



# TrailFix<sup>TM</sup>

## Closing Agent/Notary Guide

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Pavaso

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# What You Need to Know about TrailFix

## What does TrailFix do, and how does it enhance the platform?

TrailFix allows you to re-open an order, upload additional documents and send those documents for signature. The signature can be captured via IPEN, RON, or the Signer using their own device at a separate location without needing to interact with the Notary.

## Does the order have to be in a specific status or type to use this feature?

The order must be in the Closed status to use TrailFix.

## How do I turn this feature on?

Contact your Implementation Lead or [support@pavaso.com](mailto:support@pavaso.com).

## Who can use this feature?

TrailFix is for Closing Agent/Notary users only. It is not available for Lender users.

## How many times can a package be modified?

The package can be modified and closed as many times as needed.

## Can a package be modified using a different signing method than when the order was originally closed?

Yes. For example, if the package was signed using RON, the modified documents can be signed using IPEN, RON, or with the Signer using their own device.

# Sending a Document Using In-Person eNotarization (IPEN)

## IPEN – Closing Agent View

**Note:** This guide refers to Closing Agent. This is intended to be inclusive of anyone with a Closing Agent role.

Once the order is closed, the **TrailFix** button will appear for the Closing Agent. In this example, **Document One** was uploaded to the order before it was closed.

The screenshot shows the Pavaso Digital Close Enterprise interface. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:29:40 AM. The interface is for a closing package titled "234 Ever Lane, Dallas, TX 12345". On the left, there is a sidebar with order details: ORDER NUMBER: Order\_One\_Example, COMPANY: BH Title, BUYER: Stanley Buyer, SELLER: (blank), SALES PRICE: \$ 0.00, CLOSING DATE: 09/26/2022 11:28 AM, and ACTUAL CLOSING COMPLETED: 09/30/2022 11:28 AM. A "Post Closing" button is at the bottom of the sidebar. The main area shows a "TrailFix" button highlighted with a red box. Below it, a "Documents" section states: "The documents listed below are the signed copies of your closing package." A table lists the documents:

	Date Completed	
Audit Log		
This Audit Log contains all of the activity from this Digital Closing up to the completion of the closing process.		
AuditReport	N/A	Download
Complete Package		
Bundle of all Documents	N/A	Download
Order Documents		
Document One	09/30/2022	Download
Additional Order Documents		Add Documents
Journal Entries		
Journal Entries	09/26/2022	Download

Enter a reason for modifying the package and select **Submit**.

The "Modify Package" dialog box is shown. It has a title bar with a close button (X). The main text says: "Enter the reason for modifying the document package (i.e. missed signature, additional document, etc)." Below this is a text input field containing the text "Need additional signature". At the bottom, there are two buttons: "Cancel" and "Submit".

Once hitting **Submit**, you will be directed to Edit Mode. Select **Upload**.

The screenshot displays the Pavaso Digital Close Enterprise web application. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and the user profile (Cindy Closer). The current date/time is 09/30/2022 09:36:09 AM. The main interface is titled 'Document Details' for 'Document One'. On the left sidebar, there are buttons for 'Back', 'Print', 'Upload' (highlighted with a red box), 'Delete', 'Save as Template', 'Send Action Request', and 'Save'. Below these are options for 'Audience' (set to 'All'), 'Date Due' (09/26/2022), and checkboxes for 'Additional Action Required at Closing' and 'Wet Signature Required (Hybrid Closing Only)'. There is also a 'Document Templates' section with a dropdown menu. The main document area shows a 'TEST ORDER' watermark and two signature tags. The first tag is for 'Cindy Closer' with a date of '2022-09-26'. The second tag is for 'CINDY CLOSER', a Notary Public for the State of Texas, Commission # TX12345, Commission Exp. 01-20-2025, with a date of 'Jan. 20, 2025'.

Upload the document(s) to be sent to the Signer and select **Save**. In this example, we'll call the document **Document Two**. Templates can be applied to documents, if applicable.

The screenshot shows the 'Add Documents' page in the Pavaso Digital Close Enterprise system. The page has a blue header with the Pavaso logo and navigation links: Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:37:46 AM. Below the header, there's a 'Digital Close Enterprise' logo and a 'Lobby' button. The main content area has a 'Back' button and an 'Add Documents' title. A 'Files' section with a 'Choose Files' button is present. Below this is a table with the following columns: Name, Description, Document Template, Status, and Action. The table contains one row with 'Document Two' in the Name column, 'Document Two' in the Description column, 'Please select a template' in the Document Template column, and 'Completed' in the Status column. The Action column has three icons: a pencil, a magnifying glass, and a trash can. A red box highlights the 'Document Two' entry in the Name column. Below the table, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

Select the new document from the dropdown menu.

The screenshot shows the 'Document Details' page in the Pavaso Digital Close Enterprise system. The page has a blue header with the Pavaso logo and navigation links: Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:39:34 AM. Below the header, there's a 'Digital Close Enterprise' logo and a 'Lobby' button. The main content area has a 'Back' button and a 'Document Details' title. Below the title, there's a dropdown menu with the following options: Document One, Document One, and Document Two. A red box highlights the 'Document Two' option. To the right of the dropdown menu, there's a 'Full screen' button. Below the dropdown menu, there's a 'Name:' label and an 'Edit' button. Above the dropdown menu, there are several buttons: Print, Upload, Delete, Save as Template, Send Action Request, and Save.

Add the appropriate tags to be completed by the Signer. Once the tags or templates have been applied, select **Send Action Request**.

