



AAR Quick Reference Guide SureClose® Advantage View for Agents

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Preface

The Arizona Association of REALTORS® Business Services team is here to assist you with any questions that you might have regarding SureClose®. However, you should always ask your company's SureClose® Site Administrator first. If they don't have the answer, then we will be happy to help.

Business Services Team

Nick Catanesi - Director of Business Services
Dan Howells - Business Application Specialist
Niki Burrige - Business Application Specialist
Dena Roberts - Business Application Specialist
Dan Pemberton - Business Application Specialist

Hours

We are available Monday through Friday from 8 a.m. to 5 p.m. to answer your questions. You can use the following methods to contact us:

- Local Support Hotline: 480.304.8930
- Toll Free Support Hotline: 866.833.7357
- Email: Support@AARonline.com

NOTE: *The Arizona Association of REALTORS® is closed on the following holidays: New Years Day, Martin Luther King Day, President's Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Veteran's Day, Thanksgiving, the Friday after Thanksgiving, and Christmas.*

Welcome to Sureclose[®] Advantage for Agents

You can use SureClose[®] Advantage from either a Windows or a Mac computer. You can use any of the following browsers to access SureClose[®] Advantage:

- Internet Explorer
- Mozilla Firefox
- Safari
- Google Chrome

Go to <https://sureclosetm.com> to log in using the User ID and password given to you by your SureClose[®] system administrator.

Reference Information

Our website (www.AARonline.com/tm) contains the following information:

- Tutorial Videos
- Manuals for you to download
- Links to download the printer driver

SureClose[®] Process

Every office has its own process for using SureClose[®], but the basic steps are just about the same for every company:

1. An agent obtains a listing or an accepted contract.
2. The agent fills out a New File Request and forwards it to their office.
3. An office employee creates the appropriate file in SureClose[®]. SureClose[®] automatically sends an email to the agent letting them know the file has been created.
4. The agent attaches their documents.
5. The broker or designated reviewer logs in to the Document Review Tool and searches for all new documents to be reviewed.
6. The broker completes a review of each new file or document, and sends emails to the agent to let them know what is missing or needs to be fixed.
7. The office employee (or broker) reviews the file in SureClose[®] to delete any unnecessary placeholders or add additional placeholders that might be needed. They also delete any tasks that do not apply to the transaction.
8. The agent can distribute documents to their client through SureClose[®] to maintain a record of these messages within the file.
9. The agent continues to attach executed documents as they receive them until the listing expires or the transaction closes escrow.
10. The office employee completes a final check of the file when the transaction is finished and then archives the file.

Arizona Department of Real Estate Information

The Arizona Department of Real Estate (ADRE) requires brokers to maintain written policies, procedures, and systems for their firms. In many cases, the brokers' staff will continue the same roles and responsibilities after starting with transaction management (TM) as they did before. However, ADRE holds brokers directly responsible for who handles real estate documents, what they do with those documents, how they are compensated, etc. **We strongly recommend that brokers using AAR TM review their policy manuals to ensure they are within ADRE compliance.** AAR will make suggestions and recommendations regarding AAR TM/SureClose® use, however it is ultimately the broker's responsibility to know and follow ADRE guidelines regarding transactions and files.

Brokers should make themselves familiar with the following Substantive Policy Statements (<http://www.azre.gov/LawBook/SubstantivePolicyStatements.aspx>):

- SPS 2005.04
- SPS 2005.10
- SPS 2010.01

Brokers should also review Commissioner's Rule R4-28-1103 (http://www.azsos.gov/public_services/Title_04/4-28.htm).

Direct any specific questions regarding compliance issues or adherence to ADRE guidelines to Robin King, Senior Investigator / Manager Auditing & Investigations Division. Her email address is rking@azre.gov.

You can also call the Legal Hotline with questions at 800.533.9294. You must have a Legal Hotline personal identification number to access the hotline. If you are a Designated Broker and do not have a personal identification number, go to <http://www.aaronline.com/documents/LH.aspx>.

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Chapter 1.

Layout of SureClose® Advantage

The frame of SureClose® Advantage is the same on every page. You see the **Navigation Pane** on the left side of your screen and **Action** buttons on the upper right side of your screen (Figure 1).

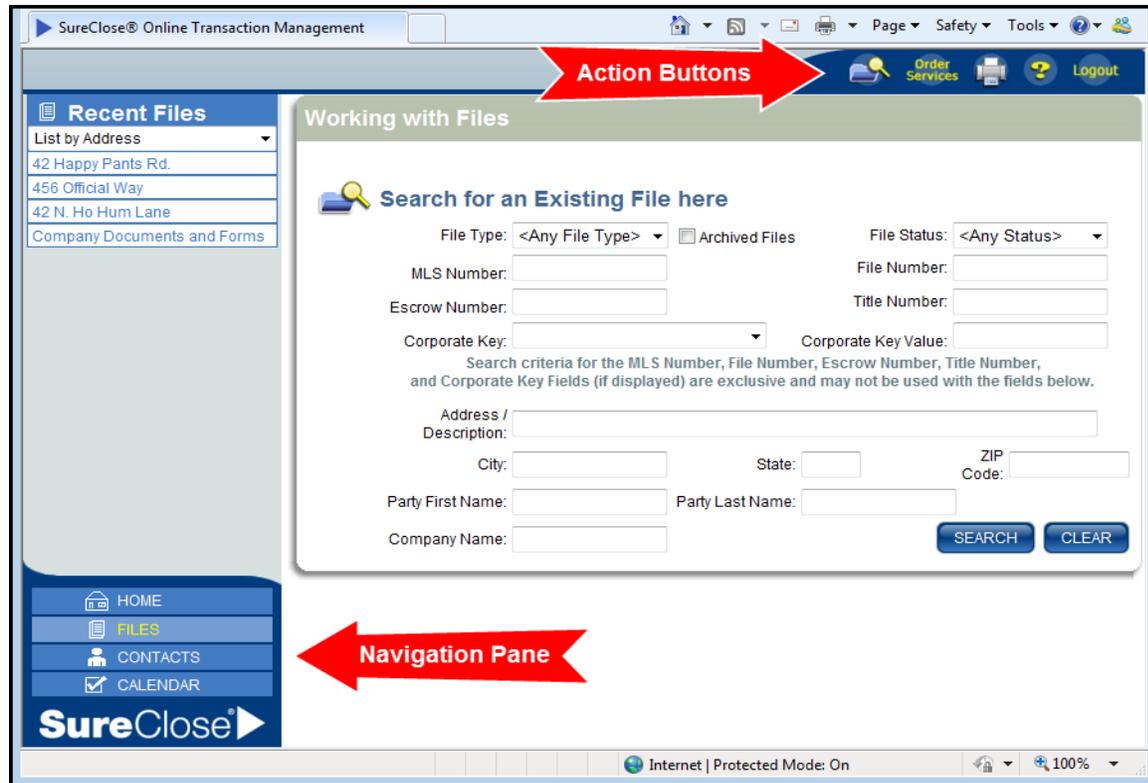


Figure 1

The **Navigation Pane** contains tabs at the bottom of the pane that enable you to move to the different pages in SureClose® Advantage. Your current tab is always displayed at the top of the **Navigation Pane**.

The tabs are:

- **Home** – takes you to the **Home** page with general information about SureClose®. There are two sub-tabs under the Home tab:
 - **Profile** – enables you to change your personal profile within SureClose®.
 - **MLS Integrations** – not used with your profile.
- **Files** – takes you to the **Files** page. The last file you accessed in SureClose® automatically opens to the **Summary** page.

- **Messages** – This section is only available to office administrators.
- **Contacts** – takes you to the **Contacts** page where you can find your corporate contacts within SureClose®.
- **Calendar** – displays the **Calendar** page where you can see a calendar view of the tasks you need to complete for all your files within SureClose®. First time Advantage users, see page 18.

You also see **Action** buttons on the upper right side of the screen. They are:



File Search – takes you to the **Search Files** page.



Print – prints the current screen.



Help – shows a list of help topics.



Logout – ends your session and logs you out of SureClose® Advantage. You must always use this button when you are done with your session. Do not log out by closing your browser!

Home Page

The first time you log in to SureClose® Advantage, you see the **Home** page (Figure 2). The **Home** page gives you general information about SureClose® Advantage.

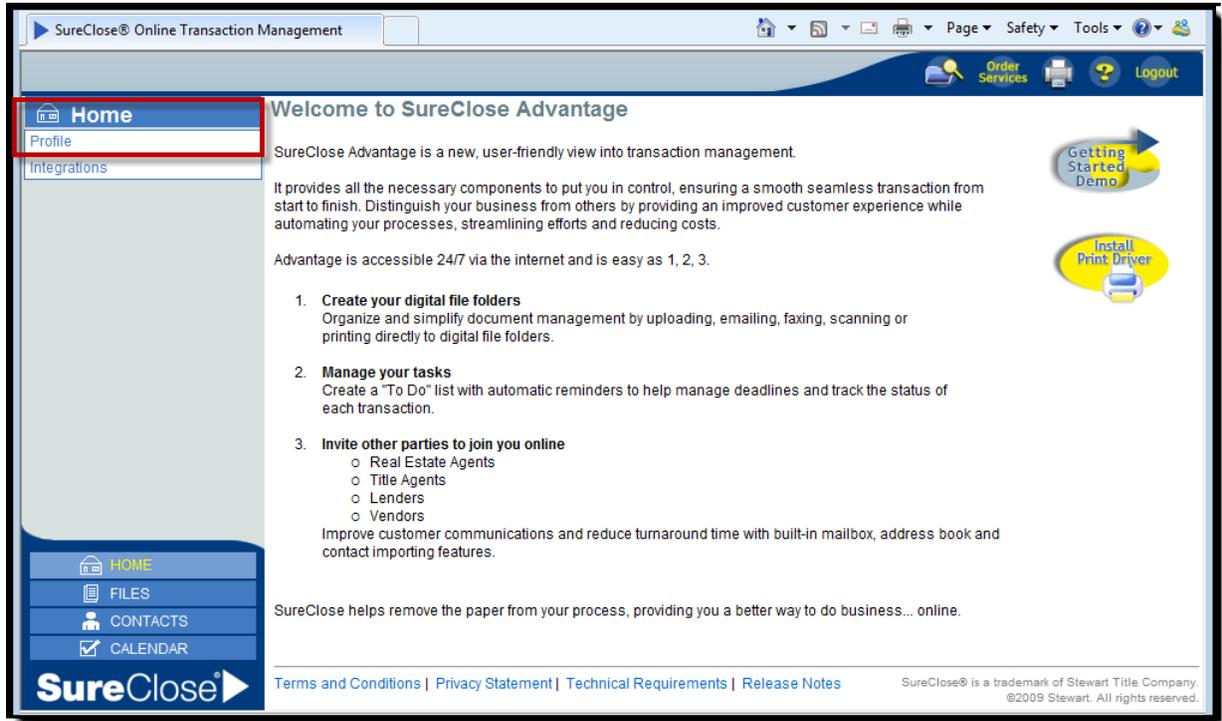


Figure 2

Directly under the **Home** tab is the **Profile** tab which takes you to the **Profile** page (Figure 3 - Page 12).

Profile Page

The **Profile** page enables you to update your information in SureClose® (Figure 3). The initial information entered for you in SureClose® comes from your local board and the company to which you are affiliated. The **Profile** page is divided into the following sections:

- Personal Information
- Contact Information
- Preferences
- Security Settings

The screenshot shows the SureClose Profile Page for user '42 Agent'. The page is divided into several sections: Personal Information, Contact Information, Preferences, and Security Settings. The user's profile picture is visible, and the company is listed as 'AAR Training Company'. The contact information includes an address in Phoenix, AZ, and an email address '42agent@aaronline.com'. The preferences section shows notification settings for new files and tasks, and the starting page is set to 'File Search'. The security settings section includes links to change the username and password.

42 Agent

Personal Information

Prefix:

First Name: 42 * MI: Last Name: Agent * Suffix:

Company: AAR Training Company

Title:

Contact Information

Address Line 1: 255 E Osborn Rd

Address Line 2:

Zip: 85012 City: Phoenix State: AZ

Office Phone: (866) 833-7357 Home Phone: Cell Phone:

Email: 42agent@aaronline.com Email 2: Fax: (602) 351-2474

Preferences

Notify About: New Files Tasks Send Notifications To: Email

Starting Page: File Search Distribute Documents To: Email

File Description: List by Address Send Messages To: Email

Show File Type: (C=Closing, L=Listing, G=Generic)

Always expand File Details

Always expand Party Details

Local Time Zone

Security Settings

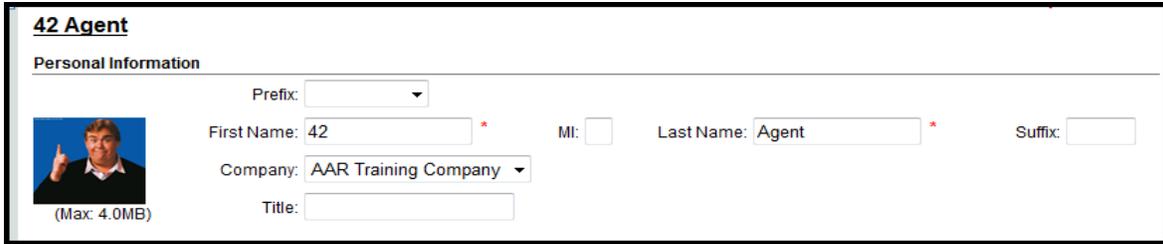
[Change Username](#)

[Change Password](#)

Figure 3

Personal Information

The **Personal Information** section contains your name (including prefix and suffix), your company, your title, and your picture (Figure 4).



