



SureClose Advantage
Release Notes | Version 2.2.000

propertyinfo®

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Overview

SureClose Advantage Release 2.2 includes additional core functionality as well as enhancements recommended during the internal pilot usability testing period. This document provides a brief explanation of what has been fixed, and an introduction to new features and functionality implemented with this release.

Deployment Date: June 12, 2009

Post-Installation Considerations

After the new version has been deployed and prior to your logging in, it is recommended that you complete the following post-installation tasks:

- Delete Temporary Internet Files
- Delete Cookies

Deleting Temporary Internet Files

(MS Article ID: 260897)

The **Temporary Internet Files** (or cache) folder contains webpage content that is stored on your hard disk for quick viewing. This cache permits Internet Explorer or MSN Explorer to download only the content that has changed since you last viewed a webpage instead of downloading all the content for the page every time it is displayed.

Administrators can customize Temporary Internet File settings to prevent modifications. Contact your System Administrator if you cannot access the **Internet Options** dialog box or the **General** tab.

Steps

1. Close **Internet Explorer** and any instances of **Windows Explorer**.
2. From the **Start** menu, point to **Control Panel** and then select **Internet Options**. The Internet Options dialog box displays.
3. On the **General** tab, locate **Temporary Internet Files** and then click **Delete Files**. The Delete Files dialog box displays.
4. If available, select the **Delete all offline content** check box and then click **OK**. A confirmation message displays asking if you are sure you want to complete the delete process.
5. To confirm, click **OK**.



Note

Be patient when performing this task, if the **Temporary Internet Files** folder contains a significant amount of webpage content, then this process may take several minutes to complete.

Deleting Cookie Files

(MS Article ID: 278835)

Files starting with the word *Cookie* may remain in the Temporary Internet Files folder even after opting to delete them. You can delete these files; however, it is recommended that you make a backup copy of cookies prior to deleting them because these files may contain information for a customized webpage or login information for a website that you do not want to lose. If needed, contact your System Administrator for assistance or refer to *MS Article ID: 221523*.

Steps

1. Close **Internet Explorer** and any instances of **Windows Explorer**.
2. From the **Start** menu, point to **Control Panel** and then select **Internet Options**. The Internet Options dialog box displays.
3. On the **General** tab, locate **Temporary Internet Files** and then click **Delete Cookies**. The Delete Cookies dialog box displays. A confirmation message displays asking if you are sure you want to complete the delete process.
4. To confirm, click **OK**.

Features and Functionality

This section introduces new features and functionality added to SureClose Advantage 2.2.000.

What's New in this Release

- √ Give all individuals in a company implied access to a file when their company is added as a party to the file.
- √ Ability to edit tasks from within the CALENDAR tab, List View.
- √ Link the property address on the CALENDAR tab, List View to the File Summary page.
- √ Ability to set a Relative Deadline Type on a task.
 - Relative to Start, Relative to End, Relative to Another Tasks Completion
- √ Ability to delete an activity log entry.
- √ Ability to transfer documents to an existing placeholder on a file.
- √ Return users who access Advantage from a 3rd party integrated site to their site in the event they time out due to inactivity or log out.
- √ Additional merge fields for task reminders.
- √ Update Favorites Icons and Application text
- √ Miscellaneous updates to the HOME page including:
 - Revised welcome text
 - A link to current release notes
 - An Icon for installing the print driver
- √ A 'Getting Started' audio demonstration of the application features and basic navigation.

Company Implicit Access

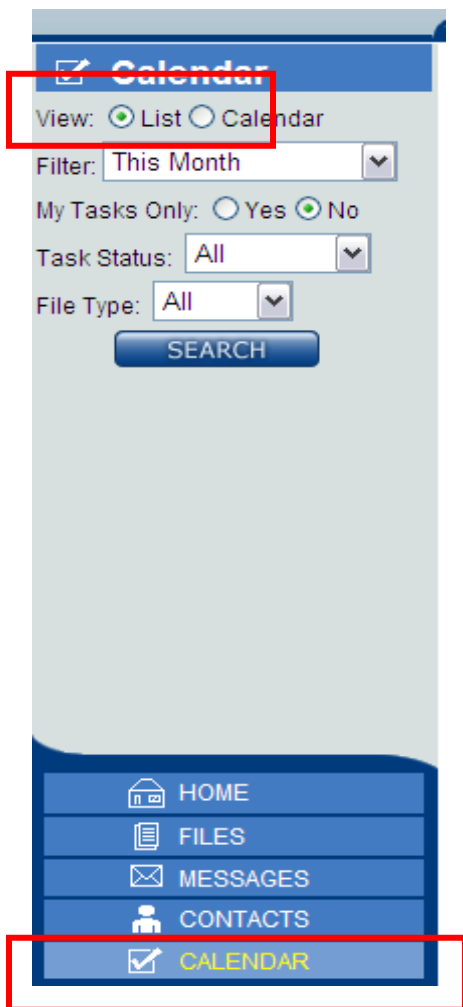
When a company is added as a party to a file all users in that company now have implied access to the file including documents, tasks and activity log. The user's security privileges on the file documents, tasks and activity log are determined by the permissions granted on the File Security Profile that is assigned to the company. These privileges work in conjunction with the user's own Application Security Profile.

