



Uploading Documents to SureClose Advantage

Quick Reference Card

Purpose

Use the instructions in this document to upload documents to SureClose Advantage in one of multiple ways:

- **Method I:** Use the **Attach** button from the Documents page to upload a document to a placeholder.
- or
- **Method II:** Use the **Click here to add an attachment** button from within a placeholder to upload a document.

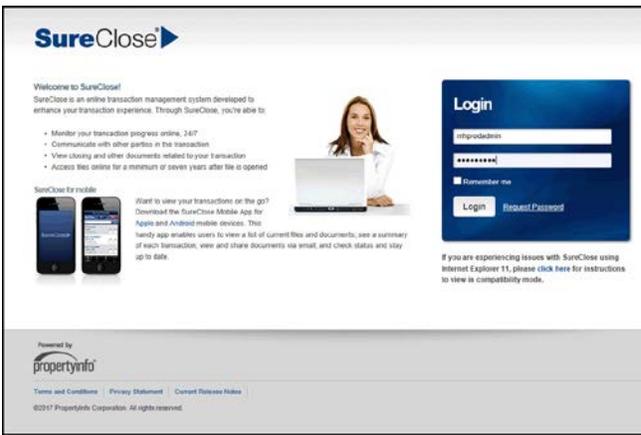
Method I: Accessing SureClose Advantage to Upload Documents

Log into SureClose Advantage to upload your document to a placeholder. Click the **Attach** button to locate and upload a document to a placeholder.

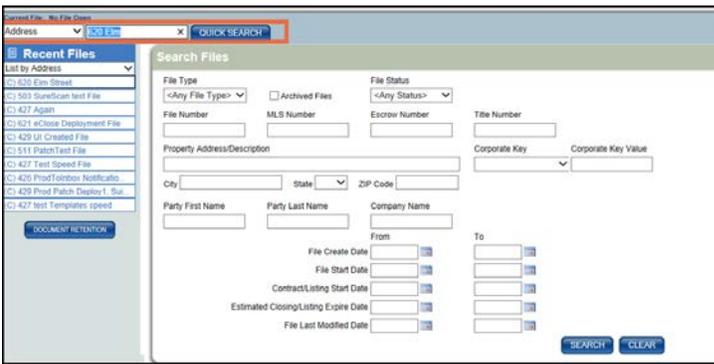
Steps

Complete these steps to log into SureClose Advantage and upload a document to a placeholder.

1. Go to [SureClose Advantage](#) and enter your username and password.



2. Upon successful log in, the *SureClose Advantage* screen displays.
3. From the *Navigation* pane, enter the property address to locate the placeholder you wish to upload a document to, and click **Quick Search**.

