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Overview

SureClose Advantage 3.2 includes additional Admin features, product enhancements, and defect corrections for the migration of select SureClose Professional users. This document provides a brief explanation of what has been fixed and an introduction to new features implemented with this release.

For more information about any of the new features, refer to SureClose Advantage Online Help and search for the specific topic.

Deployment Date: January 6, 2012

Post-Installation Considerations

After the new version has been deployed and prior to your logging in, it is recommended that you complete the following post-installation tasks:

- Delete Temporary Internet Files
- Delete Cookies

Deleting Temporary Internet Files

(MS Article ID: 260897)

The Temporary Internet Files (or cache) folder contains web page content that is stored on your hard disk for quick viewing. This cache permits Internet or MSN® Explorer to download only the content that has changed since you last viewed a web page instead of downloading all the content for the page every time it is displayed.

Administrators can customize Temporary Internet File settings to prevent modifications. Contact your System Administrator if you cannot access the Internet Options dialog box or the General tab.

Steps

1. Close Internet Explorer® and any instances of Windows® Explorer.
2. From the Start menu, point to Control Panel and then select Internet Options. The Internet Options dialog box displays.
3. On the General tab, locate Temporary Internet Files and then click Delete Files. The Delete Files dialog box displays.
4. If available, select the Delete All Offline Content check box and then click OK. A confirmation message displays asking if you are sure you want to complete the delete process.
5. To confirm, click OK.

Note

Be patient when performing this task, if the Temporary Internet Files folder contains a significant amount of web page content, then this process may take several minutes to complete.
Deleting Cookie Files
(MS Article ID: 278835)

Files starting with the word Cookie may remain in the Temporary Internet Files folder even after opting to delete them. You can delete these files; however, it is recommended that you make a backup copy of cookies prior to deleting them because these files may contain information for a customized web page or login information for a website that you do not want to lose. If needed, contact your System Administrator for assistance or refer to MS Article ID: 221523.

Steps

1. Close Internet Explorer and any instances of Windows Explorer.
2. From the Start menu, point to Control Panel and then select Internet Options. The Internet Options dialog box displays.
3. On the General tab, locate Temporary Internet Files and then click Delete Cookies. The Delete Cookies dialog box displays. A confirmation message displays asking if you are sure you want to complete the delete process.
4. To confirm, click OK.
Features and Functionality

This section introduces new features and functionality added to SureClose Advantage 3.2.

New in This Release

**SureClose Advantage 3.2**

- Barcodes have been implemented in SureClose Advantage. Refer to [Barcodes](#) for more information.
- A new **History** button has been added to the Documents page. Click this button to view up to two year’s activity for a selected document. You can view all history, or enter a specific date range.
- Corporate Document Libraries have been implemented in SureClose Advantage. Refer to [Corporate Document Library](#)
- Notes can now be added to contact records. Certain security permissions are required to see these notes. Refer to [Notes](#) for more information.
- You now have the ability to add notes to contacts with certain security restrictions to ensure they are only visible to those who need to see them.
- To prevent duplicate entries, a new search feature has been added to Contacts. Now prior to adding a new contact, you must search for the contact to ensure they do not already exist.
- Terms have been implemented in SureClose Advantage. With the appropriate permissions, you can now add, edit and delete terms from a file by clicking Terms. Refer to [Terms](#) for more information.
- A new **Quick Search** feature has been added to help you quickly and easily locate your files with an **Active** status. **Archived** files are not included.
- Several defects were corrected. Refer to [Defects](#) for more information.
Documents

The following changes were made to Documents.

Barcodes

Barcodes have been implemented in SureClose Advantage. With the appropriate permissions, you can now:

From the Admin Menu

- Add forms for company, corporate or public use
- Delete company, corporate or public forms
- Upload existing barcode cover sheet templates (previously created)
- Download a barcode starter kit

From the File Menu

- Add a barcode property to document placeholders
- Generate barcode cover sheets for placeholders on a file and distribute
- Print barcode coversheets

Admin

A new, Forms option has been added to the Admin menu. Use this option to add new or delete existing forms for company, corporate, or public use, as well as, upload existing barcode cover sheet templates and/or download a barcode starter kit.
You can select this option one of two ways:

- Select **Forms** from the left navigation pane, or
- Click **Manage** under the **Forms** section

Either option displays the Forms page. All available forms are listed alphabetically in one of the following categories:

- **Company Forms**
- **Corporate Forms**
- **Public Forms**
Adding Forms
You can add forms by clicking the **Add** button in the top menu to display the Add Form window.

Deleting Forms
You can select one or many forms to delete from the Forms page, then click the **Delete** button. A confirmation message displays asking you to confirm the deletion.
**Creating Barcode Templates**

Similar to adding forms, you can upload any previously created barcode cover sheet templates by clicking the **Add** button in the top menu to display the Add Form window.

