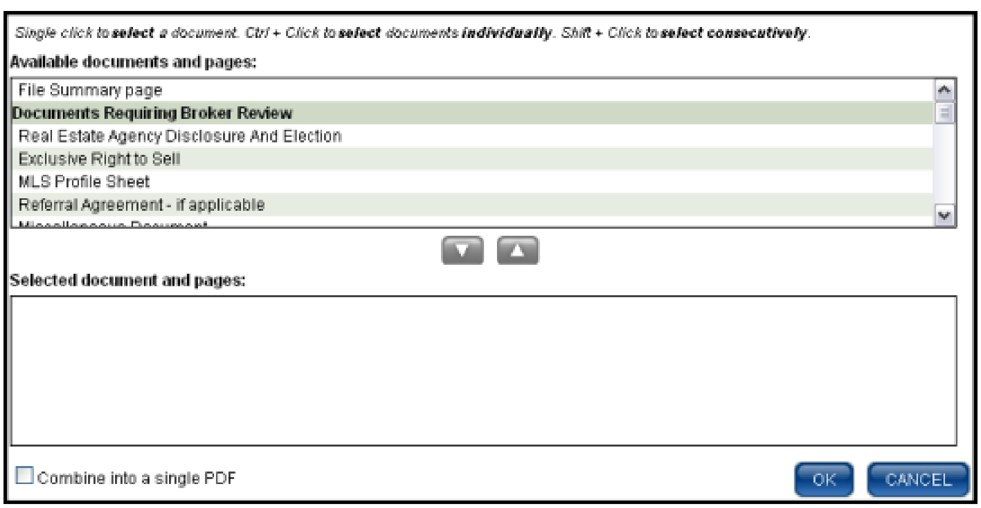

Figure 121

10. Choose the documents by clicking on the placeholder name and then clicking the **Down** button to add them to the *Selected document and pages* field.

11. Click the **OK** button to return to the **New Task Reminder** screen.
12. Ensure that the *Record this reminder on the Activity Log* check box is checked.
13. Compose the message in the *Message* field.
14. Click the **Save** button to add the task reminder to the template. You receive a message stating that the task reminder has been saved and you see a calendar icon to the right of the task (Figure 122).

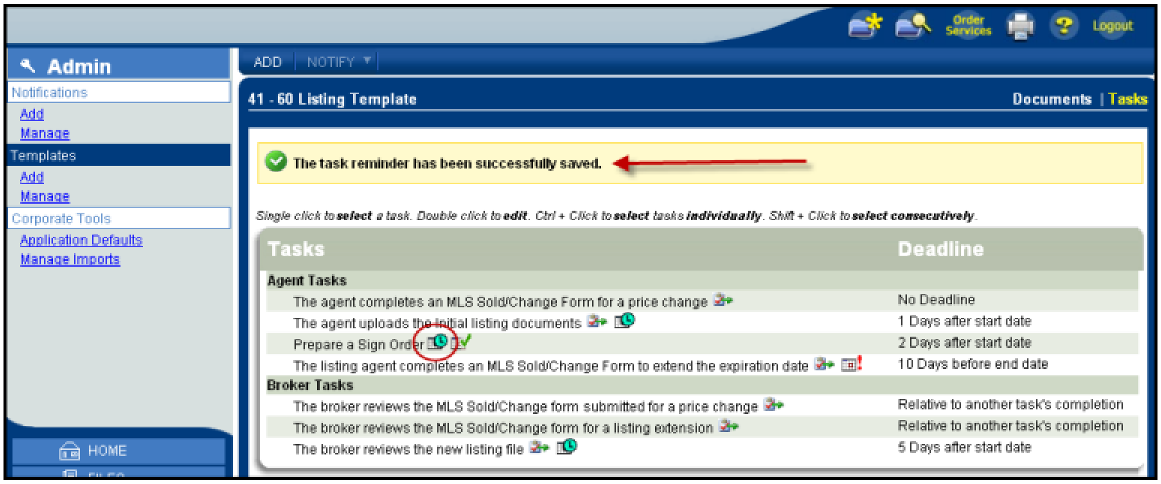

Figure 122

Adding Document Placeholders to a Template

The pre-built templates come with document folders and placeholders. The placeholders included in each template are the common documents associated with each type of transaction file.