The screenshot displays the Pavaso Digital Close Enterprise web application. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:41:54 AM. The main interface shows a document titled "Document Two" with a large "TEST ORDER" watermark. On the left, there are options to tag the document for signature, initials, education, notary, or text. The document content area shows four tags: "Stanley Buyer" (blue), "Notary Signature" (yellow), "Notary Seal" (yellow), and "Comm. Exp. Date" (blue). Each tag has a "copy tag" button and a "Details" panel. The "Stanley Buyer" details panel shows the signer as "Stanley Buyer" with options for "Pre-closing" and "Closing" (selected). The "Notary Signature" details panel shows the notary type as "Acknowledgment" and the link to the signer as "Buyer". The "Send Action Request" button is highlighted in red in the top right corner of the document area.

**Document Details**

Name:  [Edit](#)

Audience:  Date Due: 09/26/2022

☐ Additional Action Required at Closing

☐ Wet Signature Required (Hybrid Closing Only)

Document Templates:

[+ Tag for Signature](#)

[+ Tag for Initials](#)

[+ Tag for Education](#)

[+ Tag for Notary](#)

[+ Tag for Text](#)

**Document Content:**

**TEST ORDER**

**Tags:**

- B1 Stanley Buyer** (copy tag) **Details:** Signer: Stanley Buyer, Pre-closing, Closing (selected)
- N Notary Signature** (copy tag) **Details:** Notarization Type: Acknowledgment, Link to signer: Buyer
- Notary Seal**
- Comm. Exp. Date**

**Buttons:** Back, Print, Upload, Delete, Save as Template, Collapse Tag Info, Save, **Send Action Request**

You will be prompted to choose which method may be used to sign the document.

**Important Note:**

This example contains a document that requires eNotarization. Because of this, the option for the Signer to sign on their own device is not available. The document must be completed using IPEN or RON.

The following fields must be completed before the document can be sent:

- A. Closing Type:** In this example, we can choose IPEN or RON, since our document contains eNotarization. For documents that do not require eNotarization, the Signer can sign the document on their own device.
- B. Notes to Recipient:** The Closing Agent can enter a note for the Signer. This note is visible in the email that notifies the Signer there are additional actions to complete.
- C. Date:** The date that the document will be signed in person with the Closing Agent should be entered here.
- D. Time:** The time of the document signing appointment should be entered here.
- E. Cancel:** Selecting this option closes the window.
- F. Confirm:** Selecting this option saves the changes and sends an email notification to the Signer.

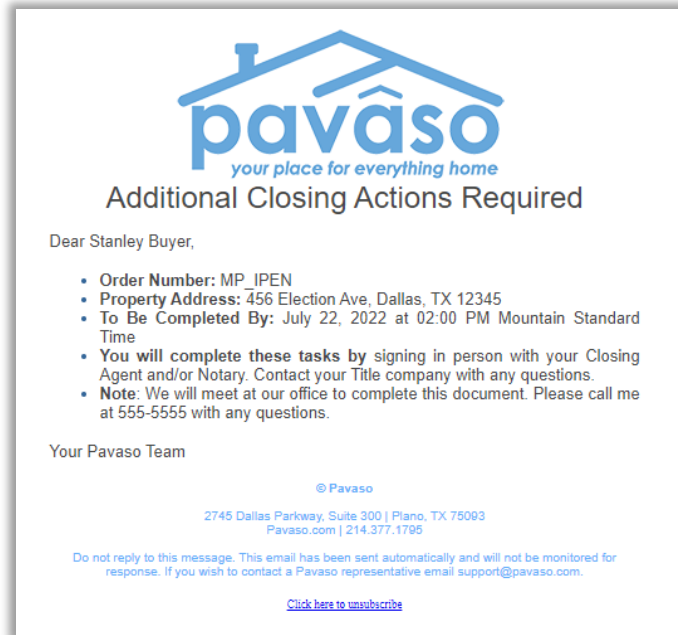
The screenshot shows a dialog box titled "Select Closing Type and Time" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Closing Type (\*):** Labeled with a red circle 'A'. It has two radio button options:
  - ☒ IPEN - Complete required task(s) with Signers present using a shared device
  - ☐ RON - Complete required task(s) remotely (minimum system requirements must be met)
- Notes to Recipient (\*):** Labeled with a red circle 'B'. It is a text area containing the text: "We will meet in our office to complete this document. Please call me at 555-5555 with any questions."
- Date (\*):** Labeled with a red circle 'C'. It is a date input field showing "08/23/2022" with a calendar icon to its right.
- Time (\*):** Labeled with a red circle 'D'. It is a time input field showing "02:00 PM".
- Buttons:** At the bottom right, there are two buttons: "Cancel" (labeled with a red circle 'E') and "Confirm" (labeled with a red circle 'F').



## IPEN – Signer View

The Signer receives notification that additional actions are required for the closing. There will not be any actions required for them to take on Pavaso because they will be meeting with the Notary in person.



## IPEN – Closing Agent View – Completing the Document

At the scheduled time, the Closing Agent will access the order. **Web Closing** or **Multi-Device Closing** (MDC) can be used to conduct the signing. For this example, we'll choose **Web Closing**.

