

Real partners. Real possibilities.™



SureClose - Transfer a Document to a Message

By default, the Record on the Activity Log option is Transfer a Document to a Message selected. Accept the default to record the transfer on the Activity Log, or select the check box to clear the selection. You can select a single or multiple documents to transfer. When a document is transferred, a copy is made and sent to Messages, When finished, click Save. while the original document remains intact on the file. Transferred documents display as Notifications on the Messages tab. Notes: Steps 1. On the navigation pane, click Files. Recent Files display at the top of the navigation pane. From Recent Files, click the file you want to work with. If needed, search for the file. 3 Click Documents 4. Select the document or documents you want to transfer. 5. From the menu bar, select Move-Transfer Documents. Under Transfer selected document(s) to, select Messages. Notice the documents you selected from the Documents page display in the Selected document(s): box. ile Number: 2010111151 Transfer Selected Document(s) to: @ Messages @ File Single click to select a document. Cirl + Click to select documents individually. Shift + Click to select consecutively. Available document(s): Title Commitment (.pdf) Inspection (.pdf) Loan Policy (PDF) Owners Policy (.pdf) Selected document(s): Closing Statement (.pdf) Owners Policy (.pdf) MOVE UP NOVE DOWN MOVE BOTTOM Convert to a single PDF Record on the Activity Log 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. 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. Note: If Convert to a single PDF is selected, the Move buttons can be used to determine the order in which the documents will be displayed in the PDF.