SureClose – Secure Messages

Secure Messages

To send private information or confidential documents, use the following options:

- Corporations can ensure all documents distributed in a message are secure.
- Users can send secure messages.
- Users can ensure all documents distributed in a message are secure.

Prerequisites

To send a secure message, the following criteria must be met:

- All recipients must have login access to SureClose.
- All recipients must have **Allow Login** selected on the **Permissions** tab.
- All recipients must on the file or an existing contact.

You can secure messages and documents when:

- Sending a New message.
- Replying to a message.
- Forwarding a message.
- Messaging a party on a file.
- Distributing a document.
- Sending a Document Notify (Manual notify only).

Recipient Requirements

When sending secure messages or secure documents, all recipients must have login access to SureClose. In addition, all recipients must have **Allow Login** selected on the **Permissions** tab.
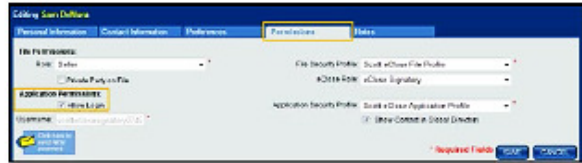
If a secure message (or document *hyperlink*) is sent to one recipient and that recipient does not have login rights, an *Information Message* will display and the message will not be sent.

If a secure message (or document *hyperlink*) is sent to multiple recipients and at least one does not have login rights, an *Information Message* will display listing which recipients do not have login rights.
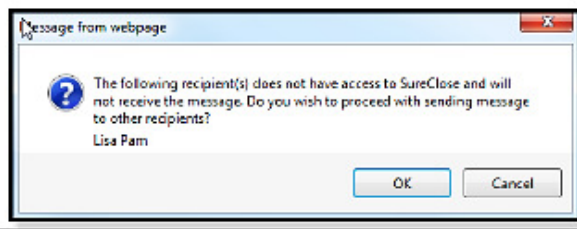
Steps

1. Click OK to send the secure message to all recipients that have login access. Recipients that do not have login access will not receive the message.
2. Click Cancel and the message will not be sent. The sender can edit the recipient's login permissions; recreate the message, and the resend.

Set Corporate Defaults

Corporations concerned about exposing sensitive information have the option of setting a default to ensure that all outgoing documents are secure. Selecting this option converts all message attachments to hyperlinks and forces the message recipient to log into SureClose to view the attachment (*hyperlink*).

Steps

1. On the navigation pane, click **Admin**.
2. Under **Corporate Tools**, click **Settings and Defaults**.
3. Under **Distribute File Documents Default Setting**, select **Send Hyperlink to Access Secure Documents**.

4. When finished, click **Save**.

Note: When selected, **Send hyperlink to access documents** is checked and disabled and *NOTE: Required by Corporation* displays for users of that corporation when sending a message.
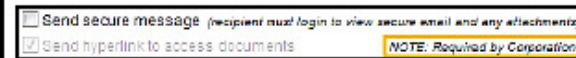
Send Secure Messages

When sending a message, you can ensure your message is secure by selecting **Send secure message**. When selected, the following occurs:

- The **Send hyperlink to access document** option defaults to *checked* and becomes disabled so that all attachments are sent as *hyperlinks*.
- The secure message content is replaced with a generic message that informs the recipient a secure message has been sent and includes a link to the SureClose login page.
- The recipient must log into SureClose to view the secure message.

Steps

1. Prepare the message you want to send as you would any other message.

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2. Select the **Send secure message** check box.

Note: When Send secure message check box is checked, the **Send hyperlinks to access documents** check box defaults to *checked* and becomes disabled so that all attachments are sent as *hyperlinks*.

Select Message To Send: New Message Editor
Subject:
Attach: Add Documents
☑ Send secure message *(recipient must login to view secure email and any attachments)*
☑ Send hyperlink to access documents *(standard email – recipient must login to view attachments)*

3. Type the content of your message.
4. When finished, click **Send**.

Receipt of a Secure Message

When a secure message is received, the body of the message is replaced with generic information. A *hyperlink* directs you to the SureClose login page where the secure message can be reviewed.

Send Hyperlink to Access Documents

When attaching a document to a message, you can ensure the document is secure by selecting **Send hyperlink to access documents**. When selected, all attachments are converted to *hyperlinks* and the recipient must log into SureClose to view the document.

Steps

1. Initiate the message and attach the document.
2. Select the **Send hyperlink to access documents** check box.

Select Message To Send New Message Editor
Subject: Please Review the Attached Closing Statement
Attach: Closing Statement
☐ Send secure message *(recipient must login to view secure email and any attachments)*
☑ Send hyperlink to access documents *(standard email – recipient must login to view attachments)*

3. Type the content of your message.
4. When finished, click **Send**.

Note: When sending a secure message or document hyper link, external recipients cannot be included and **External Email Addresses** becomes disabled.

Receipt of a Document Hyperlink

When only **Send hyperlink to access documents** is selected, the message content is not secure. A default message providing a *hyperlink* to your SureClose login page is added. You must log into SureClose to view all secure documents.

Hi Sam,
Your owners policy is ready.
Sincerely,
Scott Hilton
This message includes secure documents. Click here to access your secure documents.

View Secure Messages in SureClose

After you log into SureClose, the secure message displays and is denoted by a Lock icon. Select the secure message you want to view and the document *hyperlink* displays.

Use the Filter By option to filter the types of messages that display: **All**, **Regular**, or **Secure**.

Note: If you do not have access to Messages, a Secure Messages sub-tab displays. Use this option to view and access secure messages and documents.

Note: For step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Sending and Receiving Secure Messages and Secure Documents*.