The screenshot shows the Pavaso Digital Close Enterprise interface. On the left, there's a sidebar with the address "234 Ever Lane, Dallas, TX 12345" and order details: "ORDER NUMBER: Order\_One\_Example", "COMPANY: BH Title", "BUYER: Stanley Buyer", "SELLER:", "SALES PRICE: \$ 0.00", "CLOSING DATE: 09/26/2022 11:28 AM", and a countdown timer. Below the sidebar are checkboxes for "Take a Tour", "Pre-Closing Review", and "Closing Setup", all of which are checked. The main area is titled "Select where you want to close:" and lists five options: "SIGNING TABLE (Windows 8 app)", "WEB CLOSING (Any web browser)", "MULTI-DEVICE CLOSING (Any web browser, all participants using their own device)", "CLOSING AGENT ACCESS", and "PAPER CLOSING". The "WEB CLOSING" option is highlighted with a red box and a green checkmark. At the bottom right, there is a "Continue" button with a right arrow, also highlighted with a red box.

The Closing Agent completes the document with the Signer present, ending the closing session.

**Note:** This example shows 2.0, but TrailFix is also available for 1.0.

The screenshot shows the Pavaso Closing BMP IPEN interface. The top bar indicates "75% Complete" and has links for "Contact Support" and "End Session". The left sidebar shows a "Tasks" list with "Document One" and "Document Two" (2 of 2 Actions Complete). The main area displays the document "TEST ORDER" and "SAMPLE DOCUMENT". It shows the signature of Stanley Buyer, dated 07/19/2022, and the eNotary signature of Cindy Closer, dated 07/19/2022. The document is titled "TEST ORDER" and "SAMPLE DOCUMENT".

Once the order has closed, **Document Two** now appears in the document list from the Post-Closing screen.

**pavaso** Home My Messages My Team My Company Help Cindy Closser

Current date/time: 09/30/2022 10:04:01 AM System

**Digital Close Enterprise** Lobby Notifications

234 Ever Lane, Dallas, TX 12345

View eVault Archive

ORDER NUMBER:  
Order\_One\_Example

COMPANY:  
BH Title

BUYER:  
Stanley Buyer

SELLER:

SALES PRICE:  
\$ 0.00

CLOSING DATE:  
09/30/2022 11:28 AM

ACTUAL CLOSING COMPLETED:  
09/30/2022 11:28 AM

**Post Closing**

**TrailFix**


**Documents**  
The documents listed below are the signed copies of your closing package.

	Date Completed	
Audit Log This Audit Log contains all of the activity from this Digital Closing up to the completion of the closing process.		
AuditReport	N/A	Download Print
Complete Package		
Bundle of all Documents	N/A	Download Print
Order Documents		
Document One	09/30/2022	Download Print
Document Two	09/30/2022	Download Print
Additional Order Documents		Add Documents
Journal Entries		
Journal Entries	09/30/2022	Download

The actions are also captured in the Audit Log.

TEST ORDER

**Order Audit Log**



**Digital Close Order #:** Order\_One\_Example

**Property Address:** 234 Ever Lane Dallas, TX 12345

**Settlement Agent:** BH Title - Cindy Closer

**Borrower(s):** Stanley Buyer

**Report Generated Date:** September 30, 2022 12:03:17 PM

**Central Daylight Time**

User	Action	Platform	IP Address	Date
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 12:03 PM
Cindy Closer	Cindy Closer notarized Document Two	Digital Close Enterprise	68.230.42.174	09/30/2022 12:02 PM
Stanley Buyer	Buyer Stanley Buyer signed in document Document Two	Digital Close Consumer	68.230.42.174	09/30/2022 12:02 PM
Cindy Closer	Accepted the Remote Online Notary Disclaimer	Digital Close Enterprise	68.230.42.174	09/30/2022 12:00 PM

**Legal Compliance Disclaimer:**

Pavaso does not warrant or represent that the documents signed or notarized using the Software comply with federal, state or county laws, rules, or regulations relating to the execution, notarization, or recordation of documents, including, without limitation, whether such documents are properly notarized or can be electronically recorded in the applicable county recorder offices. Pavaso shall have no obligation to confirm whether such documents, or the execution or notarization thereof, comply with any applicable federal, state or county laws, rules, or regulations (including, without limitation those concerning the commission, appointment or duties of a notary public), and such obligation shall be solely that of Licensee.

Cindy Closer	Change ClosingDate	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Edit Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Configure Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:45 AM
Cindy Closer	Upload Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:39 AM
Cindy Closer	Package reopened for modification because Need additional signature	Digital Close Enterprise	68.230.42.174	09/30/2022 11:35 AM
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM
Cindy Closer	The previous Seal with key 05a66bfb-	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM

# Sending a Document Using Remote Online Notarization (RON)

## RON – Closing Agent View

**Note:** This guide refers to Closing Agent. This is intended to be inclusive of anyone with a Closing Agent role.

Once the order is closed, the **TrailFix** button will appear. In this example, **Document One** was uploaded to the order before it was closed.

The screenshot shows the Pavaso Digital Close Enterprise interface. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:29:40 AM. The interface displays the address 234 Ever Lane, Dallas, TX 12345 and a sidebar with order details: ORDER NUMBER: Order\_One\_Example, COMPANY: BH Title, BUYER: Stanley Buyer, SELLER: (blank), SALES PRICE: \$ 0.00, CLOSING DATE: 09/26/2022 11:28 AM, and ACTUAL CLOSING COMPLETED: 09/30/2022 11:28 AM. A blue button labeled "Post Closing" is visible. The main content area shows a "TrailFix" button highlighted with a red box. Below it, a "Documents" section lists signed copies of the closing package. The list includes: Audit Log (Date Completed: N/A), Complete Package (Date Completed: N/A), Order Documents (Date Completed: 09/30/2022), Additional Order Documents, and Journal Entries (Date Completed: 09/26/2022). The "Document One" entry is highlighted with a red box.