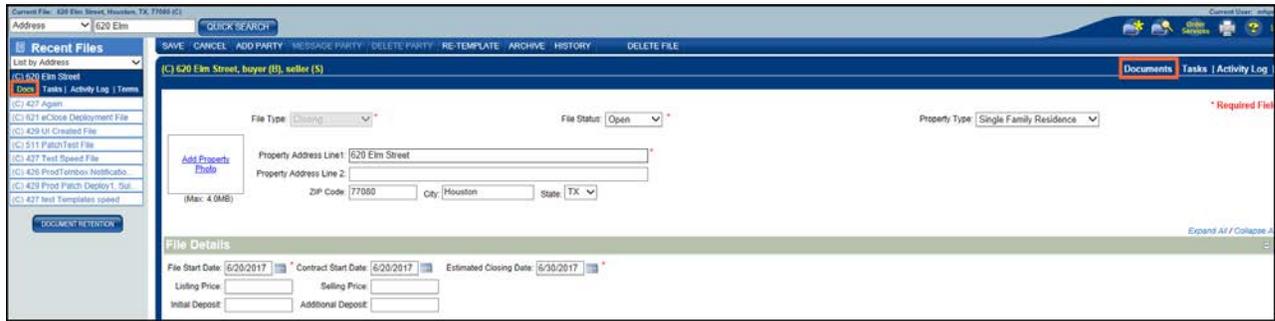




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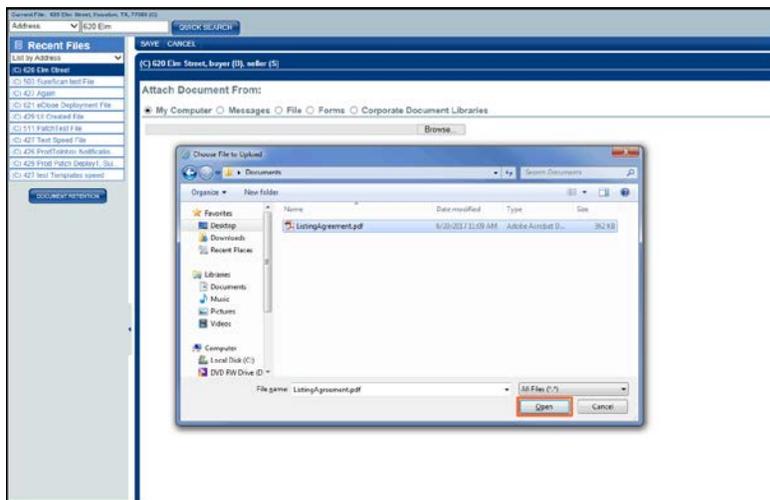
4. Select the property address from the **Quick Search** results.
5. Click the **Docs** link to access the *Documents* page. The *Documents* page can be accessed from the **Docs** link on the left side of the screen, or the **Documents** link on the right side of the screen.



6. From the *Documents* page, select the placeholder to be attached, then click **Attach**.



7. The *Document Attach* screen displays. Click **Browse** to locate the document from your computer.
8. Select the document to upload from your computer, then click **Open**.

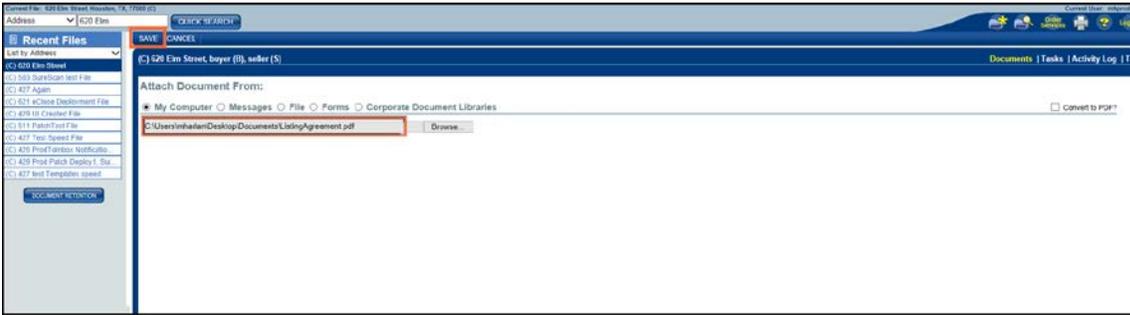




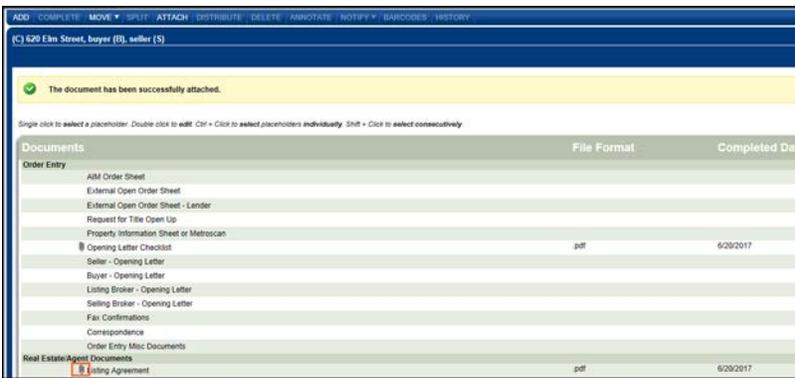
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9. The document file path and document name display in the *Browse* text box. Click **Save**.



10. The *Documents* page displays with a message confirming **The document has been successfully attached**. A **Paperclip** icon will display to the left of the placeholder, indicating a document is now attached to that placeholder.



