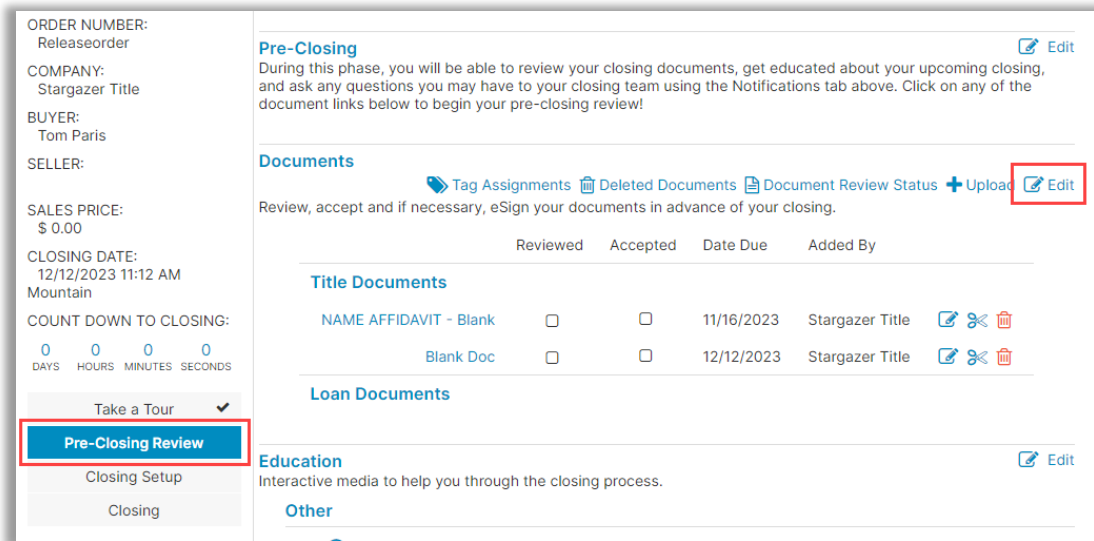


Document Templates

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 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 + 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	Edit Close Delete
Blank Doc	<input type="checkbox"/>	<input type="checkbox"/>	12/12/2023	Stargazer Title	Edit Close Delete
Loan Documents					

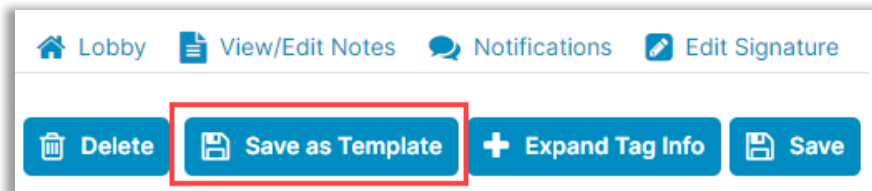
Education Edit

Interactive media to help you through the closing process.

Other

Saving a Template

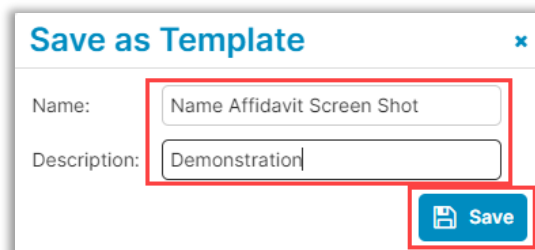
Once all tags and settings are applied, select **Save as Template**.



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 x

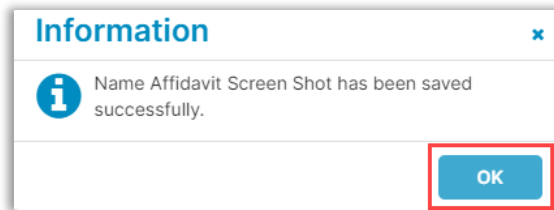
Name:

Description:

Save



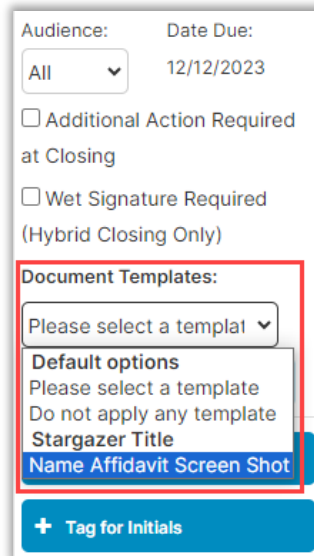
Select **OK**.



Applying a Template

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

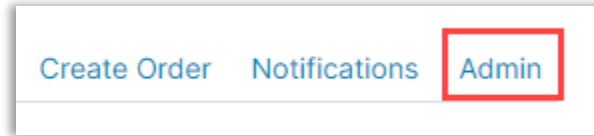
Note: Applying a template will override any current tags that are placed.



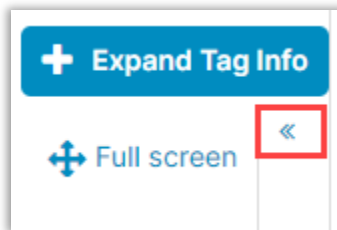
Updating a Template in the Template Library

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

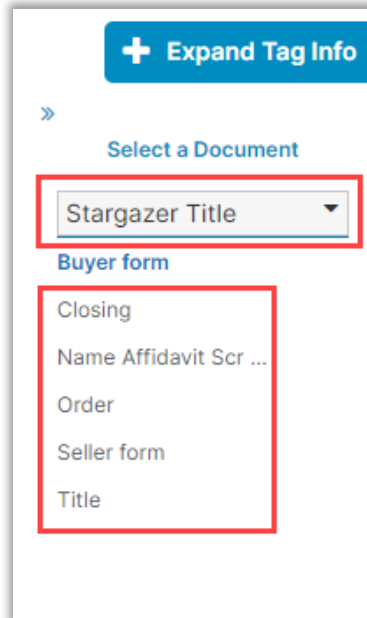
Note: This is only available to Company Admins.



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.

The screenshot shows a document management interface. At the top left, there is a 'Files' section with a 'Choose Files' button. Below this is a table with the following columns: Name, Description, Document Template, Status, and Action. The table contains two rows, both with 'Blank Doc' in the Name and Description columns. The 'Document Template' column for the second row has a dropdown menu open, showing a list of templates. The status of the second row is 'Completed', and the Action column contains icons for edit, share, and delete. A 'Save' button is visible at the bottom of the table area.

Name	Description	Document Template	Status	Action
Blank Doc	Blank Doc	Please select a template	Completed	
		Default options Please select a template Do not apply any template Stargazer Title Name Affidavit Screen Shot Order Seller form Buyer form Title Closing		

Pavaso Support

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

Phone/ Closing Hotline: (866) 288-7051

Email: support@pavaso.com

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