



Document Templates

A document template is a saved template that contains all tags placed on a document including position, size, and tag details as well as document details, including wet signature.

Note: Document templates are accessible through the Pre-Closing review phase and in the edit documents screen. You can also select individual documents with the pencil icon.

ORDER NUMBER: Releaseorder

COMPANY: Stargazer Title

BUYER: Tom Paris

SELLER:

SALES PRICE: \$ 0.00

CLOSING DATE: 12/12/2023 11:12 AM Mountain

COUNT DOWN TO CLOSING:

0 DAYS 0 HOURS 0 MINUTES 0 SECONDS

Take a Tour

Pre-Closing Review

Closing Setup

Closing

Pre-Closing

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 + Upload **Edit**

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

	Reviewed	Accepted	Date Due	Added By	
Title Documents					
NAME AFFIDAVIT - Blank	<input type="checkbox"/>	<input type="checkbox"/>	11/16/2023	Stargazer Title	
Blank Doc	<input type="checkbox"/>	<input type="checkbox"/>	12/12/2023	Stargazer Title	
Loan Documents					

Education

Interactive media to help you through the closing process.

Other

Saving a Template

Once all tags and settings are applied, select **Save as Template**.

Lobby View/Edit Notes Notifications Edit Signature

Delete **Save as Template** + Expand Tag Info Save

Fill in the Name and Description field and select **Save**.

Save as Template

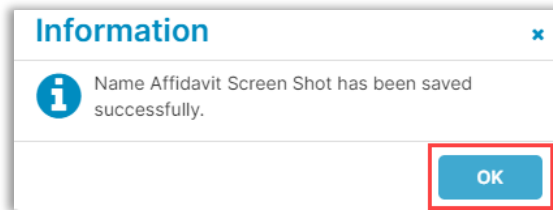
Name: Name Affidavit Screen Shot

Description: Demonstration

Save



Select **OK**.



Applying a Template

Once the document is open, select a template from the drop-down on the left side.

Note: Applying a template will override any current tags that are placed.

Audience:Date Due:

All12/12/2023

☐ Additional Action Required at Closing

☐ Wet Signature Required (Hybrid Closing Only)

Document Templates:

Please select a template

Default options

Please select a template

Do not apply any template

Stargazer Title

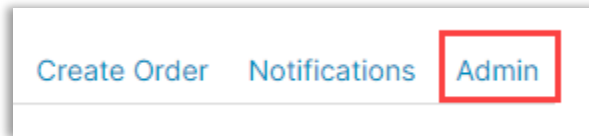
Name Affidavit Screen Shot

+ Tag for Initials

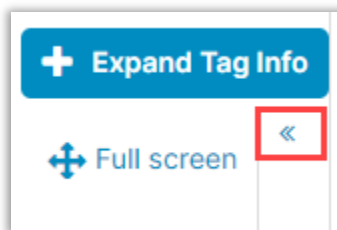
Updating a Template in the Template Library

Go to the Order Lobby screen and select **Admin**.

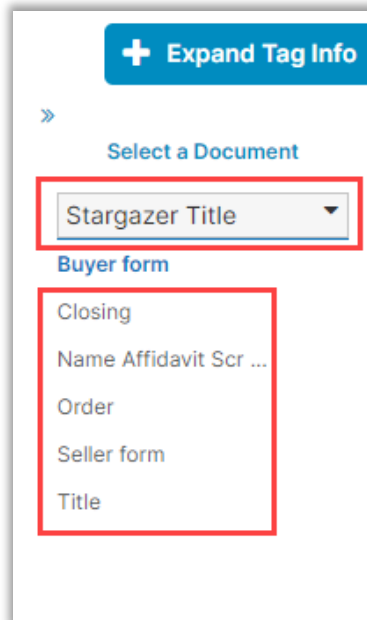
Note: This is only available to Company Admins.



Select the **arrows** on the right-hand side.



Select the company from the dropdown, then select the template you would like to edit.





Applying a Template While Uploading a Document

Upload the file(s) and select the template from the dropdown.

Note: This can be done from order creation or during pre-closing set up.

Files

Choose Files

Name	Description	Document Template	Status	Action
Drag and drop files here.				
Blank Doc	Blank Doc	<div>Please select a template</div> <div><div>Default options</div><div>Please select a template</div><div>Do not apply any template</div><div>Stargazer Title</div><div>Name Affidavit Screen Shot</div><div>Order</div><div>Seller form</div><div>Buyer form</div><div>Title</div><div>Closing</div></div>	Completed	<div><div></div><div></div><div></div></div>

Save

Pavaso Support

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

Phone/ Closing Hotline: (866) 288-7051

Email: support@pavaso.com

[View Our 24/7 Online Help Library](#)