



RamQuest Integration Guide

Complete Closing Enterprise (CCE)

Closing Agent Guide

Revised: 03/20/2023

Pavaso

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Getting Started

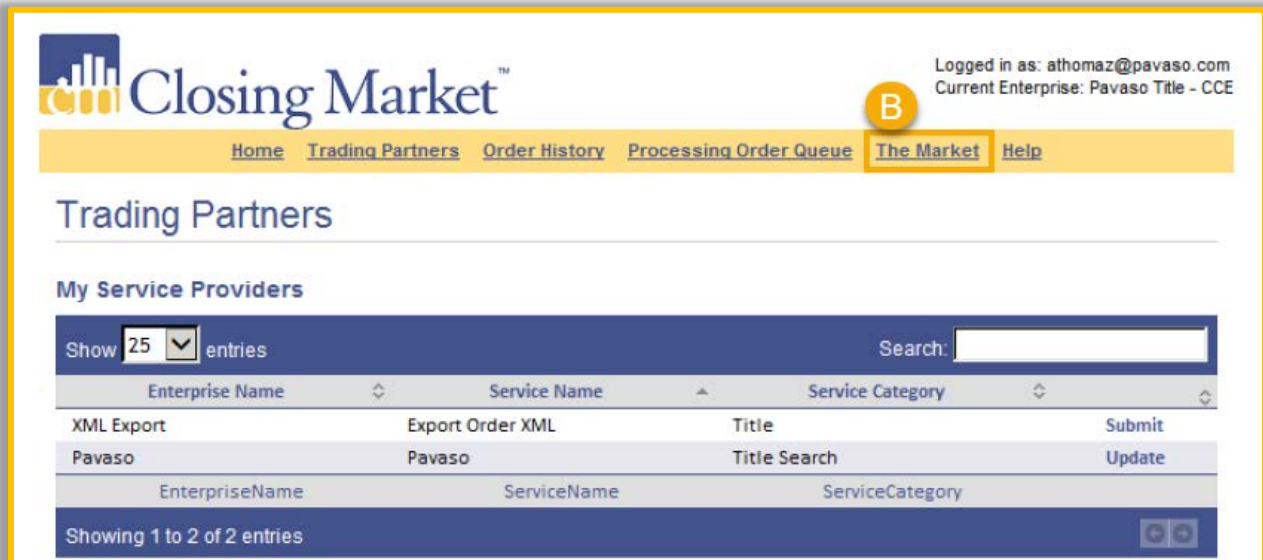
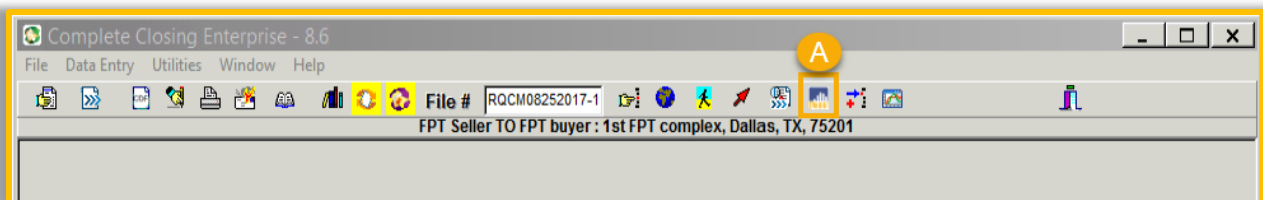
Request a Trading Partner Relationship (TPR)

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.

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.

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.

Order Entry

Main Buyer/Seller Loan Property Misc Additional Agents

Use Template

Status Legacy Title Co 1 RamQuest Title Corr

Escrow Bank 2 TransAct Test Bank

Closing Agent JW Underwriter OldRepub

Settlement Agent

Search Prov.

