



Adding a Document to an Order

In the order lobby, select the order you are working on.

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

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

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.



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

1. Once you have uploaded the document, you can make the following selections in the Add Documents pop-up.
 - a. Phase: Select what specific phase the document will show up in. Default — All
 - b. Audience: Select who can view the document.
 - c. Due Date: Use the calendar icon to select when this document is due, if needed.
 - d. Additional Action Required: Use the check box to set the document for special attention or requirement.
 - e. 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:

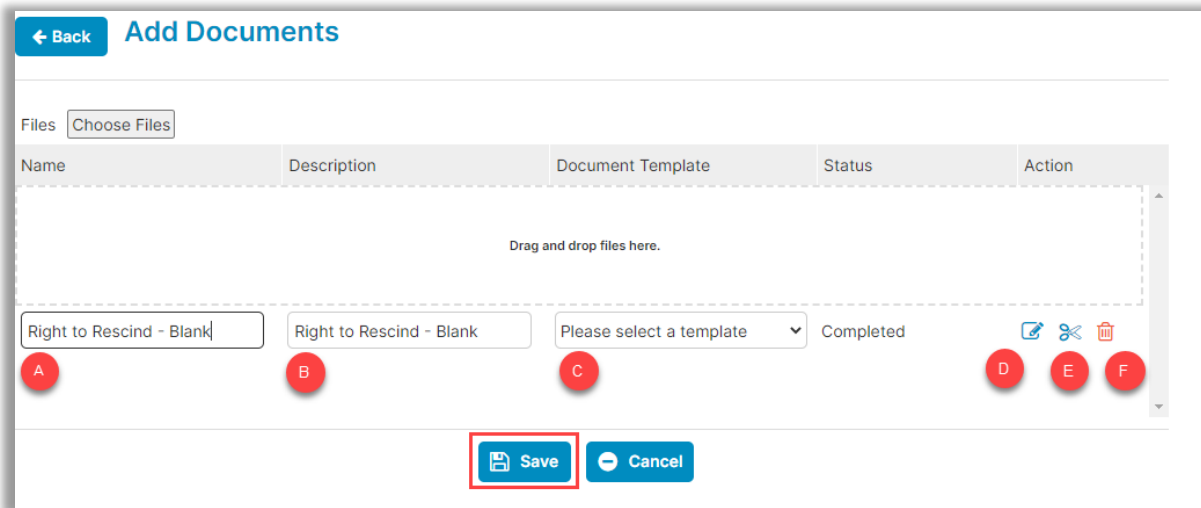
E Wet Signature Required (Hybrid Closing Only):

Save **Cancel**



Additional Document Actions

1. 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.



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

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