

# SureClose<sup>®</sup> Product Line

**Release Notes 4.2**

**April 10, 2015**

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# Overview

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SureClose Advantage 4.2 includes additional security features, product enhancements, and defect corrections. This document provides a brief explanation of what has been updated, as well as an introduction to new features implemented within this release.

For more information about any of the new features, refer to SureClose Advantage Online Help and search for the specific topic.

**Deployment Date: April 10, 2015**

## Post-Installation Considerations

After the new version has been deployed and prior to 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 web page content that is stored on your hard disk for quick viewing. This cache permits Internet or MSN<sup>®</sup> Explorer to download only the content that has changed since you last viewed a web page 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<sup>®</sup>** and any instances of **Windows<sup>®</sup> 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

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Be patient when performing this task. If the *Temporary Internet Files* folder contains a significant amount of web page 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 web page 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

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This section introduces new features and functionality added to SureClose Advantage 4.2.

## New in This Release

### SureClose Advantage 4.2

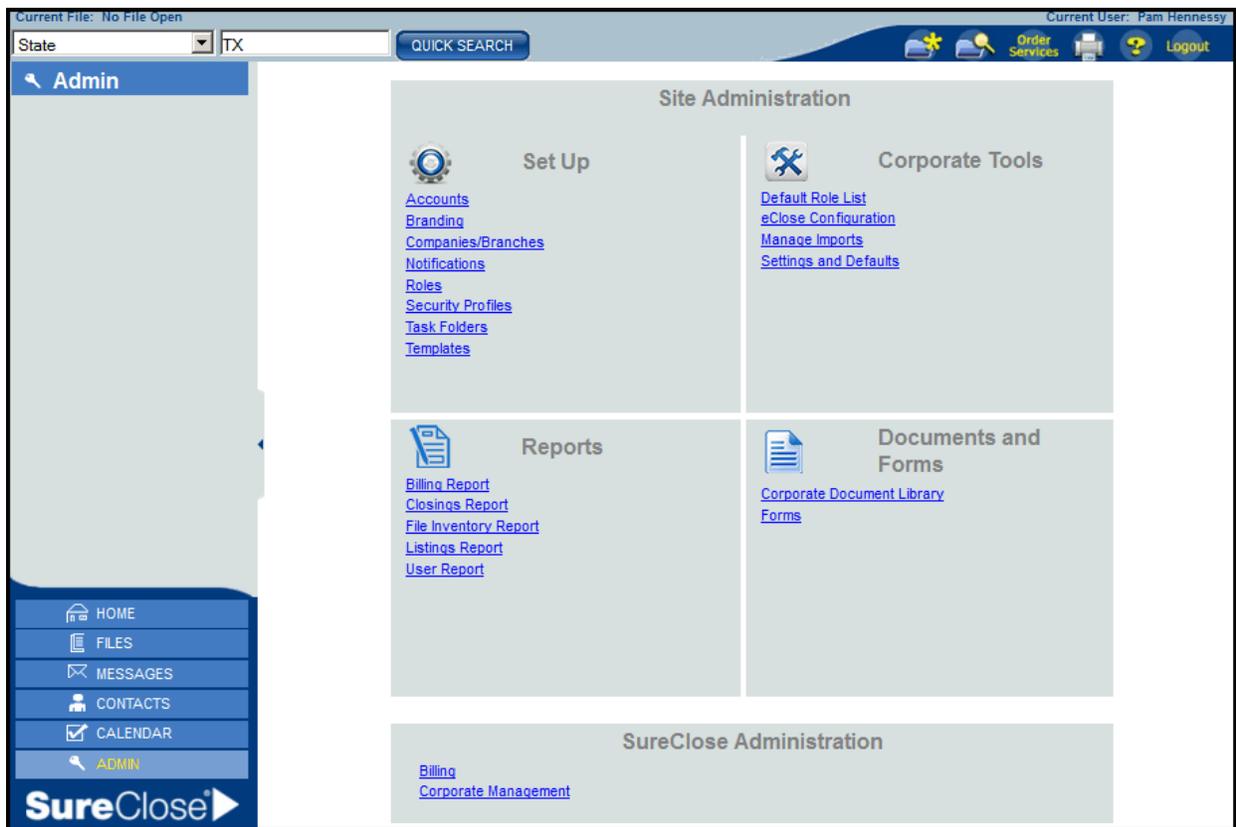
- The SureClose **Admin** tab has been updated with a new look and feel, providing better accessibility to users with Admin permissions. For more information, refer to [New Look of the Admin Tab](#).
- For better manageability of existing corporations in SureClose Advantage, a **Corporate Management** screen has been added for a variety of operations on existing corporations in the application. For more information, refer to [Managing Corporations](#).
- SureClose Advantage provides more control to its users by allowing them to conduct elaborate **searches** for existing corporations in the application. For more information, refer to [Searching for Existing Corporations](#).
- A new screen, **Corporation Setup**, has been added for the creation of corporations in SureClose Advantage. For more information, refer to [Creating New Corporations](#).
- A new screen, **Edit Corporation**, has been added to SureClose for editing details of an existing corporation. For more information, refer to [Editing Details of an Existing Corporation](#).
- Learn about the **Corporation-Company Affiliation** feature that displays the administrators and companies that are associated to a corporation. For more information, refer to [Corporation-Company Affiliation](#).
- Explore the functionality behind **adding administrators for corporations**. You can search for an existing user or create a new one to be added as an administrator. For more information, refer to [Adding Administrators in Corporation-Company Affiliation](#).
- You can now **link existing companies** or **add new companies** to corporations. For more information, refer to [Linking Companies in Corporation-Company Affiliation](#).
- Learn about the **unlinking companies** feature that unlinks associated companies from corporations. For more information, refer to [Unlinking Companies in Corporation-Company Affiliation](#).
- Explore the functionality behind **managing billing plans** for a corporation. For more information, refer to [Viewing the Corporate Billing Plans](#) and [Adding/Editing the Billing Plans](#).
- SureClose Advantage now provides the capability to **generate a billing report** for any corporation. For more information, refer to [Generating the Billing Report](#).
- SureClose Advantage now displays a list of **defined SureClose billing plans**. For more information, refer to [Viewing SureClose Billing Plans](#).
- When sending **Secure Email** messages from SureClose Advantage, a notification displays containing a list of message recipients along with their usernames. For more information, refer to [Displaying Username in Secure Email Notification](#).