Order Category 1

Critical Dates

File Opened 10/29/2018 Commitment Due 5/22/2020 Closing Date 7/26/2019

Cancelled 5/28/2020 Closing Time 10:00 AM

Proposed Close 5/29/2020 Fund/Disb. Date 7/29/2019

Service

☐ Owner (Res) ☐ Simult. (Non Res)

☐ Owner (Non Res) ☐ Binder

☐ Mort. ☐ Other

☒ Simult. (Res)

☐ Binder with Policy Kind of Premium 1000

Escrow Officer KS

Escrow Processor SA

Title Officer LO

Title Processor RW

Sales Rep RW

Sales Price \$150,000.00

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.

Order Entry

Main Buyer/Seller Loan Property Misc Additional Agents

1 of 2 Buyers Buyers Edit Buyer/Seller

TheGray, Gandalf and Galadriel Lorien, husband and wife

Business Name

First MI Last Ext Gender

Nm1 Gandalf TheGray M

Nm2 Galadriel Lorien F

Relationship of 2nd Person to First

☒ Wife ☐ Husband ☐ Partner ☐ Other

Vesting

☐ Is Address Foreign

Address

2001 Valinor Ave

City State Zip

Belerland FL 555455

Home Phone Work Phone Fax

(888) 888-888 () - () -

Nm1 Cell () - Nm2 Cell () -

Nm1 E-Mail thegraywizard@aol.com

Nm2 E-Mail valinor5eva@hotmail.com

Notes

Selling Agent

Attorney

Category

Notary

Tax ID/SSN 666666666 SSN

SSN Name 2 555555555 SSN

Nm1 DOB

Nm2 DOB

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**.

Order Entry

Main Buyer/Seller Loan Property Misc Additional Agents

1 of 2 Buyers Buyers Edit Buyer/Seller

TheGray, Gandalf and Galadriel Lorien, husband and wife

Business Name

First MI Last Ext Gender

Nm1 Gandalf TheGray M

Nm2 Galadriel Lorien F

Relationship of 2nd Person to First

☒ Wife ☐ Husband ☐ Partner ☐ Other

Vesting

☐ Is Address Foreign

Address

2001 Valinor Ave

City State Zip

Belerland FL 555455

Home Phone Work Phone Fax

(888) 888-888 () - () -

Nm1 Cell () - Nm2 Cell () -

Nm1 E-Mail thegraywizard@aol.com

Nm2 E-Mail valinor5eva@hotmail.com

Notes

Selling Agent

Attorney

Category

Notary

Tax ID/SSN 666666666 SSN

SSN Name 2 555555555 SSN

Nm1 DOB

Nm2 DOB

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

Tax Cat	Payee	Payee Name	Curr Taxes	Unpaid Periods
City Property Taxes				1
County Property Taxes				1
Assessment Taxes				1
School Property Taxes				1
HOA Dues				1
Other Taxes				1

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

TO Gandalf TheGray and Galadriel Lorien, husband and wife : 3489 Mount Doom Lane, Mordor, FL, 55432

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

The screenshot shows the Closing Market website interface. At the top, there is a navigation bar with links: Trading Partners, Order History, Processing Order Queue, The Market, and Help. A search bar is located in the top right corner with the text "Pavaso" entered. Below the search bar, a table displays the search results. The table has columns: Enterprise Name, Service Name, Service Category, and a Submit button. The first row shows "Pavaso" as the Enterprise Name, "Pavaso" as the Service Name, and "eSignature" as the Service Category. Below the table, it says "Showing 1 to 1 of 1 entries (filtered from 167 total entries)".

Chat With Support Now
Logged in as: JLindsey@corecce.com
Current Enterprise: RQ Development CMCore01T - CCE

Trading Partners Order History Processing Order Queue The Market Help

Trading Partners

My Service Providers

Show 25 entries Search: Pavaso

Enterprise Name	Service Name	Service Category	
Pavaso	Pavaso	eSignature	Submit
EnterpriseName	ServiceName	ServiceCategory	

Showing 1 to 1 of 1 entries (filtered from 167 total entries)

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.