Document	Date Completed	Actions
Audit Log	N/A	Download, Print
Complete Package	N/A	Download, Print
Order Documents	09/30/2022	Download, Print
Additional Order Documents		Add Documents
Journal Entries	09/26/2022	Download

The Closing Agent must enter a reason for modifying the package, then select **Submit**.

The "Modify Package" dialog box prompts the user to enter a reason for modifying the document package (i.e. missed signature, additional document, etc.). A text input field contains the text "Need additional signature". At the bottom, there are "Cancel" and "Submit" buttons.

**Modify Package**

Enter the reason for modifying the document package (i.e. missed signature, additional document, etc).

Need additional signature

Cancel Submit

You will be directed to Edit Mode. Upload the documents you wish to send the Signer.

The screenshot displays the Pavaso Digital Close Enterprise web application. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and the user profile (Cindy Closer). The current date/time is 09/30/2022 09:36:09 AM, and the system is set to 'System'. Below the navigation bar, there are icons for Lobby, View/Edit Notes, Notifications, Invite Others, and Edit Signature. The main interface is divided into two sections: Document Details on the left and the document preview on the right. The Document Details section includes fields for Name (Document One), Audience (All), Date Due (09/26/2022), and checkboxes for Additional Action Required at Closing and Wet Signature Required (Hybrid Closing Only). It also has a Document Templates section with a dropdown menu. The preview section shows a document titled 'TEST ORDER' with two signatures: 'Cindy Closer' and 'Cindy Closer' (Notary Public). The document is dated 2022-09-26 and 2025-01-20. The 'Upload' button in the top toolbar is highlighted with a red box.

**Pavaso** Home My Messages My Team My Company Help Cindy Closer

Current date/time: 09/30/2022 09:36:09 AM System

**Digital Close Enterprise** Lobby View/Edit Notes Notifications Invite Others Edit Signature

**Document Details** Document One Full screen

Back Print **Upload** Delete Save as Template Send Action Request Save

Name: Document One

Audience: All Date Due: 09/26/2022

☐ Additional Action Required at Closing

☐ Wet Signature Required (Hybrid Closing Only)

Document Templates: Please select a template

+ Tag for Signature

+ Tag for Initials

+ Tag for Education

+ Tag for Notary

+ Tag for Text

**TEST ORDER**

2022-09-26

Jan. 20, 2025

Once you have uploaded the document(s), select **Save**. You can upload as many documents as necessary. In this example, we'll call the document **Document Two**. Templates can be applied to documents, if applicable.

The screenshot shows the 'Add Documents' page in the Pavaso Digital Close Enterprise system. The page has a blue header with the Pavaso logo and navigation links: Home, My Messages, My Team, My Company, Help, and Cindy Closer. The current date/time is 09/30/2022 09:37:46 AM. The page title is 'Add Documents' with a 'Back' button. Below the title is a 'Files' section with a 'Choose Files' button. A table with the following columns is displayed: Name, Description, Document Template, Status, and Action. The table contains one row with the following data: Name: Document Two, Description: Document Two, Document Template: Please select a template, Status: Completed, and Action: (edit, delete, and share icons). A red box highlights the 'Document Two' entry in the 'Name' column. Below the table is a 'Save' button and a 'Cancel' button. The 'Save' button is highlighted with a red box.

Select the new document from the dropdown menu.

The screenshot shows the 'Document Details' page in the Pavaso Digital Close Enterprise system. The page has a blue header with the Pavaso logo and navigation links: Home, My Messages, My Team, My Company, Help, and Cindy Closer. The current date/time is 09/30/2022 09:39:34 AM. The page title is 'Document Details' with a 'Back' button. Below the title is a 'Document Details' section with a dropdown menu for selecting a document. The dropdown menu is open, showing 'Document One' and 'Document Two'. A mouse cursor is pointing at 'Document Two'. The 'Save' button is highlighted.

Add the appropriate tags to be completed by the Signer. Repeat the process for each new document. Once the tags or templates have been applied to desired documents, select **Send Action Request**.

The screenshot displays the Pavaso Digital Close Enterprise web application. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:41:54 AM. The main interface is titled "Document Details" for "Document Two". On the left, there are fields for Name (Document Two), Audience (All), and Date Due (09/26/2022). Below these are checkboxes for "Additional Action Required at Closing" and "Wet Signature Required (Hybrid Closing Only)". A "Document Templates" section has a dropdown menu. A sidebar on the left contains buttons for "Tag for Signature", "Tag for Initials", "Tag for Education", "Tag for Notary", and "Tag for Text". The main area shows a document titled "TEST ORDER" with two tags: "Stanley Buyer" (tag B1) and "Notary Signature" (tag N). Each tag has a "copy tag" button and a "Details" panel. The "Stanley Buyer" details panel shows "Signer: Stanley Buyer" and radio buttons for "Pre-closing" and "Closing" (selected). The "Notary Signature" details panel shows "Notarization Type: Acknowledgment" and "Link to signer: Buyer". A "Send Action Request" button is highlighted with a red box in the top right of the document area.



You will be prompted to choose which methods may be used to sign the document.

**Important Note:**

This example contains a document that requires eNotarization. Because of this, the option for the Signer to sign on their own device is not available. The document must be completed using IPEN or RON.