If at any point the user is added individually as a party on the file (meaning an explicit party) the users privileges set on the File Security Profile will override what was assigned to the user's company.

Edit task from CALENDAR

The **List View** of the CALENDAR has been enhanced to allow editing of a task. By double clicking on a task in the List View, the task will open in edit mode. Modifications can be made to the General Information or Permissions of the task.

1. Select CALENDAR – List View



2. Double click on the task to open the edit window.

The screenshot displays the SureClose Advantage 2.2 web application interface. On the left is a navigation sidebar with a 'Calendar' tab selected. The main content area is titled 'View: All Files, All Tasks, This Month'. It contains a table of tasks for property '12109 Brandberry, Houston, TX 77001 (Closing)'. The tasks listed are: Approval of Settlement Statement (5/8/2009), Survey / Mortgage Inspection Ordered (5/8/2009), Survey Ordered (5/10/2009), Hazard Insurance Ordered (5/11/2009), and Preliminary Title Commitment (5/12/2009). An 'Editing the Preliminary Title Commitment task' window is open, showing fields for Task Name, Status (Not Started), Responsible Role (<Not Specified>), Description, Deadline Type (Relative to Start Date), Days after Start (4), and Date. A checkbox for 'Record this task on the Activity Log' is also present. The bottom of the task list shows 'Sellers Closing Check(s)' (5/13/2009), 'Hazard Insurance Policy' (5/18/2009), 'Schedule Closing' (5/18/2009), 'Proof of Insurance Received' (5/20/2009), and 'Survey' (5/22/2009). The bottom navigation bar includes links for HOME, FILES, MESSAGES, CONTACTS, and CALENDAR.

Tasks	Assigned To	Deadline	Completed
12109 Brandberry, Houston, TX 77001 (Closing)			
Approval of Settlement Statement	-	5/8/2009	
Survey / Mortgage Inspection Ordered	-	5/8/2009	
Survey Ordered	-	5/10/2009	
Hazard Insurance Ordered	-	5/11/2009	
Preliminary Title Commitment	-	5/12/2009	

Editing the Preliminary Title Commitment task

General Information | **Permissions**

Task Name: *

Status:

Responsible Role:

☐ Record this task on the Activity Log

Description:

Deadline Type: *

Days after Start: *

Date:

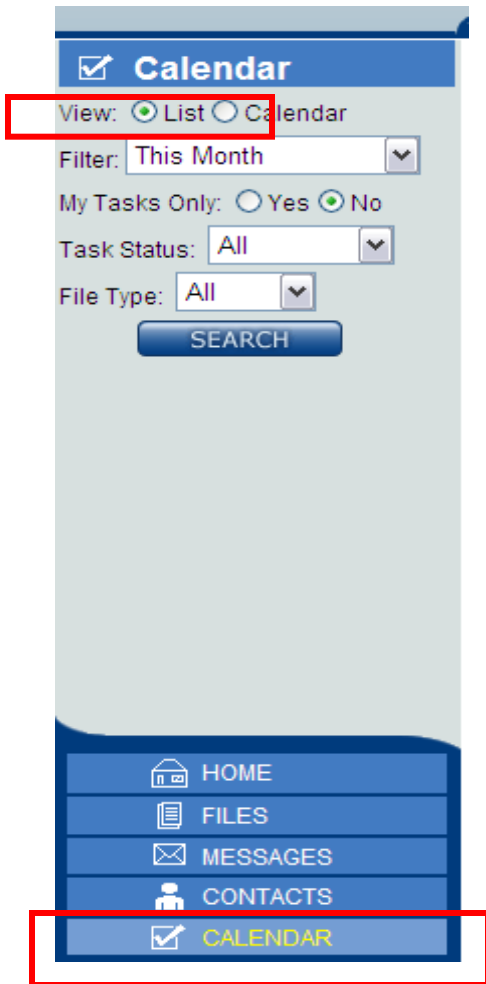
* Required Fields

Sellers Closing Check(s)	-	5/13/2009	
Hazard Insurance Policy	-	5/18/2009	
Schedule Closing	-	5/18/2009	
Proof of Insurance Received	-	5/20/2009	
Survey	-	5/22/2009	

Link the property address in CALENDAR to File Summary

The **List View** of the CALENDAR has been enhanced to provide a direct link to the File Summary Page. By clicking on the property address, the user can move from the calendar view directly to the open file.

1. Select CALENDAR – List View



2. Click on Property Address to advance to the File Summary Page

The screenshot shows the 'Tasks' section of the SureClose Online Transaction Management interface. The tasks are listed in a table with columns: Tasks, Assigned To, Deadline, and Completed. A red box highlights the task '50834 Brownstone Ave, Houston, TX 77036 (Listing)'.