# Admin Tab

## New Look of the Admin Tab

To enhance the user experience, a new look and feel has been added to the Admin page. Users with Admin permissions are able to manage all Admin features via hyperlinks, divided into sections. The sections include:

- **Set Up** – Define various parameters including SureClose accounts, companies, roles, templates etc.
- **Corporate Tools** – Manage corporation settings, role list, imports and eClose configurations.
- **Reports** – Generate various reports for analyzing user and file data.
- **Documents and Forms** – Manage the Corporate Document Library and forms.
- **SureClose Administration** – This new section has been added to the Admin page for users with additional security permissions to manage administrative-level features.



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topics available under the section labeled, *Admin*.

# SureClose Administration

The new section, **SureClose Administration**, contains links that allow you to manage all SureClose Advantage administrative-level features:

- **Corporate Management link** – Search, add or edit new and existing corporations.
- **Billing link** – View SureClose Advantage billing plans.



## Note

Only users with permission to access the SureClose Administration sections of the Admin tab can access these links.

## Corporate Management Link

From the SureClose Administration section, click the **Corporate Management** link to display the *Search for Existing Corporations* screen. From this screen, you can manage corporations, add/edit details of a corporation, as well as link or unlink corporation-company affiliation.

## Managing Corporations

Click the **Corporate Management** link to view the *Search for Existing Corporations* screen. A menu bar displays at the top of the Search screen. Use this menu bar to assist with any of the following:

- Search for and select existing corporations.
- Add a new corporation.
- Assign administrators and link companies to corporations.
- Assign billing plans to corporations.