The screenshot shows a form titled "42 Agent" with a sub-section "Personal Information". On the left is a photo of a man with a "Max: 4.0MB" label. The form fields include: Prefix (dropdown), First Name: "42" (with an asterisk), MI (checkbox), Last Name: "Agent" (with an asterisk), Suffix (text), Company: "AAR Training Company" (dropdown), and Title (text).

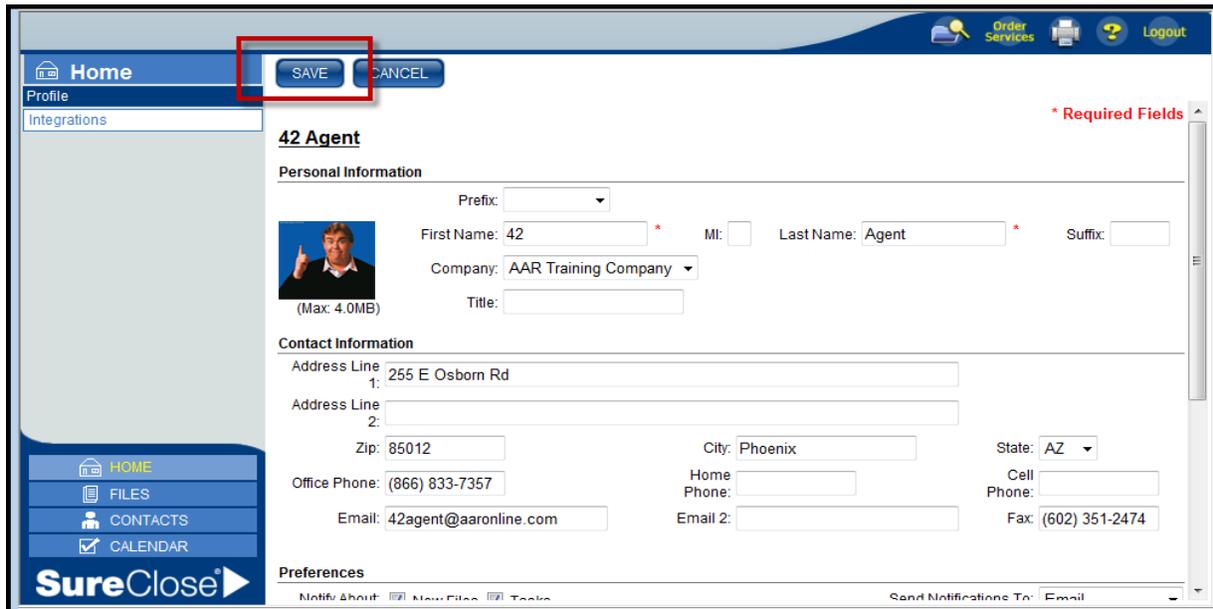
Figure 4

You can change or update your name by typing over the information in the *First Name*, *MI*, *Last Name*, or *Suffix* fields. You can add a prefix to your name by selecting the correct prefix in the *Prefix* drop-down menu. Click the **Save** button at the upper left side of the screen to save your changes.

Use the following steps to add your picture to your profile (Figure 5):

1. Click on the *Add Photo* hyperlink in the photo box to see a **Browse** window. (Or, to replace a photo you've already attached, simply click on the existing photo to replace.)
2. Find your photo on your computer.
3. Select the photo you want to attach and click the **Open** button. The photo attaches to your profile.

NOTE: The photo must be no larger than 4.0 MB.



The screenshot shows the full user profile page for "42 Agent". The "Personal Information" section is visible, with the "SAVE" button highlighted by a red box. Below this section is the "Contact Information" section with fields for Address Line 1 (255 E Osborn Rd), Address Line 2, Zip (85012), City (Phoenix), State (AZ), Office Phone ((866) 833-7357), Home Phone, Cell Phone, Email (42agent@aaronline.com), Email 2, and Fax ((602) 351-2474). A "Preferences" section is at the bottom with "Notify About" checkboxes for "New Files" and "Tasks", and a "Send Notifications To" dropdown set to "Email". A sidebar on the left contains navigation links for HOME, FILES, CONTACTS, and CALENDAR, along with the SureClose logo.

Figure 5

4. Click the Save button to save your changes and return to the Personal Information section.

Contact Information

The **Contact Information** section includes your company address, telephone numbers, and email addresses. The address and office telephone are controlled by the company with which you are affiliated (Figure 6).

Contact Information		
Address Line 1:	255 E Osborn Rd	
Address Line 2:		
Zip:	City:	State:
85012	Phoenix	AZ
Office Phone:	Home Phone:	Cell Phone:
(480) 304-8932		(602) 758-8932
Email:	Email 2:	Fax:
susanch@aaronline.com		(602)351-2474
SC Messages:	STrainer@mysureclose.com	

Figure 6

You can add an additional email address, your cell phone number, and a fax number to this section. Be sure to click the **Save** button on the upper left side of the screen when you have finished making your changes.

NOTE: *You do not need to enter parentheses or dashes when entering a telephone number, SureClose® enters those for you automatically.*

Preferences

The **Preferences** section enables you to specify the following information (Figure 7):

- The first page you want to see when you log in to SureClose® Advantage.
- Where you want to receive task notifications, document notifications, and messages.
- How you want your files listed.

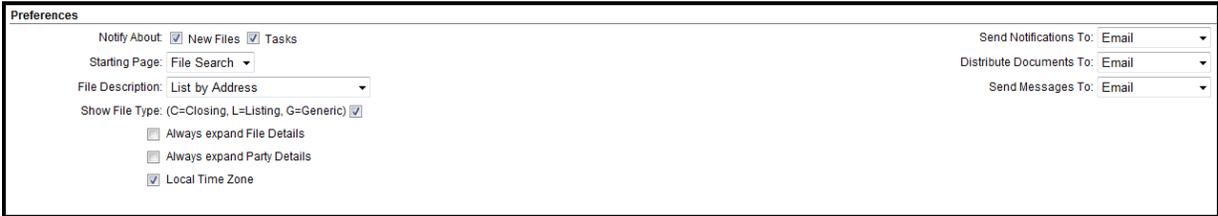


Figure 7

Use the following steps to make changes to your preferences:

1. Select the appropriate page you want to see when you log in to SureClose® from the Starting Tab drop-down menu. The **Files** page is recommended.
2. Select the appropriate format for how you want your files listed from the *File Description* drop-down menu. The choices are:
 - List by Address
 - List by Buyer/Seller
 - List by File Number
 - List by File Number/Address
 - List by File Number/Buyer/Seller
 - List by MLS Number/Address
 - List by MLS/File Number
 - List by Seller/Buyer
3. Click the *Show File Type* check box to see the type of file to the left of the address when displaying a list of your files.
4. Select the email address to which you want notifications, documents, and messages sent from the *Send Notifications To*, *Distribute Documents To*, and *Send Messages To* drop-down menus, respectively.
5. Click the *Local Time Zone* check box. This will allow the system to display your local time zone in the **Activity Log** and **Task** pages in each file. (Note: The file History will always record file activity in the PST time zone.)
6. Click the **Save** button at the top left side of the screen to save your changes.

Security Settings

The **Security Settings** section enables you to change your username or your password (Figure 8).



Figure 8

You can change your SureClose® username by clicking on the *Change Username* hyperlink to see Figure 9. Enter a new username and your current password and click the **Save** button on the upper left side of the screen to save your changes (Figure 9).



Figure 9

If your chosen Username has already been assigned, you receive a message asking you to enter a different Username (Figure 10).

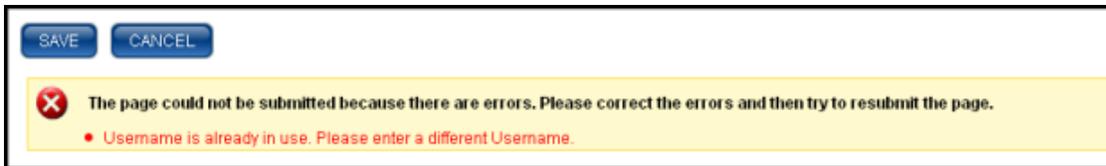


Figure 10

You can change your SureClose® password by clicking on the *Change Password* hyperlink to see Figure 11. Enter your current password, your new password, and re-enter your new password (Figure 11). Click the **Save** button at the upper left side of the screen to save your changes.



Figure 11

NOTE: *Your password must be at least 8 characters in length, contain at least one letter or number, one upper case letter, and cannot contain your first or last name, or the word password.*

Contacts Page

The **Contacts** tab takes you to the **Contacts** page (Figure 12). This page enables you to search for contacts that are added to your files as a party. You can perform the following functions on this page:

- Search for a contact.
- View the information of a particular contact.



Figure 12

Calendar Page

The **Calendar** tab takes you to the **Calendar** page (Figure 15 - Page 19). This page enables you to see your tasks in a list or calendar view. Upon your first login, you will need to set this area up with your preferences via the Manage Views option (Figure 13 & Figure 14). You can set up multiple views, i.e. a list of files which do not have PTD conditions met, etc. (See also **Tasks** - Page 45)