You should check each placeholder to be sure it matches your company's list of required documents and that the permissions are set correctly. You might want to reorganize the **Documents** page or add additional placeholders for company-specific documents.

Adding a New Placeholder

Use the following steps to create a new placeholder:

1. Click the **Add** button to see the **New Document Placeholder Entry** screen (Figure 123).

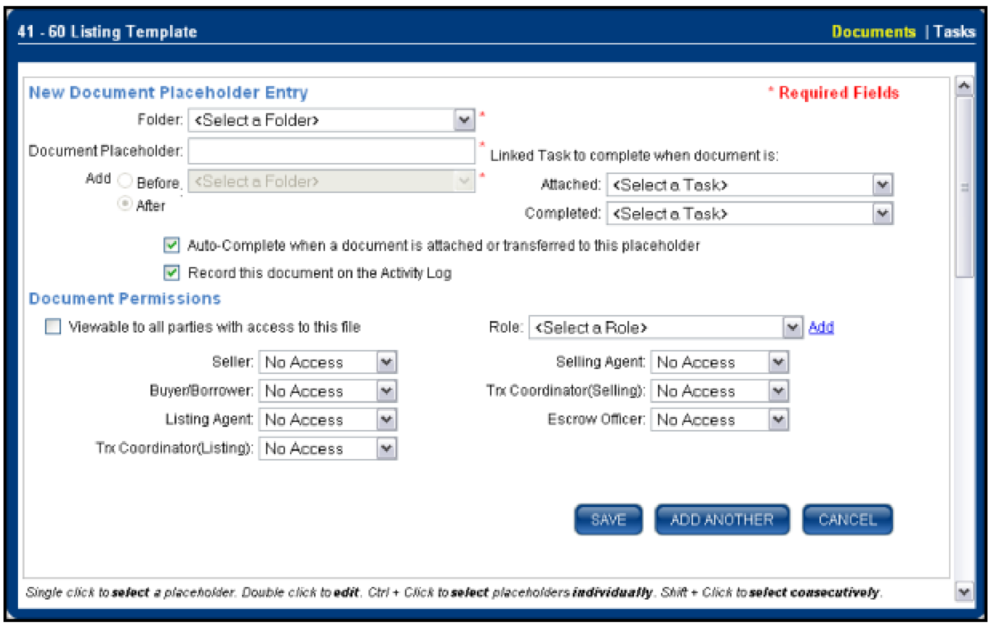

Figure 123

2. Select a folder in which to put the new placeholder from the *Folder* drop-down menu.
3. Type the name of the placeholder in the *Document Placeholder* field.
4. Select the placeholder after which you want to place the new placeholder in the *Add* field.
5. Select a task from the *Attached* drop-down menu if you want an associated task marked complete when a document is uploaded to the placeholder.
6. Select a task from the *Completed* drop-down menu if you want an associated task marked complete when the document is marked complete.
7. Uncheck the *Auto-Complete when a document is attached or transferred to this placeholder* check box.
8. Uncheck the *Record this document on the Activity Log* check box.

9. Select the appropriate permission for each guest role from the *Permission* drop-down menu to allow access to the document. The choices are:
   - No access. The guest cannot see the document.
   - View only. The guest is allowed to view the document.
   - View & Upload. The guest is allowed to upload to the placeholder.
   - Edit only. The guest is allowed to upload to the placeholder and change the name of the placeholder.
   - Full control. The guest is allowed to have full control over the placeholder. However, their general security profile limits their access within SureClose®.
10. Click the **Save** button to add your new placeholder to the file. You receive a message stating that your placeholder has been created (Figure 124).