Tasks	Assigned To	Deadline	Completed
12109 Brandenberg, Houston, TX 77061 (Closing)	-	5/8/2009	
Approval of Settlement Statement	-	5/8/2009	
Survey / Mortgage Inspection Ordered	-	5/13/2009	
Hazard Insurance Ordered	-	5/11/2009	
Preliminary Title Commitment	-	5/12/2009	
Sellers Closing Check(s)	-	5/13/2009	
Hazard Insurance Policy	-	5/18/2009	
Schedule Closing	-	5/20/2009	
Board/Insurance Received	-	5/22/2009	
Survey	-	5/23/2009	
50834 Brownstone Ave, Houston, TX 77036 (Listing)	-	5/15/2009	
Schedule Closing	-	5/25/2009	
7575 Post Road, Houston, TX 77043 (Closing)	-	5/11/2009	
Hazard Insurance Ordered	-	5/12/2009	
Export to CO	-	5/12/2009	
Hazard Insurance Policy	-	5/12/2009	
Closing Statements Prepared	-	5/12/2009	
Survey / Mortgage Inspection Ordered	-	5/12/2009	
Proof of Insurance Received	-	5/12/2009	
Approval of Settlement Statement	-	5/12/2009	
Closing Appointment Set	-	5/12/2009	
Payoff Taxes, Other Liens Confirmed	-	5/8/2009	
Survey Ordered	-	5/8/2009	
Survey	-	5/8/2009	



The screenshot shows the 'File Summary' page for the property '50834 Brownstone Ave'. The page displays various details including the file type, file status, and property address. The 'File Details' section is expanded, showing the property address and other relevant information.

File Type: Listing | File Status: Active

Property Address Line 1: 50834 Brownstone Ave

Property Address Line 2:

Star: 4 (088) | ZIP Code: 77036 | City: Houston | State: TX

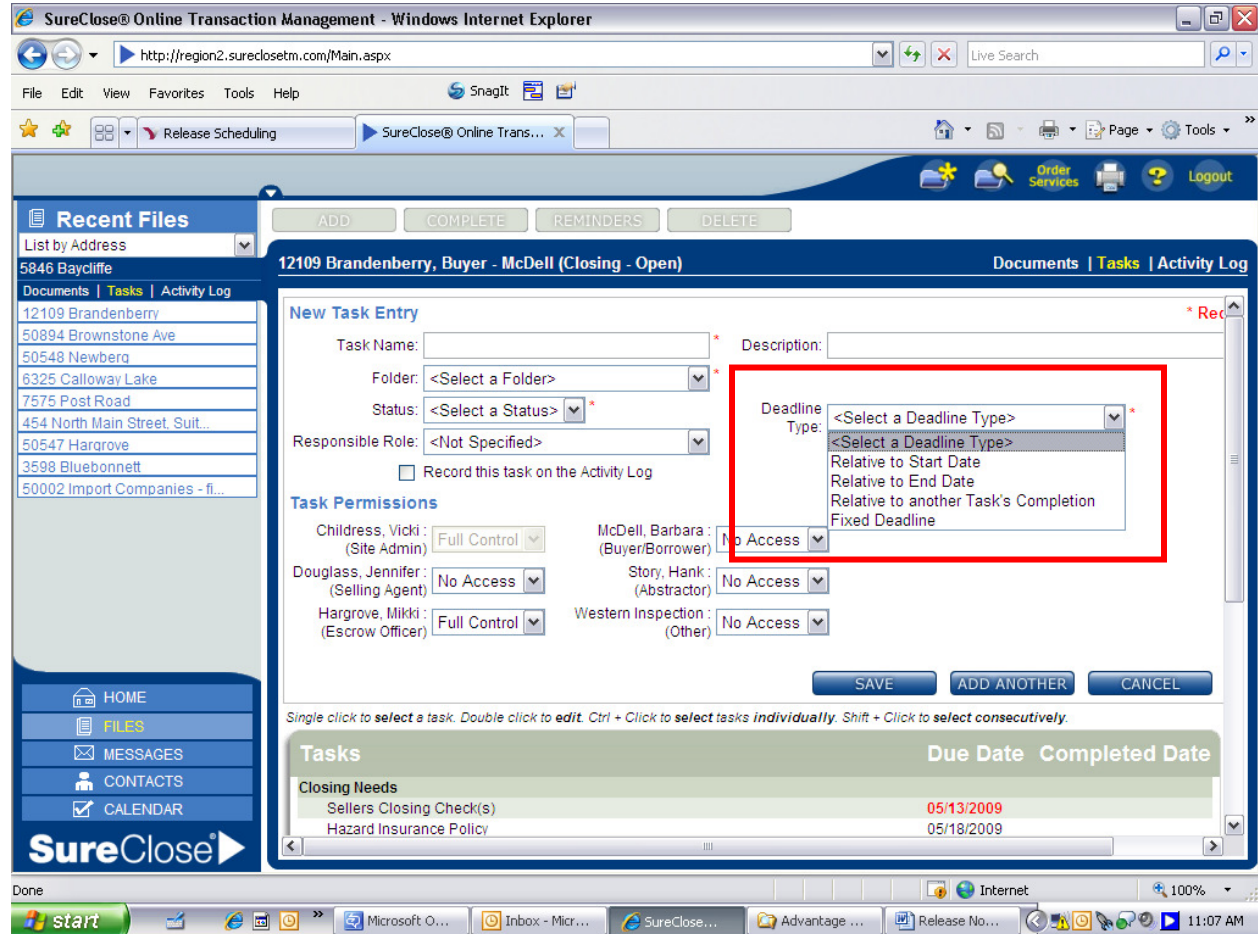
File Details: Show | Hide

Party Details: Show | Hide

Parties to Import: Show | Hide

Relative Deadline Types on Tasks

Users now have the ability to set a relative due date on a task. In addition to the existing fixed deadline type, tasks can now have a deadline type relative to the file start date, end date or another tasks completion.



