



Filing Documents from the SureClose Advantage Inbox

Quick Reference Card

Purpose

Use the instructions in this document to file documents to SureClose Advantage placeholders from your SureClose Advantage Inbox (SureClose Messages).

Use the **mysureclose.com** email address you received when your SureClose Advantage account was created. Your SureClose email address contains your SureClose username, **.mysureclose.com**.

Note: If you are unsure what your SureClose email address is, simply log into SureClose Advantage, navigate to the **Home** screen and click **Profile**.

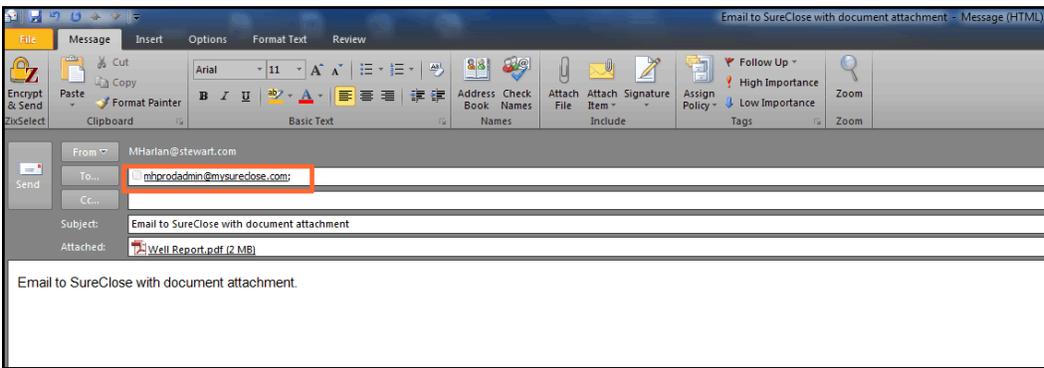
Filing a Document from SureClose Advantage Email to a Placeholder

You can email document attachments to your SureClose Advantage Inbox, to then file the documents to a SureClose Advantage placeholder.

Steps

Complete these steps to send document attachments to your SureClose Advantage Inbox.

1. From any other email platform, such as *Outlook*, send your document attachments to your **.mysureclose.com** email address.



2. Once your email is sent, log into [SureClose Advantage](#) and navigate to the **Messages** tab. The Sent email displays on the *Messages* screen.