Current File: No File Open

State: TX

QUICK SEARCH

Current User: Pam Hennessy

ADD AFFILIATION BILLING CANCEL

Admin

Search for Existing Corporations

Corporation Name: Blueberry City: State: Zip:

Channel: Linked Company Name: Administrator:

SEARCH CLEAR

Single click to select a corporation. Double click to edit.

Channel	Corporation	City/State	Status	Billing Plan	# of Admins	# of Linked Companies
Stewart - Affiliate	Blueberry	Austin, TX	Active	Personal Edition (SureClose - Personal Edition)	0	0

HOME FILES MESSAGES CONTACTS CALENDAR ADMIN

SureClose



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Searching for Existing Corporations*.

## Searching for Existing Corporations

Under *SureClose Administration*, click the **Corporate Management** link to search for existing corporations in SureClose Advantage. Enter data in the fields provided and click **Search** to display results. Use the arrow links to navigate between page numbers.



### Note

If all fields are left blank before clicking **Search**, all SureClose corporations display in the search results.

The screenshot shows the 'Search for Existing Corporations' form with the following fields: Corporation Name (containing 'real'), City, State (dropdown), Zip, Channel (dropdown), Linked Company Name, and Administrator. There are 'SEARCH' and 'CLEAR' buttons. Below the form is a table with the following data:

Channel	Corporation	City/State	Status	Billing Plan	# of Admins	# of Linked Companies
Personal Edition Partner	Realty Network (Created: 10/15/2007 9:05 AM)	Mountain View, CA	Active	Personal Edition (SureClose - Personal Edition)	0	1
Stewart Title	Real Estate Title Services Corp.		Active	STC Natl License 2005 (STC SureClose)	2	3
Stewart Title	Realtor Title Corp	Louisville, KY	Active	STC Natl License 2005 (STC SureClose)	4	1
Unassigned	Real Advantage Realty Inc.		Active	Service Bureau (Service Bureau)	3	1
Unassigned	Real Estate Executives	Beaverton, OR	Active	RADemo (RA Demo)	2	1
Unassigned	Real Estate Team Mates		Inactive	RA0004 (AgentTMS 4)	2	1
Unassigned	RealControl		Inactive	RA0004 (AgentTMS 4)	1	1
Unassigned	Realty Executives	Houston	Inactive	RA0025 (BrokerTMS/CloserTMS 25)	3	7
Unassigned	Realty World - Realty Solutions		Active	Service Bureau (Service Bureau)	8	2
Unassigned	Realty World - Residential Specialists	San Jose, CA	Active	RA0004 (AgentTMS 4)	5	2
Unassigned	Realty World Home Team	Elk Grove, CA	Inactive	RA0025	2	1



