



Adding a Document to an Order

In the Order Lobby, select the order you are working on.

Order Lobby
Select an Order below to view the details

Display orders from: 8/20/2022 to: 11/18/2022

Show Orders: All Companies Search Criteria: LoanNumber Search Order Search

ORDER NUMBER	LOAN NUMBER	BORROWER	SELLER	NOTARY	COMPANY	PROPERTY	SCHEDULED CLOSING DATE	ACTUAL CLOSING DATE	STATUS
Config		Wil Riker		N/A	N/A	2345 Street, City, TX 65181	05/31/2023 06:55:00 AM		Configuration Needed
Pending1		Wil Riker		N/A	N/A	2345 Street, City, TX 65165	05/30/2023 06:50:00 AM		Pending Closing

Under the Documents section, select **Edit**.

Pre-Closing [Edit](#)

During this phase, you will be able to review your closing documents, get educated about your upcoming closing, and ask any questions you may have to your closing team using the Notifications tab above. Click on any of the document links below to begin your pre-closing review!

Documents [Tag Assignments](#) [Deleted Documents](#) [Document Review Status](#) [Edit](#)

Review, accept and if necessary, eSign your documents in advance of your closing.

	Reviewed	Accepted	Date Due
Title Documents			

Select **Upload** then **Choose Files**.

Print **Upload** Delete

← Back **Add Documents**

Files **Choose Files**

Name	Descrip
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If you would like to open multiple files simultaneously:

- Press Ctrl on your keyboard and click on the additional files.
- Drag and drop files into the pop-up window.

Note: Both PDF and Word files can be uploaded.



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Select **Choose File** to upload your document.

Once you have uploaded the document, you can make the following selections in the Add Documents pop-up.

- Phase:** Select what specific phase the document will show up in. Default — All
- Audience:** Select who can view the document.
- Due Date:** Use the calendar icon to select when this document is due, if needed.
- Additional Action Required:** Use the check box to set the document for special attention or requirement.
- Wet Signature Required:** Use the check box to set the document for wet signature.

Select **Save** when finished.

Add Documents ✕

Choose Files No file chosen

Drag and drop files here.

A Phase All

B Audience* ---Please select---

C Date Due 05/31/2023 06:55 AM

D Additional Action Required at Closing:

E Wet Signature Required (Hybrid Closing Only):

Save Cancel



Additional Document Actions

Once saved, the **Add Documents** screen will allow you to use the following document actions.

- a. **Name**
- b. **Description:** Add a description if desired.
- c. **Document Template:** Use the drop-down arrow to apply a document template.
- d. **Edit Icon:** Use this button to go back and edit the document details.
- e. **Scissors Icon:** Use this splitting tool to split the PDF file into multiple documents.
- f. **Trash Icon:** Use this button to delete the file. It will not be uploaded.

The screenshot shows the 'Add Documents' screen. At the top left, there is a 'Back' button and the title 'Add Documents'. Below this is a 'Files' section with a 'Choose Files' button. A table is displayed with the following columns: Name, Description, Document Template, Status, and Action. The table contains one row with the following data: Name: 'Right to Rescind - Blank', Description: 'Right to Rescind - Blank', Document Template: 'Please select a template', Status: 'Completed'. Below the table, there are three red circular callouts labeled A, B, and C, pointing to the Name, Description, and Document Template fields respectively. To the right of the table, there are three red circular callouts labeled D, E, and F, pointing to the Edit, Scissors, and Trash icons. At the bottom of the screen, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

If no additional document actions are needed, select **Save**.

Pavaso Support

Support Hours: <https://pavaso.com/contact/>

Phone/ Closing Hotline: (866) 288-7051

Email: support@pavaso.com

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