

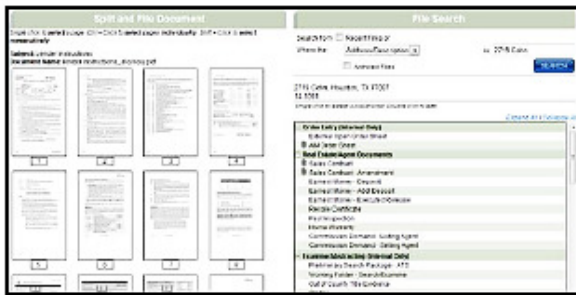
## SureClose - Split and File a Document

### Split and File a Document

PDF documents attached to messages can be split and filed to an empty placeholder that already exists on the file, or to a new placeholder.

#### Steps

1. On the navigation pane, click **Messages**.
2. Find and select the message and then from the menu bar, select **Split**. A new page displays with two columns; the document pages display in the left column and the file search and placeholders display in the right.

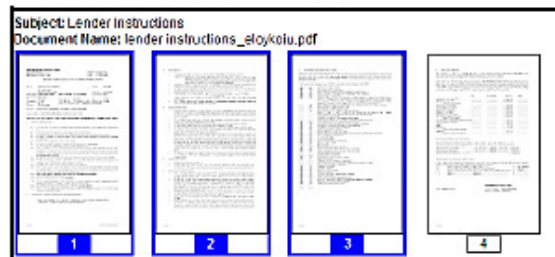


**Note:** File Search defaults to the **Current File** listed at the top of the screen. If no file has been opened, then no **Current File** will be listed.

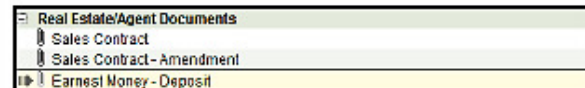
3. Under **File Search**, by default, if no **Current File** is listed at the top of the screen, the file you last searched for displays. Search for the file by the file number, property address or description.
  - **Search from**—Select this checkbox to search for files from the **Recent Files** list. Once selected, only files from within the **Recent Files** list display.
  - **Where the**—Select the option that best describes how you want to search for the file: by the file number or property address.
  - **is:**—Type all or part of the file number or property address of the file you want to search for.
  - **Archived Files**—Select to search archived files.
4. With the criteria entered, click **Search**.
 

**Note:** The search results include both the file number and property address for easier identification.
5. From the file list, select the appropriate file. Available folders and placeholders display.
  - To expand or collapse the list of placeholders under a folder, click the + or - sign to the right of each folder.

- To expand or collapse all folders and placeholders at once, click **Expand All/Collapse All** at the top of the placeholder list.
6. From the document list, select the page or pages you want to transfer. Selected pages are highlighted in blue.



7. Single-click on the placeholder to transfer the message. Notice the placeholder is highlighted and a paperclip icon indicates the document is attached. If needed, click the paperclip icon to display the document.



- You can create a new placeholder by clicking a folder or an occupied placeholder; this adds a new placeholder directly below the selection with the same name as the message subject.

**Note:** To edit the name of a placeholder, double-click the placeholder to make your changes. A red asterisk ( \* ) indicates a required field must be completed to continue.

8. By default, the **Record on Activity Log** option is selected. Accept the default if you want to record the transfer on the Activity Log.



9. If you want to delete the message upon filing, select the **Delete Original Message** check box.
10. When finished, click **Save**.

**Note:** If you selected **Delete Original Message**, a pop-up will display to continue or cancel the action. Click **OK** to delete the original message and all attached documents.