



Custom Text Tags

Configuration and User Guide

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Pavaso, Inc.

Table of Contents

What are Custom Text Tags?	2
Enabling Custom Text Tags.....	3
Custom Text Tags During Signing	9
Pavaso Support	11

What are Custom Text Tags?

Custom Text Tags were designed to allow users to create a library of pre-filled text tags to place on documents as needed. For example, if your county, underwriter, or company requires specific verbiage on a document that you may traditionally write on a document, you can create a Custom Text Tag on Pavaso to replicate this practice digitally.

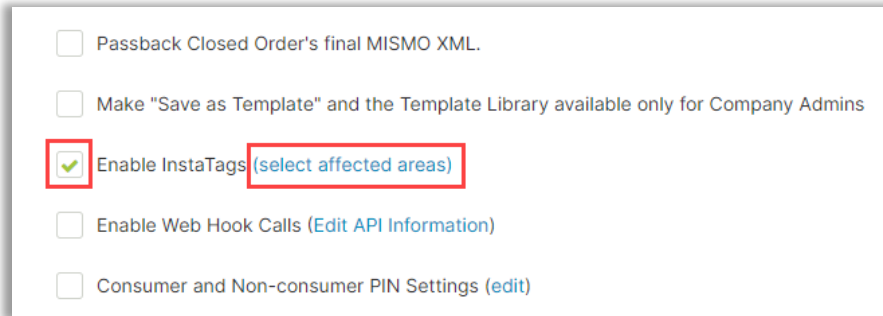
Custom Text Tags are available to all users within your company. Administrators can create and edit tags for all users within the company as well.

Enabling Custom Text Tags

If you do not see this option, contact your company administrator.

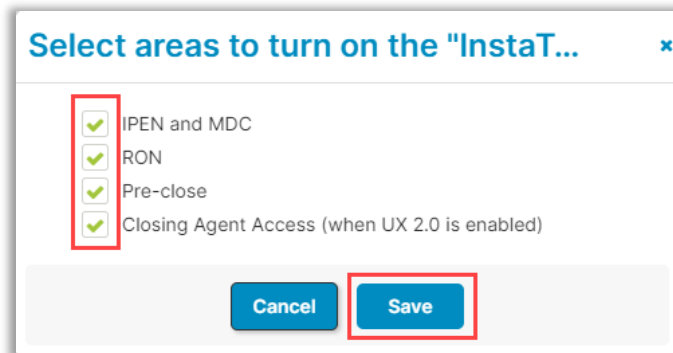
The screenshot shows the Pavaso user interface. At the top, the navigation bar includes 'Home', 'My Messages', 'My Team', 'My Company', 'Support Center', and 'Candy Closer'. The 'My Company' tab is selected and highlighted with a red box and a red circle containing the number 1. Below the navigation bar, the 'My Company' section has tabs for 'Companies' and 'Users'. A search bar for companies is present. A table lists company information with columns for Company Name, Company Type, Address, City, State, and Action. The 'Action' column for the first entry has an 'Edit' link highlighted with a red box and a red circle containing the number 1. Below the table, a sidebar menu is shown with a red circle containing the number 2 next to it. The 'Configuration' option in the sidebar is highlighted with a red box. To the right of the sidebar, a configuration panel is shown with a red circle containing the number 3 next to it. The panel has a checked checkbox and the text 'Enable Custom Text Tags'. Below this, a light blue box contains three numbered steps: 1. Select My Company and Edit. 2. Select Configuration. 3. Choose Enable Custom Text Tags. At the bottom of this box, it says 'Available to Company and Primary Administrators.'

To be able to easily access Custom Text Tags during closing, enable InstaTags for all phases. This allows for the Notary to use the Custom Text Tags via the InstaTag toolbar during closing.



A screenshot of a configuration panel with a white background and a light gray border. It contains five settings, each with a checkbox and a label. The third setting, "Enable InstaTags", is checked and has a red box around the checkbox and the text "(select affected areas)".