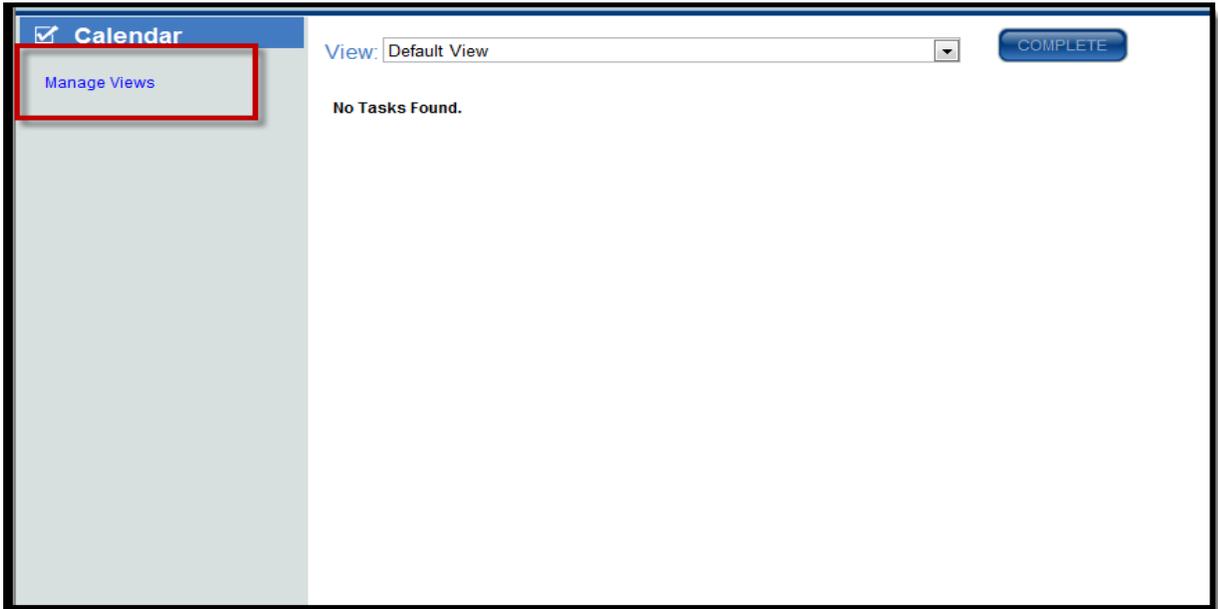


Figure 13

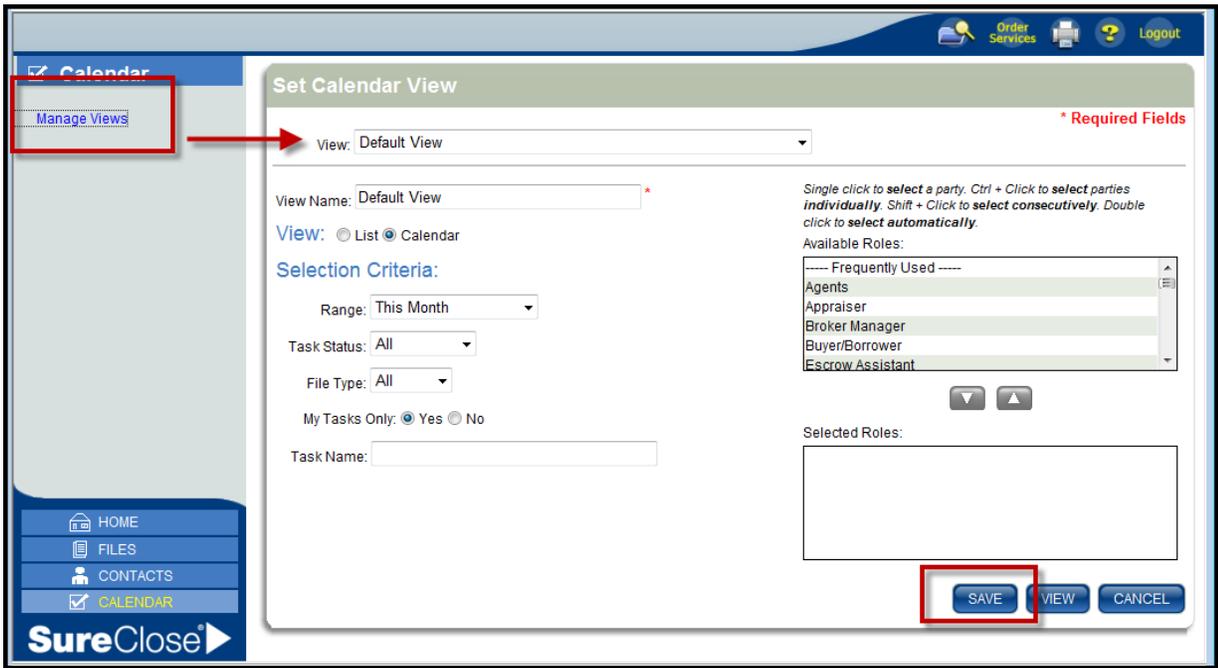


Figure 14

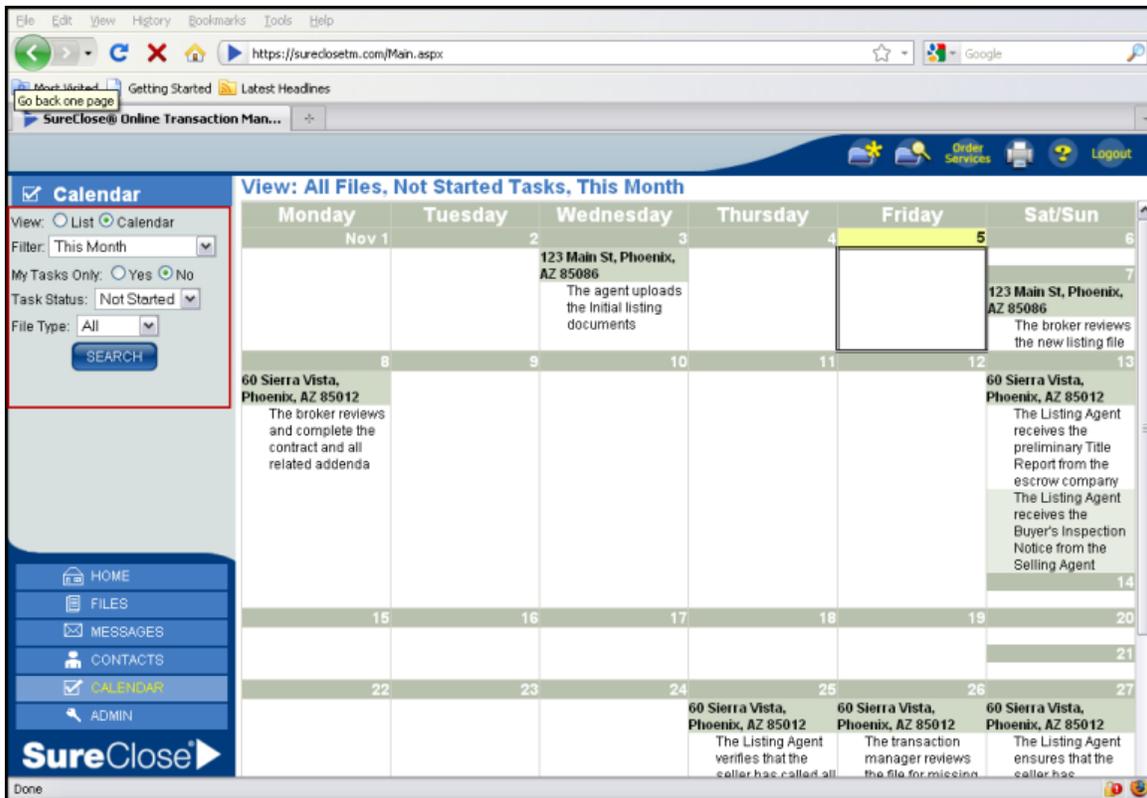


Figure 15

Once your default Calendar view has been created, you can change the view for your calendar by using the following steps:

11. Click the *List* radio button in the **Navigation** pane to see your calendar in a list view or click the *Calendar* radio button to see your calendar in calendar view.
12. Choose the span of time for the calendar from the *Filter* drop-down menu. Your choices are:
 - Today
 - This week
 - This business week
 - This month
 - Up to today
 - Custom (choose your own date span)
13. Click the *Yes* radio button to see your tasks.

14. Choose the status of the tasks you want to see from the *Task Status* drop-down menu. The choices are:
 - All
 - Not started
 - In progress
 - Completed
15. Choose the types of files you want displayed from the *File Type* drop-down menu. The choices are:
 - All
 - Closing
 - Generic
 - Listing
16. Click the **Search** button to display your calendar.

Chapter 2.

Files Page

The **Files** page enables you to search for and open your files within SureClose® Advantage. When you click on the **Files** tab, you see the **Summary** page of the last file you accessed. You also see a list of the ten most recent files you have opened in the **Navigation Pane** on the top left corner of your screen.

Files that have not had activity for 90 days or more are automatically **Archived**. If you are searching for a file and it does not show in your search results, check mark the **Archived Files** box and repeat the search (Figure 16 - Page 22).

You can search for any existing file by clicking the **Search File** button () on the upper right side of your screen. The **Search File** screen displays (Figure 16).

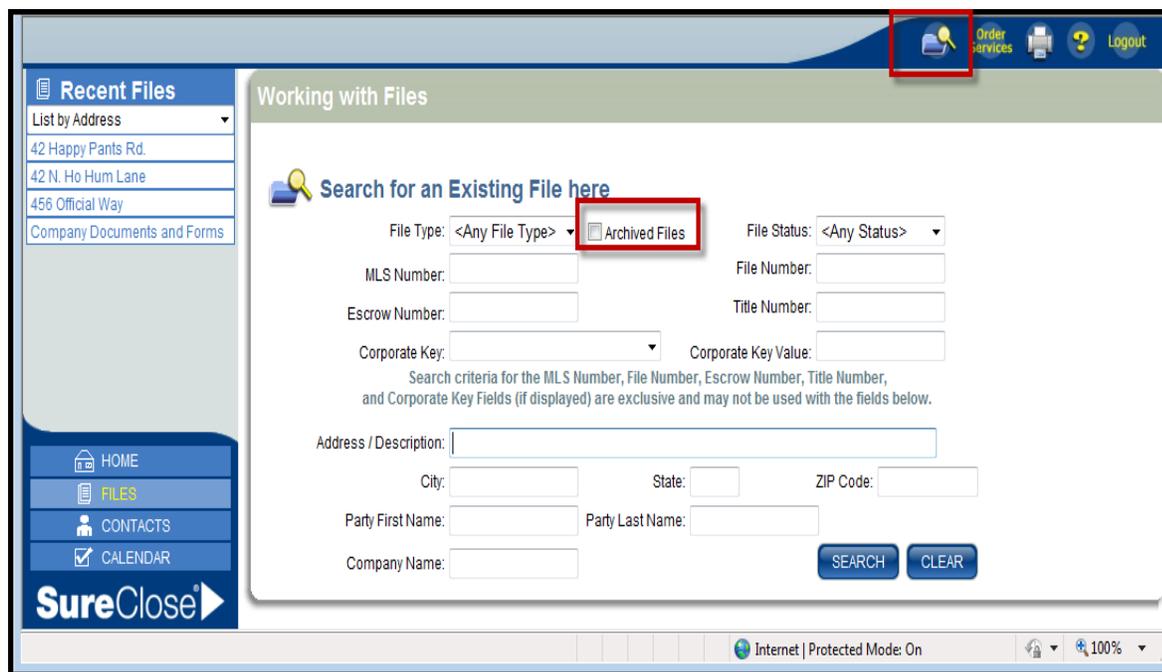


Figure 16

You can limit the search by any of the criteria on the screen (for example, MLS number). Click the **Search** button to see a list of your files (Figure 17).

Search Results (6 Files found.)

Property Address / Description	File Type	File Status	File#	Escrow#	MLS#
1234 Anywhere Avenue (View Only) for students Sun City, AZ 85373	Closing	Open	08-0200	08-0001	20080123
Broker Review Test Phoenix, AZ 85012	Closing	Open			
123 Closing File Phoenix, AZ 85012	Closing	Open	11-0103	213654	904356
123 Main St Phoenix, AZ 85012	Closing	Open	09-1234	09-0987	12345678
60 Sierra Vista Phoenix, AZ 85012	Closing	Open	60	10-123-SVA	123
7510 W Wandering Coyote Drive Marana, AZ 85741	Closing	Open	11-0104		21028338

Figure 17

You open a file in the list by clicking on the address. The file opens to the **Summary** page (Figure 18 - Page 23).

Summary Page

You can view the information on the **Summary** page but you cannot modify it. The **Summary** page is separated into three sections (Figure 18):

- *General* – includes the property address, the file type, and the file status.
- *File Details* – includes the pertinent dates of the file, the property description, reference numbers, and whether notifications and reminders are enabled.
- *Party Details* – shows other parties on the file and their roles.

The screenshot shows a web application interface for 'MESSAGE PARTY'. On the left, there is a 'Recent Files' sidebar with a list of addresses including '42 Happy Pants Rd.', '456 Official Way', '42 N. Ho Hum Lane', and 'Company Documents and Forms'. The main content area is titled 'MESSAGE PARTY' and shows details for the selected file '42 Happy Pants Rd.'. At the top right of the main area, there are links for 'Documents | Tasks | Activity Log' and a 'Logout' button. The main content is divided into three sections: 'General', 'File Details', and 'Party Details'. The 'General' section contains 'File Type: Closing' and 'File Status: Open', both with asterisks indicating required fields. The 'File Details' section contains a property address form with fields for 'Property Address Line 1' (filled with '42 Happy Pants Rd.'), 'Property Address Line 2', 'ZIP Code' (filled with '85012'), 'City' (filled with 'Phoenix'), and 'State' (filled with 'AZ'). There is also a small house icon and '(Max. 4.0MB)' text. The 'Party Details' section is currently empty. At the bottom left, there is a navigation menu with 'HOME', 'FILES', 'CONTACTS', and 'CALENDAR' buttons, and the 'SureClose' logo.

Figure 18

You can view (but cannot change) the following information by double-clicking on a party:

- *Personal Information* – includes the person's name, title, and role.
- *Contact Information* – includes the person's address, phone numbers, and email addresses.
- *Preferences* – includes whether they want to be notified about new files or tasks.
- *Permissions* – includes their role on the file and their security access for the file.

You can send a message to any party by using the following steps:

1. Highlight the party by clicking on their name. Click the *Message Party* button at the top of the page. (Figure 19).

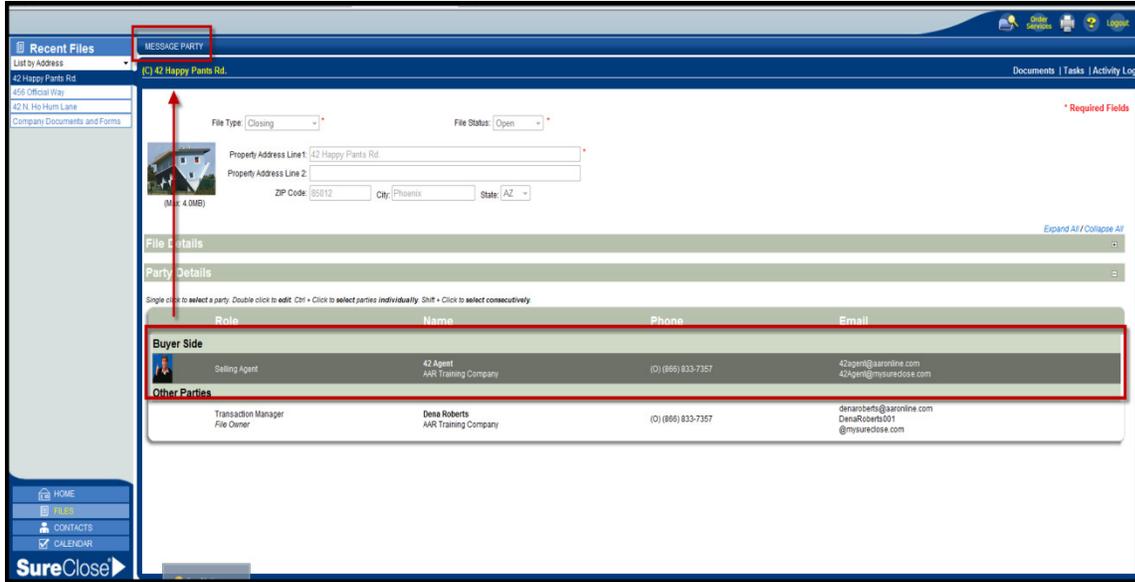


Figure 19

2. You will see this Message screen (Figure 20).

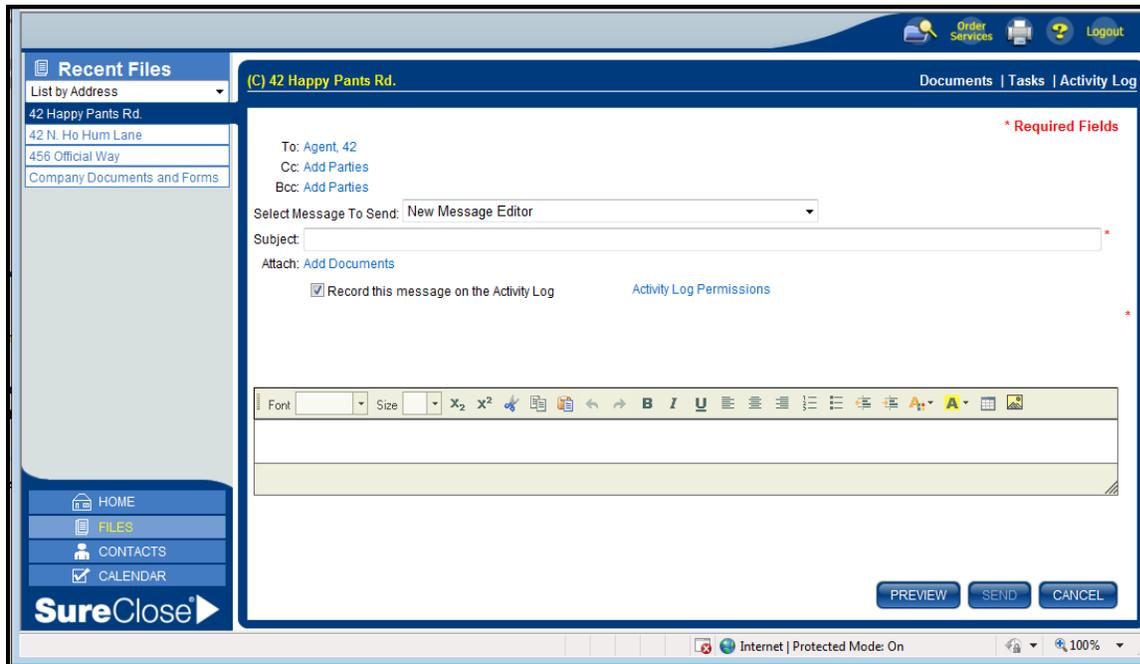


Figure 20

3. To add additional recipients, click the *To* field and select the parties whom you want to message (Figure 20). Once all parties are selected, press the OK button.

