


SureClose – Transfer a Document from a Message

Transfer a Document from a Message

Messages can be individually transferred to placeholders on a file. If the message has a document attached, then the document is attached to the placeholder and the actual message text is written as a note on the placeholder.

Steps

1. On the navigation pane, click Messages. Sub-tabs display.
2. Find and select the message, and then from the menu bar, select Transfer—File. A new page displays with two columns; messages display in the left column and the file search and placeholders display in the right.



Search from	Where the	Is	Archived Files
<input type="checkbox"/> Recent Files	<input type="checkbox"/> File Number	<input type="checkbox"/> File Number	<input type="checkbox"/> Archived Files

2719 Cole, Houston, TX 77007
72 3911
Apply now to select a placeholder. Search for a file

Search Results:


- Real Estate Agent Documents
 - Sales Contract
 - Sales Contract - Amendment
 - Earnest Money - Deposit


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 and you must search for the file you want to work with.

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. Accept the default, or search for a different file by entering the requested search criteria.
 - **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**—If you also want to search Archived files, then select this check box.

Note: The search results include both the file number and property address for easier identification.

4. From the transfer list, select the file you want to transfer the message to. Available folders and placeholders display.
 - To expand or collapse the list of placeholders under a folder, click the + or - sign to the left 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.

5. Single-click on the placeholder to transfer the message. Notice the message moves from the message list to the placeholder and is highlighted. A paperclip icon  appears to indicate the document is attached. If needed, click the paperclip icon to display the document.



- If needed, 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.

6. By default, the Record on Activity Log option is selected. Accept the default if you want to record the transfer on the Activity Log. If not, select the check box to clear the selection.

Convert to PDF Record on the Activity Log
 Delete Original Message

7. If you want to delete the message upon filing, select the Delete Original Message check box.
8. 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.

Notes:
