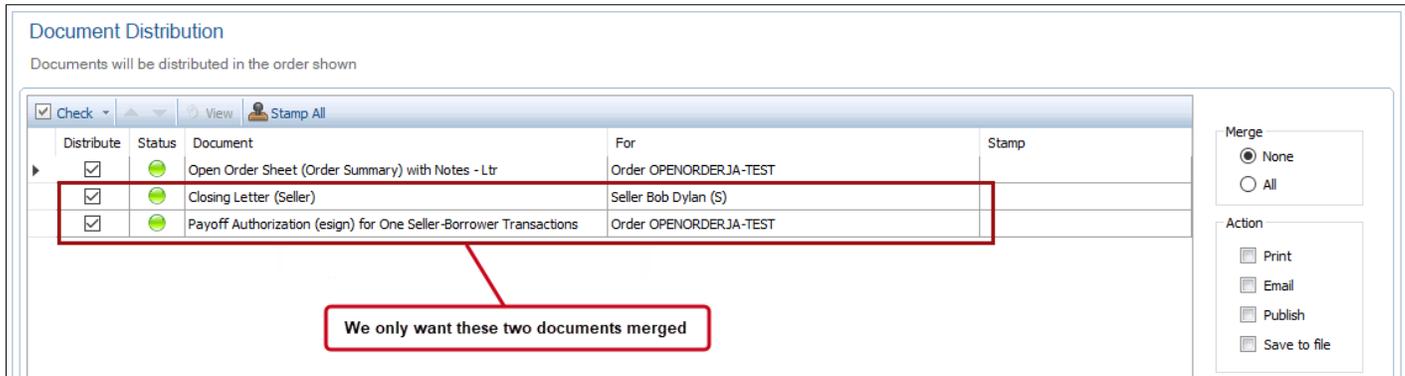


Merging Selected Documents to Publish

Selected documents can be merged while leaving others unmerged and all of your documents can be published in a two-step process without leaving the **Document Distribution** screen.

In our example, we have three documents to publish. If we want to merge all three documents, we select the **Merge > All** radio button and when the documents are published to Smartview they are merged into one document.

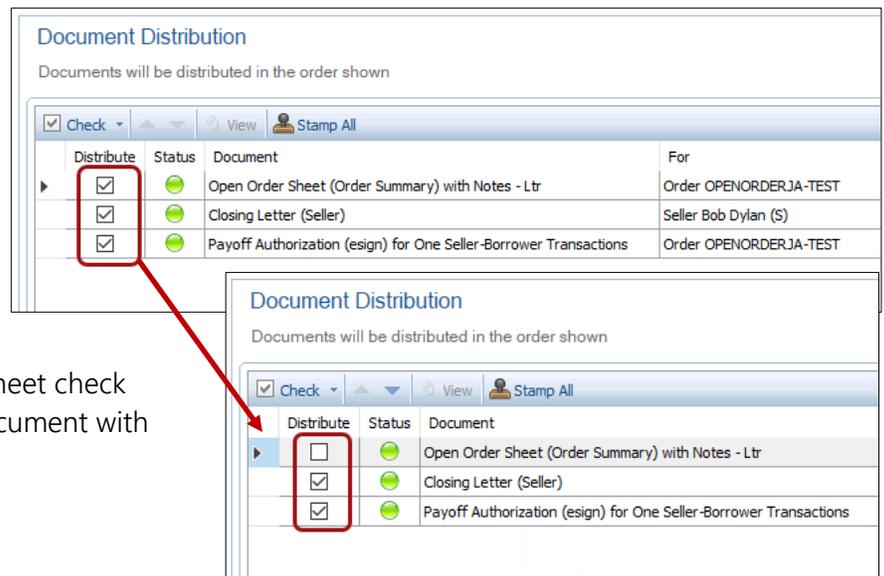
However, we only want two of the three documents, **Closing Letter (Seller)** and the **Payoff Authorization**, to be merged when we publish to Smartview.



Follow these steps to merge only selected documents while publishing others as individual documents.

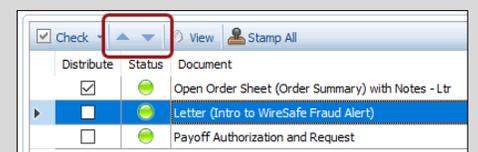
Once our documents are previewed and we're ready to publish, from the **Document Distribution** screen,

1. Uncheck the **Distribute** check box for each document you do **not** want merged



In our example, we uncheck the Open Order Sheet check box because we do not want to merge that document with the Letter and Authorization documents.

NOTE: Documents do not have to be in consecutive order to use the **Merge** function. But if you wish the merged documents to appear in a specific order once published use the **Up/Down** arrows on the toolbar to re-order.



Merging Selected Documents to Publish

2. In the **Merge** section, check the **All** radio button
3. In the **Action** section, check the **Publish** radio button
4. Click the **Distribute** button

Document Distribution
Documents will be distributed in the order shown

Distribute	Status	Document	For	Stamp
<input type="checkbox"/>		Open Order Sheet (Order Summary) with Notes - Ltr	Order OPENORDERJA-TEST	
<input checked="" type="checkbox"/>		Closing Letter (Seller)	Seller Bob Dylan (S)	
<input checked="" type="checkbox"/>		Payoff Authorization (esign) for One Seller-Borrower Transactions	Order OPENORDERJA-TEST	

Merge

None

All

Action

Print

Email

Publish

Save to file

5. When prompted,
 - a. Update the **Name** of the merged document if needed; click **OK** to save to **Attachments**
 - b. If needed, enter/select the Smartview information (**Document Name**, **Comments**, and **Folder**); click **OK** to complete publishing

Publish To Order

The following items will be added to the order's attachments. To rename items or change the selected folders, edit the entries in the grid below.

Name	Description	Folder
Documents		Attachments

smartview Document Post

Merged Documents

Document Name	Comments	Publish as PDF	Folder
Seller Letter & Payoff Authorization		<input checked="" type="checkbox"/>	Documents

Once returned to the **Document Selection** screen,

6. Check the corresponding check box for the document(s) you did **not** merge above
7. Uncheck the corresponding check boxes for those you did merge
8. In the **Merge** section, check the **None** radio button if there are multiple documents that you do not want merged
9. Repeat **steps 3-5** above

Merging Selected Documents to Publish

Document Distribution
Documents will be distributed in the order shown

Distribute	Status	Document	For	Stamp
<input checked="" type="checkbox"/>		Open Order Sheet (Order Summary) with Notes - Ltr	Order OPENORDERJA-TEST	
<input type="checkbox"/>		Closing Letter (Seller)	Seller Bob Dylan (S)	
<input type="checkbox"/>		Payoff Authorization (esign) for One Seller-Borrower Transactions	Order OPENORDERJA-TEST	

8 Merge
 None
 All

Action

Print
 Email
 Publish
 Save to file

9

Your documents have now been published to Smartview as two separate documents: the Open Order Sheet and the combined Letter and Authorization.

Place Order | Orders | smartDOCS | Contacts | BarCode Package Upload

43181839 > Advanced Search > Recent Orders XTR-2025-JAOPENORDER P

Action | Full View | Document Name Ascending

- Documents (2)
 - Accounting (0) !NEW
 - Evidence for Payments (0) !NEW
 - Loan Documents (0) !NEW
 - Open Order (0) !NEW
 - State and Federal Tax Documents (0) !NEW
 - Title Documents (0) !NEW
 - Transmittals (0) !NEW
 - Open Order Sheet (Order Summary) w ... PDF v1 !NEW
 - Seller Letter & Payoff Authorization.pdf v1 !NEW
 - Office Documents (0)