RamQuest Integration Guide

Complete Closing Enterprise (CCE)
Closing Agent Guide

Revised: 03/20/2023

Pavaso

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Getting Started

Request a Trading Partner Relationship (TPR)

A Trading Partner Relationship (TPR) must be established between you and Pavaso before orders can be sent between platforms. A TPR can be established via **Complete Closing Enterprise (CCE)**, or by accessing the dedicated **Closing Market** website:

1. Via **CCE**:
   A. Select **Closing Market** from within **CCE**.
   B. Choose **The Market**.
   C. Search for **Pavaso**.
   D. Select **Request**.
      *Note: Your request will be reviewed and approved by a member of **Pavaso Support**.*

2. Via dedicated **Closing Market** website at www.closingmarket.com.
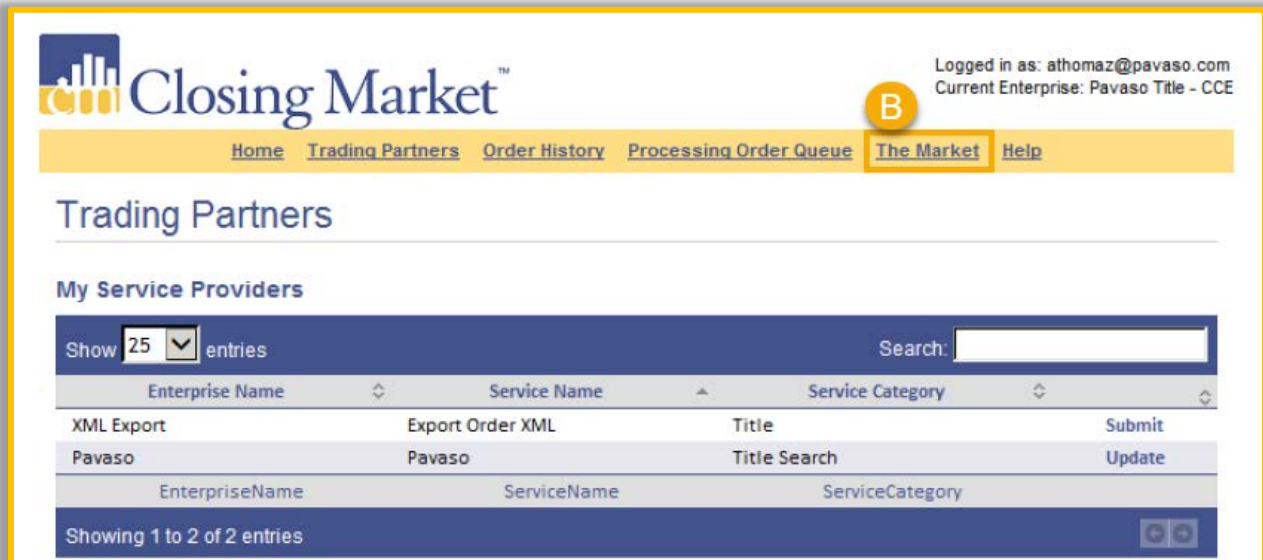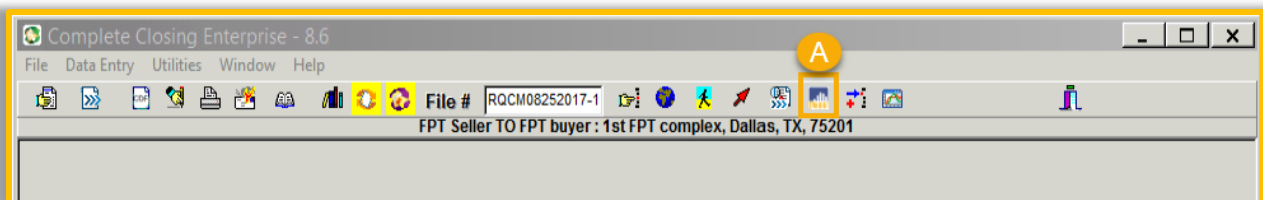
Order Creation - Complete Closing Enterprise (CCE)

Access the **Complete Closing Enterprise** (CCE) application and complete required fields in **Order Entry**.
Note: Ensure there is a Title Company and Closing Agent associated with the order. Otherwise, the order will not be pushed to Pavaso.

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Important Note

Prior to being able to submit documents to Pavaso via RamQuest, your Pavaso Implementation Specialist must configure your company appropriately. Email your Implementation Specialist or implementation@pavaso.com with any questions.

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The system requires both **Close Date** and **Close Time**. If these fields are left blank in **Order Entry**, there will be an opportunity to revise in the **Closing Market** portal.

If this will be a Remote Online Notarization (RON) signing, ensure the Buyer/Seller Address is a physical location, ideally one that the party has lived at for six (6) months. This address, as well as the Signer's name, is required for Knowledge Base Authentication (KBA) Validation.