The following fields must be completed by the Closing Agent before the document can be sent to the Signer:

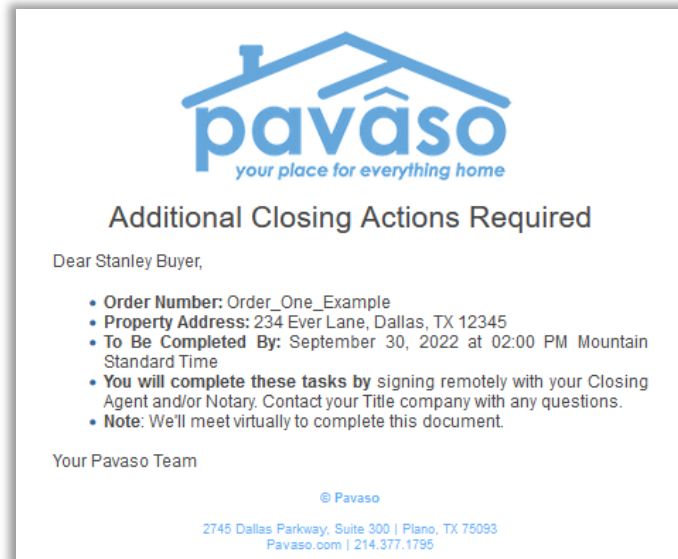
- A. Closing Type:** In this example, we can choose IPEN or RON, since our document contains eNotarization. For documents that do not require eNotarization, the Signer can sign the document on their own advice.
- B. Notes to Recipient:** The Closing Agent can enter a note for the Signer. This note is visible in the email that notifies the Signer there are additional actions to complete.
- C. Date:** The date that the document is signed in person with the Closing Agent should be entered here.
- D. Time:** The time of the document signing appointment should be entered here.
- E. Cancel:** Selecting this option closes this window.
- F. Confirm:** Selecting this option saves the changes and sends an email notification to the Signer.

The screenshot shows a dialog box titled "Select Closing Type and Time" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Closing Type (\*):** Labeled with a red circle 'A'. It has two radio button options:
  - ☐ IPEN - Complete required task(s) with Signers present using a shared device
  - ☒ RON - Complete required task(s) remotely (minimum system requirements must be met)
- Notes to Recipient (\*):** Labeled with a red circle 'B'. It is a text area containing the text: "We'll meet virtually to complete this document."
- Date (\*):** Labeled with a red circle 'C'. It is a date input field showing "09/30/2022" with a calendar icon to its right.
- Time (\*):** Labeled with a red circle 'D'. It is a time input field showing "02:00 PM".
- Buttons:** At the bottom right, there are two buttons: "Cancel" (labeled with a red circle 'E') and "Confirm" (labeled with a red circle 'F').

## RON – Signer View

The Signer receives a notification that additional actions are required for the closing. There will not be any actions required for them to take on the Pavaso platform because they will be meeting with the Notary virtually via RON.



## RON – Closing Agent View – Completing the Document

At the scheduled time, access the order and select **Remote Online Closing**.

**Digital Close Enterprise**

234 Ever Lane, Dallas, TX 12345

ORDER NUMBER: Order\_One\_Example

COMPANY: BH Title

BUYER: Stanley Buyer

SELLER:

SALES PRICE: \$ 0.00

CLOSING DATE: 09/30/2022 11:28 AM

COUNT DOWN TO CLOSING:

NaN NaN NaN NaN  
DAYS HOURS MINUTES SECONDS

Take a Tour ✓

Pre-Closing Review ✓

Closing Setup ✓

**Closing**

**Select where you want to close:**

SIGNING TABLE  
(Windows 8 app)

WEB CLOSING  
(Any web browser)

**REMOTE ONLINE CLOSING**  
(Minimum browser requirements: Chrome 72, Firefox 52, Opera 60, Safari 13 for macOS)

MULTI-DEVICE CLOSING  
(Any web browser, all participants using their own device)

CLOSING AGENT ACCESS

PAPER CLOSING

**Change Closing Platform** **Continue →**

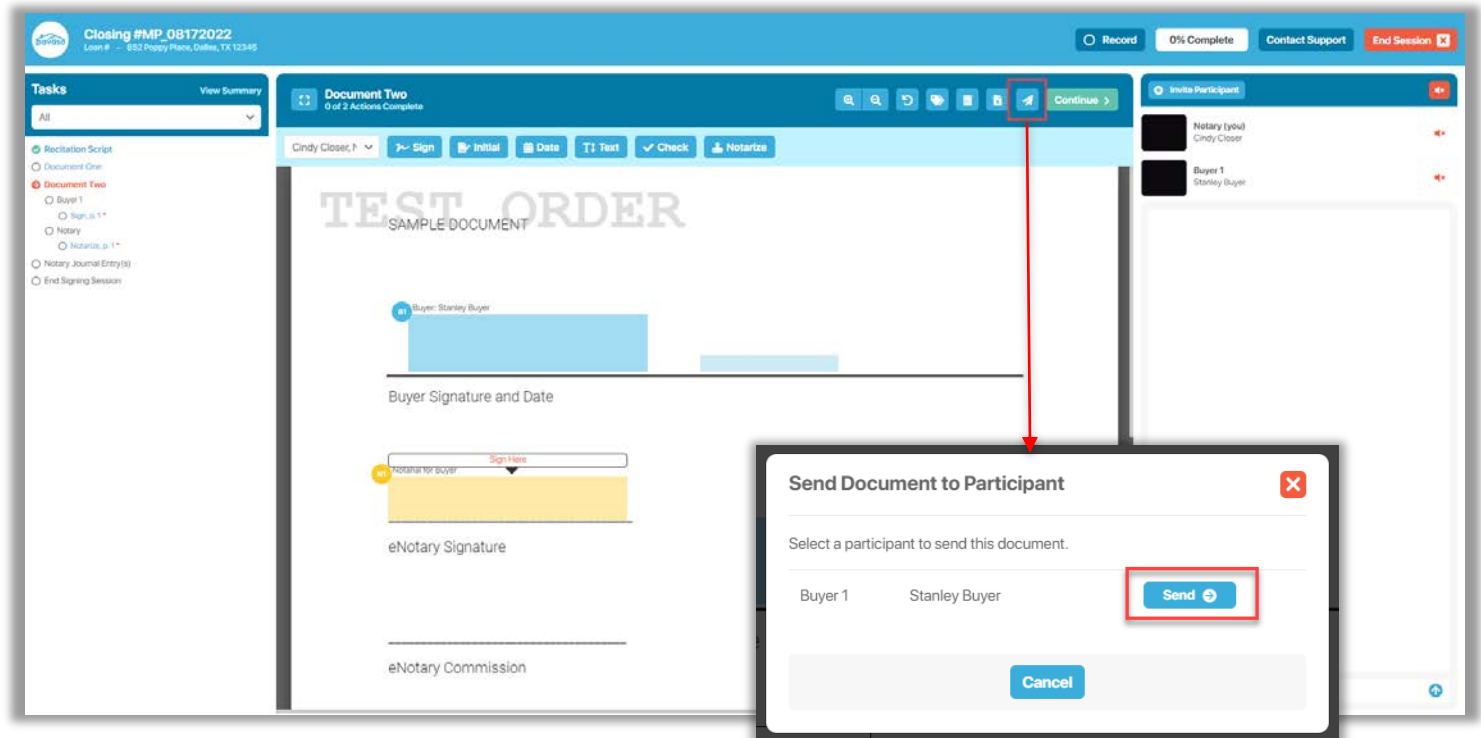
The signer must complete each step of the check in process. All RON requirements must be met to complete the document using RON. This includes KBA questions and ID validation. If the **Skip** option is enabled for your company, you will see them here.

