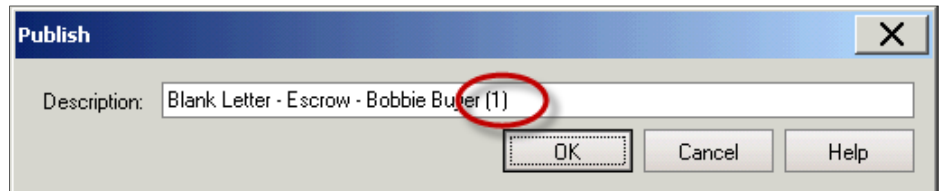


Publishing & Editing Published Docs

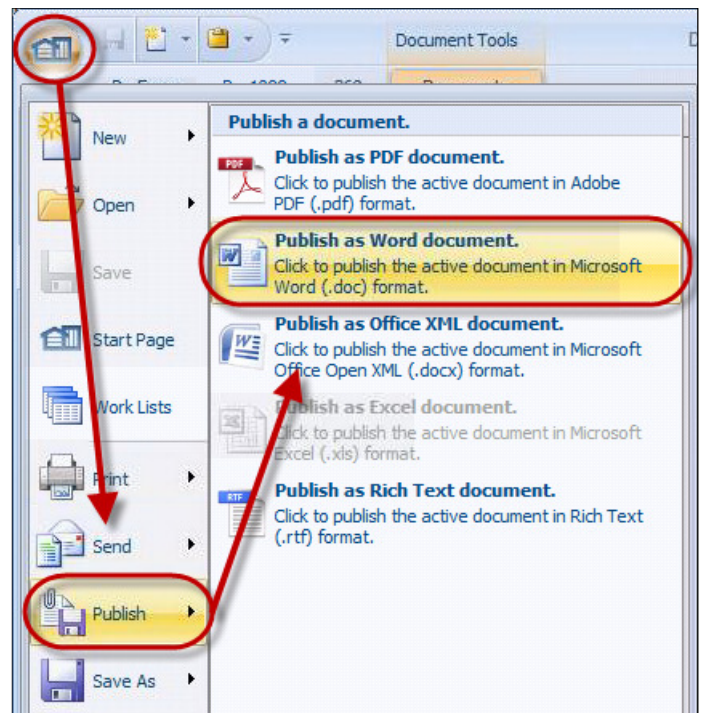
Follow these steps to publish a document, retrieve, then edit that document.

- › BEFORE editing the document, be sure to review and click any necessary hotspots. If you edit the document, then click a hotspot, all edited information is lost.
- › You cannot publish multiple documents, only the current document you are previewing.
- › Published documents with the same name automatically version.

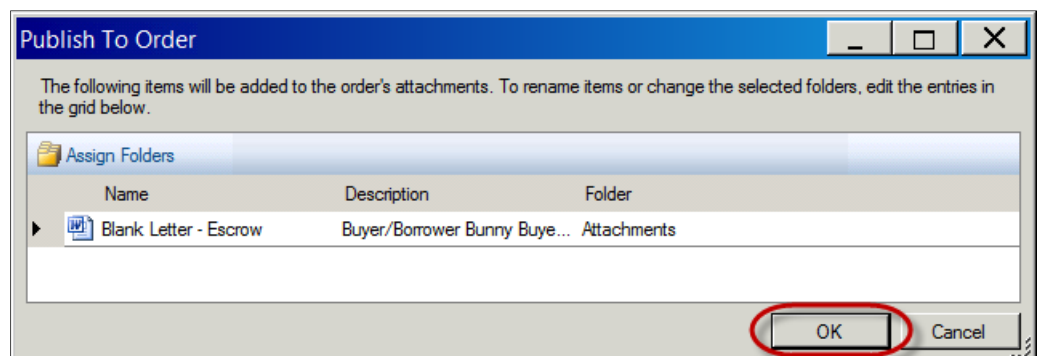


To Publish a Document

1. Open the document in Preview mode, answering any prompts
2. Click the **SoftPro** icon > **Publish** > **Publish as Word document**.