Relative to Start

When selecting the deadline type Relative to Start, the user is prompted to enter the number of days after the file start date. The file start date plus the number of days entered will determine the task due date.

New Task Entry * Required Fields

Task Name: *

Description:

Folder: *

Status: *

Deadline Type: *

Responsible Role:

Days after Start Date:

☐ Record this task on the Activity Log

Task Permissions

Childress, Vicki : (Site Admin)

McDell, Barbara : (Buyer/Borrower)

Douglass, Jennifer : (Selling Agent)

Story, Hank : (Abstractor)

Hargrove, Mikki : (Escrow Officer)

Western Inspection : (Other)

SAVE

ADD ANOTHER

CANCEL

Relative to End

When selecting the deadline type Relative to End, the user is prompted to enter the number of days before the file end date. The file end date minus the number of days entered will determine the task due date. (Note: On closing file types, the file end date is the Estimated Closing Date. On listing files, the file end date is the Listing Expiration Date.)

New Task Entry * Required Fields

Task Name: *

Description:

Folder: *

Status: *

Deadline Type: *

Responsible Role:

Days before End Date:

☐ Record this task on the Activity Log

Task Permissions

Childress, Vicki : (Site Admin)

McDell, Barbara : (Buyer/Borrower)

Douglass, Jennifer : (Selling Agent)

Story, Hank : (Abstractor)

Hargrove, Mikki : (Escrow Officer)

Western Inspection : (Other)

SAVE

ADD ANOTHER

CANCEL

Relative to Another Tasks Completion

When selecting the deadline type Relative to Another Tasks Completion, the user must specify which task the current task will be related to and enter the number of days after the related task. The system then uses the related tasks completion date plus the number of days entered to determine the task due date.

Deadline Type: **Relative to another Task's Completion** *

Related Task: **<Select a Task>** *

Days after Related Task: *

New Task Entry

*** Required Fields**

Task Name: *

Folder: **Post Closing** *

Status: **Not Started** *

Responsible Role: **<Not Specified>**

☐ Record this task on the Activity Log

Description:

Deadline Type: **Relative to another Task's Completion** *

Related Task: **<Select a Task>** *

Days after Related Task: **<Select a Task>**

Task Permissions

Childress, Vicki : (Site Admin)	Full Control	McDell, Barbara : (Buyer/Borrower)	No Access
Douglass, Jennifer : (Selling Agent)	No Access	Story, Hank : (Abstractor)	No Access
Hargrove, Mikki : (Escrow Officer)	Full Control	Western Inspection : (Other)	No Access

SAVE

Single click to **select** a task. Double click to **edit**. Ctrl + Click to **select** tasks **individually**. Shift + Click to **select** tasks **in a range**.

Tasks

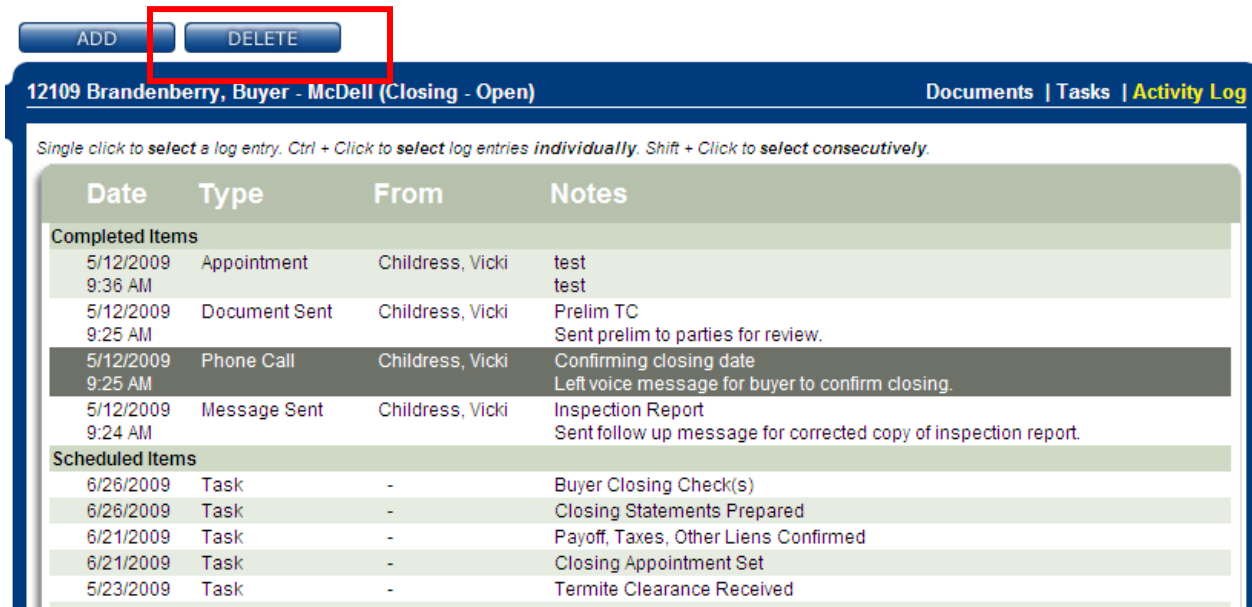
- Closing Needs
 - Sellers Closing Check(s)
 - Hazard Insurance Policy
 - Survey
 - Buyer Closing Check(s)
- General 1
 - Survey Ordered
 - Proof of Insurance Received
 - Termite Clearance Received
 - Closing Appointment Set
 - Closing Statements Prepared
- Order Information
 - Survey / Mortgage Inspection Ordered
 - Hazard Insurance Ordered
 - Preliminary Title Commitment