11. Click the **Paperclip** icon to open the document.





Method II: Upload Documents to a Placeholder within SureClose Advantage

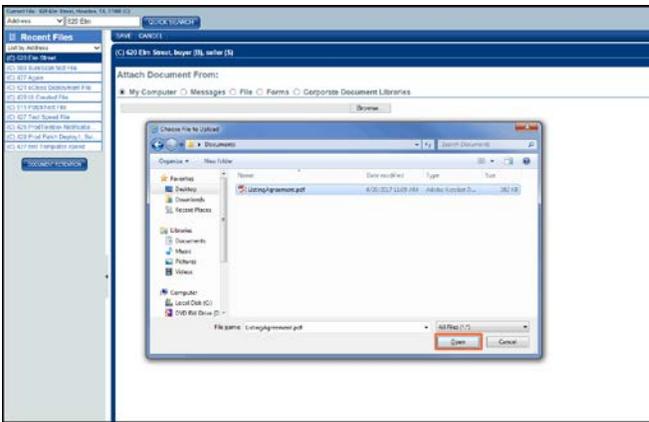
Complete these steps for another option to uploading documents to a placeholder.

Steps

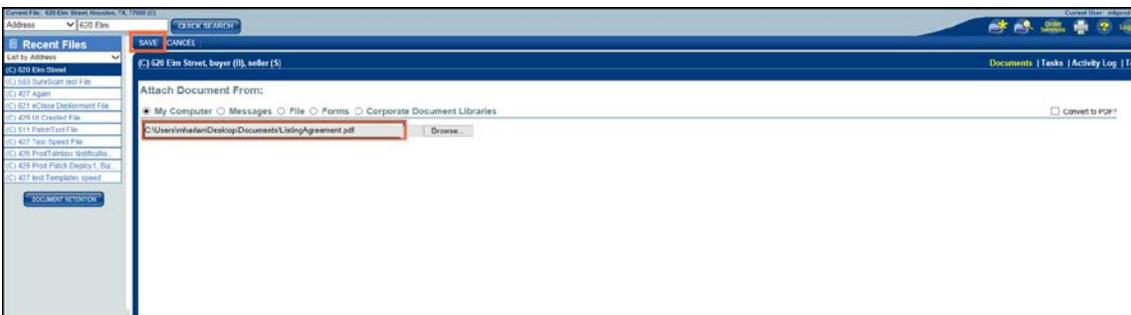
1. From *SureClose Advantage*, navigate to a placeholder on a file, and double-click the placeholder name. The placeholder opens and displays.
2. Click the icon that reads, **Click here to add an attachment**.



3. The *Document Attach* screen displays. Click **Browse** to locate the document on your computer.
4. Select the document to, then click **Open**.



5. The document file path and document name display in the **Browse** text box. Click **Save**.





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6. The *Documents* page displays with a message confirming **The document has been successfully attached**. A **Paperclip** icon will display to the left of the placeholder, indicating a document is now attached to that placeholder.

The screenshot shows a web interface with a blue header and a yellow success message: "The document has been successfully attached." Below the message is a table with columns for "Documents", "File Format", and "Completed Date". The table lists various document types under "Order Entry" and "Real Estate Agent Documents". A red paperclip icon is visible next to the "Listing Agreement" row.

Documents	File Format	Completed Date
Order Entry		
AIM Order Sheet		
External Open Order Sheet		
External Open Order Sheet - Lender		
Request for Title Open Up		
Property Information Sheet or Metroscan		
Opening Letter Checklist	pdf	6/29/2017
Seller - Opening Letter		
Buyer - Opening Letter		
Listing Broker - Opening Letter		
Selling Broker - Opening Letter		
Fax Confirmations		
Correspondence		
Order Entry Misc Documents		
Real Estate Agent Documents		
Listing Agreement	pdf	6/29/2017

7. Click the **Paperclip** icon to open the document.

The screenshot shows a document titled "RESIDENTIAL REAL ESTATE LISTING AGREEMENT EXCLUSIVE RIGHT TO SELL" from the Texas Association of Realtors. The form includes a section for "PARTIES: The parties to this agreement (this Listing) are:" with fields for Seller, Address, City, State, Zip, Phone, and Fax.