SureClose – Add a Document Placeholder

Add a Document Placeholder

Most of your document placeholders will be added to your file based on the template selected to create the file. However, you can manually add document placeholders as needed.

> **Note:** A red asterisk (*) indicates a required field must be completed to continue.

Steps

1. With the file open, click **Documents**. The Documents page displays.
2. From the menu bar, click **Add**. Additional fields display.
3. Under **New Document Placeholder Entry**, complete these fields:

New Document Placeholder Entry

Folder:	\<Select a Folder\> ▼ *
Document Placeholder:	*
Import Code:	
Add ○ Before ◉ After	\<Select a Folder\> ▼ *

- **Folder** * —Determine which folder you want to place the document in using the selection list.
- **Document Placeholder** * —Type the name of the document placeholder. This may or may not be the actual document name.
- **Add Before or After** * —Select where the new document or folder should appear on the Documents page.
- **Linked Task to complete when document is**— You can link a placeholder to a task so that the task is automatically completed when a document is Attached to the placeholder or when the placeholder is Completed. To link a task, use the selection list provided. To remove a link, select \<Select a Task\> option from the selection list, rather than an actual task.

Linked Task to complete when document is:

Attached:	\<Select a Task\> ▼
Completed:	\<Select a Task\> ▼

- **Auto-Complete when a document is attached or transferred to this placeholder**—By default, this check box is selected and the placeholder will be automatically completed when a document is attached or transferred to it.

☐ Display only latest version on Basic View
☐ Is this document complete?
☑ Auto-Complete when a document is attached or transferred to this placeholder
☐ Use for Barcoding

- **Record this document on the Activity Log**—By default, this check box is selected. When checked, the document will be recorded on the Activity Log.
- **Convert to PDF?**—By selecting this check box, the document will automatically be converted to PDF when it gets attached to a placeholder.

☑ Record this document on the Activity Log
☐ Convert To PDF?

4. Under **Document Permissions**, assign Document Permissions for each party on the file using the selection list.
5. When finished, click **Save**.

Notes:

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