4. Choose a pre-written message from the *Select Message to Send* drop-down menu or select *New Message Editor* from the list to write your own message. These messages are created by your office administrator.
5. Check the check box to the left of *Record this Message on the Activity Log* to save the message in the history of the file.
6. Write your message. Use the toolbar above the message screen to edit font, color, etc.
7. Click the **Send** button on the lower right side of the screen to send the message. You return to the **Summary** page of the file.

There are three hyperlinks on the upper right side of page that you can use to go to the **Documents**, **Tasks**, or **Activity Log** pages. You can also hover your mouse over the address in the Recent Files list to see the same hyperlinks.

Documents Page

The **Documents** page is separated into logical areas with folders (in bold lettering, bordered in pale green) (Figure 21). Under each folder are placeholders. There is a placeholder for each document you need to add to the transaction file. When a placeholder has a document attached, you will see a paper clip icon to the left of the placeholder name.

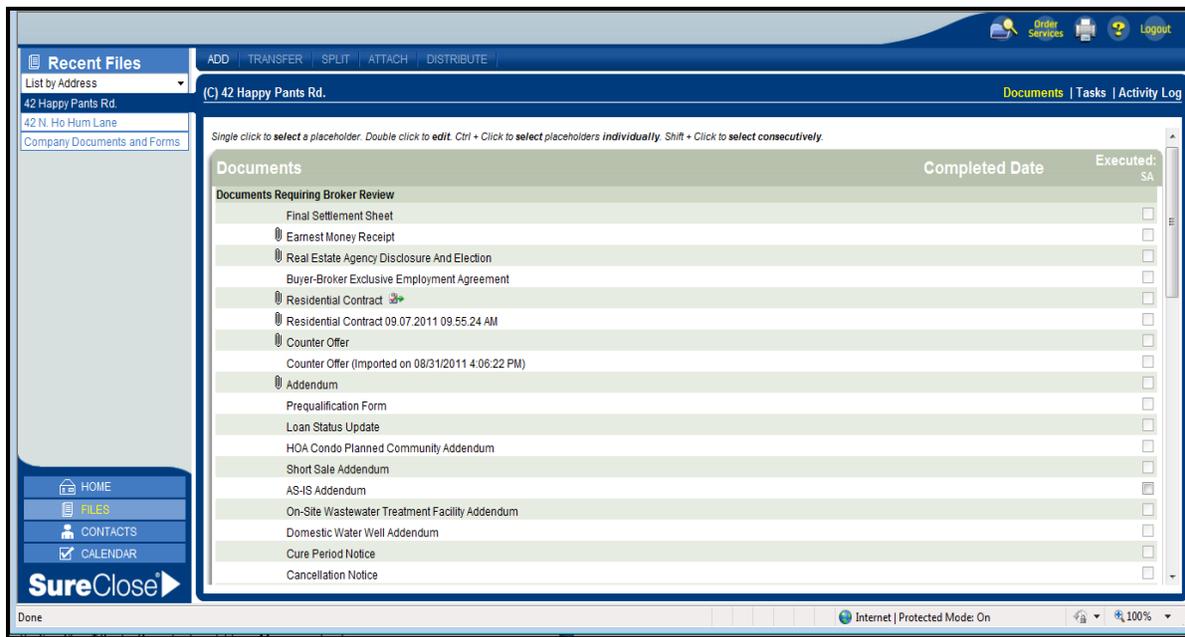


Figure 21

If you see a clipboard with red checkmark icon to the right of a document, the placeholder is linked to a task. You can hover your mouse over the clipboard to see the details of the link.

There are three ways to attach documents to a SureClose® file when using Advantage:

- Using the **Attach** button on the Documents page.

- Using the **Split** button on the Documents page.
- Using the SureClose® **Printer Driver** (not available on Mac computers).

Uploading Documents Using the Attach Button

You can use the **Attach** button to attach a single document to a placeholder.

Use the following steps to attach a document using the **Attach** button:

1. Highlight the placeholder by clicking on the placeholder name and click the **Attach** button (Figure 22).

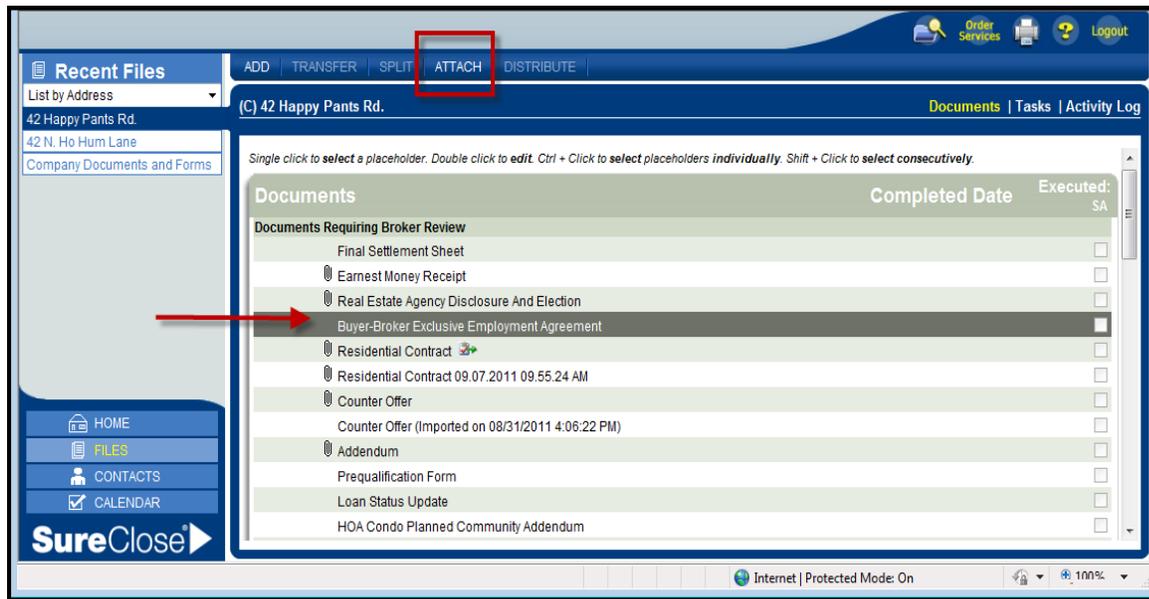


Figure 22

2. You see the Attach screen (Figure 23).



Figure 23

Choose to attach the document from one of the following sources:

- My computer (most common)
- Messages (not used)

- File - You can attach documents from one of your other files, i.e. a Buyer Advisory for a Buyer purchasing multiple properties.
 - Forms (not used)
3. Click the **Browse/Choose File** button to search your computer for the document. Your computer opens up a second window for you to find the document (Figure 24).

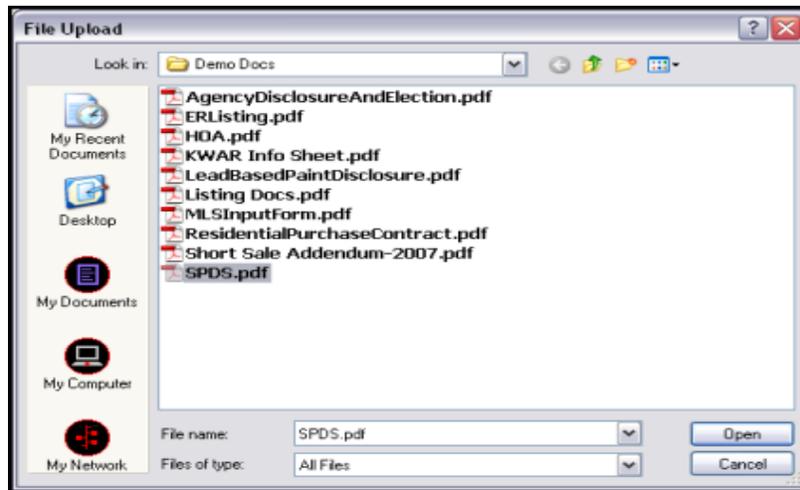


Figure 24

4. Select the appropriate document and click the **Open** button.
5. Click the **Save** button to attach the document to your file. You receive a message stating that your document has been successfully attached to the file. You can view your attached documents anytime by clicking on the paperclip to the left of the document name (Figure 25).

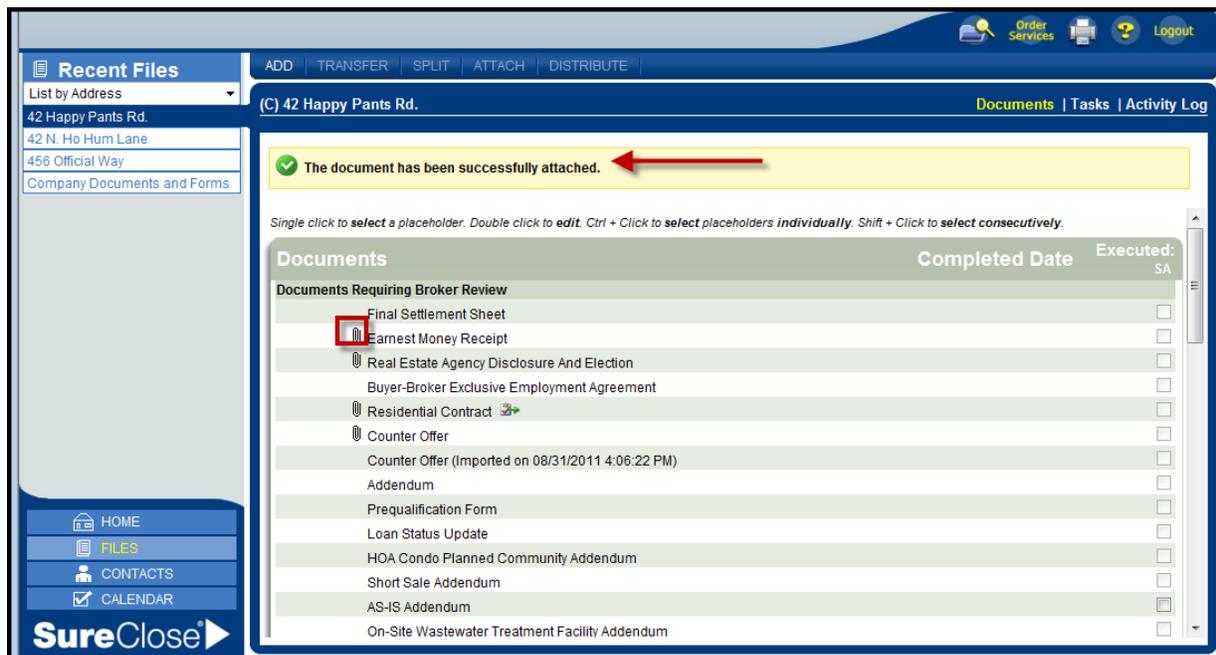


Figure 25

You can select a placeholder that already has a document attached. SureClose® adds an additional placeholder for the new document and appends it with the date and time of import. When you do so, you will receive the below error message (Figure 26). This error means that SureClose® has created a new placeholder for you, but did not attach the actual document. You simply need to return to the documents page, locate the NEW placeholder, and re-attach the document.

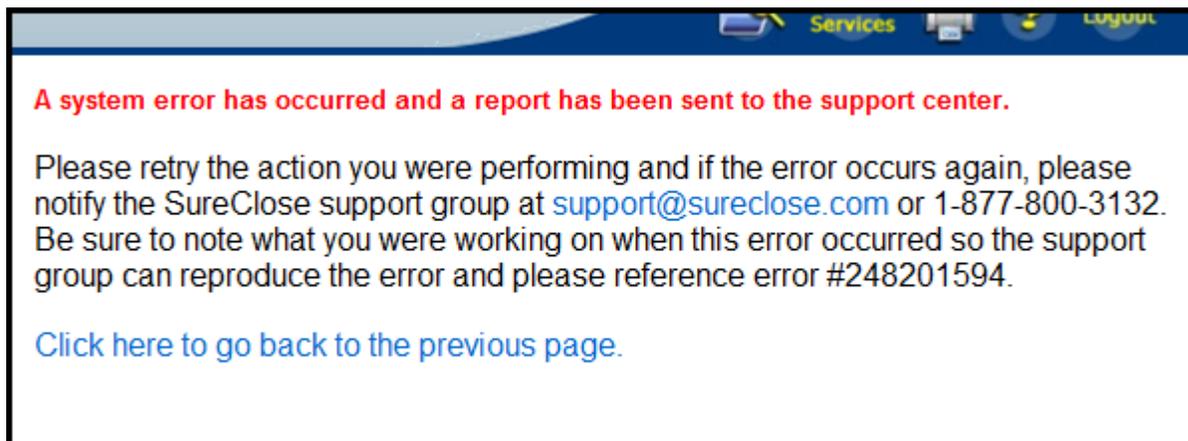


Figure 26

Attaching Documents Using the Split Button on the Documents Page

You can use the **Split** button to attach documents to your transaction file when you have multiple documents scanned together. The **Split** button enables you to split the documents and attach them to their correct placeholders. You must get the document into your **Documents** page before you can split it (Figure 27).