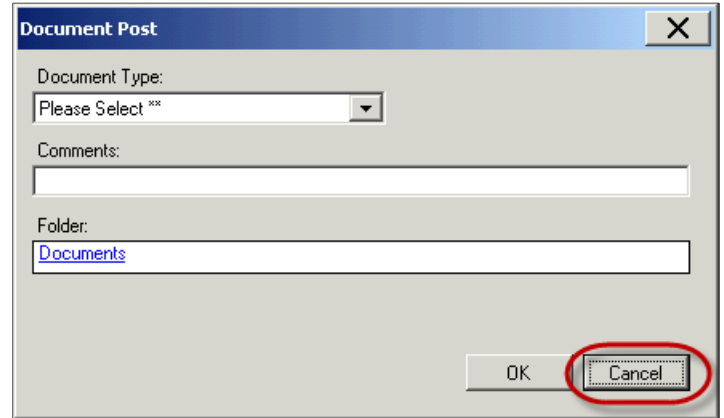


3. In the **Publish to Order** pop-up window, if necessary, edit the default name of the document; click **OK**



Publishing & Editing Published Docs

4. In the **Document Post** pop-up window, click the **Cancel** button
5. Close the document preview window

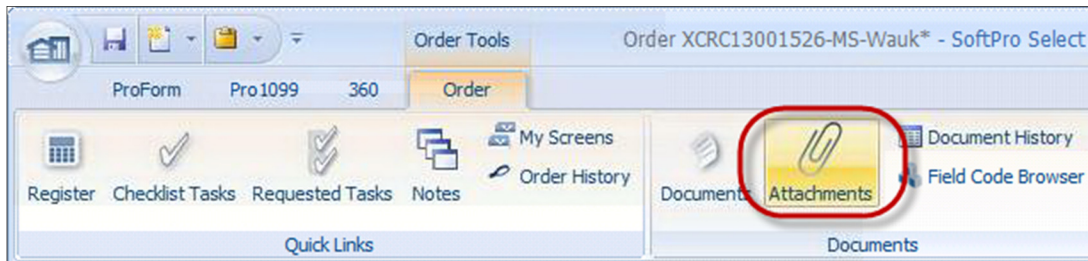


The **Document Post** window contains the following fields:

- Document Type:** A dropdown menu currently showing "Please Select **".
- Comments:** A text input field.
- Folder:** A text input field containing the text "Documents".
- Buttons:** "OK" and "Cancel" buttons at the bottom right. The "Cancel" button is circled in red.

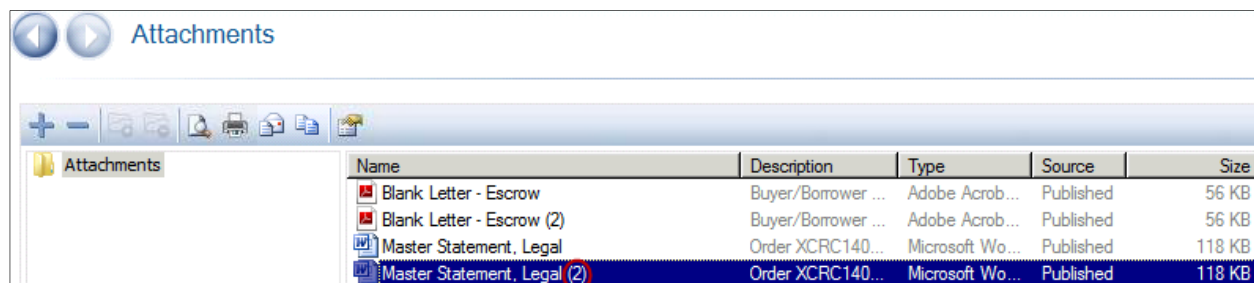
Where to Find Published Documents

From the **Order** tab, click the **Attachments**



On the **Attachments** screen,

- › The Attachments more/less bar indicates in parentheses the number of published documents.
- › Documents with the same name are versioned.
- › The only editable fields are under the **Description** column. The fields in the **Description**, **Type**, **Source**, and **Size** columns are locked for editing.



Name	Description	Type	Source	Size
Blank Letter - Escrow	Buyer/Borrower ...	Adobe Acrob...	Published	56 KB
Blank Letter - Escrow (2)	Buyer/Borrower ...	Adobe Acrob...	Published	56 KB
Master Statement, Legal	Order XCRC140...	Microsoft Wo...	Published	118 KB
Master Statement, Legal (2)	Order XCRC140...	Microsoft Wo...	Published	118 KB

A red arrow points to the "(2)" in the "Master Statement, Legal (2)" row, indicating the version number.