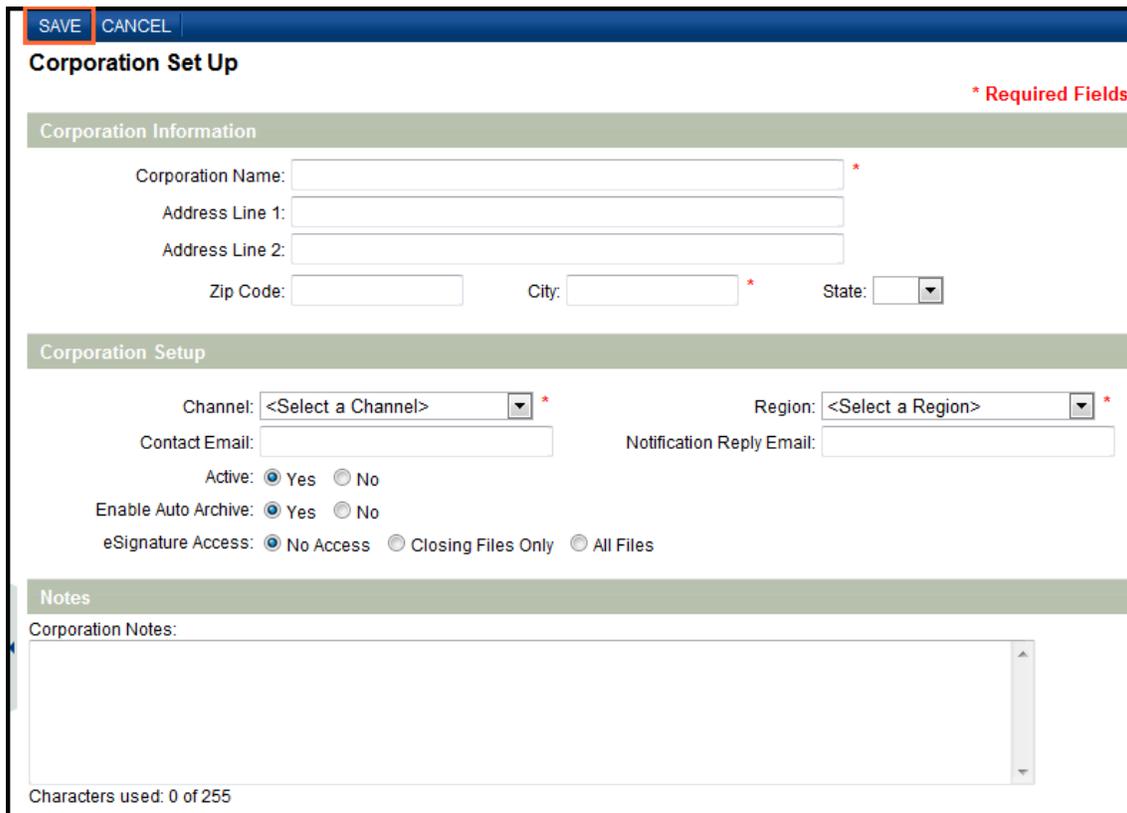
For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Searching for Existing Corporations*.

## Creating New Corporations

From the *Search for Existing Corporations* screen, click **Add** to create a new corporation. The **Corporation Set Up** page displays.



Enter the new corporation data and click **Save**.



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Adding a New Corporation*.

## Editing Details of an Existing Corporation

From the *Search for Existing Corporations* screen, enter the search criteria for the corporation to edit. Click **Search** to display search results.

Current File: No File Open      QUICK SEARCH      Current User: Andriana Binder

Address      ADD   AFFILIATION   BILLING   CANCEL

Admin

Search for Existing Corporations

Corporation Name: Blueberry      City: Austin      State: TX      Zip:      Channel:      Linked Company Name:      Administrator:      SEARCH      CLEAR

Single click to select a corporation. Double click to edit.

Channel	Corporation	City State	Status	Billing Plan	# of Admins	# of Linked Companies
Stewart - Affiliate	Blueberry	Austin, TX	Active	Personal Edition (SureClose - Personal Edition)	1	1

From the *Search Results* list, double-click the corporation to display fields for editing. The *Corporation Set Up* page appears. When finished, click **Save**.

SAVE      CANCEL

### Corporation Set Up

\* Required Fields

Corporation Information

Corporation Name: Blueberry \*  
CorporationID: f3144ab0-d8bb-4649-9769-8fc349446433  
Address Line 1: 101 Ducton Road  
Address Line 2: Arlington Avenue  
Zip Code:      City: Austin \*      State: TX

Corporation Setup

Channel: Stewart - Affiliate \*      Region: Region A \*  
Contact Email: mathew@blueberrycorp.com      Notification Reply Email: customer-rep@blueberry.com  
Active:  Yes  No      Folder Files: Disabled  
Enable Auto Archive:  Yes  No      Number of Folder Files Allowed: 0  
eSignature Access:  No Access  Closing Files Only  All Files

[Corporation Settings and Defaults](#)

Notes

Corporation Notes:  
Notification Reply Email is added.

Characters used: 0 of 255



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Editing an Existing Corporation*.

## Corporation-Company Affiliation

The new *Corporation-Company Affiliation* screen allows users with permissions to add multiple administrators to a company, as well as link or unlink companies to a corporation.