IMPORTANT: You cannot use the **Split** Function or **Printer Driver** for electronically signed Documents. You must attach these directly to the placeholder.

You can attach your documents to your **Documents** page using one of the following methods:

- Attaching the file directly into the *To be Split or Miscellaneous* placeholder on the file's Documents page (See page 26).
- Use the Advanced tab on the SureClose® **Printer Driver** to attach a copy of your document to the *To be Split or Miscellaneous* placeholder on the file's Documents page (Figure 27). (See page 36).

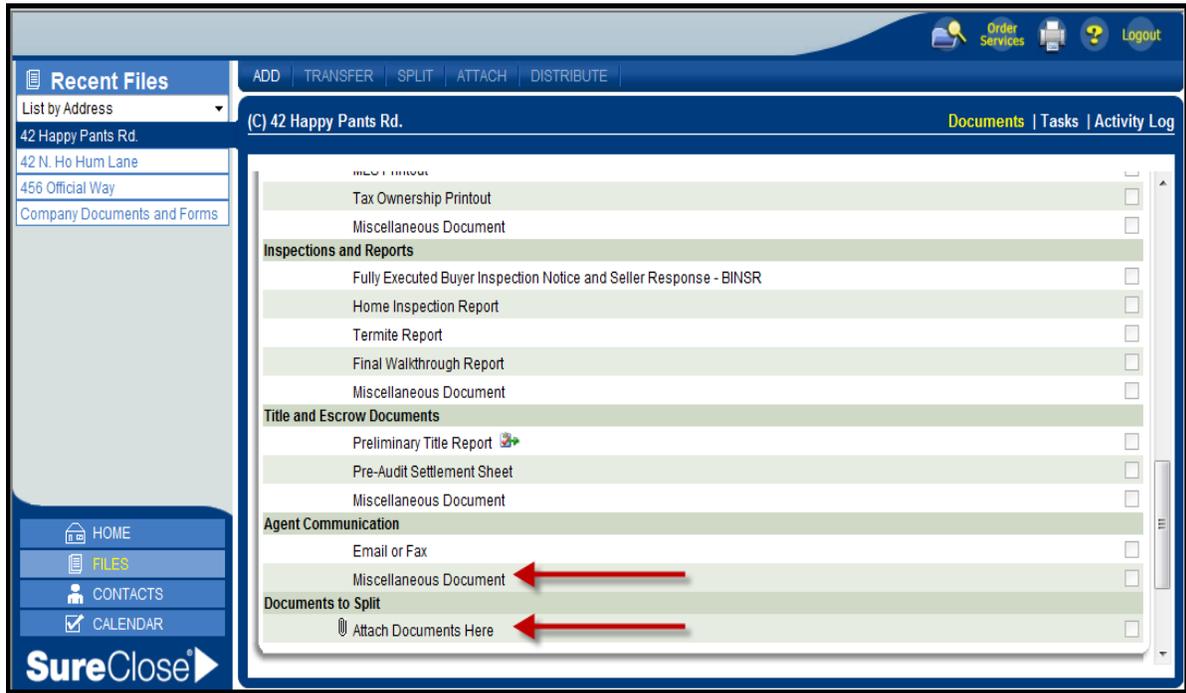


Figure 27

Split Button

Use the following steps to split a document to its correct placeholders:

1. Once the document is attached to the *To be Split* or *Misc.* placeholder, click once on the placeholder to highlight, then click **Split** at the top of your screen (Figure 28). Note: you can also access the **Split** function from the document preview screen if you accidentally click on the paperclip as opposed to the placeholder name.

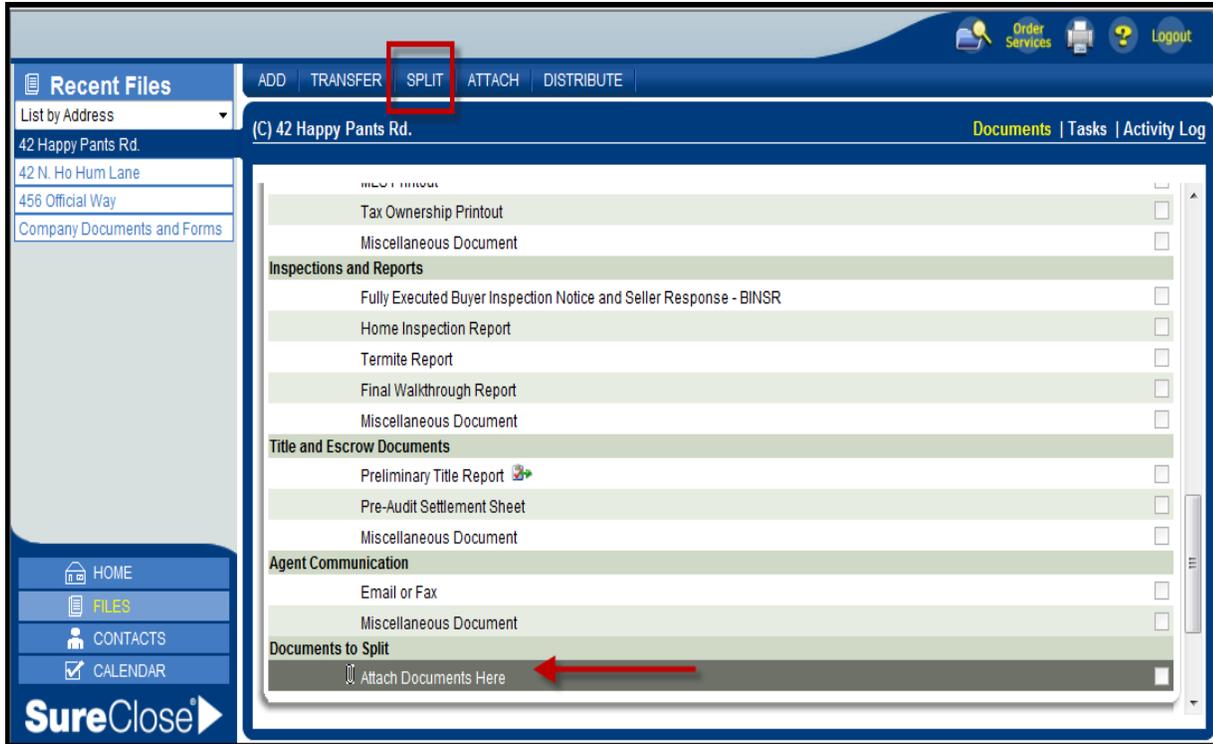


Figure 28

- Your screen splits into two sections (Figure 29). The thumbnails of the document are on the left and the current file current file you are working in with its list of document placeholders is on the right.

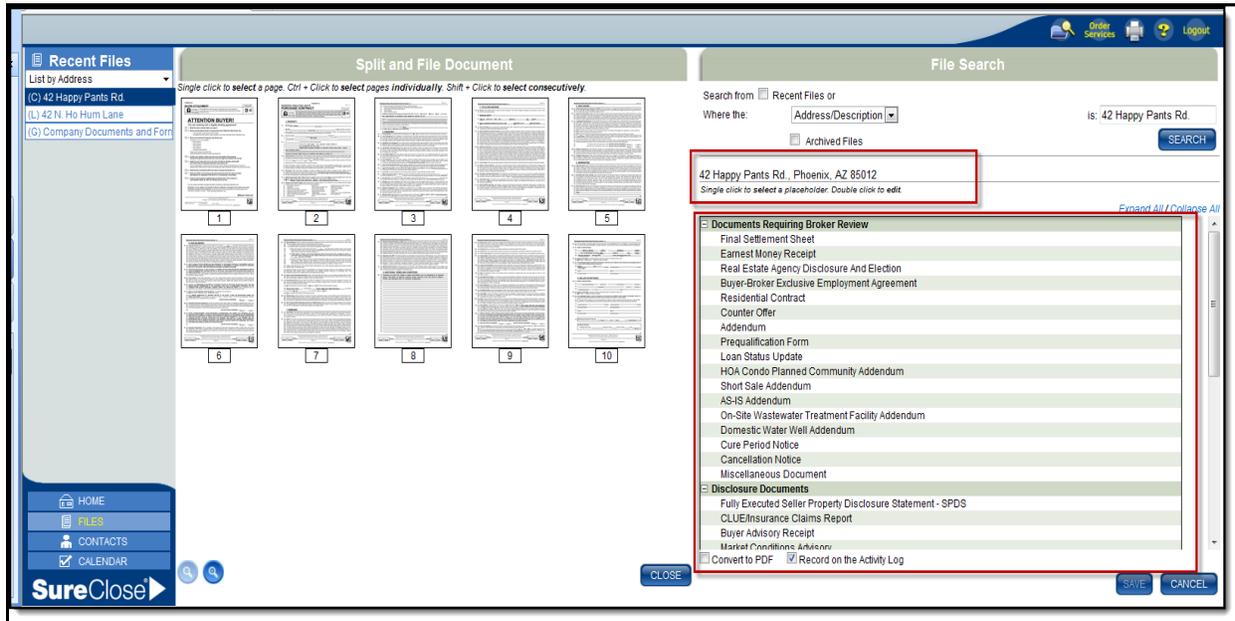


Figure 29

- You can also file these documents to a different file by using the **File Search** function (Figure 30).
- Once you find your file, click on the address.
- The file opens to the **Documents** page and you see your folders and placeholders (Figure 30).

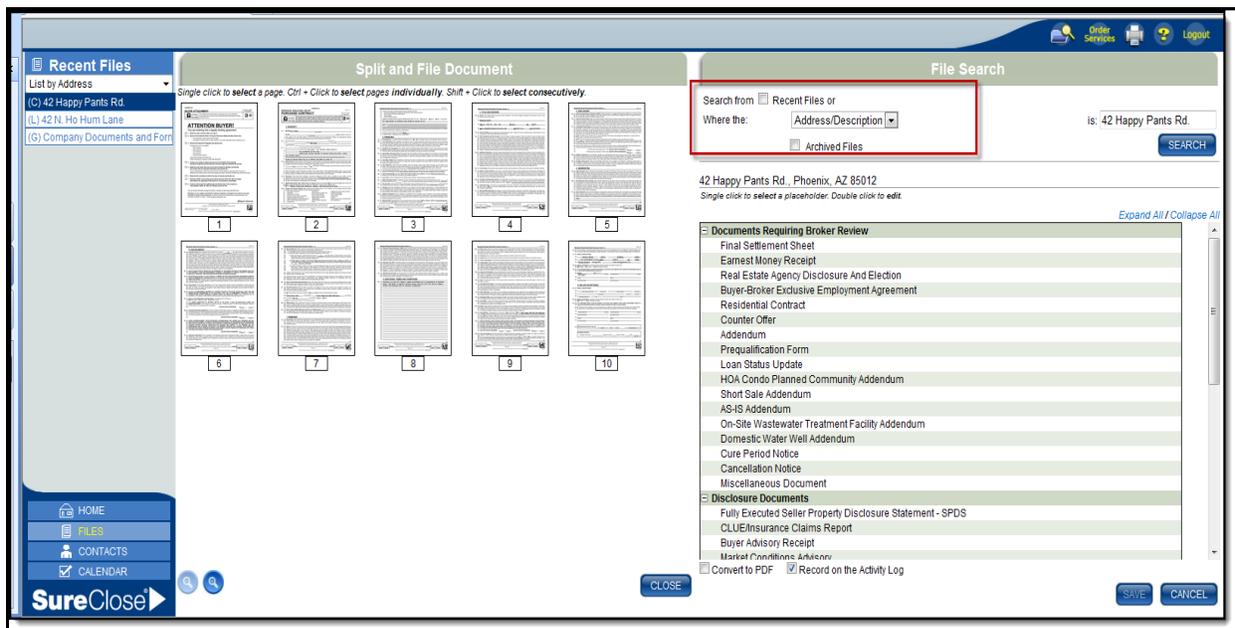


Figure 30

6. Highlight the page or the range of pages you wish to split and attach to your first placeholder by clicking the first page while holding down the **Shift** key and then clicking the last page of the range (Figure 31). If the pages are not in the correct order, hold down the **Control** key and click on the pages in the order that they should be placed into the placeholder.

