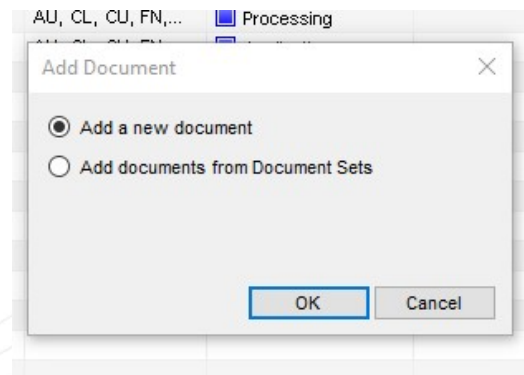# eFolder Overview

eFolder File Manager

Within the eFolder, File Manager, you will have the ability to:

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

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eFolder File Manager –
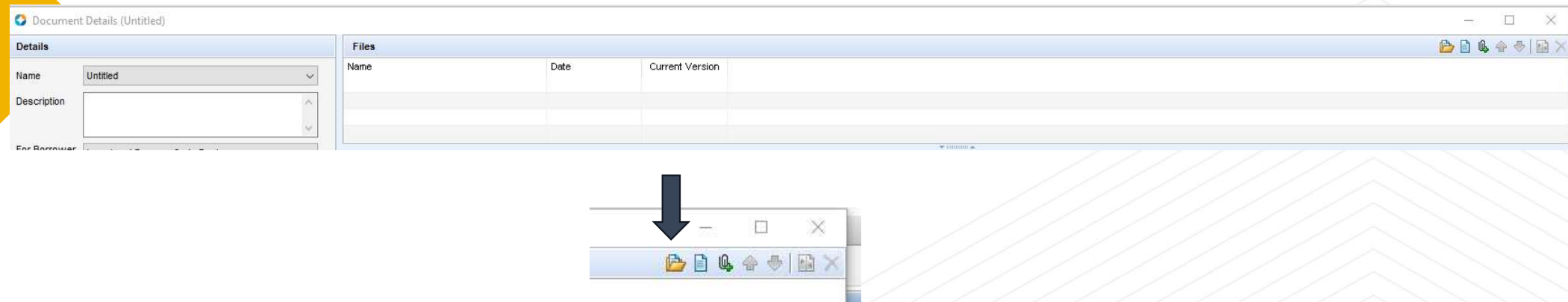# Browse and Attach Files/Upload

**In order to attach files in the eFolder, you will need to first select add new document icon and press ok.
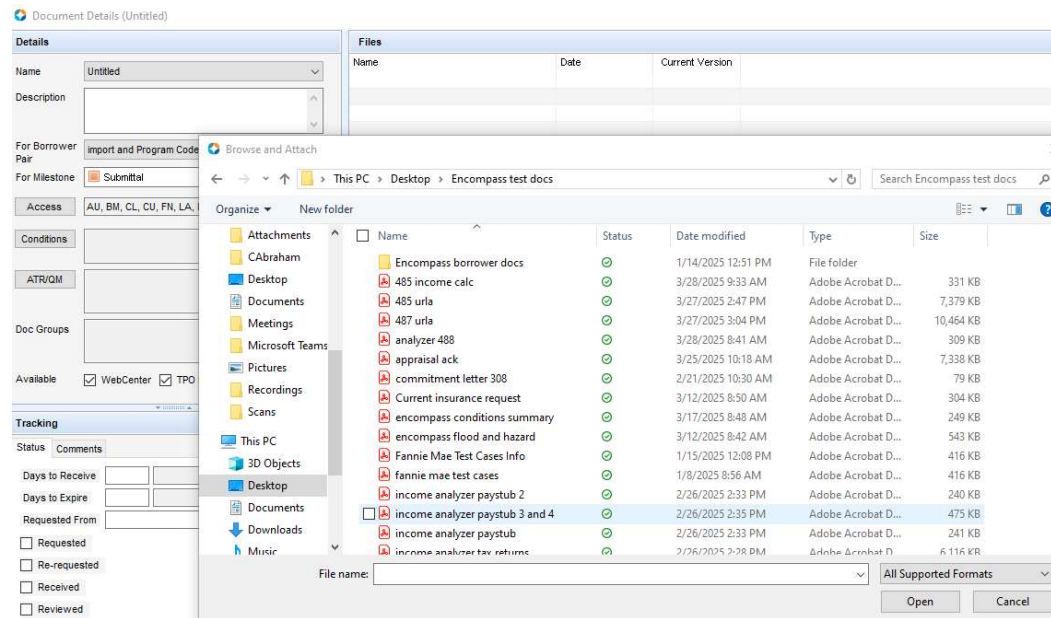This will put you into the document details screen.**

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eFolder File Manager –
Browse and Attach Files/Upload

In document details, you will need to press the browse and attach icon, to add new document.

