eFolder Overview



eFolder File Manager

Open Web Vie	w Se	arch AllRegs	🛄 वन्वातव			
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Within the eFolder, File Manager, you will have the ability to:

- Browse and Attach files (Upload)
- Merge files
- Split files
- Annotate





Add Document		
Add a new doc	ument	
Add documents	from Document Sets	
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In order to attach files in the eFolder, you will need to first select add new document icon and press ok. This will put you into the document details screen.



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You will locate the documents you wish to upload.



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The chosen document will then upload into the document details.



O Document Details (Paystub)

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Access Conditions ATR/QM Doc Groups	AU, BM, CL, CU, FN, LA, LD, LO, LP, Othe Pay Stubs	ers, PC, UW,

You can name the attachment from the dropdown and if available, assign the document to a condition. When finished you will press close, and the attachment will appear in the documents folder.

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eFolder File Manager – Merging Documents

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	Recycle/Misc Bin		import and Program Cod	Needed	Duplicate Document		
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					Export to Excel		
					Print Document		
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If you have several documents that need to be merged into one document, (for example 1 page each of bank statement that needs to be combined) you will need to highlight the documents. Once highlighted, you will need to right click and press the edit document.

This will then openup the Document Manager.



eFolder File Manager – Merging Documents

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The two documents will then combine into one in the windowpane area.

Drag and drop the highlighted documents to the condition type and press close.

Then the merged document will appear in the documents folder.



eFolder File Manager – Extracting/Splitting



eFolder File Manager – Extracting/Splitting

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り つ つ		New file name income analyzer paystub 3 and 4.pdf Assign to folder Recycle/Misc Bin Documents list shows folders created before loan save Delete pages after extraction
1	2	Cancel Apply Apply and Exit

To extract a document, mark the document you would like to separate and press extract. It will ask what folder you want to assign the document to. Once chosen, press apply. The document will then go to the assigned folder.

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eFolder File Manager – Annotating

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eFolder File Manager – Annotating



There are three types of annotations:

- 1. Public anyone can see these comments, including our end investors.
- 2. Internal anyone within M/I Financial
- 3. Private just the person completing the annotation.

Best practice would be to mark your comments internal. You will add the internal annotation and press save. It will appear to the right and be marked on the document as well.