When the Add Form window displays, simply complete the information but when asked for the **Form Type**, select **barcode cover sheet template** you want to upload.
Downloading the Barcoding Starter Kit

If preferred, you can download a barcoding starter kit by clicking the Download Barcoding Starter Kit link at the top of the Forms page. This links you to a zip file that can be downloaded to a location of your choice and contains sample forms, barcodes and instructions to create your own custom barcode forms.
Files

A new, **Barcodes** button has been added to the top menu of the Documents page. Use this button to generate, print and distribute barcode cover sheets.

You may generate these one of two ways:

- If the placeholder has the new, **Use for Barcoding** check box selected, then clicking the **Barcodes** button automatically generates barcode cover sheets for all placeholders on the file with this setting, without having to select each individual placeholder.

- If the placeholder does not have the **Use for Barcoding** check box selected, then you must select the placeholder or placeholders you want to generate a barcode cover sheet for, and then click the **Barcodes** button.

**Note**

If no placeholders exist on a selected file, then the **Barcodes** button displays but is disabled.
In either scenario, clicking the **Barcodes** button displays a selection window. From the list, select the barcode cover sheet you want to generate and click **OK**.

The barcode cover sheet displays and looks similar to this:

Once generated, you can view, print, or distribute the cover sheet to selected parties.
Distributing the Barcode Cover Sheet

To distribute the barcode cover sheet, click the **Distribute** button.

The Party Distribute screen displays.
History Log

You can now view a history of up to the last two year’s activity for a selected document from the Documents page by clicking the History button on the top menu.

The History log for the selected placeholder displays. View all history or enter a date range to only see history for that time frame. Your screen will look similar to this:
Corporate Document Library

Corporate Document Libraries have been implemented in SureClose Advantage. With the appropriate permissions, you can now:

From the Admin Menu

- Add a corporate document library
- Add folders and placeholders
- Edit folders and placeholders
- Move the order of folders and placeholders
- Attach documents to placeholders
- Delete folders and placeholders
- View a history of activity within the corporate document library

From the File Menu

- Add documents from the Corporate Document Library to a file

Admin

Adding Folders and Placeholders

A new, Corporate Document Library option has been added to the Corporate Tools section of the Admin menu.

You can select this option one of two ways:

- Select Corporate Document Library from the left navigation pane, or
- Click Corporate Document Library under the Corporate Tools section
Either option displays the Corporate Document Library page.

To begin adding folders and placeholders to the corporate document library, click the **Add** button in the top menu bar.
This displays the New Document Placeholder Entry screen. Complete the fields as requested, then click **Save** your changes, or **Add Another** if you want to continue adding more.
Editing Folders and Placeholders

Once added, folders and placeholders can be edited by double-clicking the folder or placeholder.

Folders

Double-click a folder to edit. Your screen will look similar to this:

![Folder Editing Screen]

Placeholders

Double-click a folder to edit. Your screen will look similar to this:

![Placeholder Editing Screen]
Notice three new check boxes have been added to the **General Information** tab

- **Display only latest version on Basic View** – Select this check box if you only want to display the most current version of the document to users assigned the **Basic View**.

- **Convert to PDF** – Select this check box if you want any document added to the placeholder to automatically be converted to a PDF file.

- **Active Document** – Select this check box to indicate the placeholder in the corporate document library can be added to a file or template. If left clear, then the placeholder will not be listed as available document in the corporate document library.
Moving Folders and Placeholders

If needed, you can change the order in which folders and placeholders display in the corporate document library by selecting the Move button from the top menu. Selecting Move displays a sub-menu. From the sub-menu, you can select to move a folder or placeholder.

Selecting either option displays an edit screen, which looks similar to this:
Moving Placeholders
You can select one or many placeholders to move. Using the options on screen, determine which placeholders to move and where, and then click **Save**.

Moving Folders
Selecting a folder will automatically move all placeholders under that folder.

Attaching Documents to Placeholders
You can attach a document to a placeholder in the corporate document library to display as placeholder detail, exceptions or instructions by selecting a placeholder then clicking the **Attach** button in the top menu.
Deleting Folders and Placeholders

Folders and placeholders can be deleted from the Corporate Document Library.

Deleting Folders
To delete a folder, the folder must be empty. An empty folder is defined as one that does not have any placeholders under it.

To delete a folder, double-click the folder name to display a Delete button. Clicking the Delete button displays a confirmation message asking you to confirm the deletion.
Deleting Placeholders
You can select one or many placeholders to delete from the Corporate Document Library by clicking the Delete button from the top menu. A confirmation message displays asking you to confirm the deletion.
**Viewing the History**

You can view a history of *up to the last two year’s* activity for a selected placeholder within the corporate document library by clicking the **History** button on the top menu.

The History log for the selected placeholder displays. You can view all available history or enter a date range to only see history for that time frame. Your screen will look similar to this:
File

Documents added to the Corporate Document Library can be added (attached) to a file.

Adding Documents from the Corporate Document Library

You can add (attach) a document from the Corporate Document Library to a file, by clicking the Attach button on the Documents page.

TheAttach Document page displays. Select Corporate Document Libraries to display all Active documents that exist in your corporate document library. Select one or many documents, then click Save.
All selected documents are added to the bottom of the Documents page, under a new folder indicating they were imported from your corporate document library.
Contacts

The following changes were made to Contacts.

