



Creating a Cash Order

From the Order Lobby, select Create Order.

Digital Close Enterprise

Current date/time: 10/08/2019 12:56:55 PM System

Lobby **Create Order** Notifications Admin

Order Lobby

Select an Order below to view the details

Display orders from: 10/8/2018 to: 10/8/2019

Search Criteria: Loan Number Search Order Search

Order Number	Loan Number	Borrower	Seller	Property	Scheduled Closing Date	Actual Closing Date	Status
RON_Example_...	BH_08282019	Amelia Buyer		543 Testing Trail, Plano, TX 12345	8/28/2019 1:30:00 PM		Configuration Needed

Complete all required order fields.

- A. Order number:** Create a unique order number for the order.
- B. State:** Select the property state from the drop down.
- C. Closing Date:** Choose the date the order is scheduled to close.
Note: This will not affect the order's ability to close. This is for display purposes in the portal only.
- D. Closing Time:** Select the closing time and time zone.
- E. Loan Type:** Select **Cash Only** from the drop down. The **Loan Number** entry field will revert to **N/A**.
- F. Optional – Remote Closing and Video eNotary:** If this is a RON closing, select this box. The state selected in the drop down must allow RON for this to be enabled.
- G. Property Address:** Enter the address of the property.

Create Order

Create a new Order by inputting the Order information below. You can also upload the associated document packages by clicking on 'Add Documents.'

Add Documents Submit

Order Information

Order number (*) **A** Example_Order_Number

State (*) **B** Texas

Order Template (Please select an Item)

Closing Date (*) **C** 10/11/2019

Closing Time (*) **D** 02:00 PM UTC-7 MS1

Sales Price

Closing Type Digital Closing

Signing Process for Consumer Approve All, Sign Once

Remote Closing and Video eNotary **F**

Test Order

Loan Information

Loan Type **E** (Please select an item)

Loan Number Example Loan_Number

Loan Term (Year(s))

Interest Rate

Note Amount

Monthly Payment

Down Payment



G Property

Street Address (*)
963 Apple Avenue

City (*) State (*) Zip Code (*)
Plano Texas 12345

Property Type Tax ID County
(Please select an item)

Legal Description

Both buyers and seller information should be entered in Order Details. There are required fields for each:

A. Email and Street Address: Enter the email address of the consumer. Confirm the email address is correct as the Pavaso invitation email will be sent to this address. Enter the mailing address for the consumer.

Note: Buyers or sellers can share an email address if necessary. Each user will still receive an invitation email and be required to create their own account.

B. Optional – International Phone Number: For RON transactions, international numbers can be used to send ID verification texts. The number must be able to receive text messages from a U.S.-based phone number.

C. Add another Buyer/Seller: Select this option to add an additional buyer or seller to the order.

Buyer This is a company, LLC, or group account

A Email Address exampleconsumeruser@yahoo.com Username

Buyer First Name Example Buyer Middle Name Buyer Last Name Consumer

Cell Phone Street Address (*) City (*)
123 Right Road Plano

State (*) Zip Code (*)
Texas 12345

B International Phone Number +1-United S

C Add another Buyer



Seller 1 This is a company, LLC, or group account

A Email Address
sampleuser@yahoo.com

Seller First Name (*) Seller Middle Name Seller Last Name (*)
Sample [] Seller

Cell Phone Street Address (*) City (*)
[] 156 Redding Road Plano

State (*) Zip Code (*)
Texas [] 12345

International Phone Number
B +1-United S [] []

C Add another Seller Remove this Seller section

Assign the closing agent. Complete the required fields:

- A. Company:** Select the applicable company from the drop down. Associated companies/branches appear.
- B. Closer Email Address:** Choose the closing agent to be associated with the order. If the required user is not available in the drop down, contact the company administrator.
- C. Is this Closer the Notary for this order?:** If the user will be eNotarizing, select **Yes**. If the user is a registered eNotary with Pavaso, the **State of Notarization** will appear. If not, an error appears. If eNotarization does not apply to this order, leave the default **Unknown Notary** selection.
- D. Add another Closer:** Multiple users can be associated with an order. Adding another closing agent allows this additional user to access and close the order on Pavaso.

Note: This also applies to mobile/remote notaries associated with your company.

Closer

Company **A** Company BH Title Closer Email Address (*) **B** chriscloser@mailinator.com Username chriscloser@mailinator.com

Other Closer Email Address (*) []

First Name (*) Middle Name Last Name (*)
Chris [] Closer

Street Address City Cell Phone
2900 N Dallas Pkwy Plano (834) 789-4329

Zip Code State
75093 Texas

Is this Closer the Notary for this Order?
C Yes No (Please fill in the Notary details below) Unknown Notary

State of Notarization: Texas [Edit](#)

D Add another Closer



The **Additional Party** section is optional and can be used to add the following to an order:

- Co-Borrower
- Loan Officer
- Loan Processor
- Non-Purchasing Spouse
- Title Holder

Once all fields are complete, click **Submit** to create the order.

Additional Party

As Role (Please select an item) ▾	Email Address <input type="text"/>	Username <input type="text"/>
First Name <input type="text"/>	Middle Name <input type="text"/>	Last Name <input type="text"/>

Uploaded Order Documents



Additional Party Permissions

	Add users to company	Close Orders	Change Company Config Settings	Upload Documents	Modify Order Details	Pre-Closing Review required for Pending Closing status	Able to sign documents
Co-Signer	N	N	N	N	N	Y, if tags are assigned	Y, if tags are assigned
Loan Officer	Y, if Company Admin	Y	Y	Y	Y	N/A	Y, if tags are assigned. Must complete before order moves to Closed status. Documents can be signed prior to closing
Loan Processor	Y, if Company Admin	Y	Y	Y	Y	N/A	Y, if tags are assigned. Must complete before order moves to Closed status
Non-Purchasing Spouse	N	N	N	N	N	Y, if tags are assigned	Y, if tags are assigned
Title Holder	N	N	N	N	N	Y, if tags are assigned	Y, if tags are assigned

Pavaso Support

Business Hours: Monday – Friday 7:00 am – 8:00 pm CST

Email: support@pavaso.com

Phone/ Closing Hotline: (866) 288-7051, Option 3

24/7 Online Help Library: Log into your Pavaso account and click on “Help” next to your name.