- Passback Closed Order's final MISMO XML.
- Make "Save as Template" and the Template Library available only for Company Admins
- Enable InstaTags (select affected areas)
- Enable Web Hook Calls ([Edit API Information](#))
- Consumer and Non-consumer PIN Settings ([edit](#))



A screenshot of a dialog box titled "Select areas to turn on the 'InstaT...". The dialog has a white background and a light gray border. It contains a list of four items, each with a checked checkbox and a label. The entire list is enclosed in a red box. At the bottom of the dialog are two buttons: "Cancel" and "Save", both in blue with white text. The "Save" button is also enclosed in a red box.

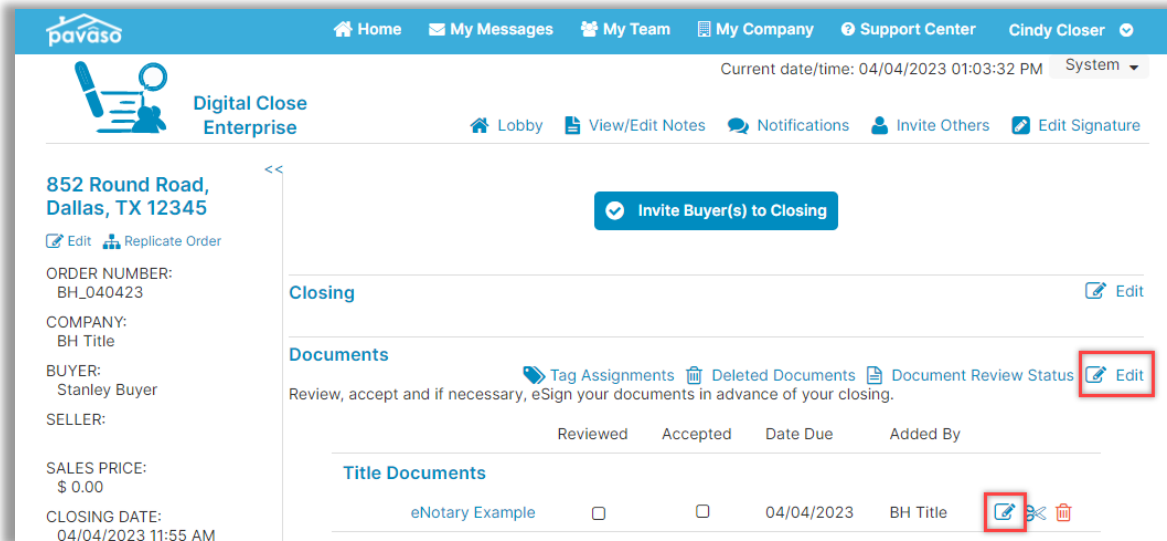
Select areas to turn on the "InstaT..."

- IPEN and MDC
- RON
- Pre-close
- Closing Agent Access (when UX 2.0 is enabled)

