

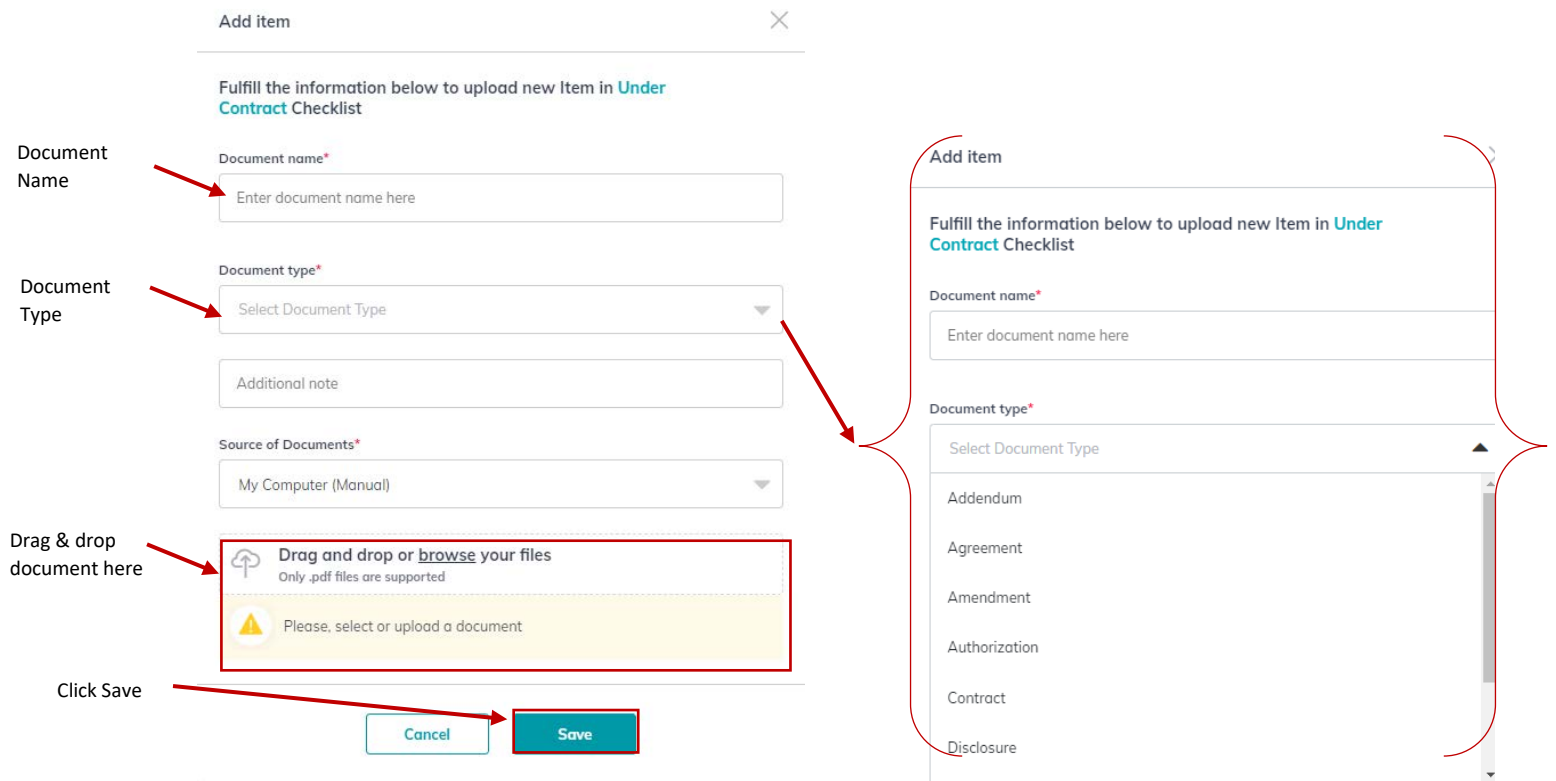
## How to ADD a new document not already on the checklist. How to replace an existing document.

### How to ADD a new document not already on the checklist.

Click on the 3 dots to the right on the “under contract” task bar. Click the “add document” tab



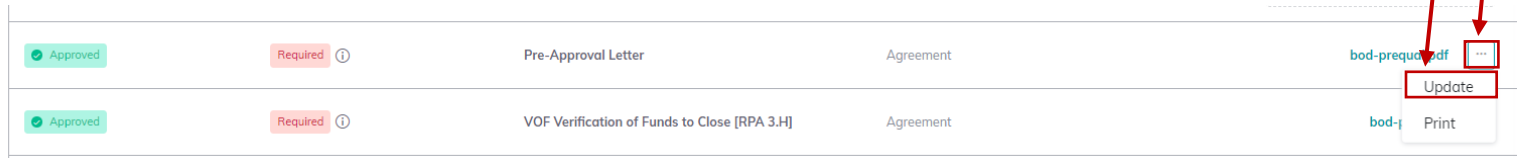
Enter Document name, document type (Addendum, Agreement, Disclosure, etc.), drag and drop your document and click save.