Notes

If you are a team member on a file, and have the appropriate permissions, you can now add, edit and delete notes on contact records from the Contacts tab or File Summary page.

Any notes added will display as a yellow sticky note on the contact record on the Contacts or File Summary page.

From the Contacts Tab

You can add a note to a contact from the Contacts tab by double-clicking the contact record to display the edit tabs. Select the Notes tab to add your note. You can type a maximum of 255 characters; notice the character count that displays at the bottom of the tab.
Once saved, the note displays as a Yellow sticky note in the contact list.

From the File Summary Page

You can add a note to a contact from the **File Summary** page by double-clicking the contact record to display the edit tabs. Select the **Notes** tab to add your note. You can type a maximum of 255 characters; notice the character count that displays at the bottom of the tab.
Once saved, the note displays as a Yellow sticky note in the contact list.

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_security_note_ Notes can only be seen by _team members_ on the File Summary page, _guests_ cannot see them.
Search Contacts

In an effort to prevent duplicate entries, a new search feature has been added to Contacts. Now prior to adding a new contact, you must search for the contact to ensure they do not already exist.
Terms

Terms have been implemented in SureClose Advantage. With the appropriate permissions, you can now add, edit and delete terms from a file by clicking Terms.

Terms can be accessed one of two ways:

- You will notice a new sub-menu option display labeled Terms, under the file name in the Recent Files list. Clicking Terms displays the Terms page.
- You can also click the Terms link displayed in the upper right corner of the File Summary page.
Adding Terms

You can add terms to a file by clicking the **Terms** link, and then the **Add** button located at the top of the Terms page.

The New Term/Charge Entry screen displays. You can enter several types of terms, including: Seller/Owner’s Term, Buyer/Borrower’s Term, Other Term, and Private Term. When all the information is complete, click **Save** or **Add Another** if you want to enter multiple terms at once.

Any new terms added display on the Terms page.
Adding Charges

Similar to adding Terms, you can add charges to a file by clicking the Terms link, and then the Add button located at the top of the Terms page.

The New Term/Charge Entry screen displays. By default, Terms is selected. Selecting Charge displays new fields.

Complete the requested information. When finished, click Save or Add Another to enter multiple charges.
Any new charges added display on the Terms page with a debit and credit amount.

**Editing Terms**

You can edit terms on a file by double-clicking the term on the Terms page to display the edit tab. Edit the necessary information and then click **Save**.
The new term displays on the Terms page.

**Editing Charges**

You can edit charges on file by double-clicking the charge on the Terms page to display the edit tab. Edit the necessary information and then click **Save**.
Deleting Terms

Terms *not associated with a charge*, can be deleted by clicking the **Delete** button located at the top of the Terms page.

**Note**

Attempting to delete a term associated with a charge will display a warning message. Otherwise, a confirmation message displays asking you to confirm the deletion.
Quick Search

A new **Quick Search** feature has been added to help you quickly and easily locate your files with an **Active** status. **Archived** files are not included.

This feature displays in the upper left corner of all screens no matter where you are and includes the ability to search by:

- Address
- City
- State
- Zip
- Escrow #
- File #
- MLS #
- Title #
- Last Name
- First Name
- Company Name
- Custom Field 1
- Custom Field 2
- Custom Field 3
- Custom Field 4

**Using Quick Search**

To perform a quick search, select a search option from the list, and then type a value.
When finished, click **Quick Search**. The file is returned.
Defects

The following defects were corrected in SureClose Advantage 3.2:

- Corrections have been made to the merge field \{PROJECTENDDATE\} so that it only includes a date stamp. Previously, this field was also including a time stamp.
- Corrections have been made to communication types to ensure all available communication types display for selection. As a result, the following communication types are now available:
  - Email
  - Asst Email
  - Fax Home
  - Fax Other
  - eFax
  - Asst Fax

When the following functions are performed:
  - Sending an Email or Notification from the Messages tab
  - Messaging a Party on a File
  - Distributing a Document from a File
  - Generating the Transaction Summary Report

- Modifications have been made to ensure activity is recorded to the History Log when attaching a document as part of creating a placeholder on a file.

- \textbf{(For iPad Users)} Corrections have been to ensure the \textbf{File Search} button displays as expected in the application menu located at the top right corner of SureClose Advantage. Previously, this button was not visible, preventing iPad users from efficiently using SureClose. As a result, a new click and hold option has been implemented on the iPad in the following areas:
  - Files/General/Party Details
  - Files/General/Party Details/Company Search
  - Files/Documents
  - Files/Documents/Split/File Search
  - Files/Tasks
  - Files/Activity Log
  - Messages/Split/File Search
  - Contacts
  - Calendar
Additional Information

Training

Through SureClose Advantage Online Help, you can access an online library of interactive tutorials and quick reference cards by clicking the Additional Learning Resources link or navigate to: http://portal.propertyinfo.com/sureclose-advantage1.

Technical Support

For technical support, contact PropertyInfo Customer Care at 1.888.526.3282 or customercare@propertyinfo.com.