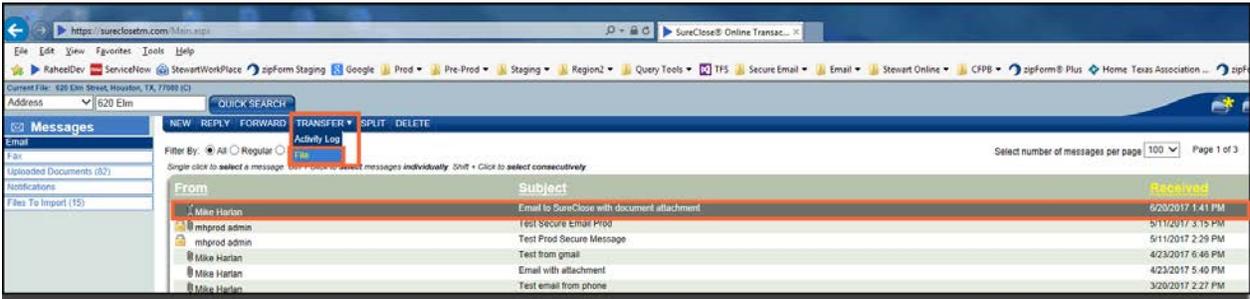




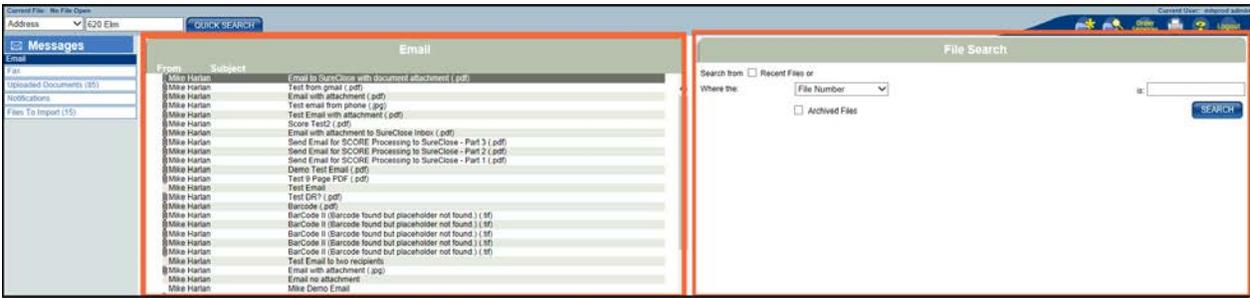
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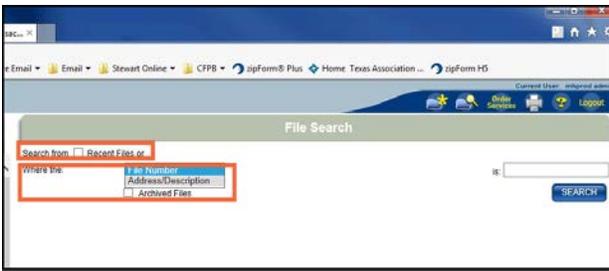
3. Select the message that contains the document you want to file to a placeholder, and click **Transfer – File**. The *Transfer* screen displays.



4. From the *Transfer* screen, your SureClose email inbox displays on the left of the screen, while the File Search section displays on the right.



5. From the *File Search* section, enter the **File Number** or **Property Address** to locate a file, or click the **Recent Files** check box to display a list of the 10 most recent files accessed.



6. Click **Search** to display results of the search criteria.





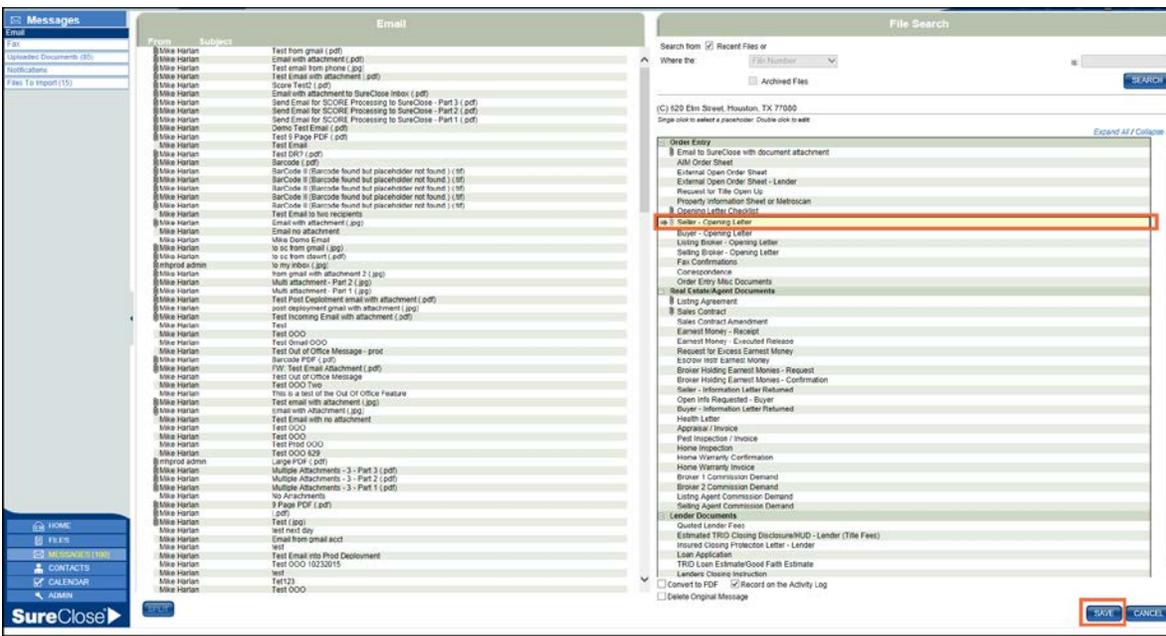
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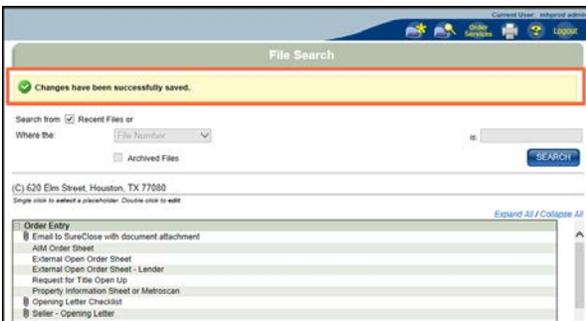
7. Select a file from the grid to include in a placeholder.