Each Signer must have a valid email address. This email is used to send the account creation email to the user once the order is present on **Pavaso**. Signers may share an email address if necessary. These email addresses can be modified on **Pavaso** if needed. Any changes made on **Pavaso** will not be sent back to the file in **RamQuest**.

Lender details are not required, but strongly recommended. The property and county information fields must be completed before documents are sent to **Pavaso**.

Once **Order Entry** is complete, select the **Closing Market** icon.

Enter Pavaso in the **Search** field and choose **Submit**.

Select the appropriate property from the drop-down menu.
Note: The Closing Date and Closing Time fields are required. These can be changed on Pavaso if needed once the order is submitted.

If the closing date entered has passed, the following error displays. The date must be either the current date or a future date.

The Closing Agent entered for the order will receive an email notification once the order is recognized by **Pavaso**. The individual submitting the order does not need to match the Closing Agent information on the order.

Select the appropriate Signers from the list.

When the order is submitted to **Pavaso**, the **Pavaso** order number will be designated as the file number in **RamQuest**. Subsequent submissions from the same **RamQuest** file number will completely replace any previous submissions with this same number. This includes any changes that were made to the order on **Pavaso**. If this occurs, a message will display indicating that the current file will be overwritten.
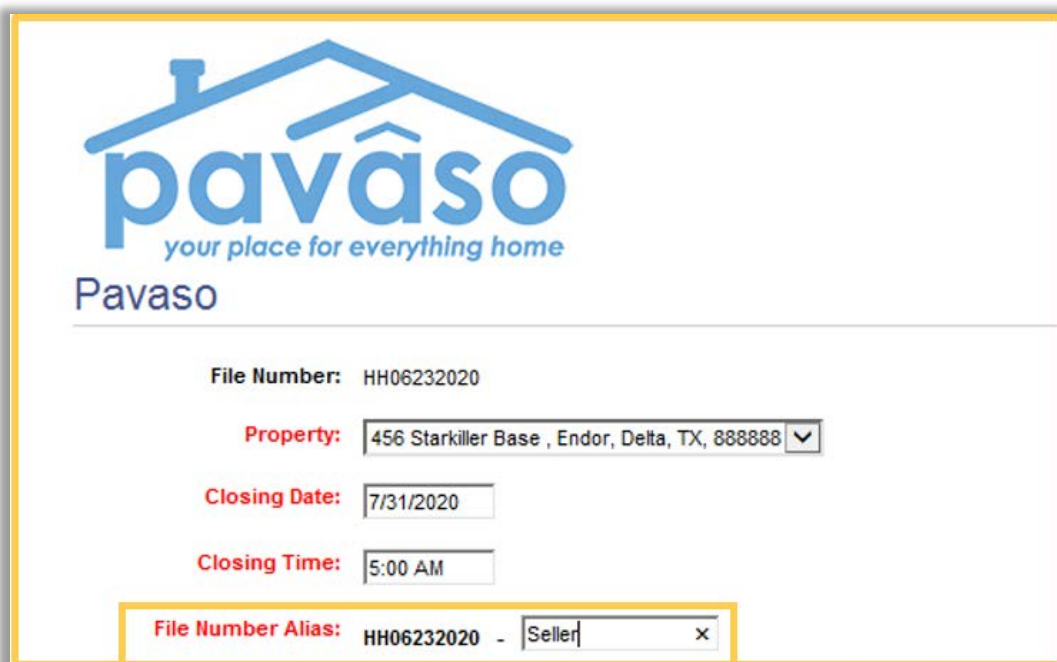

Using the **File Number Alias** option, users may submit and associate multiple **Pavaso** signing packages to a single **RamQuest** order file. This feature may be used to create separate buyer(s) and seller(s) signing packages.

Once all selections are complete, choose **New Signing Package**.

Enter a **File Number Alias** in the field attached to the file name.

Select documents that should be included in this signing package.

You can rearrange the document order by using the arrows in the **Move** column.

Note: You can make changes to the document name if desired, however, if you are utilizing templates on Pavaso, the name and page count must match the corresponding template. If the name is changed here, the appropriate template may not populate once the order reaches Pavaso.

Once all applicable documents are selected and in the proper order, select **Submit**.

You will be redirected back to the list of all submitted orders. Any File Number Aliases are recorded in the internal log, which tracks updates and provides file history.