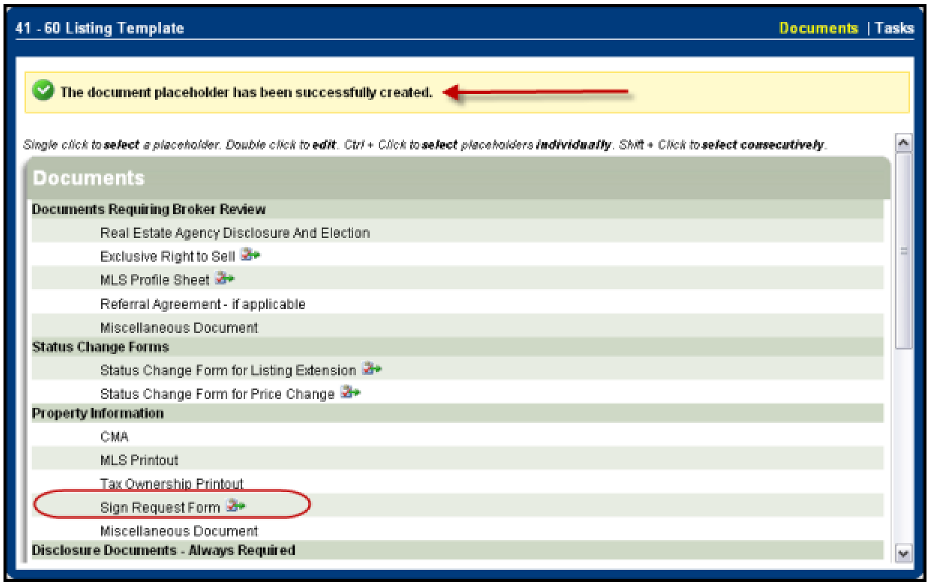

Figure 124

Modifying an Existing Placeholder

Use the following steps to modify an existing placeholder:

1. Double click on the placeholder you need to modify to see the **Editing the placeholder** window (Figure 125).

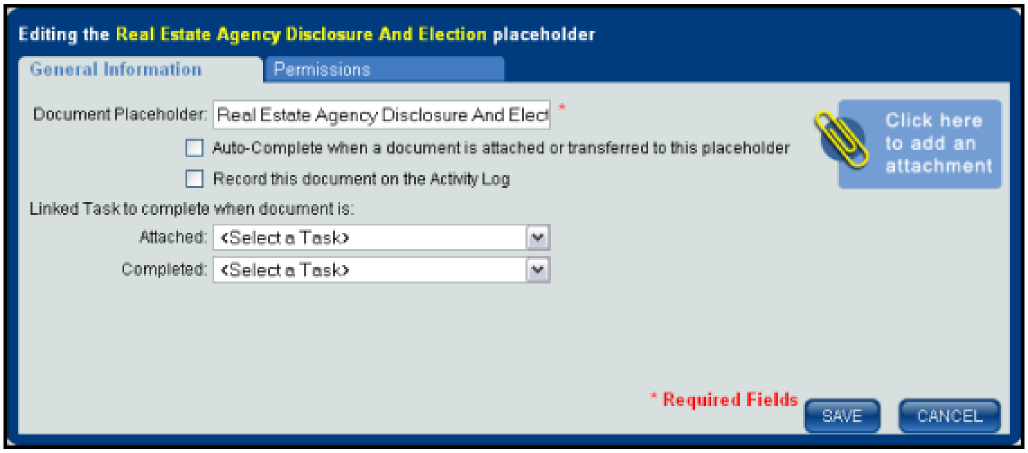

Figure 125

2. Make your necessary changes to the **General Information** tab.
3. Click on the **Permissions** tab to see Figure 126.

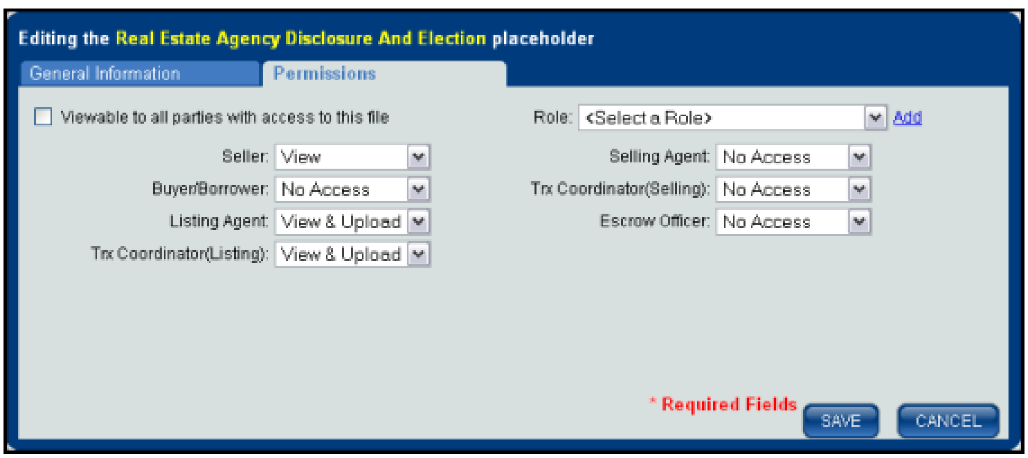

Figure 126

4. Make your necessary changes to the **Permissions** tab.
5. Click the **Save** button to save your changes.

Corporate Tools

The *Corporate Tools* section enables you to manage your corporation's application defaults and imports.

