SureClose – Import a Document

Import a Document

Documents can be imported directly into the file you are working with from another existing file. You can import a single document or multiple documents at one time. Imported documents display under a new **Documents Imported** folder. The name of the document folder will include the file the documents were imported from and a date and time stamp indicating when the document or documents were imported.

Steps

1. With the file opened, click Documents. The Documents page displays.
2. From the menu bar, select Move—Import Documents. The Import Documents search pages displays.
3. Search for the file you want to import documents from by completing these fields:

   - **Search From**—If you want to search for Recent Files, then select this check box.
   - **Where the:**—Select the option that best describes how you want to search for the file: by the **File Number** or **Address/Description**.
   - **is:**—Type all or part of the file number or property address of the file you want to search for.
   - **Archived Files**—If you also want to search Archived files, then select this check box.

File Number: 14-1091			
Search from	☐ Recent Files or		
Where the:	File Number ▼	is:	SEARCH
	☐ Archived Files		

4. When all search criteria has been entered, click Search. All files matching the criteria display.
5. From File, select the file you want to import documents from. If needed, type additional criteria in **Filter Placeholders** to limit the number of placeholders displayed. Only those placeholders that start with the criteria entered and are available display.
6. By default, the **Record on the Activity Log** option is selected. Accept the default if you want to record the import on the Activity Log. If not, select the check box to clear the selection. When an entry is recorded to the Activity Log, it includes the following:
7. When an entry is recorded to the Activity Log, it includes the following:

   - The date and time of the transfer
   - The entry type displays as, Transferred Document
   - The From field displays as, the name of the user who imported the document
   - The Notes section displays a list of all documents imported

8. When finished, click Import.

> **Hint:** If you have additional placeholders to add, click **Add Another** to continue adding additional placeholders. If you do NOT want to add the placeholder to the file, click **Cancel** and the placeholder will not be not saved.

SAVE   ADD ANOTHER   CANCEL

Notes:

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