### Note

You can add multiple administrators and link many companies to a corporation. A company can only be linked to one corporation. In order to link a company to a corporation there must be an administrator defined.

From the *Search for Existing Corporations* page, enter your search criteria and click **Search**. Select a company from your search results and click **Affiliation**.

Channel	Corporation	City\State	Status	Billing Plan	# of Admins	# of Linked Companies
Stewart - Affiliate	Blueberry	Austin, TX	Active	Personal Edition (SureClose - Personal Edition)	1	1

The *Corporation-Company Affiliation* screen displays. From this screen, you can select to add an administrator and/or link a company.

Once you have linked a company, you can double-click on the company to launch a pop-up displaying the **Company ID** that allows you to copy it for your further use.

Name	Login	Security Profile	Allow Login
Scott E Hibler	ScottHibler	andys full	No

Company Name	Address	# of Users	Company ID
AIM Company	Houston, TX 77090	2	23984dd0-8f42-470e-92fa-08693c24d680



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Corporation-Company Affiliation*.

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## Adding Administrators in Corporation-Company Affiliation

SureClose Advantage users with Admin permissions can also add an administrator to a corporation.

From the *Corporation-Company Affiliation* screen, select the Administrator(s) you would like to add to a company. Click **Add**. Once you click **Add**, the *Add Administrator* screen displays.



### Note

It is recommended that you enter your search criteria on the *Add Administrator* screen to check if the administrator already exists as a SureClose user.

If the Administrator is already a SureClose user, double-click the Administrator listing to edit any details of the existing Administrator contact information and notification preferences. However, if the Administrator is new to SureClose Advantage, simply click **<Add New Individual>** to enter their information.

Name	Email	Created By
<Add New Individual>		
Hibler, Scott AIM Company	ScottHibler@mysureclose.com	Stewart Title Services of Central Indiana by Deidra Adkins



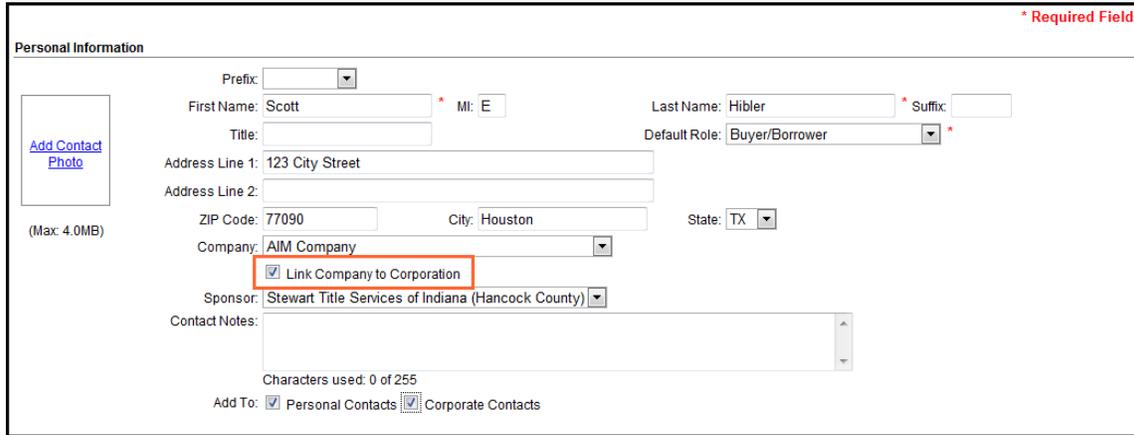
For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Adding an Administrator to a Corporation*.

## Linking Companies in Corporation-Company Affiliation

You can also link companies to corporations on the *Corporation-Company Affiliation* screen.

From the *Corporation-Company Affiliation* screen, select the Administrator(s) you would like to add to a company. Click **Add**. Once you click **Add**, the *Add Administrator* screen displays.

On the same screen, select the **Link Company to Corporation** checkbox to associate the user and their company to the corporation. This will link the user's company to the corporation at the same time as adding the administrator to the corporation.