The screenshot shows the Pavaso website interface. At the top, there is a navigation bar with links: Trading Partners, Order History, Processing Order Queue, The Market, and Help. A search bar is located in the top right corner with the text "Pavaso" entered. Below the search bar, a table displays the search results. The table has columns: Enterprise Name, Service Name, Service Category, and a Submit button. The first row shows "Pavaso" as the Enterprise Name, "Pavaso" as the Service Name, and "eSignature" as the Service Category. Below the table, it says "Showing 1 to 1 of 1 entries (filtered from 167 total entries)".

Chat With Support Now
Logged in as: hhelgesen@corecce.com
Current Enterprise: RQ Development CMCore01T - CC

Trading Partners Order History Processing Order Queue The Market Help

Pavaso

File Number: HH06232020

Property: 456 Starkiller Base, Endor, Delta, TX, 888888

Closing Date: 8/31/2020

Closing Time: 5:00 AM

New Signing Package

Submitted Packages

File Number	Date	Order No	Placed By	Signers	Documents	Actions	Status
HH06232020-123	6/23/2020 9:59 AM	7646	Hailey Helgesen	Luke Skywalker (thelastjedi@gmail.com)	No documents Selected.	Update	Active

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

File Number: HH06232020

Property: 456 Starkiller Base , Endor, Delta, TX, 888888

Closing Date: 7/31/2019 *The close date is in the past. You may need to adjust the filter in the Pavaso Lobby to find the order.

Closing Time: 5:00 AM

New Signing Package

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.

Signers Pavaso accounts can only be created for parties with an email address.

	Type	Business	First	Last	Email	Actions
<input type="checkbox"/>	Agent	Bank of Texas			lharris@ramquest.com	Edit
<input type="checkbox"/>	Agent		Randy	Hamilton		Edit
<input type="checkbox"/>	Agent		Lisa	Smith	lharris@ramquest.com	Edit
<input type="checkbox"/>	Agent		Deborah	Margraf	dm@ramquest.com	Edit
<input type="checkbox"/>	Agent		Edwina	Hollywood	eh@ramquest.com	Edit
<input checked="" type="checkbox"/>	Buyer		Han	Solo	hansolo@hotmail.com	Edit
<input checked="" type="checkbox"/>	Buyer		Leia	Organa	RebellionGeneral@hotmail.com	Edit
<input checked="" type="checkbox"/>	Closing Agent		Jane	Zoe	newperson@email.com	Edit

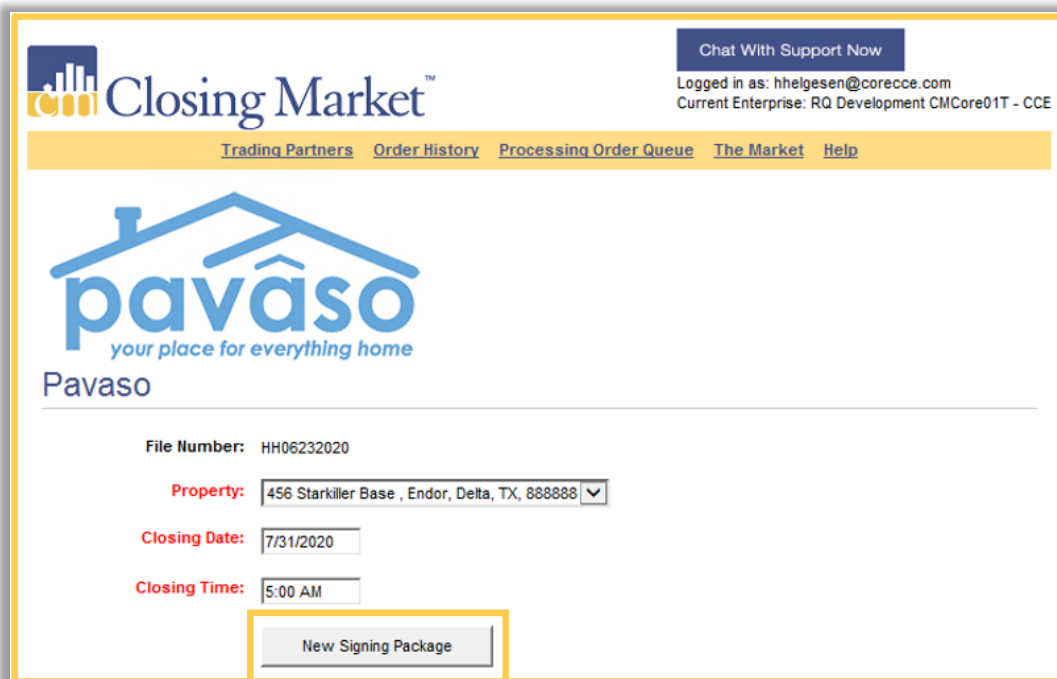
When the order is submitted to **Pavaso**, the **Pavaso** order number will be designated as the file number in **RamQuest**. Subsequent submissions from the same **RamQuest** file number will completely replace any previous submissions with this same number. This includes any changes that were made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

