

SureClose – Transfer a Document to a File

Transfer a Document to a File

Documents can be transferred to a new or existing placeholder, or to a placeholder with a document already attached.

Note: When a document is transferred, a copy is made and sent to the selected file while the original remains intact on the source file.

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.
3. Click Documents.
4. Select the document or documents you want to transfer. Multiple documents are combined into a single PDF file when transferred.
5. From the menu bar, select Move—Transfer Documents.
6. Under Transfer Selected Document(s) to, select File. Notice the document(s) you selected from the Documents page displays as a *hyperlink* next to Transfer Document(s):.

7. At Transfer Document(s), verify the documents listed (the document name displays as a *hyperlink*) are the documents you want to transfer. To add additional documents, proceed to Step 8. Otherwise, proceed to Step 12.

8. Next to Transfer Document(s):, click the document *hyperlink* to add additional documents. A list of Available document(s): and Selected document(s): displays.
9. In the Available document(s): box, select any additional documents from the Available document(s): box and then click the down arrow to move those documents to the Selected document(s): box.
10. Use the Move Top, Move Up, Move Down, or Move Bottom buttons to change the order of the documents displayed in the Selected document(s): box.
11. When finished, click OK.
12. Search for the file you want to transfer documents to by completing these fields:
(Refer to image on next page for more information.)
 - Recent Files – 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, address, or description of the file you want to search for.
 - Archived Files – If you also want to search for Archived files, then select this check box.
13. When all search criteria has been entered, click Search. All files matching the criteria display.
14. From File:, select the file you want to transfer documents to. A list of available folders and placeholders displays.
15. Type additional criteria in Filter Placeholders to limit the number of placeholders displayed. Only those placeholders that start with the criteria entered display.
16. Select the placeholder you want to transfer documents to.

Additional Information

Transferring Documents to a New Placeholder

From the list of available folders and placeholders, select the folder to add the placeholder under. The placeholder is added with a paperclip icon indicating a document is attached, highlighted in yellow and given the same name as the document.

Transferring Documents to an Existing Placeholder

From the list of available folders and placeholders, select the placeholder to transfer the document to. The existing placeholder will have a paperclip icon indicating that a document is attached and highlighted in yellow.

Transferring Documents to a Placeholder with an Attachment

Transferring a single document or multiple documents to a placeholder that already has a document attached creates a new placeholder with the same name and attachment along with a date and time stamp.