The screenshot shows a web form titled "Personal Information" with a red asterisk and "Required Fields" in the top right corner. The form contains the following fields and options:

- Prefix: [Dropdown]
- First Name: Scott \* MI: E
- Last Name: Hibler \* Suffix: [Dropdown]
- Title: [Text]
- Default Role: Buyer/Borrower \* [Dropdown]
- Address Line 1: 123 City Street
- Address Line 2: [Text]
- ZIP Code: 77090 City: Houston State: TX [Dropdown]
- Company: AIM Company [Dropdown]
- Link Company to Corporation (highlighted with a red box)
- Sponsor: Stewart Title Services of Indiana (Hancock County) [Dropdown]
- Contact Notes: [Text Area]
- Characters used: 0 of 255
- Add To:  Personal Contacts  Corporate Contacts

On the left side of the form, there is a placeholder for a photo with the text "Add Contact Photo" and "(Max: 4.0MB)".



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Linking a Company*.

## Unlinking Companies in Corporation-Company Affiliation

You can also unlink a company from a corporation on the *Corporation-Company Affiliation* page. You can unlink a single company or multiple companies together. For unlinking a single company, select the company and click **Unlink**.

For multiple companies, use **Ctrl + Click** to individually select each company or **Shift + Click** to select consecutive companies and then click **Unlink**.



### Note

Any users within the unlinked company will no longer be associated with the corporation.

The screenshot shows the 'Corporation-Company Affiliation for Blueberry' page. It features an 'Admin' sidebar, a 'QUICK SEARCH' bar, and a 'Current User: Andriana Binder' indicator. The main content area is divided into two sections: 'Administrators' and 'Linked Companies'. The 'Administrators' section includes a table with columns for Name, Login, Security Profile, and Allow Login, listing Scott E Hibler. The 'Linked Companies' section includes a table with columns for Company Name, Address, # of Users, and Company ID, listing AIM Company. Both sections have 'ADD' and 'UNLINK' buttons.

Name	Login	Security Profile	Allow Login
Scott E Hibler	ScottHibler	andys full	No

Company Name	Address	# of Users	Company ID
AIM Company	Houston, TX 77090	2	23984dd0-8f42-470e-92fa-08693c24d680



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Unlinking a Company*.

## Viewing the Corporate Billing Plans

From the *Search for Existing Corporations* screen, click the **Billing** button to view billing plans associated with a corporation. The *Corporate Billing Plan Management* screen displays.

Channel	Corporation	City/State	Status	Billing Plan	# of Admins	# of Linked Companies
Stewart - Affiliate	Blueberry	Austin, TX	Active	Personal Edition (SureClose - Personal Edition)	1	1

Use the toolbar from the *Corporate Billing Plan Management* screen to view associated corporate billing plans; add new billing plans to corporations and generate billing reports. To view and/or edit an associated billing plan, simply double-click the billing plan.

Plan	File Cost	Archive File Cost	Archive Mb Cost	Start	End
Richard's Test Plan	<250	\$10.00	\$5,000.00/75 + \$1.00/addl	\$0.00/40 + \$0.10/addl	08/01/2015
	<255	\$5.00			
	<264	\$2.00			
Personal Edition	>264	\$1.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	12/01/2014 07/31/2015
	<1000	\$0.00			
	<2000	\$0.00			
	<3000	\$0.00			
	>3000	\$0.00			