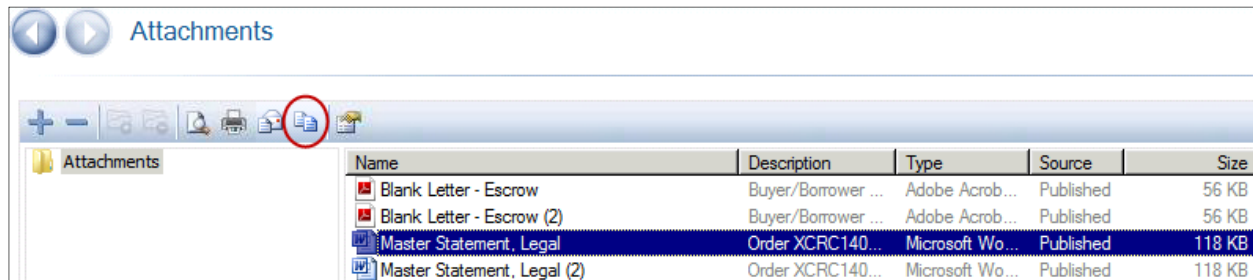
Version number of
this document

Editing a Published Document

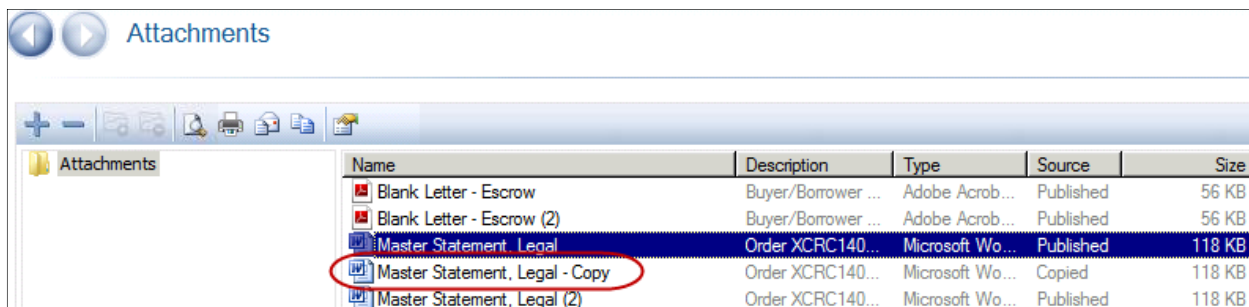
To edit a published document, **first you must copy it**. You can only edit a copied document. Hotspots are not available on copied documents.


1. From the **Attachments** screen, highlight the published document

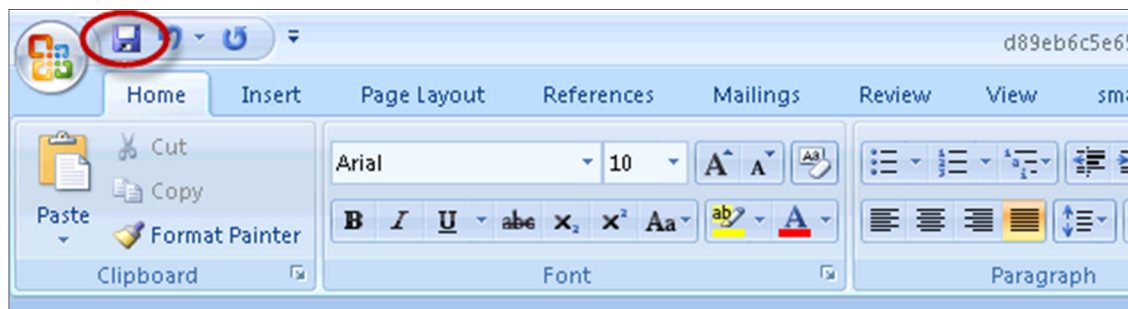
2. Click the **Copy Attachment** icon 



The **Copied** document appears below the **Published** document.



3. Double-click the copied document to open it
4. Type your edits directly onto the Word document
5. Click the **Save**  icon



6. Close Microsoft Word

Scenario 1

A document is published on August 1st. The sales price changes on August 2nd. Previously published documents do not reflect updated changes to the order.

Resolution:

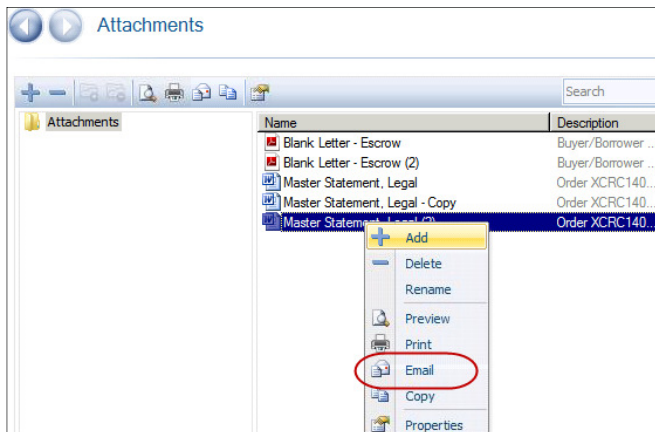
- › To view a document with the updated sales price, preview and publish the document again.
- › To view a published document with the old sales price, navigate to the **Attachments** screen, then double-click to open any documents published prior to August 2nd.

Sample Scenario 2

After publishing a document, you realize you must edit the document and email the updated version to a customer.

Resolution: Follow **Steps 1- 6** under **To Publish a Document** above

1. Return to **Order** and click on **Attachments**,
2. Highlight the Document to be sent and right-click, then select **Email**



3. From here, complete the steps to send the updated document to your customer.