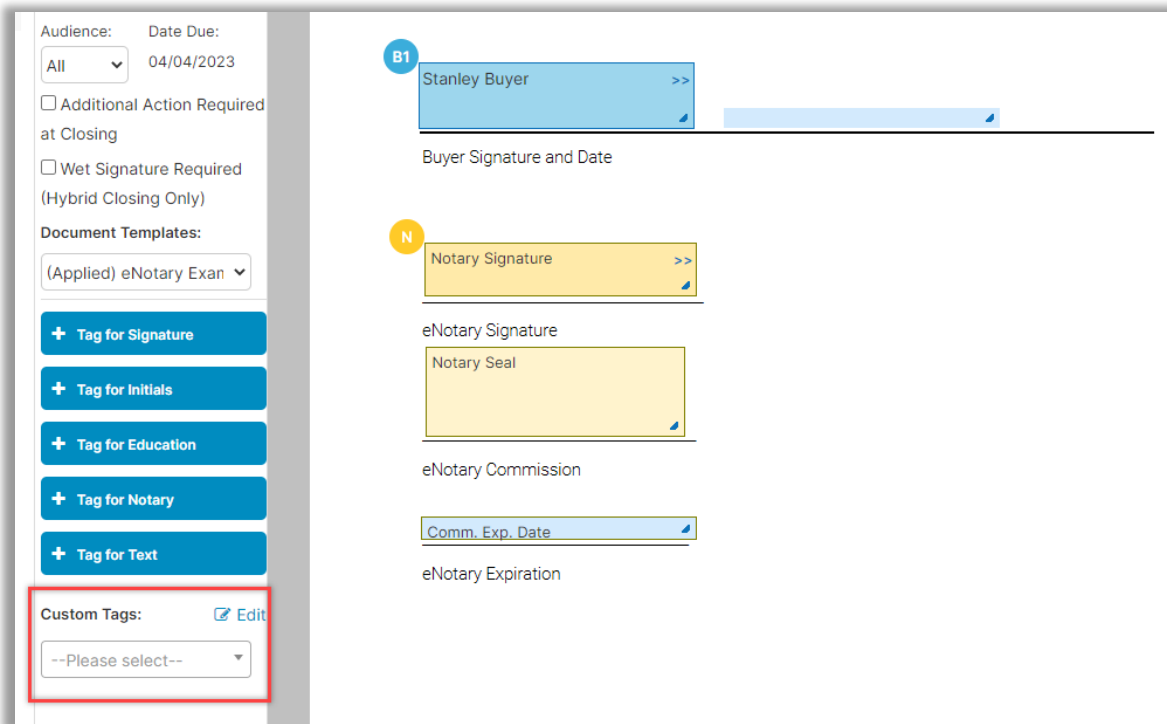
Cancel Save

Create Custom Text Tags

From within the order, select **Edit**.

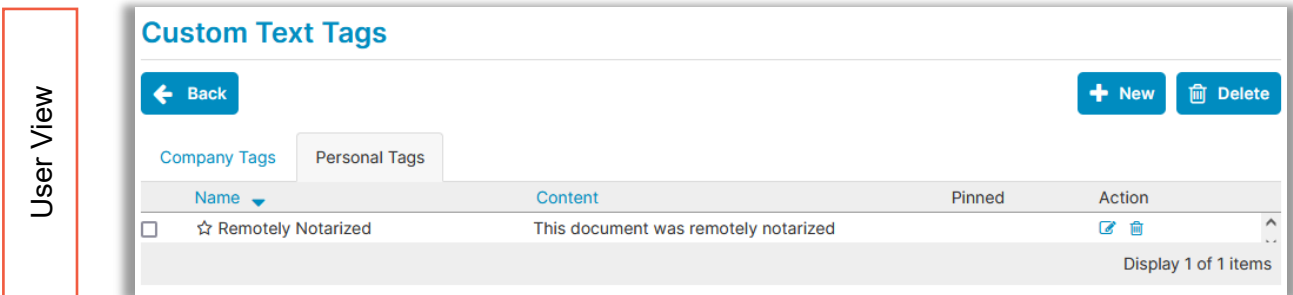
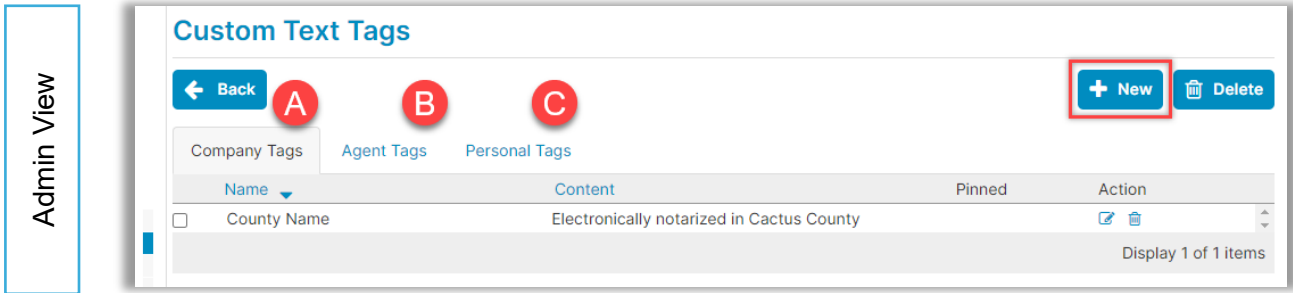


From the document tagging screen, select **Edit** next to **Custom Tags**.