**Start Signing Session**

Participants (1) **Add** **Invite**

Participant Role & Name	Accept eConsent	Device Settings	KBA Questions	Signature Setup	Validate Identity
Buyer 1 Stanley Buyer	✓	✓	✓	✓ View	✓ View ID

From within the session, send the document to the Signer. You can select the paper airplane or the **Continue** button.



Once the document is signed by the Signer, eNotarization can be completed. Select **Continue** to save the document and proceed.

The screenshot displays the TrailFix eNotarization interface for "Document Two". The top navigation bar includes "Record", "75% Complete", "Contact Support", and "End Session". The left sidebar lists tasks: "Recitation Script", "Document One", "Document Two" (selected), "Buyer 1", "Sign, Li 1", "Notary", "Notarize p. 1", "Notary Journal Entry(s)", and "End Signing Session". The main area shows the document details for "Buyer: Stanley Buyer" and "Notary for Buyer: Cindy Closer". The document is dated "08/17/2022". The "Buyer Signature and Date" section shows a signature and the date. The "eNotary Signature" section shows a signature and a "Lien Test" result of "1/20 10473289". The "eNotary Commission" section shows the date "Jan. 20, 2023" and the "eNotary Expiration". A red box highlights the "Continue" button in the top right corner.

The eNotary journal will display a record of the notarial act for the document. Complete the journal and select **Continue** to save and proceed.

The screenshot displays the TrailFix eNotarization interface for the "Entry 1 (Buyer 1)" journal. The top navigation bar includes "Record", "67% Complete", "Contact Support", and "End Session". The left sidebar lists tasks: "Recitation Script", "Document One", "Document Two", "Notary Journal Entry(s)" (selected), "Entry 1 (Buyer 1)" (selected), and "End Signing Session". The main area shows the journal entry details for "Stanley Buyer". The "Date of Notarization" is "September 26, 2022" and "September 30, 2022". The "Description/title of document(s)" is "Mortgage Documents". The "Document Date" is "09/26/2022" and "09/30/2022". The "Type of notarial act" is "Acknowledgement". The "Name of Signer" is "Stanley Buyer". The "Address of Signer" is "123 Right Road, Plano, TX, 12345". The "Signature of Signer" is "Stanley Buyer". A red box highlights the "Continue" button in the top right corner.

Once complete, the document will display on the Post-Closing screen in the document list.

**pavaso** Home My Messages My Team My Company Help Cindy Closer

Current date/time: 09/30/2022 10:04:01 AM System

**Digital Close Enterprise** Lobby Notifications

**234 Ever Lane, Dallas, TX 12345**

View eVault Archive

ORDER NUMBER:  
Order\_One\_Example

COMPANY:  
BH Title

BUYER:  
Stanley Buyer

SELLER:

SALES PRICE:  
\$ 0.00

CLOSING DATE:  
09/30/2022 11:28 AM

ACTUAL CLOSING  
COMPLETED:  
09/30/2022 11:28 AM

**Post Closing**

**TrailFix**


**Documents**  
The documents listed below are the signed copies of your closing package.

	Date Completed	
Audit Log This Audit Log contains all of the activity from this Digital Closing up to the completion of the closing process.		
AuditReport	N/A	Download Print
Complete Package		
Bundle of all Documents	N/A	Download Print
Order Documents		
Document One	09/30/2022	Download Print
Document Two	09/30/2022	Download Print
Additional Order Documents		Add Documents
Journal Entries		
Journal Entries	09/30/2022	Download

The actions are also captured in the Audit Log.