NOTE: At this time the Manage Imports section is not used.

Application defaults are applied when a user creates a file in SureClose® or adds parties to a file. The user has the ability to override the defaults as they create a file or add a party to a file, if necessary. The application defaults include File Defaults, Party Defaults, and Default Security Profiles by Role.

File and Party Defaults

Use the following steps to set your corporation's File and Party defaults:

1. Click on the Application Defaults hyperlink to see the **Corporate Application Defaults** screen (Figure 127).

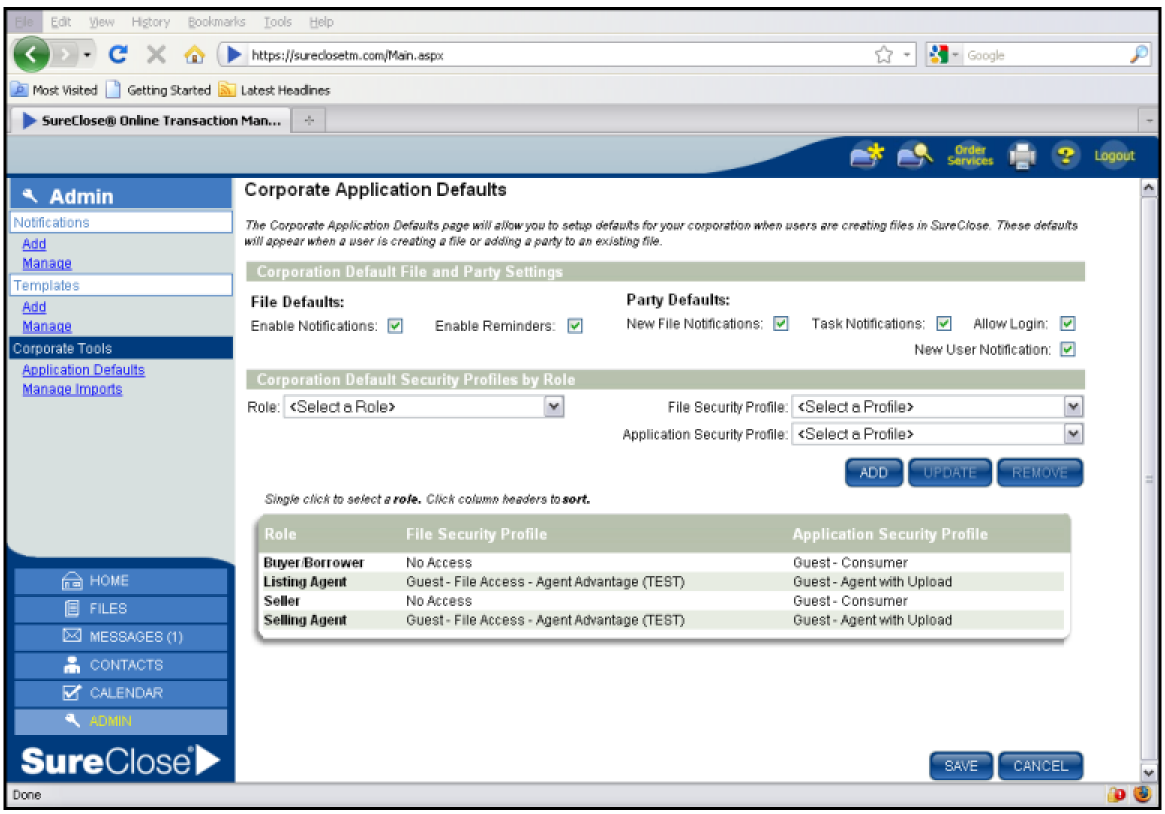

Figure 127

2. Click the *Enable Notifications* and *Enable Reminders* check boxes under the File Defaults section to have notifications and reminders automatically turned on.
3. Click the *New File Notifications* and *Task Notifications* check boxes under Party Defaults section to have all users set to receive notifications.
4. Click the *Allow Login* check box if you would like to have all your users set to log in to SureClose®.