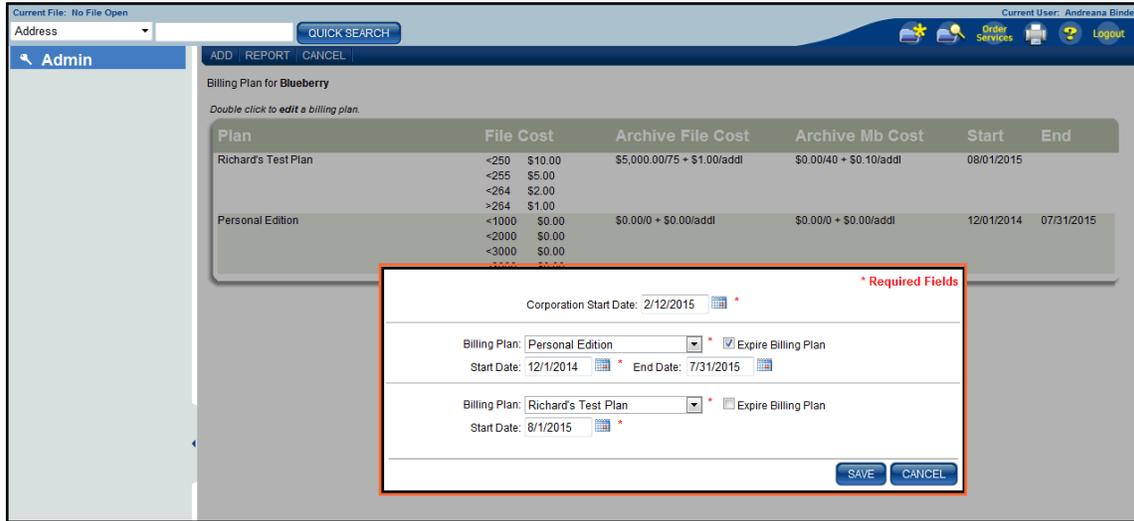
For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Viewing the Billing Plans*.

## Adding\Editing the Billing Plans

Use the toolbar from the *Corporate Billing Plan Management* screen to add a new billing plan for a new corporation, or edit an existing billing plan.

After searching for and selecting the required corporation from the screen, click the **Billing** button that navigates you to the *Corporate Billing Plan Management* screen.

From here you can assign a new billing plan to the corporation by clicking **Add**. You can also double-click an existing billing plan to modify its existing details.



The screenshot displays the 'Billing Plan for Blueberry' management screen. At the top, there is a toolbar with 'ADD', 'REPORT', and 'CANCEL' buttons. Below the toolbar is a table of billing plans. A modal dialog is open in the foreground, allowing the user to add or edit a plan. The dialog includes a 'Corporation Start Date' field, a dropdown for 'Billing Plan', and 'Start Date' and 'End Date' fields. There are also checkboxes for 'Expire Billing Plan'.

Plan	File Cost	Archive File Cost	Archive Mb Cost	Start	End
Richard's Test Plan	<250 \$10.00 <255 \$5.00 <264 \$2.00 >264 \$1.00	\$5,000.00/75 + \$1.00/addl	\$0.00/40 + \$0.10/addl	08/01/2015	
Personal Edition	<1000 \$0.00 <2000 \$0.00 <3000 \$0.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	12/01/2014	07/31/2015

Modal Dialog Fields:

- Corporation Start Date: 2/12/2015 \*
- Billing Plan: Personal Edition \*  Expire Billing Plan
- Start Date: 12/1/2014 \* End Date: 7/31/2015
- Billing Plan: Richard's Test Plan \*  Expire Billing Plan
- Start Date: 8/1/2015 \*



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Adding the Billing Plans*.

## Generating the Billing Report

SureClose Advantage allows users to view the billing data for the existing corporations in the application. To view a billing report, click the **Report** button to view the billing report From the *Corporate Billing Plan Management* screen.

Plan	File Cost	Archive File Cost	Archive Mb Cost	Start	End
Richard's Test Plan	<250 \$10.00 <255 \$5.00 <264 \$2.00 >264 \$1.00	\$5,000.00/75 + \$1.00/addl	\$0.00/40 + \$0.10/addl	08/01/2015	
Personal Edition	<1000 \$0.00 <2000 \$0.00 <3000 \$0.00 >3000 \$0.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	12/01/2014	07/31/2015

Select the **Date Range** to view billing data for a specific date range. Select the radio buttons that best describe the additional billing details you would also like to view. Click **Go** to display the billing report details.