TEST ORDER

### Order Audit Log



**Digital Close Order #:** Order\_One\_Example

**Property Address:** 234 Ever Lane Dallas, TX 12345

**Settlement Agent:** BH Title - Cindy Closer

**Borrower(s):** Stanley Buyer

**Report Generated Date:** September 30, 2022 12:03:17 PM

**Central Daylight Time**

User	Action	Platform	IP Address	Date
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 12:03 PM
Cindy Closer	Cindy Closer notarized Document Two	Digital Close Enterprise	68.230.42.174	09/30/2022 12:02 PM
Stanley Buyer	Buyer Stanley Buyer signed in document Document Two	Digital Close Consumer	68.230.42.174	09/30/2022 12:02 PM
Cindy Closer	Accepted the Remote Online Notary Disclaimer	Digital Close Enterprise	68.230.42.174	09/30/2022 12:00 PM
<p><b>Legal Compliance Disclaimer:</b></p> <p>Pavaso does not warrant or represent that the documents signed or notarized using the Software comply with federal, state or county laws, rules, or regulations relating to the execution, notarization, or recordation of documents, including, without limitation, whether such documents are properly notarized or can be electronically recorded in the applicable county recorder offices. Pavaso shall have no obligation to confirm whether such documents, or the execution or notarization thereof, comply with any applicable federal, state or county laws, rules, or regulations (including, without limitation those concerning the commission, appointment or duties of a notary public), and such obligation shall be solely that of Licensee.</p>				
Cindy Closer	Change ClosingDate	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Edit Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Configure Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:45 AM
Cindy Closer	Upload Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:39 AM
Cindy Closer	Package reopened for modification because Need additional signature	Digital Close Enterprise	68.230.42.174	09/30/2022 11:35 AM
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM
Cindy Closer	The previous Seal with key 05a66bfb-	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM

## Sending a Document Using Sign on Their Own Sign On Their Own – Closing Agent View

**Note:** This guide refers to Closing Agent. This is intended to be inclusive of anyone with a Closing Agent role.

Once the order is closed, the **TrailFix** button will appear for the Closing Agent. In this example, **Document One** was uploaded to the order before it was closed.

The screenshot shows the Pavaso Digital Close Enterprise interface. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and the user name Cindy Closer. The current date/time is 09/30/2022 09:29:40 AM. The interface displays a document package for "234 Ever Lane, Dallas, TX 12345". A "TrailFix" button is highlighted with a red box. The package details include:

- ORDER NUMBER: Order\_One\_Example
- COMPANY: BH Title
- BUYER: Stanley Buyer
- SELLER:
- SALES PRICE: \$ 0.00
- CLOSING DATE: 09/26/2022 11:28 AM
- ACTUAL CLOSING COMPLETED: 09/30/2022 11:28 AM

The "Documents" section lists the following items:

Document	Date Completed	Actions
Audit Log This Audit Log contains all of the activity from this Digital Closing up to the completion of the closing process.		
AuditReport	N/A	Download, Print
Complete Package Bundle of all Documents	N/A	Download, Print
Order Documents Document One	09/30/2022	Download, Print
Additional Order Documents		Add Documents
Journal Entries	Journal Entries 09/26/2022	Download

The user must enter a reason for modifying the package.

The "Modify Package" dialog box prompts the user to enter a reason for modifying the document package (i.e. missed signature, additional document, etc.). The text "Need additional signature" is entered in the input field. The dialog includes "Cancel" and "Submit" buttons.



Once hitting **Submit**, you will be directed to Edit Mode. Select **Upload**.

The screenshot displays the Pavaso Digital Close Enterprise interface. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and the user profile Cindy Closer. The current date/time is 09/30/2022 09:36:09 AM. The interface shows a document titled 'Document One' in Edit Mode. The 'Upload' button is highlighted with a red box. The document content includes a 'TEST ORDER' watermark, a signature of Cindy Closer, and a notary seal for Cindy Closer, Notary Public for the State of Texas, Commission # TX12345, Commission Exp. 01-20-2025. The date 'Jan. 20, 2025' is displayed at the bottom.

Upload the document(s) to be sent to the Signer and select **Save**. In this example, we'll call the document **Document Two**. Templates can be applied to documents, if applicable.

The screenshot shows the 'Add Documents' page in the Pavaso Digital Close Enterprise system. The page has a blue header with the Pavaso logo and navigation links: Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:37:46 AM. Below the header, there's a 'Digital Close Enterprise' logo and a 'Lobby' button. The main content area is titled 'Add Documents' with a 'Back' button. A 'Files' section has a 'Choose Files' button. Below this is a table with the following columns: Name, Description, Document Template, Status, and Action. The table contains one row with the following data: Name: Document Two, Description: Document Two, Document Template: Please select a template, Status: Completed, and Action: (edit, delete, and share icons). A red box highlights the 'Document Two' entry in the Name column. At the bottom right, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

Select the new document from the dropdown menu.

The screenshot shows the 'Document Details' page in the Pavaso Digital Close Enterprise system. The page has a blue header with the Pavaso logo and navigation links: Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 09/30/2022 09:39:34 AM. Below the header, there's a 'Digital Close Enterprise' logo and a 'Lobby' button. The main content area is titled 'Document Details' with a 'Back' button. Above the document details, there are several buttons: Print, Upload, Delete, Save as Template, Send Action Request, and Save. A dropdown menu is open, showing three options: Document One, Document One, and Document Two. A red box highlights the 'Document Two' option. The document details section shows the Name field with an 'Edit' button.

Add the appropriate tags to be completed by the Signer. Once the all tags or templates have been applied, select **Send Action Request**.