8. To transfer an attachment from a message in the SureClose Advantage Inbox, select the email (with the file attachment) in the grid, then click the placeholder you want to attach the document to. The selected placeholder will become highlighted in yellow, and a Paperclip icon will display next to the placeholder name, indicating that the document was attached to the selected placeholder. Click **Save** to continue.



A message displays, confirming that **Changes have been successfully saved** to the placeholder.





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- Navigate to the placeholder on the file. You will see the document originally attached to the email has been filed to the placeholder. The Subject and Message body of the email display as a note on the document placeholder.

(C) 620 Elm Street, buyer (B), seller (S)

Single click to select a placeholder. Double click to edit. Ctrl + Click to select placeholders individually. Shift + Click to select consecutively.

Documents	File Format	Completed Date
Order Entry		
Email to SureClose with document attachment	pdf	
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	6/20/2017
Buyer - Opening Letter	pdf	6/21/2017
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	6/20/2017
Sales Contract	pdf	6/20/2017
Sales Contract Amendment		
Earnest Money - Receipt		

Notes:
Subject: Email to SureClose with document attachment Message: Email to SureClose with document attachment. This email message is for the sole use of the intended recipient(s) and may contain confidential information. Any unauthorized review, use, discl...

(Optional) Delete Original Message

When transferring documents from SureClose Advantage messages, you have the option to delete the original message from the SureClose Advantage Inbox. If you do not delete the message, then the original email message (with document attached to the email) remain in your SureClose Advantage Inbox.

To delete a message, select that message from your inbox, and select the **Delete Original Message** check box.

