Attaching Documents in RLSS

Is one of your office's goals to become a more "paperless" environment? To help you attain this goal, the RLSS software will allow you to attach documents to your loan files after you have scanned and stored them on your file server. This will save you many trips to the file cabinet to review your paper copies.

Within Loan Master files and Loan Activity, you will find an icon labeled "Attach/Retrieve Files". Using this icon, you can attach documents relating to your loan that have been created or saved in formats such as Excel, Word, pdf, etc. You may then retrieve and view them at any time. Items you may wish to attach are the loan contract, proof of insurance, financial documents and copies of the checks received from your clients.

To attach a document, select the appropriate loan and click on the Attach/Retrieve Files icon. Browse to the location to which your document was saved on your network server or on your local C drive. Once the location and document appear in the File Location box, click on the Save icon. The location of your document should now be visible in the grid.

When a loan has any document attached, the magnifying glass/file folder icon will appear in the lower right corner of your Loan Activity or Loan Master screen. You may click on either this icon or the icon at the top of the screen to view a listing of your attached documents. To retrieve a specific document, simply click on it in the grid. Should you wish to delete the document from the grid, click on it once to highlight it and tap the delete key on your keyboard. If you should later move the attached document to a different location, you will also need to re-attach it to your loan.