Any subsequent changes to the file start date, end date or the completion date of the relative task, will result in an automatic recalculation of the task due date.

Delete Activity Log Entry

A Delete button has been added to the Activity Log to allow users to remove a single entry or multiple entries.

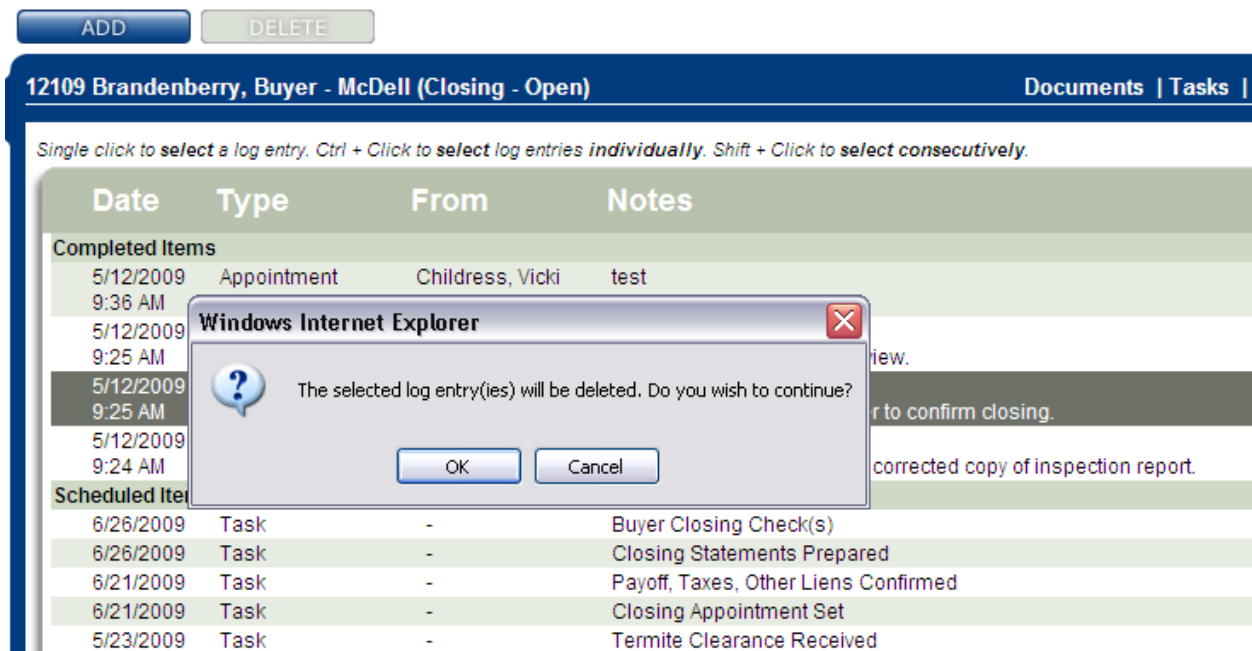
1. Select the entry(ies) to delete and click on the delete button.



The screenshot shows the top of the application window with a blue header bar. Below the header, there are two buttons: "ADD" and "DELETE". The "DELETE" button is highlighted with a red rectangular box. Below the buttons, the header bar displays "12109 Brandenberry, Buyer - McDell (Closing - Open)" and navigation links "Documents | Tasks | Activity Log". A instruction line reads: "Single click to select a log entry. Ctrl + Click to select log entries individually. Shift + Click to select consecutively." Below this is a table with columns "Date", "Type", "From", and "Notes". The table is divided into "Completed Items" and "Scheduled Items".