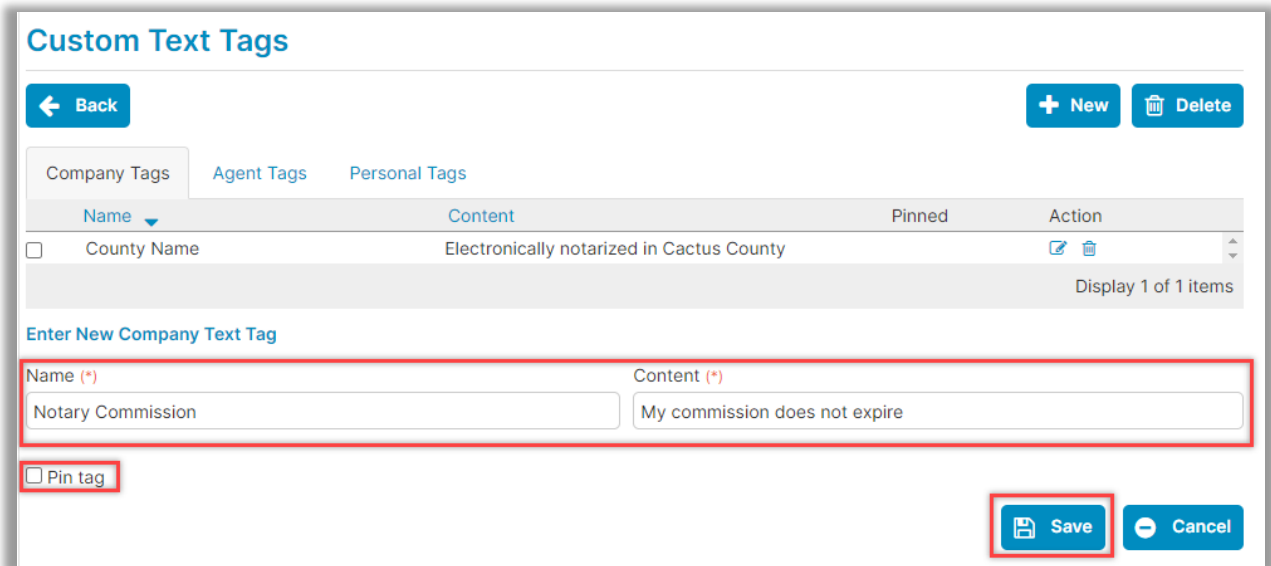
Select which tab you want to create the tag under and select **+ New**.

- A. Company Tags:** Administrators can create Company and Personal Tags. Company tags are available to all users in the company. Personal tags are available to the specific user creating the tag.
- B. Agent Tags:** Tags shown in this tab are a compilation of all Personal Tags created by anyone within the company, including Administrators. Administrators can edit and delete the Personal tags of other users. Only Administrators see the Agent Tags tab.
- C. Personal Tags:** These tags are available only to the specific user who created them but can be seen by Administrators.

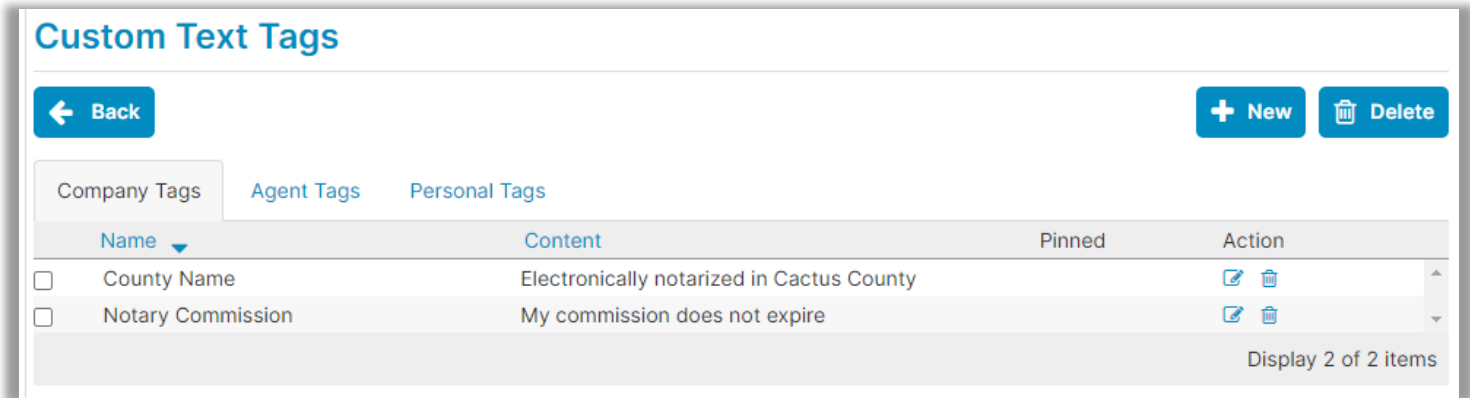


Enter the name and content of the tag. Select **Save**.