## How to ADD a new document not already on the checklist. How to replace an existing document.

### How to Replace [update] an existing document.

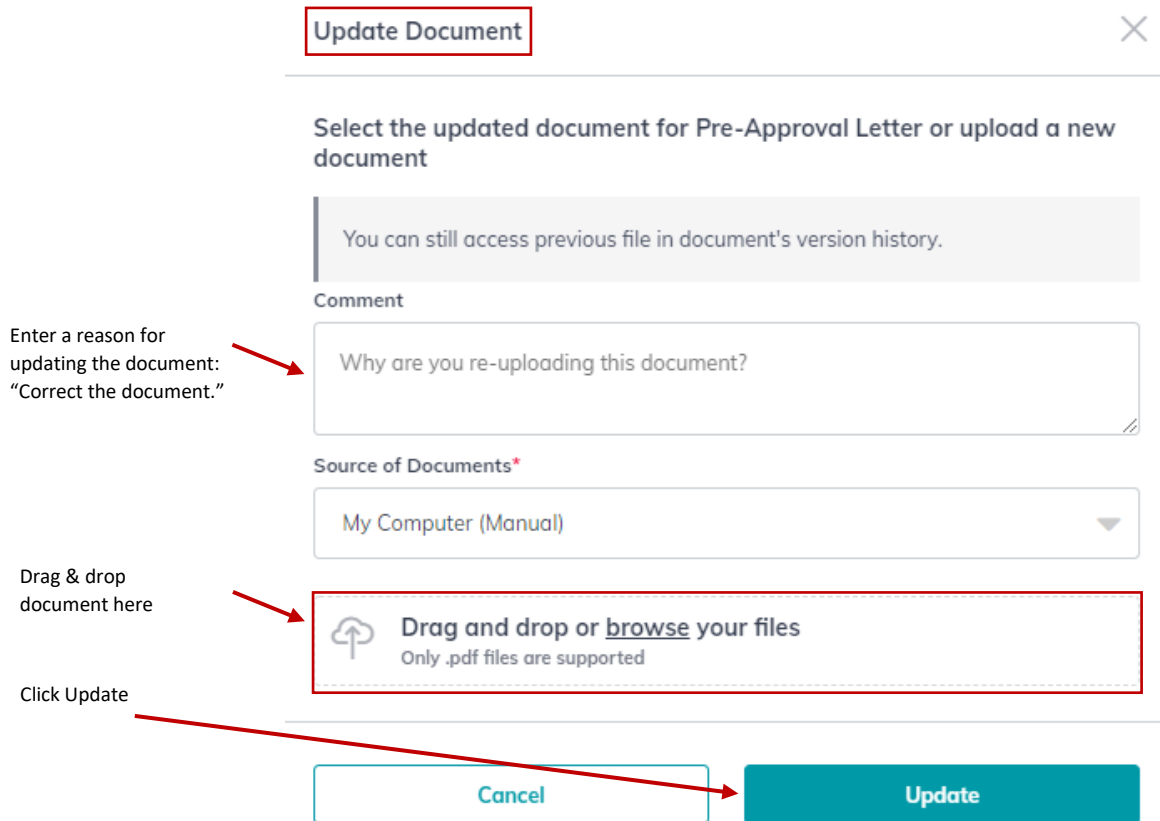
To replace a document, click on the 3 dots to the right of the document you want to replace and then click "update". The "update document" box will pop up and you can drag the new document here and then click "Update". This will replace the document previously uploaded so be sure to upload ALL pages of the new document not just the portion that needed correction or revision.



The screenshot shows a table with two rows of documents. The first row is for a 'Pre-Approval Letter' and the second is for 'VOF Verification of Funds to Close [RPA 3.H]'. Both are marked as 'Required' and 'Approved'. On the right side of the first row, there is a file icon labeled 'bod-prequ...pdf' and a three-dot menu icon. A red box highlights the three-dot menu, with an arrow pointing to it labeled '3 Dots'. Another red box highlights the 'Update' option in the dropdown menu, with an arrow pointing to it labeled 'Update'. A third red box highlights the 'Print' option, with an arrow pointing to it labeled 'Print'.

Approved	Required ⓘ	Pre-Approval Letter	Agreement	bod-prequ...pdf	⋮
Approved	Required ⓘ	VOF Verification of Funds to Close [RPA 3.H]	Agreement	bod-...	Print

At the "Update Document" screen, enter a reason for updating the document: "Correct the document." Then drag and drop the updated documents and click update.



The screenshot shows the 'Update Document' modal form. It has a title bar with 'Update Document' and a close button. The main content area has a heading: 'Select the updated document for Pre-Approval Letter or upload a new document'. Below this is a grey box with the text: 'You can still access previous file in document's version history.' There is a 'Comment' section with a text input field containing 'Why are you re-uploading this document?'. Below that is a 'Source of Documents\*' dropdown menu with 'My Computer (Manual)' selected. At the bottom is a large dashed box for file upload with the text: 'Drag and drop or browse your files' and 'Only .pdf files are supported'. At the very bottom are two buttons: 'Cancel' and 'Update'. Red arrows point from text labels to various parts of the form: 'Enter a reason for updating the document: "Correct the document."' points to the comment field; 'Drag & drop document here' points to the file upload area; and 'Click Update' points to the 'Update' button.

### Update Document

Select the updated document for Pre-Approval Letter or upload a new document

You can still access previous file in document's version history.

Comment

Why are you re-uploading this document?

Source of Documents\*

My Computer (Manual)

Drag and drop or browse your files  
Only .pdf files are supported

Cancel Update