Date	Type	From	Notes
Completed Items			
5/12/2009 9:36 AM	Appointment	Childress, Vicki	test
5/12/2009 9:25 AM	Document Sent	Childress, Vicki	Prelim TC Sent prelim to parties for review.
5/12/2009 9:25 AM	Phone Call	Childress, Vicki	Confirming closing date Left voice message for buyer to confirm closing.
5/12/2009 9:24 AM	Message Sent	Childress, Vicki	Inspection Report Sent follow up message for corrected copy of inspection report.
Scheduled Items			
6/26/2009	Task	-	Buyer Closing Check(s)
6/26/2009	Task	-	Closing Statements Prepared
6/21/2009	Task	-	Payoff, Taxes, Other Liens Confirmed
6/21/2009	Task	-	Closing Appointment Set
5/23/2009	Task	-	Termite Clearance Received

2. A confirmation message is provided.



The screenshot shows the same Activity Log interface as before, but with a confirmation dialog box overlaid. The dialog box is titled "Windows Internet Explorer" and contains a question mark icon and the text: "The selected log entry(ies) will be deleted. Do you wish to continue?". There are "OK" and "Cancel" buttons at the bottom of the dialog box. The "DELETE" button in the header is now disabled (grayed out).

Date	Type	From	Notes
Completed Items			
5/12/2009 9:36 AM	Appointment	Childress, Vicki	test
5/12/2009 9:25 AM	Document Sent	Childress, Vicki	Prelim TC Sent prelim to parties for review.
5/12/2009 9:25 AM	Phone Call	Childress, Vicki	Confirming closing date Left voice message for buyer to confirm closing.
5/12/2009 9:24 AM	Message Sent	Childress, Vicki	Inspection Report Sent follow up message for corrected copy of inspection report.
Scheduled Items			
6/26/2009	Task	-	Buyer Closing Check(s)
6/26/2009	Task	-	Closing Statements Prepared
6/21/2009	Task	-	Payoff, Taxes, Other Liens Confirmed
6/21/2009	Task	-	Closing Appointment Set
5/23/2009	Task	-	Termite Clearance Received

Transfer documents to an existing placeholder

Users now have the ability to transfer a document from one file to an existing placeholder on another file. Prior to this modification documents transferred to another file were automatically placed in a system generated generic placeholder. Now, with the ability to view and select an existing placeholder, users can transfer the document directly into the appropriate placeholder.

1. Select the document to Transfer and click the Transfer button.
2. The Transfer page displays prompting the user to search for the file to transfer the document to. A file can be located searching by File Number or Property Address.

The 'Archived Files' checkbox can be used to limit your search to include archived files only.

Where the: is:

☐ Archived Files

File:

50003
5489
50001
50002
50004

3. Once a file is selected, the placeholders are displayed. Placeholders which already contain a document are disabled and cannot be selected.

The 'Filter Placeholders' field can be used to enter specific search criteria to further refine the placeholder list.

Transfer Document(s): [Title Commitment](#)

Where the: is:

☐ Archived Files

File:

50003
50001
5051
50002
50004

Filter Placeholders:

Inspections and Reports
Proof of Insurance
Pest Inspection (Termite)
Property Inspection
Title and Escrow Documents
Preliminary Title Report

☐ Record on the Activity Log

4. Select the placeholder and click SAVE.

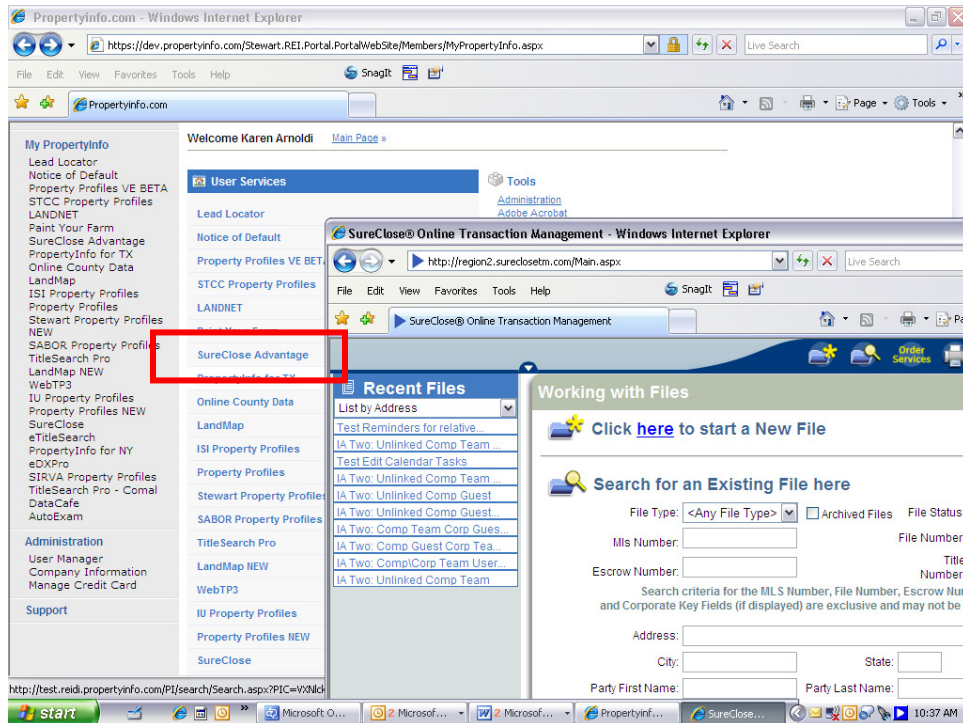
In addition to transferring documents from within a file, this feature can be used to transfer documents to and from MESSAGES.