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eFolder File Manager –
Browse and Attach Files/Upload

You will locate the documents you wish to upload.

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eFolder File Manager –
Browse and Attach Files/Upload

The chosen document will then upload into the document details.

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eFolder File Manager – Browse and Attach Files/Upload

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.
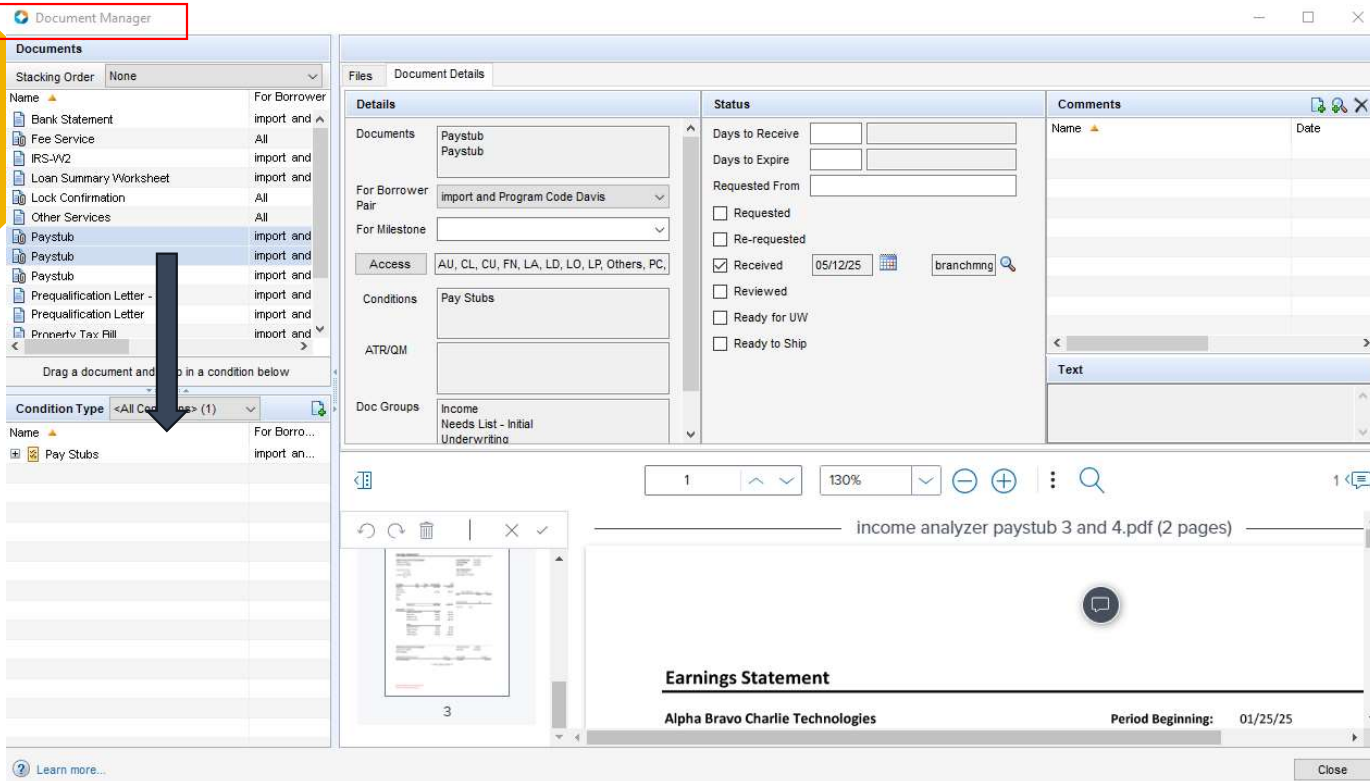
eFolder File Manager – Merging Documents

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.

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eFolder File Manager – Merging Documents

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.