Note: Select *Pin Tag* box to pin favorites.



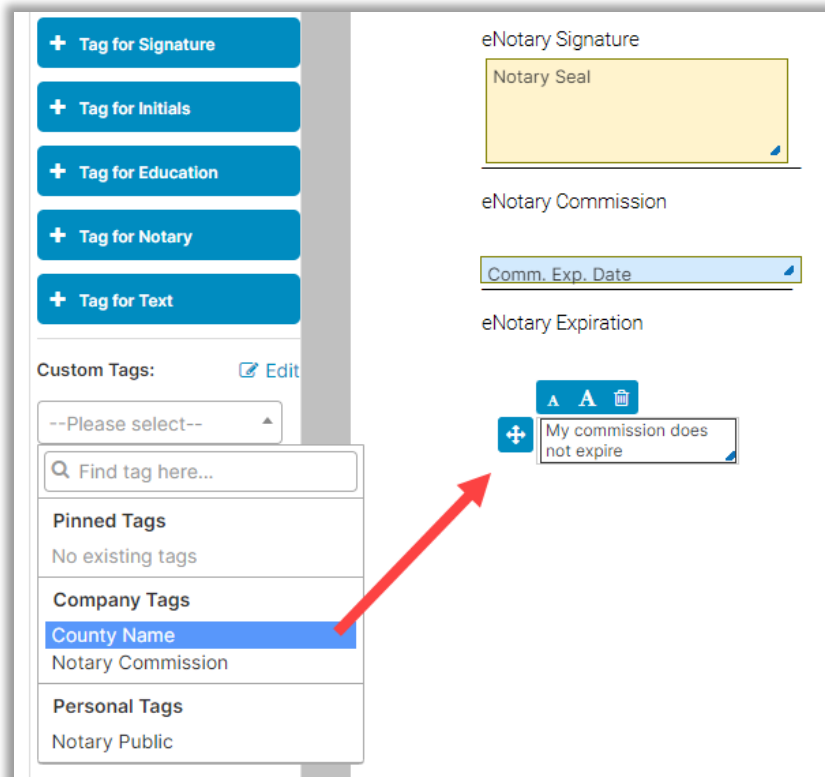
The new tag is added to the current open tab. In this example, the tag is added to the Company Tag tab, meaning anyone in this company can see and use tags.



When finished creating tags, select **Back**.

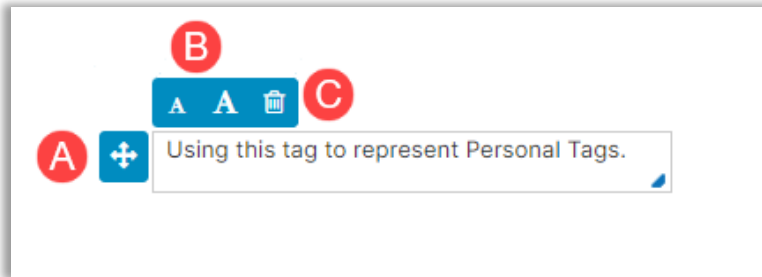


Select tag(s) from the drop-down menu and place them on the document.



Tags can be moved, and text can be resized.

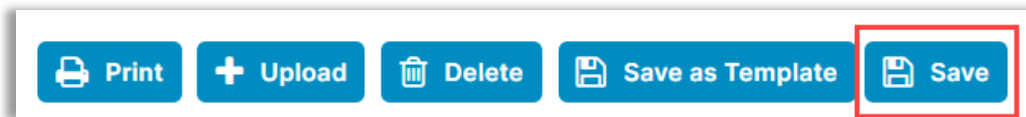
- A. Click and hold to drag tag.
- B. Select to increase or decrease font size.
- C. Delete tag.



Once finished with the document, select **Save**.

