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**.
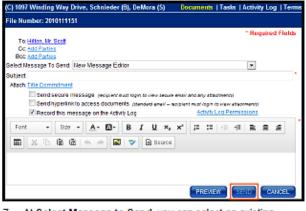

5. Select the option that best describes what you want to do:
   - **To: Add Parties** – select if you want to distribute the document to a party on the file. Click **Add Parties** to see a list of **Available Parties** on the file. Select a party from the list and then use the down arrow to move party 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, 1NNNNNNN, or 1-NNN-NNN-NNNN.

6. To continue, click **OK**.

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**.