Email

From	Subject
Missie Harlan	Text from gmail (.pdf)
Missie Harlan	Email with attachment (.pdf)
Missie Harlan	Text email from phone (.jpg)
Missie Harlan	Text Email with attachment (.pdf)
Missie Harlan	Score TestD (.pdf)
Missie Harlan	Email with attachment to SureClose Index (.pdf)
Missie Harlan	Send Email for SCORIE Processing to SureClose - Part 3 (.pdf)
Missie Harlan	Send Email for SCORIE Processing to SureClose - Part 2 (.pdf)
Missie Harlan	Send Email for SCORIE Processing to SureClose - Part 1 (.pdf)
Missie Harlan	Denro Test Email (.pdf)
Missie Harlan	Test 19 Page PDF (.pdf)
Missie Harlan	Test Email
Missie Harlan	Test DMV (.pdf)
Missie Harlan	Barcode (.pdf)
Missie Harlan	Barcode II (Barcode found but placeholder not found) (.SE)
Missie Harlan	Barcode III (Barcode found but placeholder not found) (.SE)
Missie Harlan	Barcode IV (Barcode found but placeholder not found) (.SE)
Missie Harlan	Barcode V (Barcode found but placeholder not found) (.SE)
Missie Harlan	Barcode VI (Barcode found but placeholder not found) (.SE)
Missie Harlan	Text Email to two recipients
Missie Harlan	Email with attachment (.jpg)
Missie Harlan	Missie Denro Email
Missie Harlan	to sc from gmail (.jpg)
Missie Harlan	to my inbox (.jpg)
Missie Harlan	from gmail with attachment 2 (.jpg)
Missie Harlan	Multi attachment - Part 1 (.jpg)
Missie Harlan	Multi attachment - Part 2 (.jpg)
Missie Harlan	post deployment email with attachment (.pdf)
Missie Harlan	post deployment gmail with attachment (.jpg)
Missie Harlan	Text Incoming Email with attachment (.pdf)
Missie Harlan	Test
Missie Harlan	Test OOO
Missie Harlan	Test OOO
Missie Harlan	Test Out of Office Message - send
Missie Harlan	Barcode PDF (.pdf)
Missie Harlan	Fax Test Email Attachment (.pdf)
Missie Harlan	Test Out of Office Message
Missie Harlan	Test OOO Test
Missie Harlan	This is a test of the Out of Office Feature
Missie Harlan	Test email with attachment (.jpg)
Missie Harlan	Email with Attachment (.jpg)
Missie Harlan	Test OOO
Missie Harlan	Test OOO
Missie Harlan	Test OOO
Missie Harlan	Test OOO 328
Missie Harlan	Large PDF (.pdf)
Missie Harlan	Multiple Attachments - 3 - Part 3 (.pdf)
Missie Harlan	Multiple Attachments - 3 - Part 2 (.pdf)
Missie Harlan	Multiple Attachments - 3 - Part 1 (.pdf)
Missie Harlan	No Attachments
Missie Harlan	3 Page PDF (.pdf)
Missie Harlan	Test (.jpg)
Missie Harlan	Test mail day
Missie Harlan	Email from gmail out
Missie Harlan	Test
Missie Harlan	Test Email with PDF Deployment
Missie Harlan	Test OOO 10232016
Missie Harlan	Test
Missie Harlan	Test 23
Missie Harlan	Test OOO

File Search

Search from Recent Files or Archived Files

Where the File Number

(C) 620 Elm Street, Houston, TX 77000

Single click to select a placeholder. Double click to edit

- Order Entry
 - Email to SureClose with document attachment
 - AIM Order Sheet
 - External Open Order Sheet
 - External Open Order Sheet - Lender
 - Request for Title Clean Up
 - Property Information Sheet or Metroscan
 - Opening Letter Checklist
 - Buyer - Opening Letter
 - Buyer - Opening Letter
 - Listing Broker - Opening Letter
 - Selling Broker - Closing Letter
 - Fax Confirmations
 - Correspondence
 - Order Entry Misc Documents
- Real Estate/Agent Documents
 - Listing Agreement
 - Sales Contract
 - Sales Contract Amendment
 - Earnest Money - Receipt
 - Earnest Money - Escrowed Promise
 - Request for Escrow Earnest Money
 - Escrow Hold Earned Money
 - Broker Holding Earnest Money - Request
 - Broker Holding Earnest Money - Confirmation
 - Seller - Information Letter Returned
 - Open Info Requested - Buyer
 - Buyer - Information Letter Returned
 - Health Letter
 - Appraisal / Invoice
 - Post Inspection / Invoice
 - Home Inspection
 - Home Warranty Confirmation
 - Home Warranty Invoice
 - Broker - Commission Demand
 - Seller - Commission Demand
 - Listing Agent Commission Demand
 - Selling Agent Commission Demand
 - Lender Documents
 - Quoted Lender Fees
 - Estimated TRID Closing Disclosure/HUD - Lender (Title Fees)
 - Insured Closing Protection Letter - Lender
 - Loan Application
 - TRID Loan Estimate/Good Faith Estimate
 - Lenders Closing Instructions

Delete Original Message