Important Message:

- Resubmitting this order will completely overwrite the initial submission and create a new order in Pavaso.
- Please use the [Pavaso](#) website to continue your order.

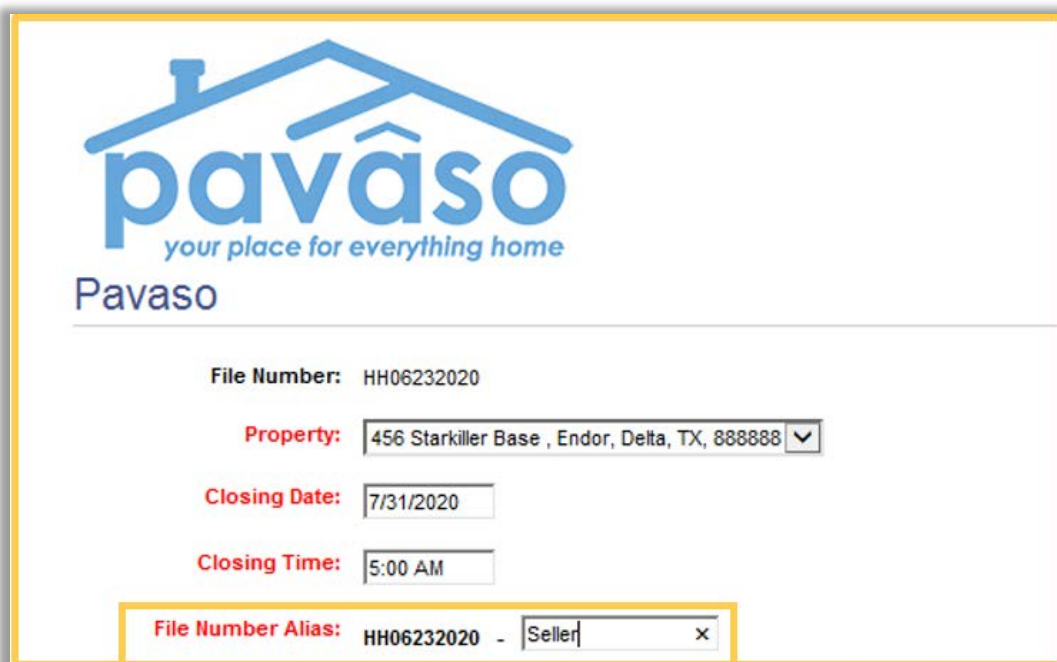
Using the **File Number Alias** option, users may submit and associate multiple **Pavaso** signing packages to a single **RamQuest** order file. This feature may be used to create separate buyer(s) and seller(s) signing packages.

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



The screenshot shows the Closing Market Pavaso web interface. At the top, there is a navigation bar with links: Trading Partners, Order History, Processing Order Queue, The Market, and Help. A 'Chat With Support Now' button is in the top right corner. Below the navigation bar, the Pavaso logo is displayed with the tagline 'your place for everything home'. The main content area contains a form with the following fields: File Number (HH06232020), Property (456 Starkiller Base, Endor, Delta, TX, 888888), Closing Date (7/31/2020), and Closing Time (5:00 AM). The 'New Signing Package' button is highlighted with a yellow border.