Redirect integrated users back to their site upon logging out or timing out

Users who are log into SureClose Advantage from an integrated site are now returned to their site when they log out or their session expires due to inactivity.

For example,

A user accesses SureClose Advantage from their integrated site.



When the user logs out of Advantage or their session expires due to inactivity they receive a message to close the window and are returned to their integration site.

Additional merge fields for task reminders

The following merge fields are now available when creating a task reminder.

Project Merge Fields

PROJECTLISTPRICE

PROJECTSALEPRICE

Prefix, First, and Last of the following parties:

SELLERPREFIX

SELLERFIRSTNAME

SELLERLASTNAME

SELLERPREFIX#1

SELLERFIRSTNAME#1

SELLERLASTNAME#1

LISTINGAGENTPREFIX

LISTINGAGENTFIRSTNAME

LISTINGAGENTLASTNAME

BUYERPREFIX

BUYERFIRSTNAME

BUYERLASTNAME

BUYERPREFIX#1

BUYERFIRSTNAME#1

BUYERLASTNAME#1

SELLINGAGENTPREFIX

SELLINGAGENTFIRSTNAME

SELLINGAGENTLASTNAME

ESCROWOFFICERPREFIX

ESCROWOFFICERFIRSTNAME

ESCROWOFFICERLASTNAME

LENDERPREFIX

LENDERFIRSTNAME

LENDERLASTNAME

BUYERATTORNEYPREFIX

BUYERATTORNEYFIRSTNAME

BUYERATTORNEYLASTNAME

SELLERATTORNEYPREFIX

SELLERATTORNEYFIRSTNAME

SELLERATTORNEYLASTNAME

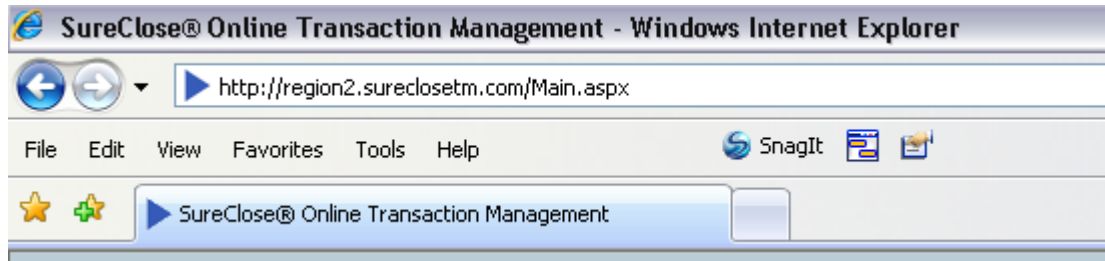
CLOSINGTRXCOORDPREFIX
 CLOSINGTRANSACTIONCOORDINATORFIRSTNAME
 CLOSINGTRXCOORDLASTNAME
 LISTINGTRXCOORDPREFIX
 LISTINGTRANSACTIONCOORDINATORFIRSTNAME
 LISTINGTRXCOORDLASTNAME
 SELLINGTRXCOORDPREFIX
 SELLINGTRANSACTIONCOORDINATORFIRSTNAME
 SELLINGTRXCOORDLASTNAME

The screenshot displays the SureClose Advantage software interface. On the left, there is a 'Recent Files' sidebar with a list of documents, including '6325 Calloway Lake'. Below this is a navigation menu with options: HOME, FILES, MESSAGES, CONTACTS, and CALENDAR. The main area is divided into two panes. The left pane shows a list of fields for a document titled '6325 Calloway Lake'. The fields include: TITLEOFFICEREMAIL, TITLEOFFICERFAX, ESCROWOFFICERNAME, ESCROWOFFICERCOMPANYNAME, ESCROWOFFICERPHONE, ESCROWOFFICERFAX, SELLERPREFIX, SELLERFIRSTNAME, SELLERLASTNAME, SELLERPREFIX#1, SELLERFIRSTNAME#1, SELLERLASTNAME#1, LISTINGAGENTPREFIX, LISTINGAGENTFIRSTNAME, LISTINGAGENTLASTNAME, BUYERPREFIX, BUYERFIRSTNAME, BUYERLASTNAME, BUYERPREFIX#1, BUYERFIRSTNAME#1, BUYERLASTNAME#1, SELLINGAGENTPREFIX, SELLINGAGENTFIRSTNAME, SELLINGAGENTLASTNAME, ESCROWOFFICERPREFIX, ESCROWOFFICERFIRSTNAME, ESCROWOFFICERLASTNAME, LENDERPREFIX, LENDERFIRSTNAME, and LENDERLASTNAME. The 'Merge Fields' section at the bottom left shows 'TITLEOFFICEREMAIL' selected. The right pane shows a document preview with a 'line date' field and a 'Document' header. At the bottom right, there are 'PREVIEW' and 'SAVE' buttons.