5. Click the *New User Notification* check box if you would like to have an email containing a username and password automatically sent to a new user.

> ***NOTE: When SureClose® Advantage sends an email to a new user, it automatically references https://sureclosetm.com. Not all security levels use https://sureclosetm.com to log in.***

6. Click the **Save** button to save your changes.

Default Security Profiles by Role

Use the following steps to set your corporation's default security profiles by role:

1. Click on the Application Defaults hyperlink to see the **Corporate Application Defaults** screen (Figure 127).
2. Select a role from the *Role* drop-down menu.
3. Select a file security profile from the *File Security Profile* drop-down menu. The choices are:
    - File Access – Guest – Agent Advantage. This profile allows agents to upload documents and modify the names of pre-determined placeholders (for example, Miscellaneous Document).
    - File Access – Guest Agent DocuSign. This profile allows agents to upload documents and modify the names of pre-determined placeholders (for example, Miscellaneous Document).
    - Guest – File Access – Affiliate. This profile allows escrow officers to view documents.
    - Guest – File Access – Agent. This profile allows agents to view and upload documents.
    - Guest – File Access – Consumer. This profile allows clients to view documents.
    - Guest – File Access – SC Archive. Do not use this profile.
    - Team – File Access – SC Archive. Do not use this profile.
    - Team – View Only. Do not use this profile.
    - Full Access. This profile allows office personnel full access to a file.
    - No Access. Use this profile when you want to have a person on a file for recordkeeping purposes only, but you do not want them to be able to access the file.
4. Select an application security profile from the *Application Security Profile* drop-down menu. The recommended choices are:
    - Advantage Agent. This profile allows agents to log in to the Advantage view of SureClose. The agents have the ability to upload documents, modify the names of pre-determined placeholders, add new placeholders, add new tasks, and add items to the Activity Log page.
    - Agent – Access: This is not used in Arizona.
    - General Access: This profile provides full access to all features, except for the system administration functions. You should limit this profile to internal office staff.

- Guest – Affiliate: This profile enables escrow officers and other affiliated organizations to view the files to which they have been added as a party.
- Guest – Agent: This profile enables agents to view their files.
- Guest – Agent – Pro: This is not used in Arizona.
- Guest – Agent w/Upload and DocuSign: This profile enables an agent to view their files and upload documents to the file.
- Guest – Agent with Upload: This profile enables an agent to view their files and upload documents to the file. When your corporation was created in and your agents were uploaded to your system, they were given this General Security profile. You can also assign this profile to Escrow Officers and Loan Officers if you want them to be able to upload documents to your transaction files.
- Guest – Consumer: This profile enables clients to view their files.
- Guest – Consumer – Pro: This is not used in Arizona.
- Guest – Lender: This profile enables lenders to view the files to which they have been added as a party.
- SC Archive Admin (Professional): This is not used in Arizona.
- SC Archive Guest (Professional): This is not used in Arizona.
- SC Archive User (Professional): This is not used in Arizona.
- Site Admin: This profile provides full access to all features, including system administration functions. You should limit this profile to a few key employees within your corporation, such as your office managers.

5. Click the **Add** button to add the role to your list of Roles at the bottom of the screen (Figure 128).

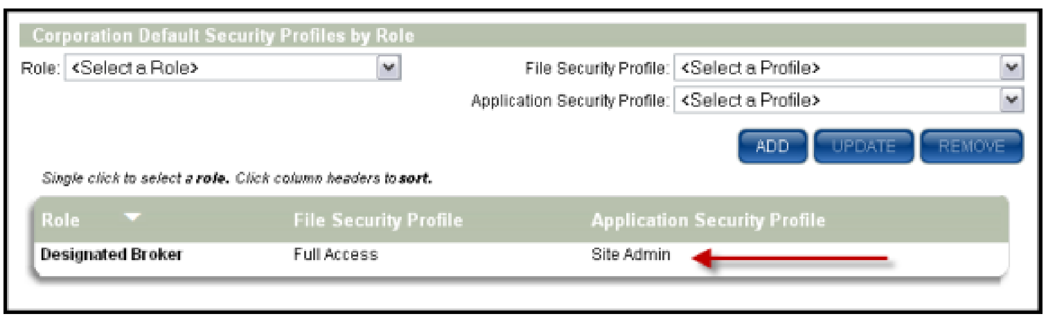

Figure 128