**BILLING REPORT**  
Range: February 2015  
Corporation: Blueberry  
Current Plan Name: Personal Edition

New Files							
	Closing	Listing	Generic	Total	Converted	Chargeable	Monthly Due
Tier 1	0	0	0	0	<0>	0	\$0.00
Tier 2	0	0	0	0	<0>	0	\$0.00
Tier 3	0	0	0	0	<0>	0	\$0.00
Tier 4	0	0	0	0	<0>	0	\$0.00
Archived Files [MB]			0 file(s) [0 MB]	0*	<0>	0 + 0 [0 + 0 MB]	\$0.00+\$0.00 \$0.00+\$0.00
						Subtotal	\$0.00
						Discount 0.0 %	<\$0.00>
						Total Due	\$0.00

\* Count includes Files converted to Closing Files

Total Files Deleted this month: 0

12-Month Usage Trend				
Month	Logins	Unique Logins	New Files	New Documents
February 2015	0	0	0	0
January 2015	0	0	0	0
December 2014	0	0	0	0
November 2014	0	0	0	0
October 2014	0	0	0	0
September 2014	0	0	0	0
August 2014	0	0	0	0
July 2014	0	0	0	0
June 2014	0	0	0	0
May 2014	0	0	0	0
April 2014	0	0	0	0
March 2014	0	0	0	0

Address/Description	City/State/Zip	Created Date	Buyer/Seller	Creator	Escrow#	File#	Template
No File was found.							



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Generating the Billing Report*.

# Billing Link

From the *SureClose Administration* section, click the **Billing** link to view SureClose Billing plans.

## Viewing the SureClose Billing Plans

Manage billing plans in SureClose Advantage using the **Billing** link, available in the SureClose Administration section on the *Admin* screen.



### Note

The **Billing** link only displays for users with permissions.

After you have accessed the *Billing* screen, you can view billing plans already.

Plan	File Cost	Archive File Cost	Archive MB Cost	Start/End Date	#ofCorporations
AAR BillingPlan (Arizona Association of Realtors)	<10000 \$0.00 <20000 \$0.00 <50000 \$0.00 >50000 \$0.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	2/1/2009	54
AJO Test Plan	<1 \$1.00 <2 \$2.00 <3 \$3.00 >3 \$4.00	\$0.00/0 + \$5.00/addl	\$0.00/0 + \$2.00/addl	3/1/2005	11
AUTOTEST Billing	<1 \$1.00 <2 \$2.00 <3 \$3.00 >3 \$4.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	10/1/2006	1
Brian's Master Plan	<0 \$0.00 <0 \$0.00 <0 \$0.00 >0 \$0.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	1/1/2000	3
Brian's test	<9999991 \$999,999.00 <9999992 \$999,999.00 <9999993 \$999,999.00 >9999993 \$999,999.00	\$99,999.00/999999 + \$1.00/addl	\$99,999.00/999999 + \$1.00/addl	8/1/2005	1
Karen Test	<20 \$1.50 <50 \$1.00 <100 \$0.50 >100 \$0.25	\$1.00/1 + \$1.00/addl	\$2.00/2 + \$2.00/addl	10/1/2014 10/31/2017	12
Karen Test 2	<1 \$0.00 <2 \$0.00 <3 \$0.00 >3 \$0.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	1/1/2015	11
Karen Test Billing Plan	<5 \$5.00	\$0.00/0 + \$0.00/addl	\$0.00/0 + \$0.00/addl	1/1/2015	0



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Viewing the Billing Plans*.

# Secure Email

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## Displaying Usernames in Secure Email Notification

Usernames have been added to the body of secure email notifications sent from SureClose Advantage. Within the notification email, a new list displays email recipient names and their usernames. This will provide users a quick and easy reference to their SureClose login. BCC recipients will not be included in the list.

# Additional Information

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## Training

Through SureClose Advantage Online Help, you can access an online library of interactive tutorials and quick reference cards by clicking the **Additional Learning Resources** link or navigate to: the [SureClose Advantage Training Center](#).

## Technical Support

For technical support, contact PropertyInfo Customer Care at 1.877.800.3132 or [customercare@propertyinfo.com](mailto:customercare@propertyinfo.com).