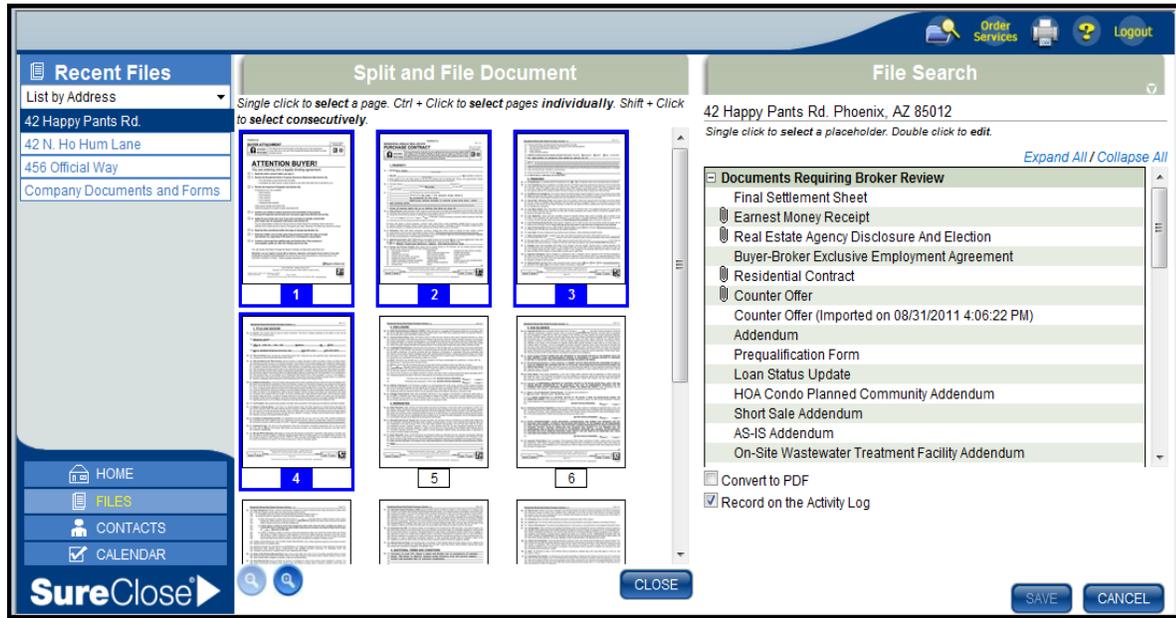


Figure 31

7. Click the appropriate placeholder on the right side of the page. The placeholder highlights in yellow (Figure 32).

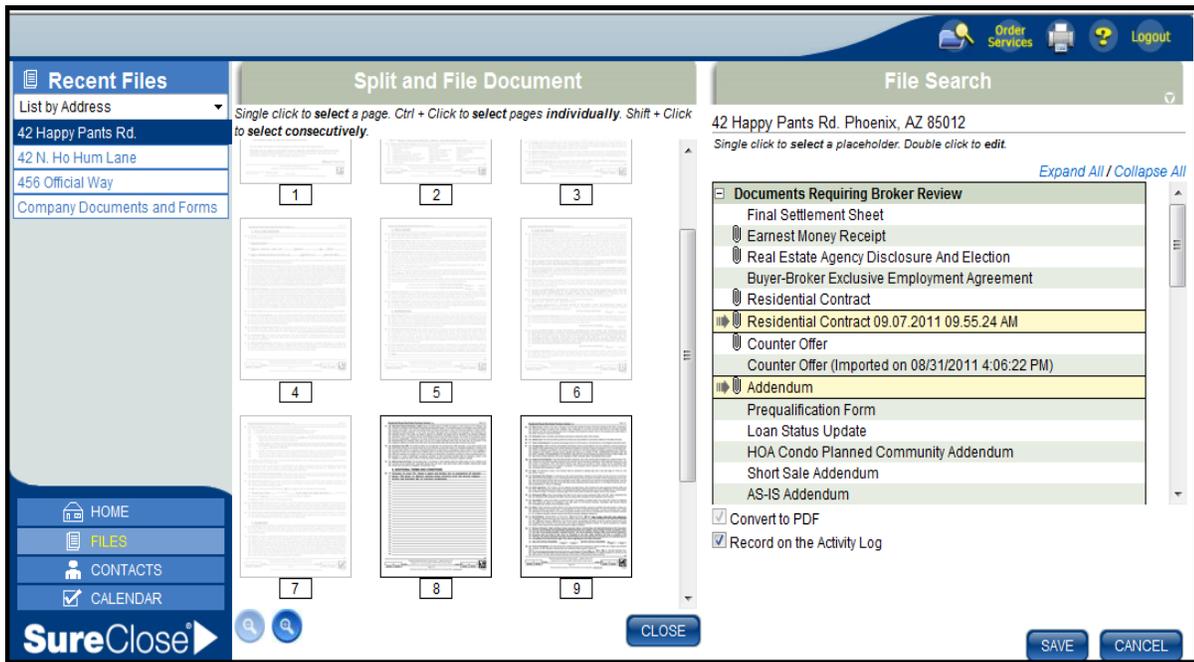


Figure 32

8. Repeat steps 5 and 6 until you have split the entire document and then click the **Save** button (Figure 32 - Page 32). You receive a message stating that your changes have been saved (Figure 33).

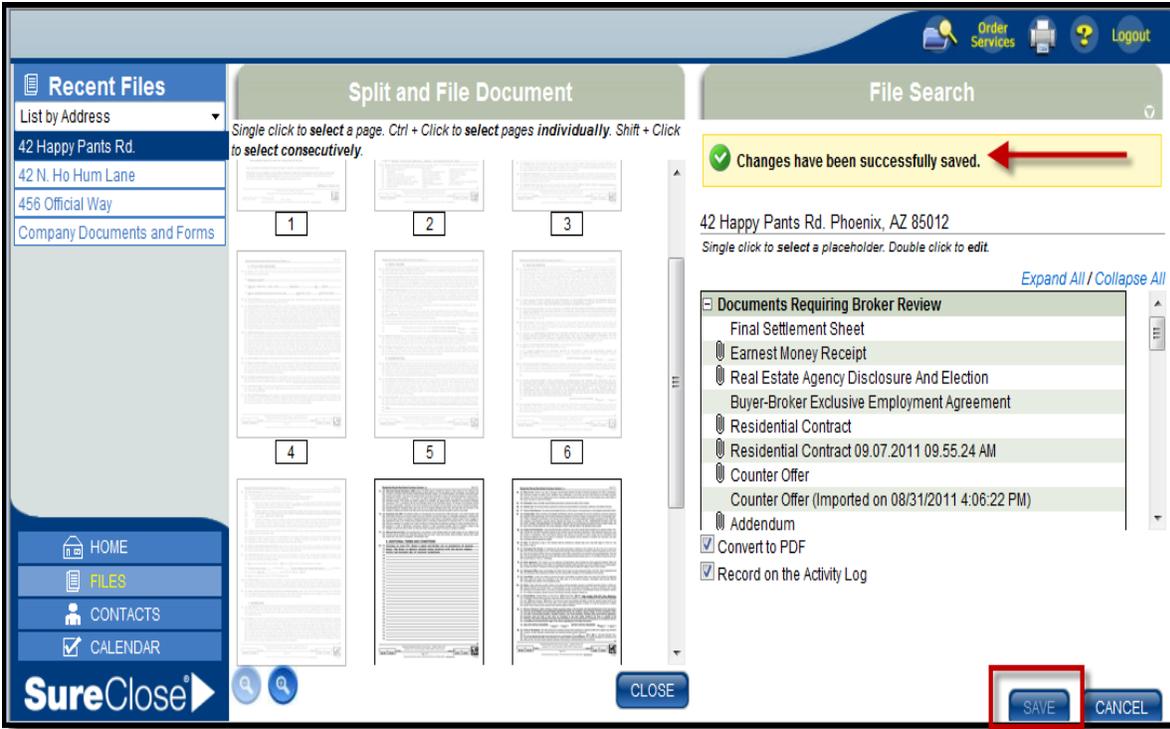


Figure 33

Note: Once a document has been filed into the placeholder, the thumbnail becomes light grey. You can still split these grayed out documents from this screen if you are splitting them into multiple files or if you have filed into the wrong placeholder.

Download the Printer Driver

***NOTE:** *The SureClose® Printer Driver cannot be installed on Mac computers. Also, you cannot use the Printer Driver to upload electronically signed documents. These must be attached directly to the placeholder within SureClose® .*

Use the following steps to install the SureClose® Printer Driver on your computer:

1. Click on the **Start** button in the lower left corner of your **Windows** screen.
2. Right click on Computer (or My Computer) to see a menu of options.
3. Click on Properties to see the **System Information** window for your computer.
4. Read through the properties to see if you have a 32-bit or 64-bit computer.

NOTE: *If you have a computer running Windows XP, it is automatically a 32-bit computer.*

5. Close the **System Information** window.
6. Go to www.aaronline.com/TM and click on the Downloads section.
7. Choose the appropriate printer driver for your computer. There are two – 32-bit and 64-bit.
8. Click on the **Open** button to download the file. The folder that opens contains installation instructions as well as the application file (Figure 34).

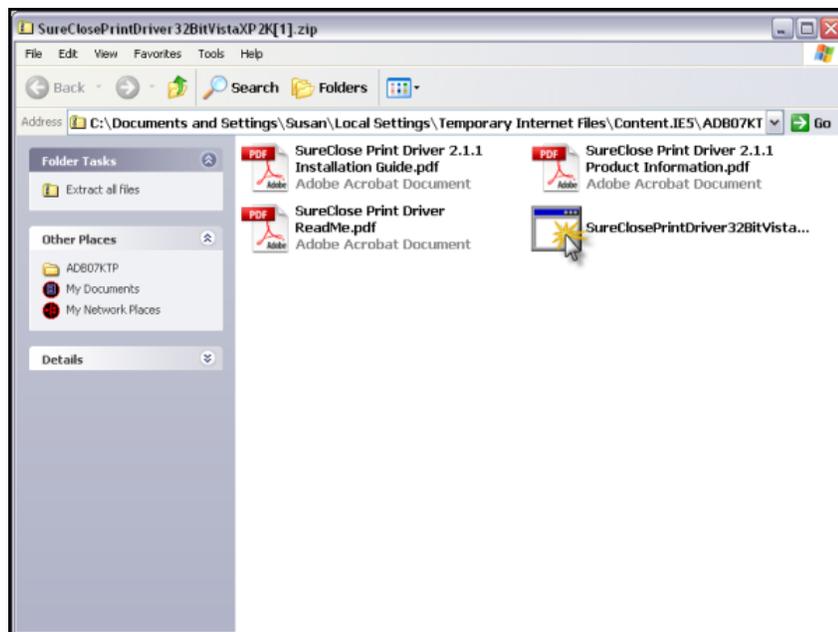


Figure 34

9. Double click on the application file as shown in Figure 8. A **Compressed (zipped) Folders Warning** window opens (Figure 35).



Figure 35

10. Click the **Run** button. A **File Download – Security Warning** window opens (Figure 36).



Figure 36

11. Click the **Run** button. The printer driver installs itself.
12. Click the **Finish** button when the printer driver has completed installation.

Using the Printer Driver (Cannot be used with Mac Computers)

You can use the Advanced tab of the SureClose® printer driver to attach any document directly into a placeholder in SureClose®.

IMPORTANT: You cannot use the **Split** Function or **Printer Driver** for electronically signed documents. You must attach these directly to the placeholder within SureClose®.

Use the following steps for the **Advanced** tab on the printer driver:

1. Open the document you want to attach and click the **Print** icon.
2. Select SureClose® upload from your list of printers (Figure 37).

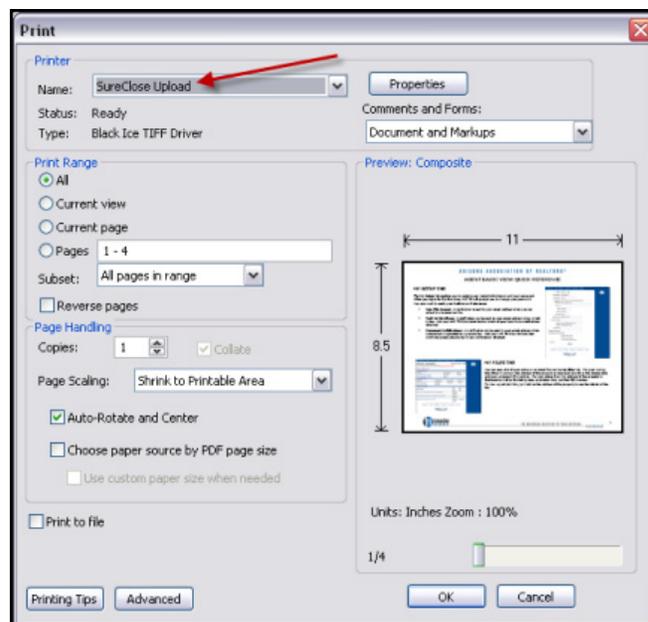


Figure 37

3. Click the **OK** button. The SureClose® **Print Driver** window displays (Figure 38).

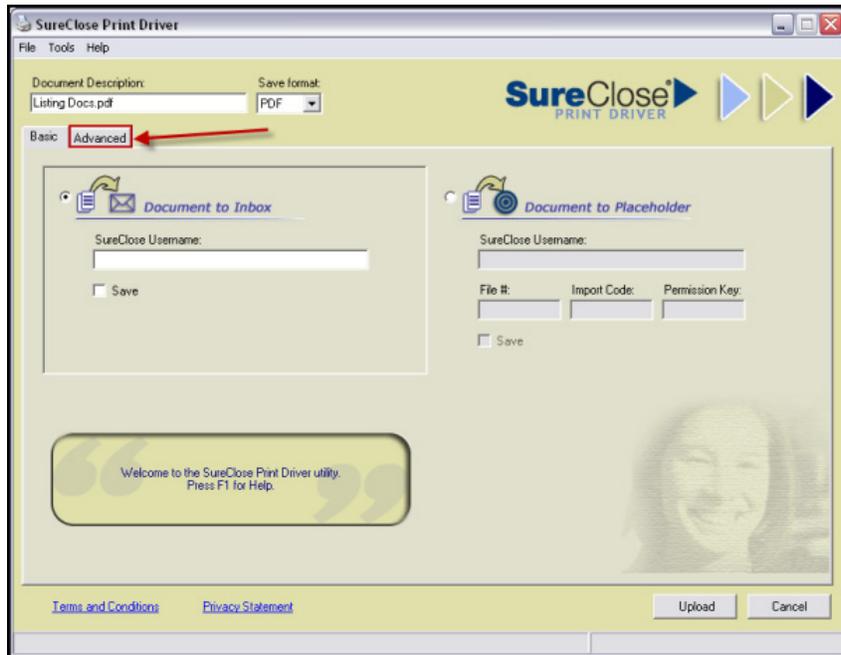


Figure 38

4. Select the **Advanced** tab on the SureClose® **Print Driver** window as shown in Figure 38.
5. Type your SureClose® username and password in the **Login** Details screen and click the **OK** button (Figure 39).

