SureClose – Attach a Document to a Placeholder

Attach a Document to a Placeholder

There are several ways to attach a document to a placeholder:

- You can upload the document from your computer
- You can attach an email message as a document from Messages
- You can attach a document from another placeholder within a file
- You can attach a form from your company
- You can attach a form from your corporation's document library

Steps

1. On the navigation pane, click **Files**. Recent Files display at the top of the navigation pane.
2. From Recent Files, click the file you want to work with. If needed, search for the file.
3. With the file selected, click **Documents**.
4. Single-click the placeholder to select it, and then click **Attach**. The Attach Document From: page displays.

File Number: 2010111151

Attach Document From:
- My Computer
  - Browse...
- Messages
- File
- Forms
- Corporate Document Libraries

☐ Convert this document to PDF?

SAVE   CANCEL
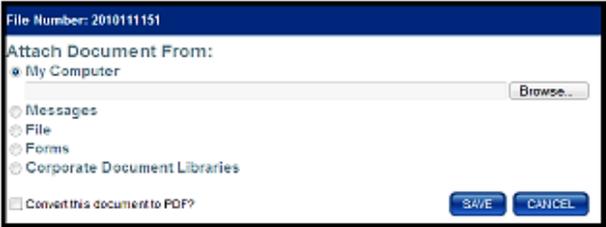
5. Select the option that best describes what you want to do:
   - **My Computer** – select to attach a document to the placeholder by uploading the document from a location on your computer. Click Browse to locate and select the document.
   - **Messages** – select to attach a message as a document to the placeholder.

Note: If a document is already attached to the email message then the document is attached to the placeholder (as a document) and the text of the email message is saved as a note ☐ on the placeholder.

   - **File** – select to attach a document to the placeholder from another placeholder within a file by transferring a copy of the original document to the selected placeholder.

Note: When attaching a document from another placeholder within a file, the original document remains on the source file and a copy of the document is attached to the target file.

- **Forms** – select to attach a form as a document from your company. The availability of the forms that display in the Available Forms list is determined by the Admin who uploads the form.
- **Corporate Document Libraries** – if available, documents can be attached from your corporate document library.

Note: Any documents attached from the corporate document library display at the bottom of the Documents page under a new folder indicating they were imported from the corporate document library with a date and time stamp.

6. If you want to convert the document to a PDF file, select **Convert this document to PDF?**.
7. When finished, click **Save**. Placeholders with documents attached display with a Paperclip icon 📎 next to their name on the Documents page.

Note: Notice there is not a document attached to the *Seller Contract* placeholder.

File Number: 2010111151

Single click to select a placeholder. Double click to edit. Ctrl + Click to select select consecutively.

Documents

Documents
- 📎 Title Commitment
  - Seller Contract

Notes:

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