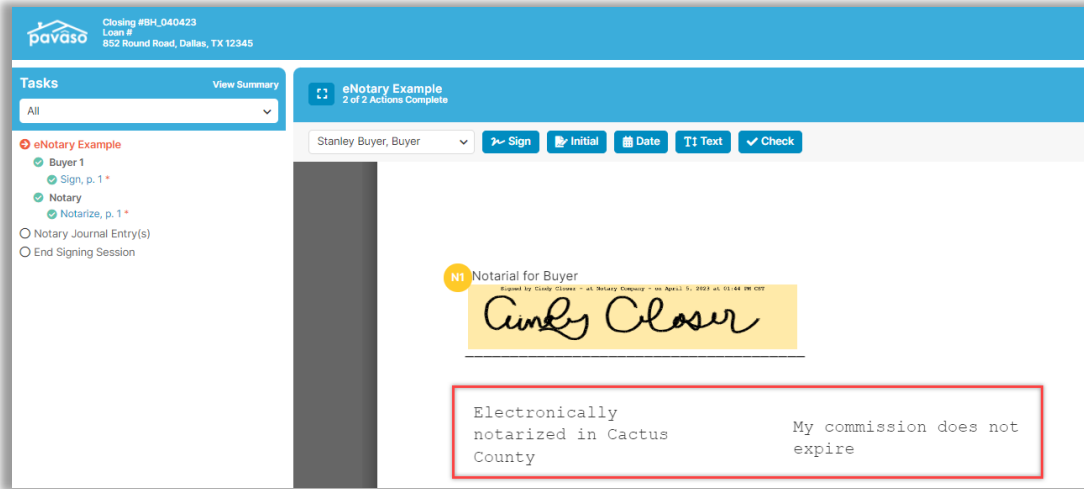
Important Note

Once the document is saved, the Custom Text Tags cannot be edited or deleted.



Custom Text Tags During Signing

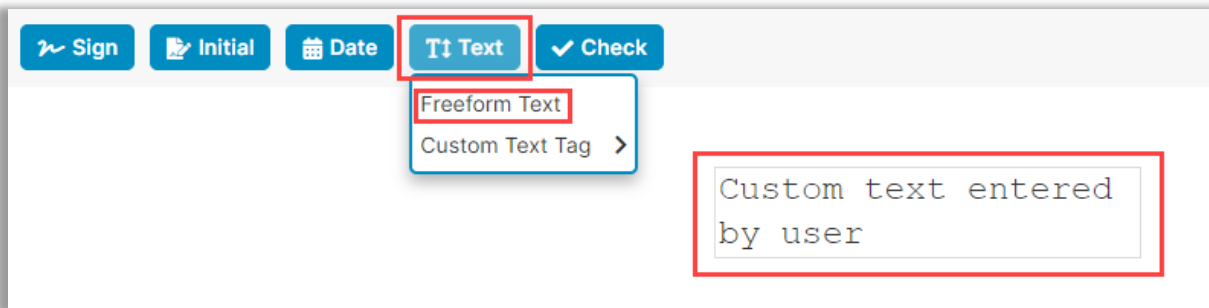
Once the signing session has begun, the tags previously placed on documents in Edit mode will display.



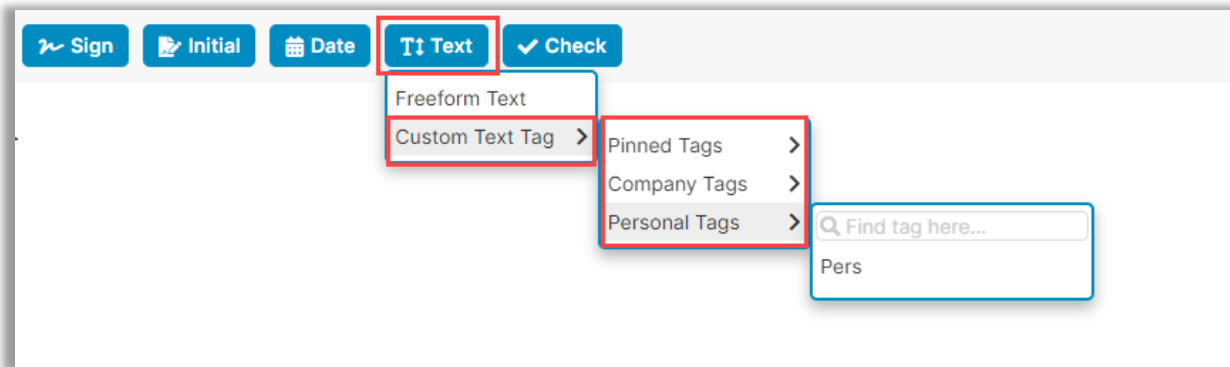
Custom Text Tags from the InstaTag Toolbar

For custom text, select the **Text** icon, then **Freeform Text**. Edit the text in the box.