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



The screenshot shows the same Pavaso web interface as the previous one, but with the 'File Number Alias' field highlighted. The 'File Number' field now contains 'HH06232020'. The 'Property', 'Closing Date', and 'Closing Time' fields remain the same. The 'File Number Alias' field is now populated with 'HH06232020 - Seller' and has a close button (X) next to it.

Select documents that should be included in this signing package.

Documents
Select all documents that need to be signed on the initial order. Additional documents cannot be added to the order using the integration.

	Description	Document Name	Move
<input type="checkbox"/>	1986 Tax Reform Req	1986 Tax Reform Req	↓
<input checked="" type="checkbox"/>	Aff - Inducement (7-09)	Aff - Inducement (7-09)	↑ ↓
<input type="checkbox"/>	Assignment - DT wReq	Assignment - DT wReq	↑ ↓
<input type="checkbox"/>	CLTA Preliminary Report Ex A (2-10)	CLTA Preliminary Report Ex A (2-10)	↑ ↓
<input checked="" type="checkbox"/>	Cmt (ALTA 6-06)	Cmt (ALTA 6-06)	↑ ↓
<input type="checkbox"/>	End ALTA C JR1	End ALTA C JR1	↑ ↓
<input checked="" type="checkbox"/>	End ALTA Construction Loan B	End ALTA Construction Loan B	↑ ↓
<input type="checkbox"/>	End CForm 19-06 Contiguity-MultiP L	End CForm 19-06 Contiguity-MultiP L	↑ ↓
<input type="checkbox"/>	End CForm 19.1-06 Contiguity-SingleP L	End CForm 19.1-06 Contiguity-SingleP L	↑ ↓
<input checked="" type="checkbox"/>	End CLTA 116.5.1 (6-06)	End CLTA 116.5.1 (6-06)	↑ ↓
<input type="checkbox"/>	End CLTA 116.5.2-06 (6-06)	End CLTA 116.5.2-06 (6-06)	↑

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

Documents
Select all documents that need to be signed on the initial order. Additional documents cannot be added to the order using the integration.

	Description	Document Name	Move
<input type="checkbox"/>	1986 Tax Reform Req	1986 Tax Reform Req	↓
<input checked="" type="checkbox"/>	Aff - Inducement (7-09)	Aff - Inducement (7-09)	↑ ↓
<input type="checkbox"/>	Assignment - DT wReq	Assignment - DT wReq	↑ ↓
<input checked="" type="checkbox"/>	CLTA Preliminary Report Ex A (2-10)	CLTA Preliminary Report Ex A (2-10)	↑ ↓
<input checked="" type="checkbox"/>	Cmt (ALTA 6-06)	Cmt (ALTA 6-06)	↑ ↓
<input type="checkbox"/>	End ALTA C JR1	End ALTA C JR1	↑ ↓
<input type="checkbox"/>	End ALTA Construction Loan B	End ALTA Construction Loan B	↑ ↓
<input checked="" type="checkbox"/>	End CForm 19-06 Contiguity-MultiP L	End CForm 19-06 Contiguity-MultiP L	↑ ↓
<input type="checkbox"/>	End CForm 19.1-06 Contiguity-SingleP L	End CForm 19.1-06 Contiguity-SingleP L	↑ ↓
<input type="checkbox"/>	End CLTA 116.5.1 (6-06)	End CLTA 116.5.1 (6-06)	↑ ↓
<input type="checkbox"/>	End CLTA 116.5.2-06 (6-06)	End CLTA 116.5.2-06 (6-06)	↑

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**.

Documents

Select all documents that need to be signed on the initial order. Additional documents cannot be added to the order using the integration.