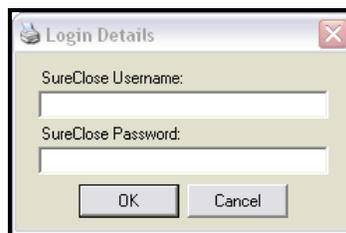


Figure 39

NOTE: *Once you have logged in, the SureClose® print driver leaves you logged in for two hours after your last document attachment.*

- Click the **Search** button to display a list of your files in the **Files** window (Figure 40). You can narrow the search by entering specific criteria in any of the search fields.

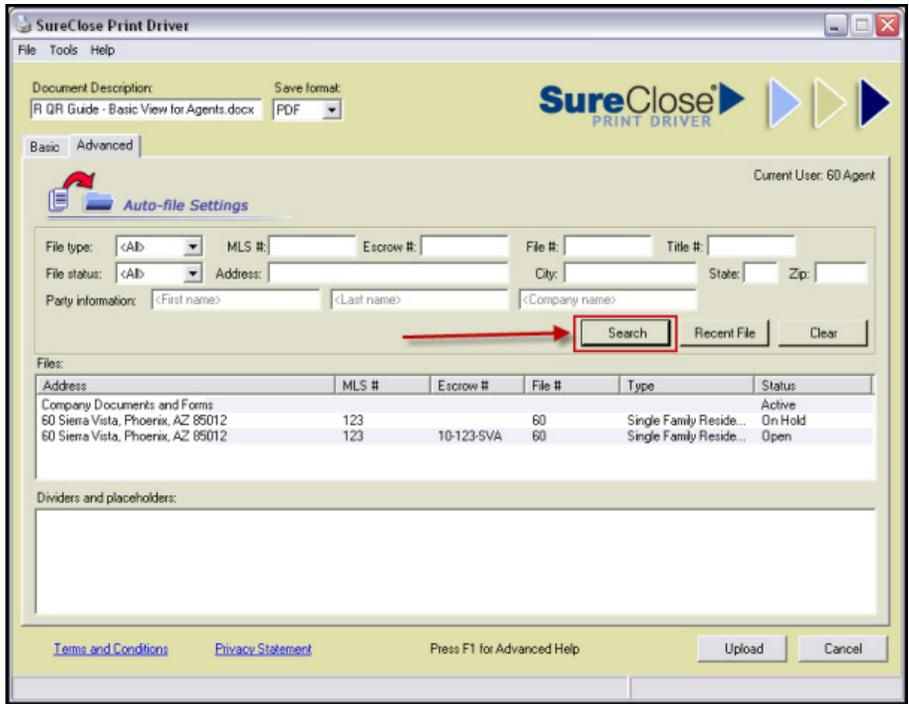


Figure 40

- Highlight the file to which you want to attach the documents by clicking on the address of the file in the **Files** field (Figure 41). You see the dividers for the file in the dividers and placeholders field.

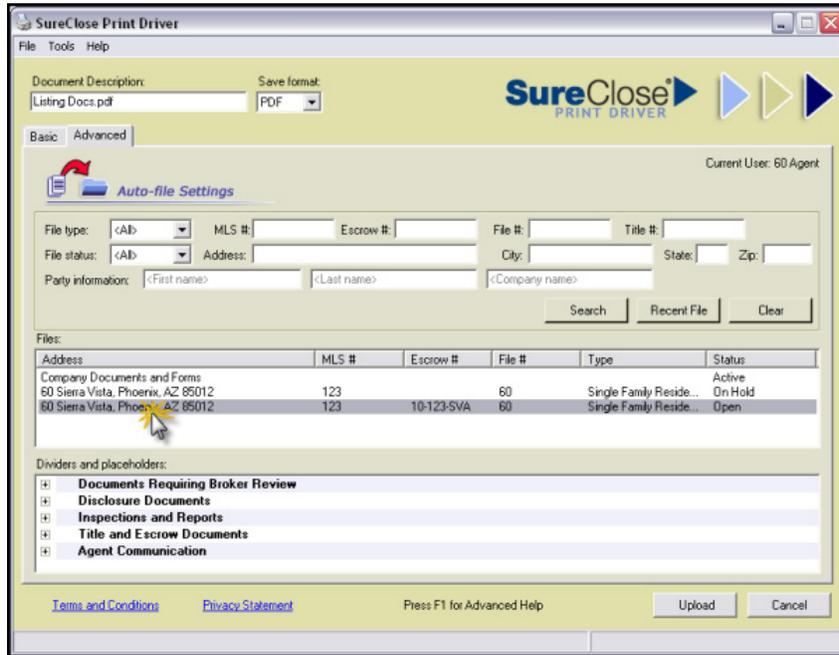


Figure 41

- Expand the divider in the dividers and placeholders field by clicking on the plus sign to the left of the divider to see the placeholders or by double clicking on the name of the divider (Figure 42).

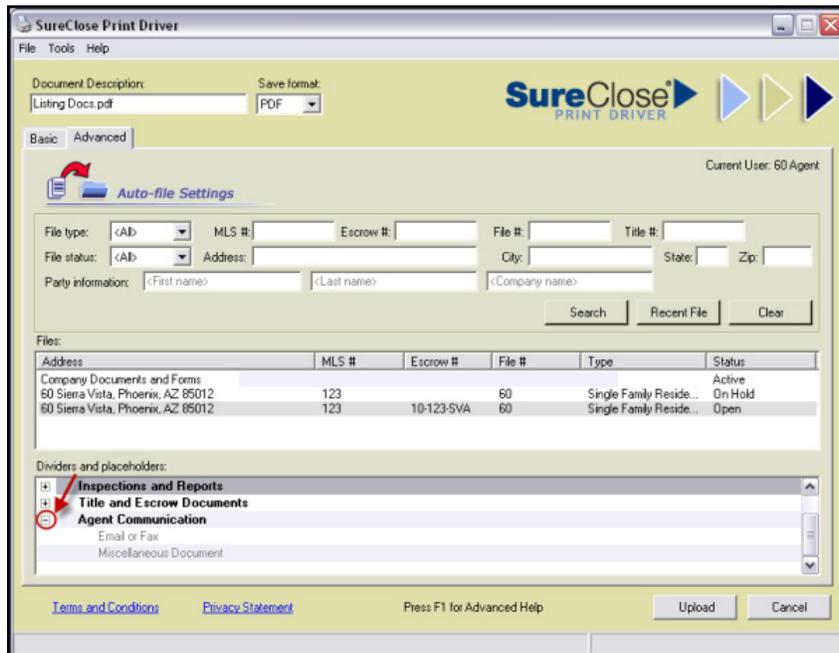


Figure 42

- Highlight the placeholder to which you want to attach the document by clicking once on the name (Figure 43).

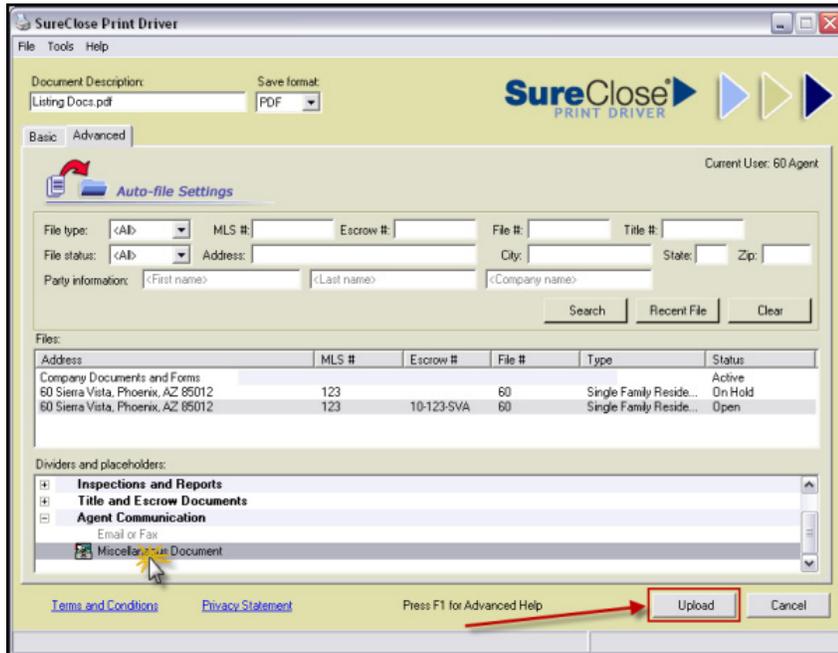


Figure 43

- Click the Upload button to attach your document. You receive a message stating that your document has been uploaded and auto-filed (Figure 44).



Figure 44

NOTE: *It can take 30 seconds to a minute for a document to actually be filed in the transaction file.*

If you choose a placeholder that already contains a document, SureClose® creates a new document placeholder directly below the original and appends the date and time of attachment to the new placeholder (Figure 45).

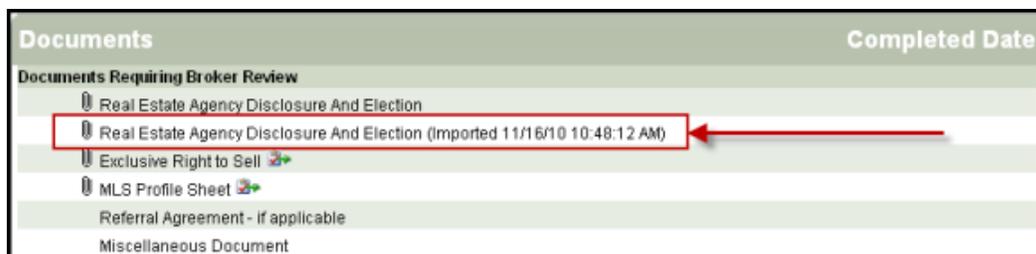


Figure 45

Action Buttons

There are three other buttons on the **Documents** page that you can use:

- *Add button
- Transfer button
- Distribute button

Add Button

The **Add** button enables you to create a new placeholder if you have a document that needs to be attached, but you do not have a corresponding placeholder. ***Please check with your office administrator before adding placeholders.** Use the following steps to create a new placeholder:

1. Click the **Add** button to see the **New Document Placeholder Entry** screen (Figure 46).

The screenshot displays the 'New Document Placeholder Entry' form within the SureClose interface. The form includes the following fields and options:

- Folder:** A dropdown menu with '<Select a Folder>' and a red asterisk indicating it is a required field.
- Document Placeholder:** A text input field with a red asterisk.
- Import Code:** A text input field.
- Linked Task to complete when document is:** A dropdown menu.
- Add:** Radio buttons for 'Before' and 'After', with a dropdown menu for folder selection. The 'After' option is selected.
- Attached:** A dropdown menu with '<Select a Task>'.
- Completed:** A dropdown menu with '<Select a Task>'.
- Auto-Complete when a document is attached or transferred to this placeholder:** A checkbox that is currently unchecked and highlighted with a red box.
- Record this document on the Activity Log:** A checked checkbox.
- Document Permissions:** A section with a checkbox for 'Viewable to all parties with access to this file' and two dropdown menus for 'Agent, 42: (Selling Agent)' (set to 'View & Upload') and 'Roberts, Dena: (Transaction Manager)' (set to 'Full Control').

At the bottom of the form are three buttons: 'SAVE', 'ADD ANOTHER', and 'CANCEL'. Below the form, there is a note: 'Single click to select a placeholder. Double click to edit. Ctrl + Click to select placeholders individually. Shift + Click to select consecutively.' The bottom of the screen shows a 'Documents' section with 'Documents Requiring Broker Review' and 'Final Settlement Sheet'.

Figure 46

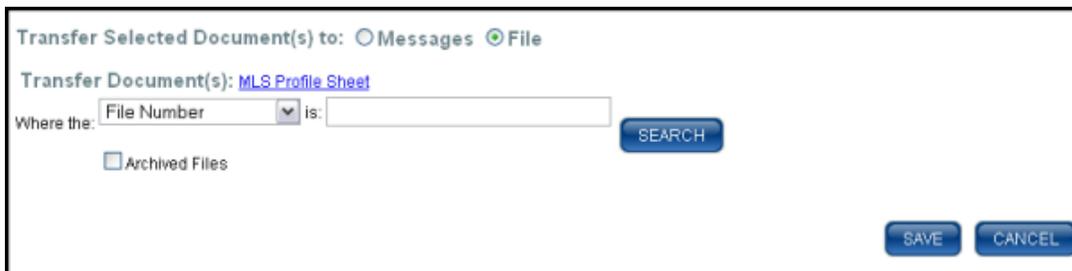
2. Select a folder in which to put the new placeholder from the Folder drop-down menu.
3. Type the name of the placeholder in the Document Placeholder field.
4. Select the placeholder after which you want to place the new placeholder in the Add field.
5. **IMPORTANT.** Be sure to UNCHECK the **Auto Complete when a document is attached or transferred to this placeholder** box.
6. Uncheck the Record this document on the Activity Log check box.

7. You may choose to modify the Document Permissions to allow other parties on your file to see the new document that will be attached.
8. Click the **Save** button to add your new placeholder to the file.

Transfer Button

The **Transfer** button enables you to transfer a document to another file. Use the following steps to transfer a document:

1. Highlight the document you want to transfer by clicking once on the document name and click the Transfer button. You see a **Transfer Selected Document To** screen (Figure 47).



Transfer Selected Document(s) to: Messages File

Transfer Document(s): [MLS Profile Sheet](#)

Where the: is:

Archived Files

Figure 47

2. Search for your file either by file number or by property address.
3. Highlight the divider under which you want to place the transferred document.
4. Click the **Save** button to complete the transfer.