Any published documents or packages associated with the order are notated in the **Notes** section at the bottom of the **Order Entry** screen.
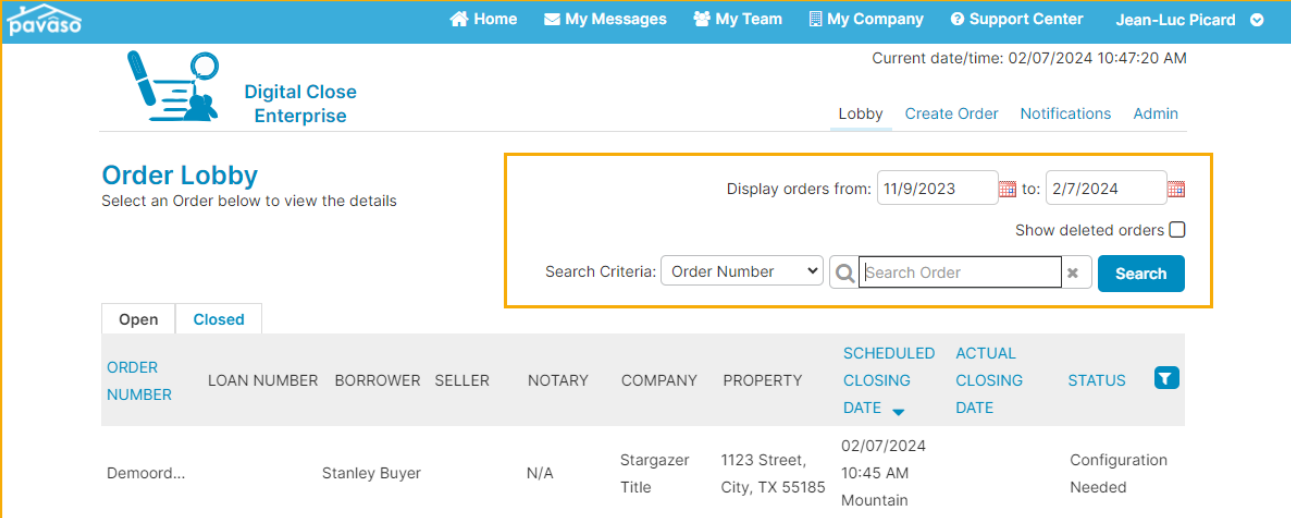

- Applicable document/document packages associated with the order are located on the **Published Documents** tab on the **Web Publishing** screen at the bottom of the **Order Entry** screen.
- Upon publication, notes are added to the Order Log at the bottom of the **Order Entry** screen.
- The Closing Agent will receive an email notification from Pavaso once the order is created successfully.

Locating and Modifying Your Order on Pavaso

Log in to your Pavaso account and select **Digital Close Enterprise** from the dashboard.
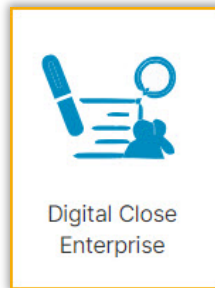
If needed, you can search for your order by choosing the dates range and the available search criteria.
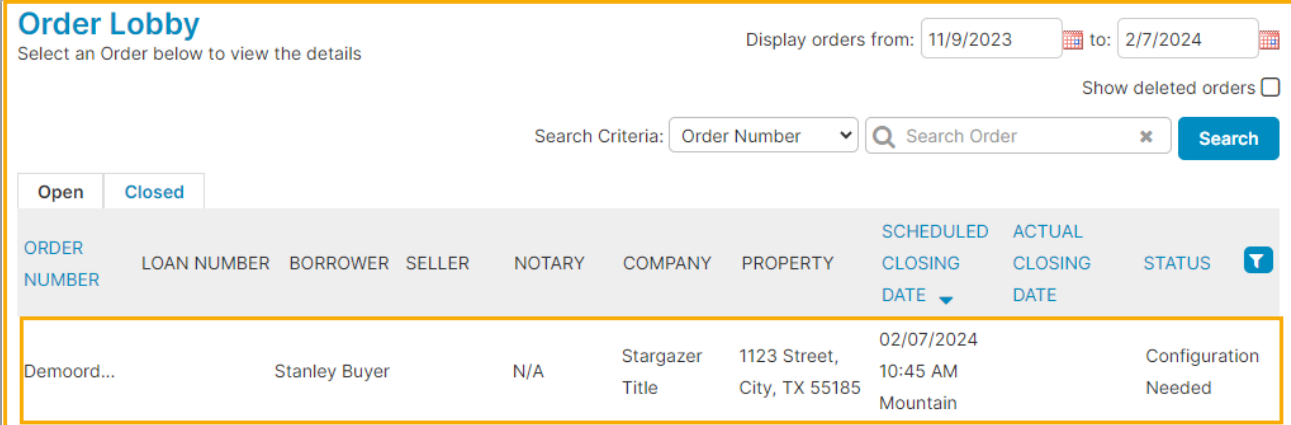
Your order will appear in the Lobby with the status of **Configuration Needed**. Select anywhere on the order to open it.

Note: *Users may or may not see the order based on role and order permissions.*

If completing a RON signing, the Signer's ID images will be stored on Pavaso a maximum of 48 hours. This setting is configurable in your company settings.

Once the order has closed on Pavaso, documents and the associated Audit Log will be passed back to FileScan.

Change the status of the order to **Closed** in Order Entry.

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