

## SureClose – Distribute a Document

### Distribute a Document

There are several ways to distribute a document:

- You can distribute a document to a party on a file
- You can distribute a document to an external email address from Messages
- You can distribute a document to a fax number only if your company has a faxing solution configured in SureClose

#### 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. If needed, search for the file.
3. With the file selected, click Documents.
4. Select the document(s) you want to distribute, and then from the menu bar click Distribute.

File Number: 2010111151

To: [Add Parties](#)

Single click to select a party. Ctrl + Click to select parties individually. Shift + Click to select consecutively.

Available Parties:

Hilton, Mr. Scott  
Lender's Title & Site Admin  
Esorow LLC

SC Messages: Scott-Hilton7956@mysureclose...

Selected Parties:

External Email Addresses (separate each email address with a comma):

Fax Numbers (separate each fax number with a comma):

OK CANCEL

Cc: [Add Parties](#)  
Bcc: [Add Parties](#)

5. Select the option that best describes what you want to do:
  - **To: Add Parties** – select if you want to distribute the document to a party on the file. Click [Add Parties](#) to see a list of Available Parties on the file. Select a party from the list and then use the down arrow to move party to the Selected Parties box.

**Note:** Click [Cc: Add Parties](#) (carbon copy) if you want the party to be visible to other parties included in the message. Click [Bcc: Add Parties](#) (blind carbon copy) to send a blind carbon copy of the message to a party discretely in which the party is not visible to other parties included in the message.

- **External Email Addresses** (separate each email address with a comma) – type a valid email address to distribute the document to someone who may not be a party on a file. Multiple email addresses can be typed; however, a comma must be inserted in between each address before the message can be sent.

- **Fax Numbers** (separate each fax number with a comma) – select to distribute the document to someone who is not a party on the file by sending the document as a fax. Type the fax number to send the document using one of these formats: NNN-NNN-NNNN, (NNN) NNN-NNNN, 1NNNNNNNN, or 1-NNN-NNN-NNNN.
6. To continue, click OK.

(C) 1097 Winding Way Drive, Schnieder (B), DeMora (S) Documents | Tasks | Activity Log | Terms

File Number: 2010111151

To: [Hilton, Mr. Scott](#)

Cc: [Add Parties](#)

Bcc: [Add Parties](#)

Select Message To Send: [New Message Editor](#)

Subject: [Title Commitment](#)

Attach: [Title Commitment](#)

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)

Record this message on the Activity Log [Activity Log Permissions](#)

Font Size A B I U X

PREVIEW SEND CANCEL

7. At **Select Message to Send**, you can select an existing message from the list or accept the default, **New Message Editor**, and type a new message in the text editor window.
8. Complete these fields:
  - **Subject** – type the email subject line.
  - **Attach** – verify the correct document is attached. If not, click the document to change your selection.
  - **Send secure message** – to send confidential information and secure the message, select this option.
  - **Send hyperlink to access documents** – to send a confidential document as a hyperlink to ensure it is secure, select this option.

**Note:** When sending a secure message or a message that includes a secure document, the **External Email Addresses** box is disabled preventing any recipient that is not a Contact in SureClose Advantage from being included in the email.

- **Record this message on the Activity Log** – if you want to record the message on the Activity Log, select this option.
  - **Activity Log Permissions** – Click this link if you want to specify permissions on the activity log entry.
9. Use the Rich Text Editor to create a custom message. You can change the font, size, color, alignment, or insert a table or image uploaded to your corporate image library.
  10. When finished, click **Send**.