Updated Application Title and Icon

The application title and icon have been updated. This change impacts the browser, any bookmarks, favorite icons or desktop shortcuts as well as the text in the subject line of the standard SureClose welcome message for new users.

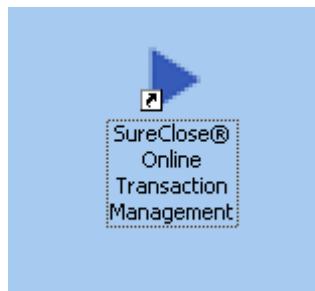
Application Title, Browser Tab



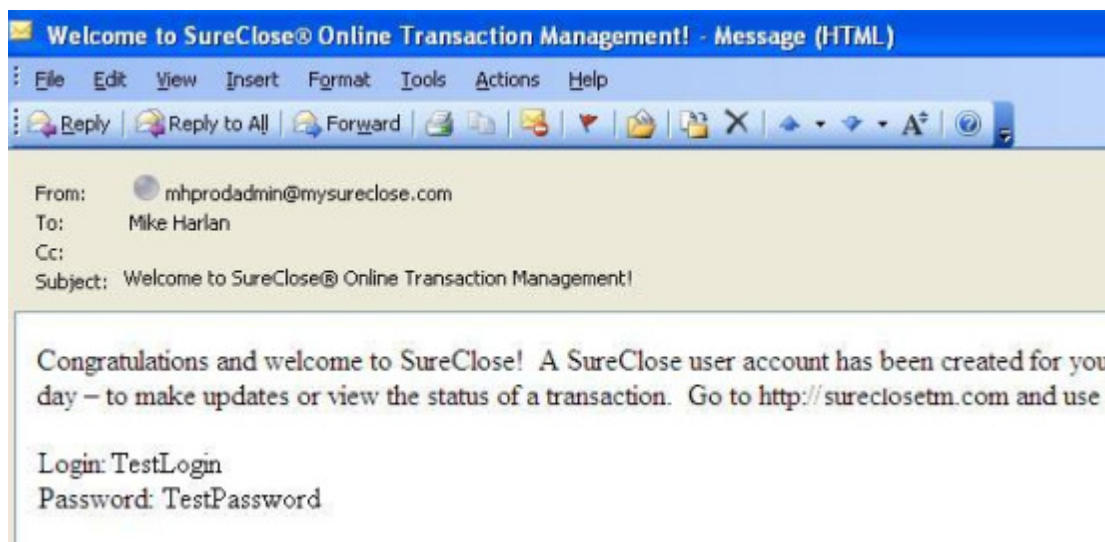
Favorites

▶ SureClose® Online Transaction Management

Desktop Shortcut



Standard Welcome Message for new users



Updates to the HOME page

The following enhancements have been made to the Advantage HOME page:

- Revised Welcome message
- Addition of a new “Release Notes” link at the bottom of the page

[Terms and Conditions](#) | [Privacy Statement](#) | [Technical Requirements](#) | [Release Notes](#)

Click on the link to view the current version of Release Notes in a separate browser window.

- Addition of an “Install Print Driver” icon link



Click this link to access online step by step instructions for installing the Print Driver.

Powered by : RoboHelp®

SureClose Print Driver

SureClose Print Driver is a utility program used to upload documents directly to your SC Messages Inbox or to a specified placeholder on a file.

Installation

Steps to Complete

1. Download an installation package for your operating system by selecting one of the following:
 - [Windows Vista 64 bit](#)
 - [Windows Vista 32 bit/XP/2000](#)
2. Extract the contents of the zip file to a convenient location on your computer.
3. Open the document labeled, [SureClose Print Driver Installation Guide](#) then follow the instructions to complete the installation.

Use

Once installed, access SureClose Print Driver Help for information about how to use the SureClose Print Driver.

Steps to Complete

1. Open any SureClose supported document and then select **File—Print** from the document menu. The Print dialog box displays.
2. From the **Name** selection list, select **SureClose Upload**.
3. Click **OK**. The SureClose Print Driver utility opens.
4. With the SureClose Print Driver open, click **Help—Print Driver Help** from the top menu. Help displays in a separate browser window.
5. Navigate **Help** to locate the use information necessary to upload documents into SureClose.

To return to SureClose Advantage, close the browser window.

- Addition of a “Getting Started Demo” icon link to a brief audio demonstration of the application features and basic navigation.



Defects

This section outlines defects which were corrected in SureClose Advantage 2.2.000.

- Not able to send a message/reminder or distribute documents to the file owner.
- File ownership is not being transferred when the file owner is removed from the file.
- When returning to Recent Files List after importing a file, the last file accesses is being displayed instead of the current file
- Task notifications are not properly filing under the property address in Messages
- Corrections to the values display in various drop down lists: Company, File Security Profile
- Imported documents were not appearing in the display when attaching from MESSAGES.
- Attachment names are incorrect if there is a dash “-“ in the subject line.
- Validation performed on the email address is causing a system exception error.
- Miscellaneous corrections to various error messages.