	Description	Document Name	Move
<input type="checkbox"/>	1986 Tax Reform Req	1986 Tax Reform Req	↓
<input checked="" type="checkbox"/>	Aff - Inducement (7-09)	Aff - Inducement (7-09)	↑ ↓
<input type="checkbox"/>	Assignment - DT wReq	Assignment - DT wReq	↑ ↓
<input type="checkbox"/>	CLTA Preliminary Report Ex A (2-10)	CLTA Preliminary Report Ex A (2-10)	↑ ↓
<input checked="" type="checkbox"/>	Cmt (ALTA 6-06)	Cmt (ALTA 6-06)	↑ ↓
<input type="checkbox"/>	End ALTA C JR1	End ALTA C JR1	↑ ↓
<input checked="" type="checkbox"/>	End ALTA Construction Loan B	End ALTA Construction Loan B	↑ ↓
<input type="checkbox"/>	End CForm 19-06 Contiguity-MultiP L	End CForm 19-06 Contiguity-MultiP L	↑ ↓
<input type="checkbox"/>	End CForm 19.1-06 Contiguity-SingleP L	End CForm 19.1-06 Contiguity-SingleP L	↑ ↓
<input checked="" type="checkbox"/>	End CLTA 116.5.1 (6-06)	End CLTA 116.5.1 (6-06)	↑ ↓
<input type="checkbox"/>	End CLTA 116.5.2-06 (6-06)	End CLTA 116.5.2-06 (6-06)	↑

Select All

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.

File Number	Date	Order No	Placed By	Signers	Documents	Actions	Status
HH06232020-123	6/23/2020 9:59 AM	7646	Hailey Helgesen	Luke Skywalker (thelastjedi@gmail.com)	No documents Selected.	Update	Active
HH06232020-123	6/23/2020 9:58 AM	7645	Hailey Helgesen	Han Solo(hansolo@hotmail.com) Leia Organa (RebellionGeneral@hotmail.com) Jane Zoe(newperson@email.com)	Cmt (ALTA 6-06)	Update	Overriden
HH06232020-Buyer	8/13/2020 1:39 PM	10261	Hailey Helgesen	Han Solo(hansolo@hotmail.com) Leia Organa (RebellionGeneral@hotmail.com) Jane Zoe(newperson@email.com)	Assignment - DT wReq Cmt (ALTA 6-06) End CForm 19-06 Contiguity-MultiP L End CLTA 116.5.1 (6-06)	Update	Active
HH06232020-Seller	8/13/2020 1:42 PM	10262	Hailey Helgesen	Jane Zoe(newperson@email.com)	Aff - Inducement (7-09) Cmt (ALTA 6-06) End ALTA Construction Loan B End CLTA 116.5.1 (6-06)	Update	Active

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

The screenshot shows the 'Order Entry' window with the following sections:

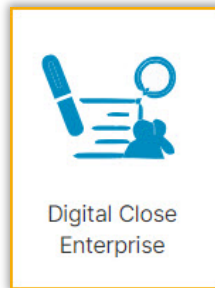
- Navigation:** Main | Buyer/Seller | Loan | Property | Misc | Additional Agents
- Buttons:** Use Template, Multiple Bank Accounts (checkbox)
- Form Fields:**
 - Status: New (dropdown)
 - Title Co: 1 (dropdown)
 - RQ Title Company: (dropdown)
 - Escrow Bank: 1 (dropdown)
 - Texas Bank: (dropdown)
 - Closing Agent: JZ (dropdown)
 - Underwriter: OldRepub (dropdown)
 - Settlement Agent: 359 A1ALegal Serv (dropdown)
 - Referral: (dropdown)
 - Order Category: 1 (dropdown)
 - Service: Owner (Res), Owner (Non Res), Mort., Simult. (Non Res), Binder, Other, Simult. (Res) (radio buttons)
 - Binder with Policy: (checkbox)
 - Kind of Premium: (dropdown)
 - Escrow Officer: LH (dropdown)
 - Escrow Processor: RH (dropdown)
 - Title Officer: DM (dropdown)
 - Title Processor: EH (dropdown)
 - Sales Rep: (dropdown)
 - Sales Price: \$250,000.00
- Critical Dates:**
 - File Opened: 6/23/2019 (calendar)
 - Commitment Due: (calendar)
 - Closing Date: 7/31/2019 (calendar)
 - Cancelled: (calendar)
 - Tent. Close Date: 6/14/2019 (calendar)
 - Closing Time: 05:00 AM (dropdown)
 - Fund/Disb. Date: (calendar)
- Notes Section:** 1 of 10 Notes. A table with columns: Date, Notes, Publish, Entered By.

