



# Document Tag Functions

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Pavaso

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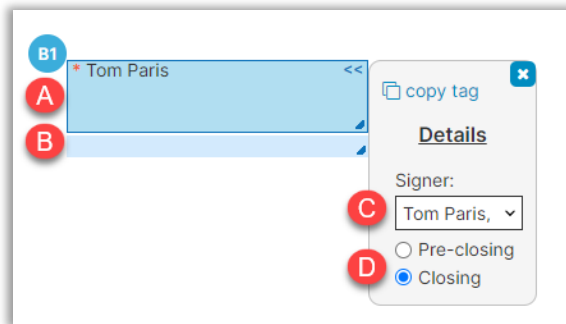
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## Document Tag Functions

**Note:** Tags are all independent from each other and can be moved to different areas of the document. The double arrows inside of a tag will hide or display its details box.

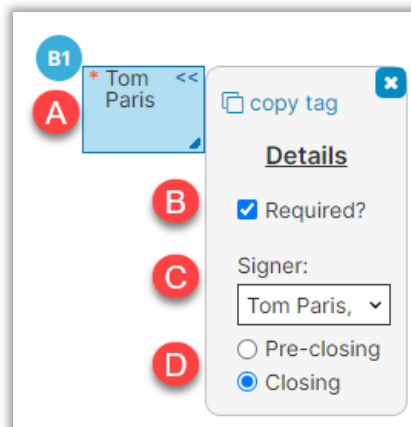
### Tag for Signature

- A. **Signature box:** Where the Signer signs.
- B. **Date box:** Date of the signature.
- C. **Signer:** Select who is signing.
- D. **Pre-Closing or Closing:** Select what phase the tag will need to be signed in. This will default to Closing. If signing will be done during closing, then leave at Closing. If signing will be done before closing, select Pre-Closing.



### Tag for Initials

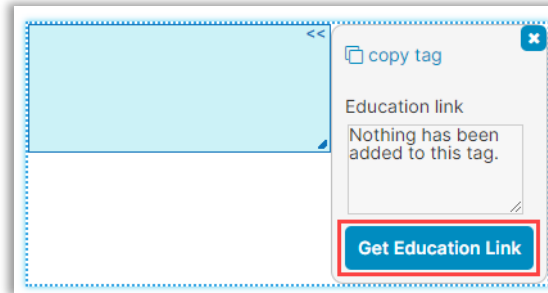
- A. **Initial Box:** Where the Signer initials.
- B. **Required:** Check if this is a required initial.
- C. **Signer:** Select who is initialing.
- D. **Pre-Closing or Closing:** Select what phase the tag will need to be signed in. This will default to Closing. If signing will be done during closing, then leave at Closing. If signing will be done before closing, select Pre-Closing.



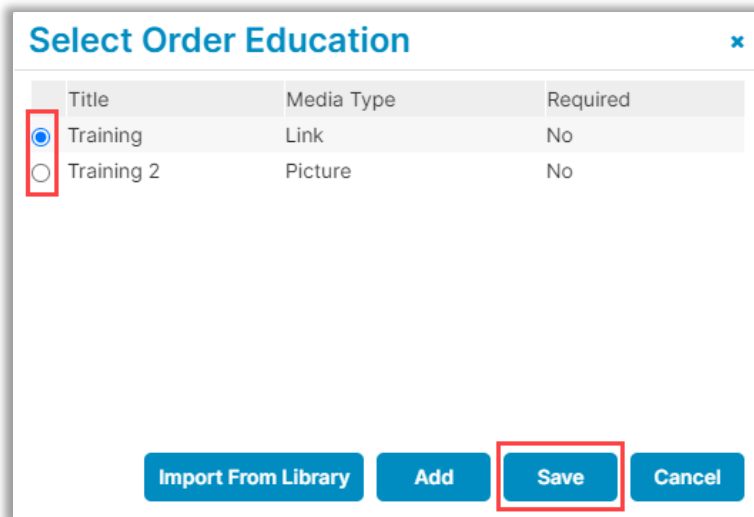
## Tag for Education

The Tag for Education button creates a box tag in which to place a link to educational content that informs and educates the Signer. This can be any media source you like.

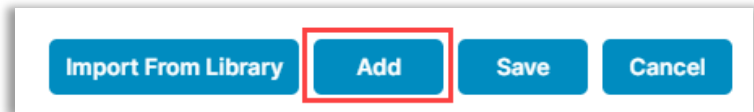
Select **Get Education Link**.



Option 1: Select an education piece from the list. Then select **Save**.



Option 2: Select **Add** for a new educational piece.



Fill in the required fields and choose the file necessary. Then select **Save**.

**Add New Educational Item**

Title (\*): Training 5

Review by Consumer (\*):  Required  Optional

Media Type (\*): Video

Category (\*): Closing Checklist

Upload File (\*): Choose File No file chosen

Save

Option 3: Select **Import from Library**.

Import From Library Add Save Cancel

Select education pieces from the library and select **Save**.

**Import from Library**

Title	Type	Languages
<input checked="" type="checkbox"/> Training	Link	English
<input checked="" type="checkbox"/> Training 2	Picture	English
<input checked="" type="checkbox"/> Training 3	Link	English

Display 3 of 3 items

Save

## Tag for Notary

- A. **Notary Signature:** Where the Notary signs.
- B. **Notary Seal:** Where the Notary's seal shows.
- C. **Comm. Exp. Date:** Date the Notary commission expires.
- D. **Notarization Type:** Select what type of notarization it is.
- E. **Link to Signer:** Select who the notarization is for.

The screenshot shows a 'Notary' tag form. On the left, there are three yellow input fields: 'Notary Signature' (with callout N), 'Notary Seal' (with callout B), and 'Comm. Exp. Date' (with callout C). On the right, there is a 'Details' panel with a 'copy tag' button and a dropdown for 'Notarization Type' (set to 'Acknowledged', with callout D), and another dropdown for 'Link to signer' (set to 'Buyer', with callout E).

## Tag for Text

- A. **Text Box:** Where any desired text goes.
- B. **Format:** Select if this is to be a text, date, or checkbox.
- C. **Required:** Check if this is a required item.
- D. **Signer:** Who needs to fill out this tag.
- E. **Pre-Closing or Closing:** Select what phase the tag will need to be signed in. This will default to Closing. If signing will be done during closing, then leave at Closing. If signing will be done before closing, select Pre-Closing.

The screenshot shows a 'Text' tag form. On the left, there is a large text input area (with callout A). On the right, there is a 'Details' panel with a 'copy tag' button and several options: 'Format' (dropdown set to 'Text', with callout B), 'Required?' (checkbox, with callout C), 'Signer' (dropdown set to 'Tom Paris', with callout D), and 'Pre-closing' (radio button) and 'Closing' (radio button, selected, with callout E).

## Custom Text Tagging

Custom text tagging document can be found here [https://pavaso.com/training/wp-content/uploads/Custom\\_Text\\_Tags\\_Guide.pdf](https://pavaso.com/training/wp-content/uploads/Custom_Text_Tags_Guide.pdf).

## Pavaso Support

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

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