Distributing Documents

The **Distribute** button enables you to send one or multiple documents to another party or parties. Use the following steps to distribute a document:

From the **Documents** page:

1. Highlight the document or documents you want to distribute and click the Distribute button (Figure 48). You'll see a **Message** screen (Figure 49 - Page 44). Hold down the control key as you click on each placeholder to select multiple documents.
2. Click Distribute.

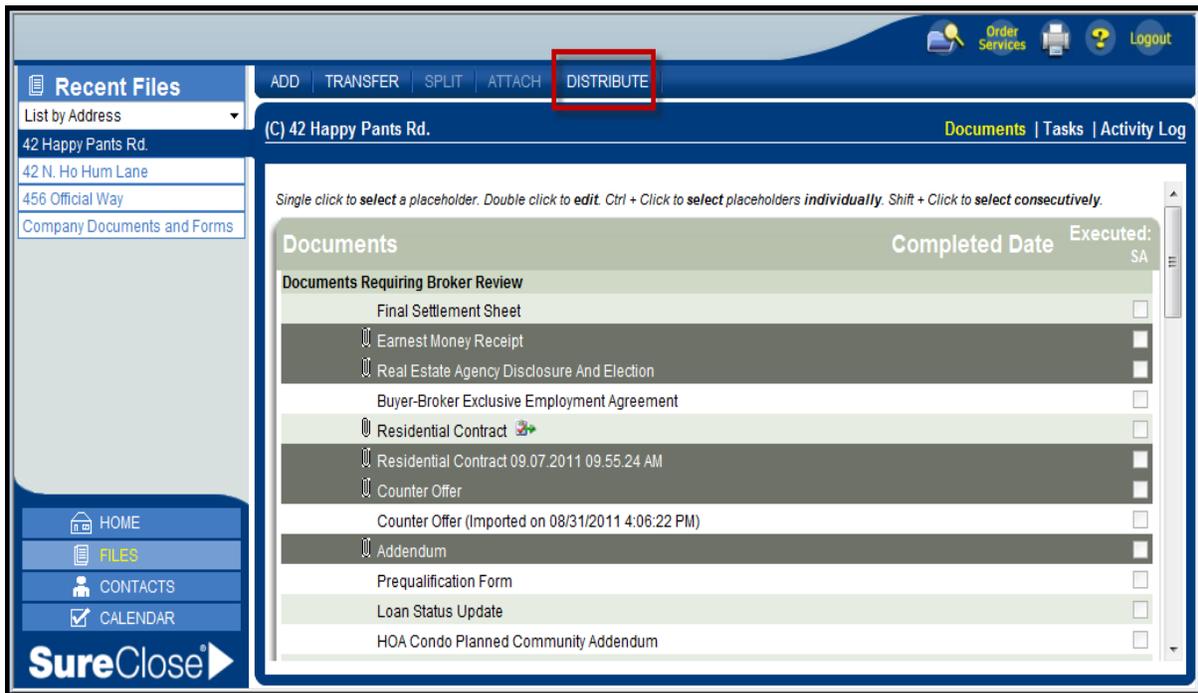


Figure 48

3. Click on the *Add Parties* hyperlink to see the list of parties on the file (Figure 49).
4. Highlight the party or parties to which you want to send the document and click the **Down Arrow** button to add them to the Selected Parties field.
5. Click the **OK** button to return to the **Message** screen.
6. Select a pre-written message for the Select Message to Send drop-down menu or write your subject and message in the Subject and Message fields.
7. Checkmark the box **Record this message on the Activity Log** to record this message in the file (See **Activity Log** - Page 47).
8. Click the **Send** button to send the message with the document or documents attached.

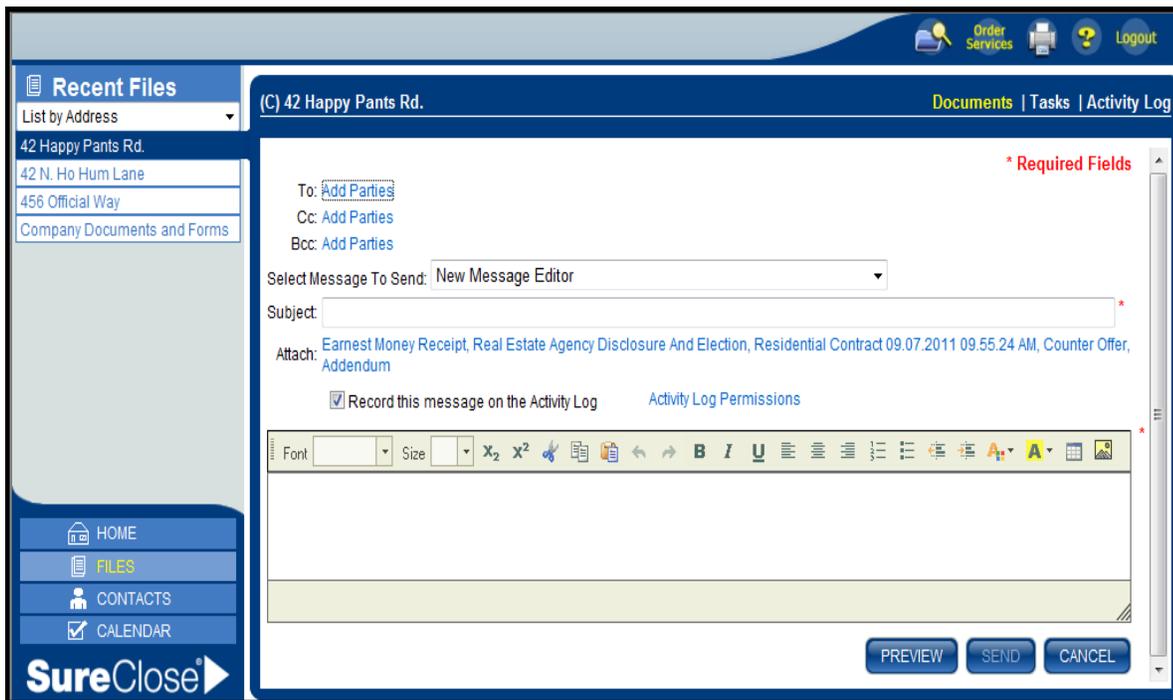


Figure 49

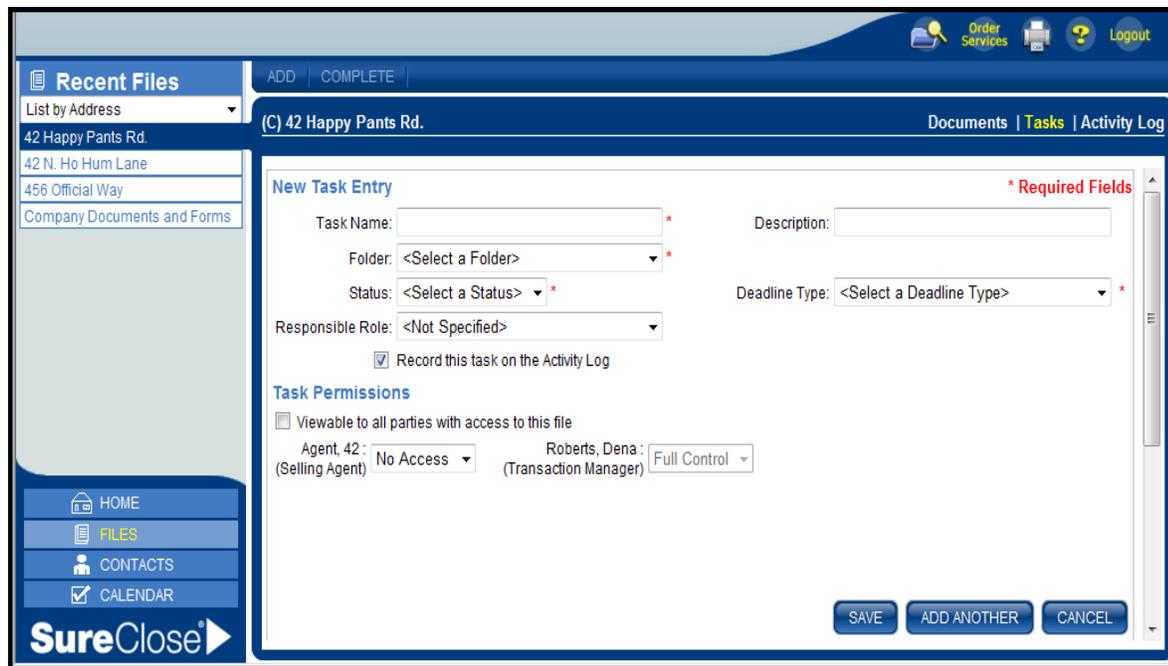


Figure 51

2. Type the task in the *Task Name* field.
3. Type a description of the task in the Description field (optional). The description could include specific instructions about how to complete the task.
4. Select the appropriate folder from the Folder drop-down menu.
5. Select the appropriate status from the Status drop-down menu. The statuses are:
 - *Not started*
 - *In progress*
 - *Completed*
6. Select the deadline type from the Deadline Type drop-down menu:
 - Relative to start date. This option requires you to enter the number of days after the start date for the task to be due.
 - Relative to end date. This option requires you to enter the number of days before the end date for the task to be due.
 - Relative to contract acceptance (for closing files only). This option requires you to enter the number of days after the contract acceptance date for the task to be due.
 - Relative to another task's completion. This option requires you to choose a task and then enter the number of days after the chosen task for the new task to be due.
 - Fixed deadline. This option requires you to pick a date and time for the task to be due.
7. Select your role from the Responsible Role drop-down menu.

8. Ensure that the check box for Record this task on the Activity Log is unchecked.
9. Change the task permissions for the other guest parties on the file to be View Only if you want them to see the task in their view of SureClose®.
10. Click the **Save** button to add your task to the file.

You can view your tasks using your **Calendar** - see Page 18.

Activity Log

The **Activity Log** page shows all the activity for a file in chronological order (Figure 52). Some of the activities recorded are:

- **Messages** that you send from the file.
- **Notifications** that your broker has reviewed your documents.
- **Documents** that you have sent from the file or attached to the file.

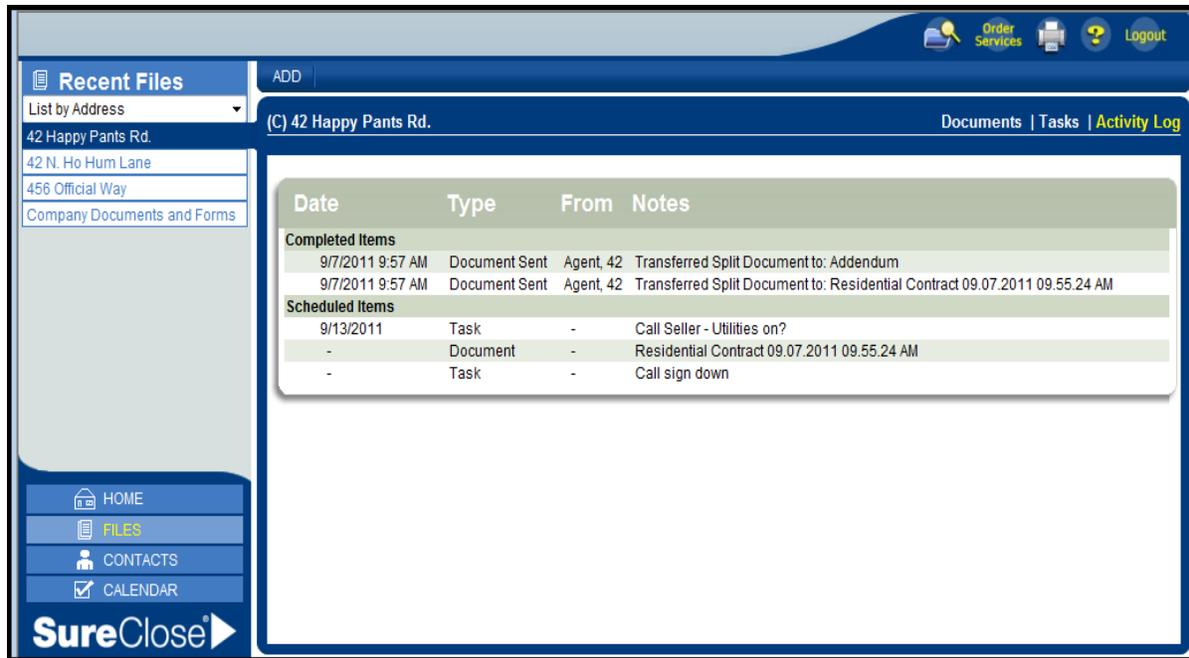


Figure 52

You can also add notes and records of phone calls to the **Activity Log**. Use the following steps to add an item to the **Activity Log**:

1. Click the **Add** button to see the **New Activity** screen (Figure 53).

New Activity Log Entry * Required Fields

Activity Type: * <Select an Activity Type>

Subject: *

Notes:

Log Entry Permissions

Famiglietti, Tegan (Seller): No Access

Trainer, Susan (Trainer): Full Control

Testing, Advantage Guest (Listing Agent): No Access

SAVE ADD ANOTHER CANCEL

Figure 53

2. Select the type of Activity from the Activity Type drop-down menu. The types are:
 - *Appointment*
 - *Comment*
 - *Document sent*
 - *Message sent*
 - *Phone call*
3. Type the subject of the activity in the Subject field.
4. Type the information about the activity in the Notes field.
5. Change the permissions for the guest parties on the file if you want them to see the activity on their view of SureClose®.
6. Click the **Save** button to save your activity or click the **Add Another** button to add another activity.