Date	Notes	Publish	Entered By
8/13/2020 1:42:00 PM	Order sent to Pavaso - order id : HH06232020	<input checked="" type="checkbox"/>	
8/13/2020 1:42:00 PM	Order HH06232020-Seller, submitted to Pavaso	<input checked="" type="checkbox"/>	
8/13/2020 1:39:00 PM	Order sent to Pavaso - order id : HH06232020	<input checked="" type="checkbox"/>	
8/13/2020 1:39:00 PM	Order HH06232020-Buyer, submitted to Pavaso	<input checked="" type="checkbox"/>	
7/14/2020 11:21:00 AM	Order submitted successfully to PMCDF3 for file HH06232020.	<input checked="" type="checkbox"/>	

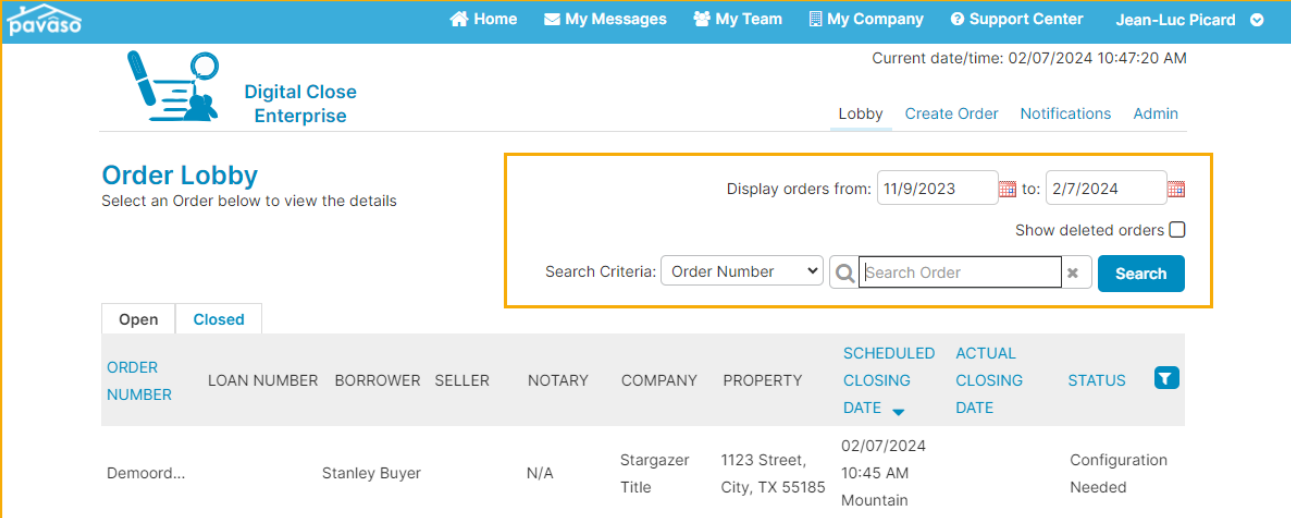
- Applicable document/document packages associated with the order are located on the **Published Documents** tab on the **Web Publishing** screen at the bottom of the **Order Entry** screen.
- Upon publication, notes are added to the Order Log at the bottom of the **Order Entry** screen.
- The Closing 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.