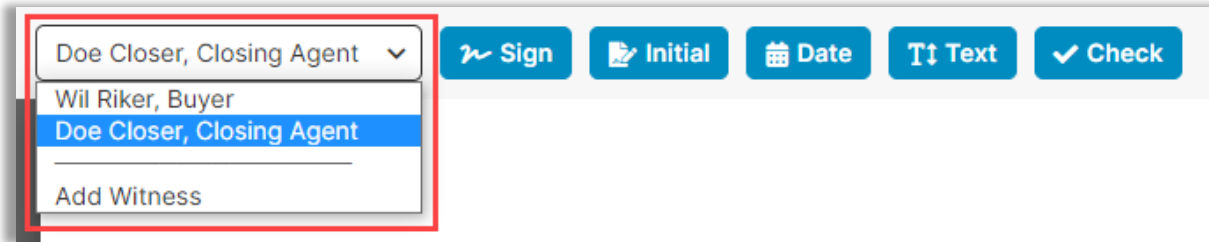
Note: These new custom tags cannot be saved.



For premade custom tags, select the **Text** icon, then choose from **Pinned**, **Company** or **Personal** tags.



If these options are not available, confirm that a Notary/Closing Agent is selected in the dropdown. Custom Text Tags are not for use by Signers.



Select **Continue** when finished to save the document.

Important Note
Once the document is saved, the Custom Text Tags cannot be edited or deleted.

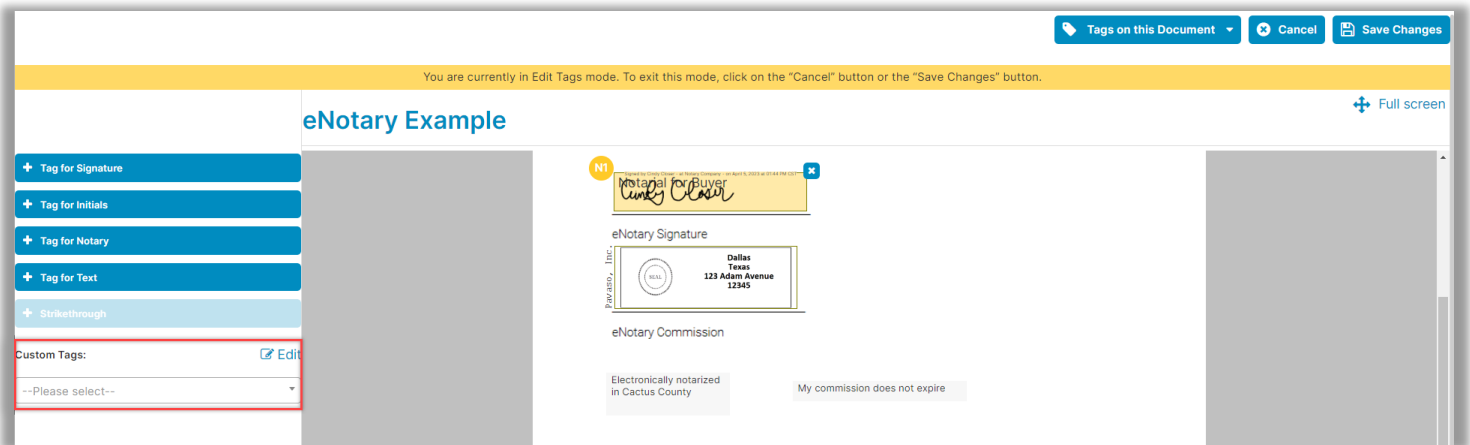
Custom Text Tags Using Edit Tags

A second option for accessing custom tags is under the **Edit Tags** icon.

Note: With this option, you can edit existing and make new tags.



Same process as the document tagging screen earlier, select your custom tags here or create new ones.



Select **Save Changes** when finished.



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](#)