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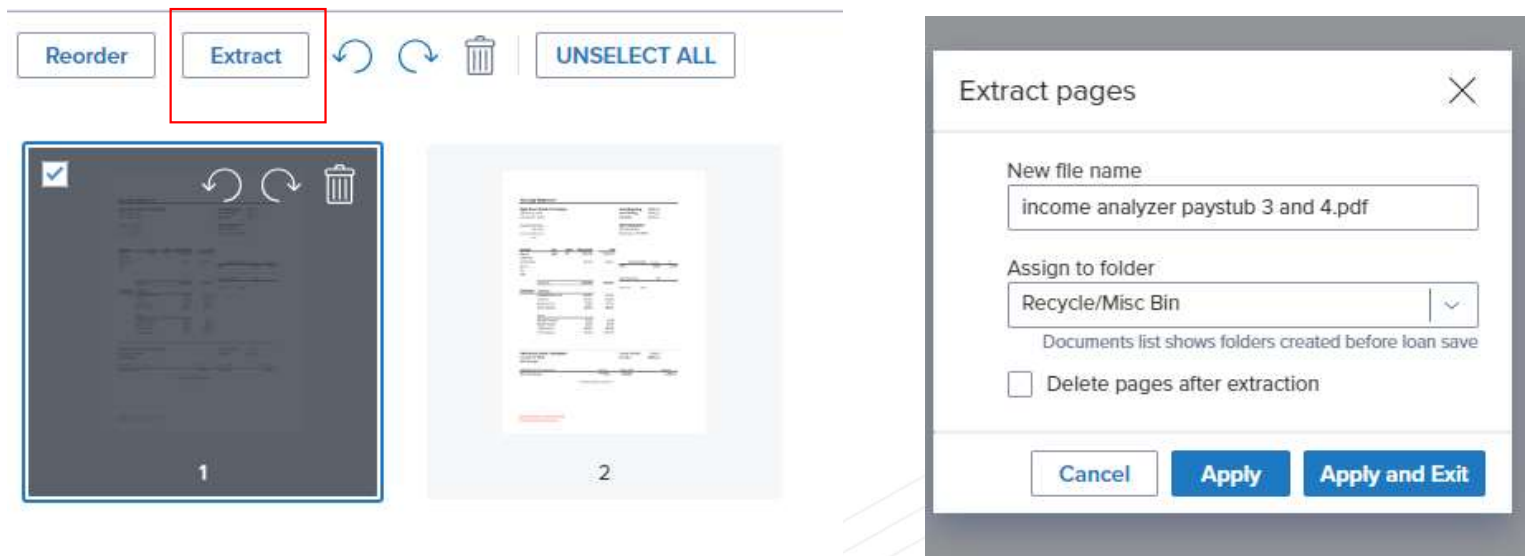A Subsidiary of M/I Homes, Inc.

eFolder File Manager – Extracting/Splitting

In the eFolder, documents, open up the document you would like to split. Mark the documents you would like to edit. (holding down the cntrl button) Press the edit file button.

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eFolder File Manager – Extracting/Splitting

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.

eFolder File Manager – Annotating

When you are attaching your documents, you can annotate a document items you want to draw attention to. In the eFolder, go into Document Details screen from the documents. You will want to add annotation, then create annotation. This will open up a dialog box.

eFolder File Manager – Annotating
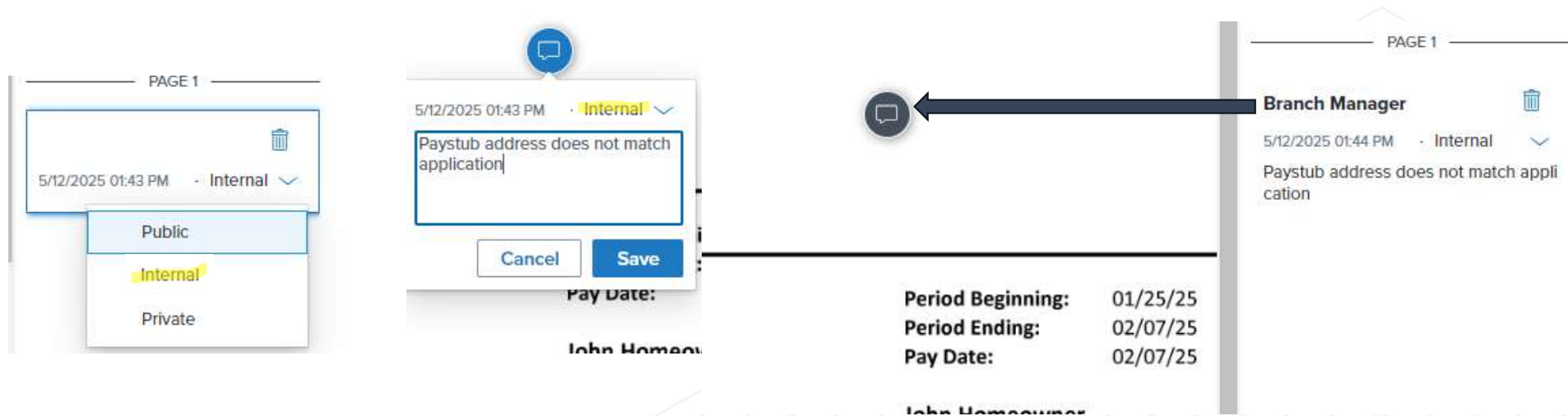
There are three types of annotations:
1. Public – anyone can see these comments, including our end investors.
2. Internal – anyone within M/I Financial
3. Private – just the person completing the annotation.
Best practice would be to mark your comments internal. You will add the internal annotation and press save. It will appear to the right and be marked on the document as well.

M/I TITLE AGENCY

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TransOhio Residential Title

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