Order Lobby
Select an Order below to view the details

Display orders from: 11/9/2023 to: 2/7/2024

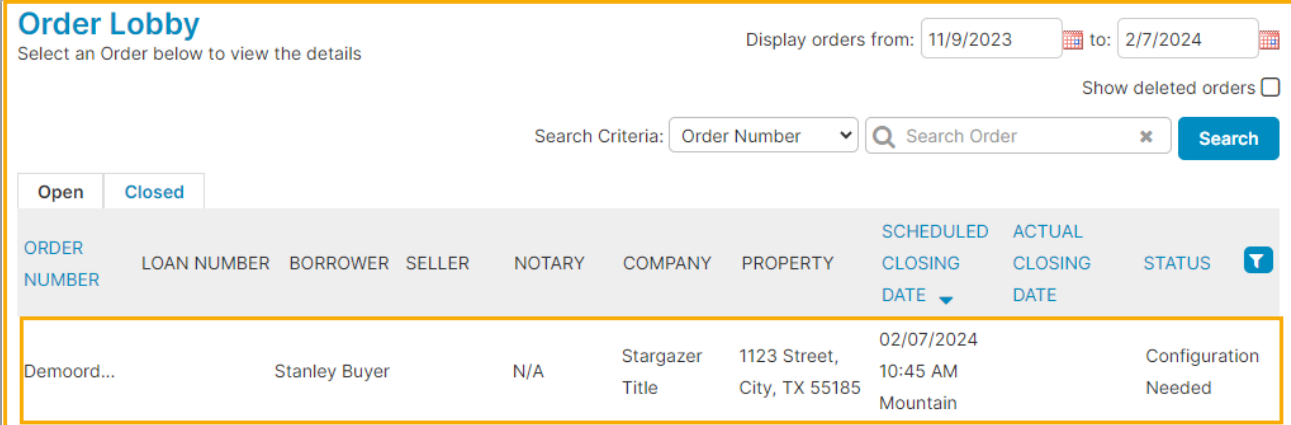
Show deleted orders ☐

Search Criteria: Order Number

ORDER NUMBER	LOAN NUMBER	BORROWER	SELLER	NOTARY	COMPANY	PROPERTY	SCHEDULED CLOSING DATE	ACTUAL CLOSING DATE	STATUS
Demoord...		Stanley Buyer		N/A	Stargazer Title	1123 Street, City, TX 55185	02/07/2024 10:45 AM Mountain		Configuration Needed

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.



Order Lobby
Select an Order below to view the details

Display orders from: 11/9/2023 to: 2/7/2024

Show deleted orders ☐

Search Criteria: Order Number

ORDER NUMBER	LOAN NUMBER	BORROWER	SELLER	NOTARY	COMPANY	PROPERTY	SCHEDULED CLOSING DATE	ACTUAL CLOSING DATE	STATUS
Demoord...		Stanley Buyer		N/A	Stargazer Title	1123 Street, City, TX 55185	02/07/2024 10:45 AM Mountain		Configuration Needed

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.

The screenshot shows the 'Order Entry' window with various tabs and fields. The 'Status' dropdown is highlighted with a yellow box and set to 'Closed'. Other visible fields include 'Escrow Bank' (1), 'Closing Agent' (JZ), 'Settlement Agent' (359), 'Referral' (1), 'Order Category' (1), 'Escrow Officer' (LH), 'Escrow Processor' (RH), 'Title Officer' (DM), 'Title Processor' (EH), 'Sales Rep' (), 'Sales Price' (\$250,000.00), and 'Fund/Disb. Date'. A 'Critical Dates' section shows 'File Opened' (6/23/2019), 'Commitment Due' (), 'Closing Date' (7/31/2019), 'Cancelled' (), 'Tent. Close Date' (6/14/2019), and 'Closing Time' (05:00 AM). A 'Notes' section at the bottom shows a list of 10 notes, with the first one being 'Order sent to Pavaso - order id : HH06232020'.

Date	Notes	Publish	Entered By
8/13/2020 1:42:00 PM	Order sent to Pavaso - order id : HH06232020	<input checked="" type="checkbox"/>	
8/13/2020 1:42:00 PM	Order HH06232020-Seller, submitted to Pavaso	<input checked="" type="checkbox"/>	
8/13/2020 1:39:00 PM	Order sent to Pavaso - order id : HH06232020	<input checked="" type="checkbox"/>	
8/13/2020 1:39:00 PM	Order HH06232020-Buyer, submitted to Pavaso	<input checked="" type="checkbox"/>	
7/14/2020 11:21:00 AM	Order submitted successfully to PMCDF3 for file HH06232020.	<input checked="" type="checkbox"/>	

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](#)