The screenshot displays the Pavaso Digital Close Enterprise web application. The top navigation bar includes links for Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The current date/time is 10/03/2022 10:08:19 AM. The main interface shows a document titled 'TEST ORDER' with a signature tag for 'Stanley Buyer'. A 'Send Action Request' button is highlighted with a red box. The left sidebar contains 'Document Details' with fields for Name (Blank), Audience (All), Date Due (09/23/2022), and checkboxes for 'Additional Action Required at Closing' and 'Wet Signature Required (Hybrid Closing Only)'. There is also a 'Document Templates' section with a dropdown menu. The bottom of the sidebar has a 'Tag for Signature' button. The right sidebar shows a 'Details' panel for the signature tag, including a 'Signer' dropdown (Stanley Buyer) and radio buttons for 'Pre-closing' and 'Closing' (selected).

You will be prompted to choose which method may be used to sign the document. In this example, we'll choose **Sign on their own**. This option allows the Signer to complete the document on their own device without the Notary present.

The following must be completed before the document can be sent:

- A. Closing Type:** In this example, **Sign on their own** can be used because the document does not require eNotarization. The Signer can sign their document on their own device without the Notary present.
- B. Notes to Recipient:** The Closing Agent can enter a note to the Signer. This note is visible in the email sent that notifies the Signer of additional actions to complete.
- C. Cancel:** Selecting this option closes this window.
- D. Confirm:** Selecting this option saves the changes and sends the notification to the Signer.

**Select Closing Type and Time** ✕

Closing Type (\*): **A**

- ☐ IPEN - Complete required task(s) with Signers present using a shared device
- ☐ RON - Complete required task(s) remotely (minimum system requirements must be met)
- ☒ Sign on their own - Send required task(s) to the Signer to complete on their own device (must be completed using a laptop, desktop, or tablet)

Notes to Recipient (\*): **B**

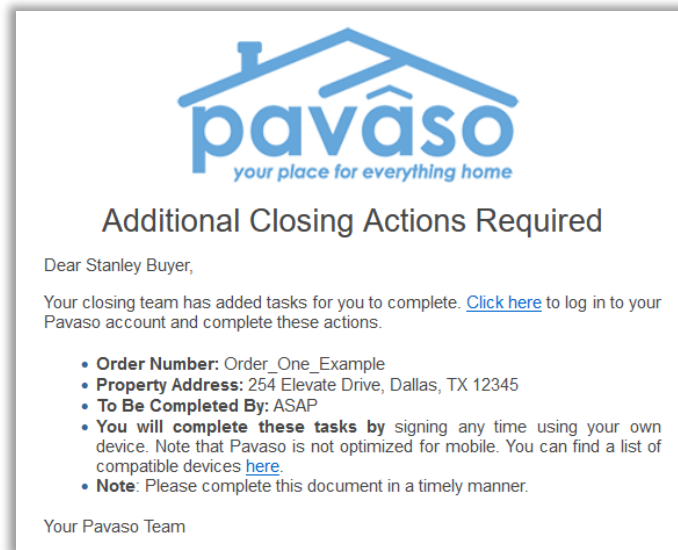
Please complete this document in a timely manner.

**C** **D**

Cancel Confirm

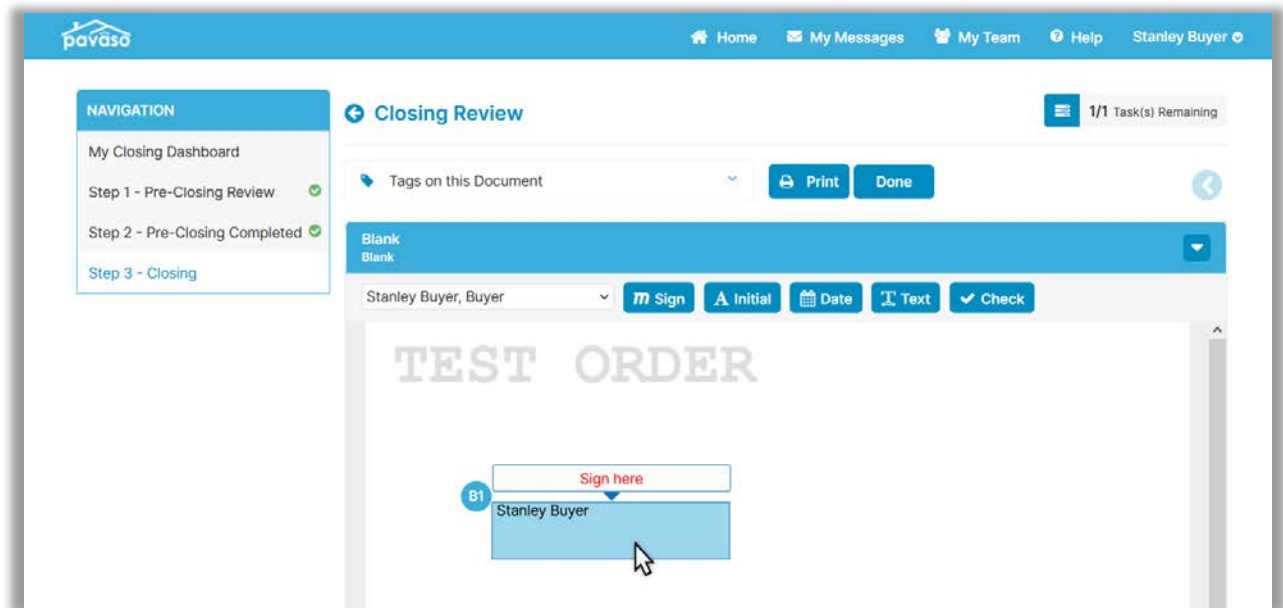
## Sign On Their Own – Signer View

The Signer receives an email indicating they have pending actions to complete.

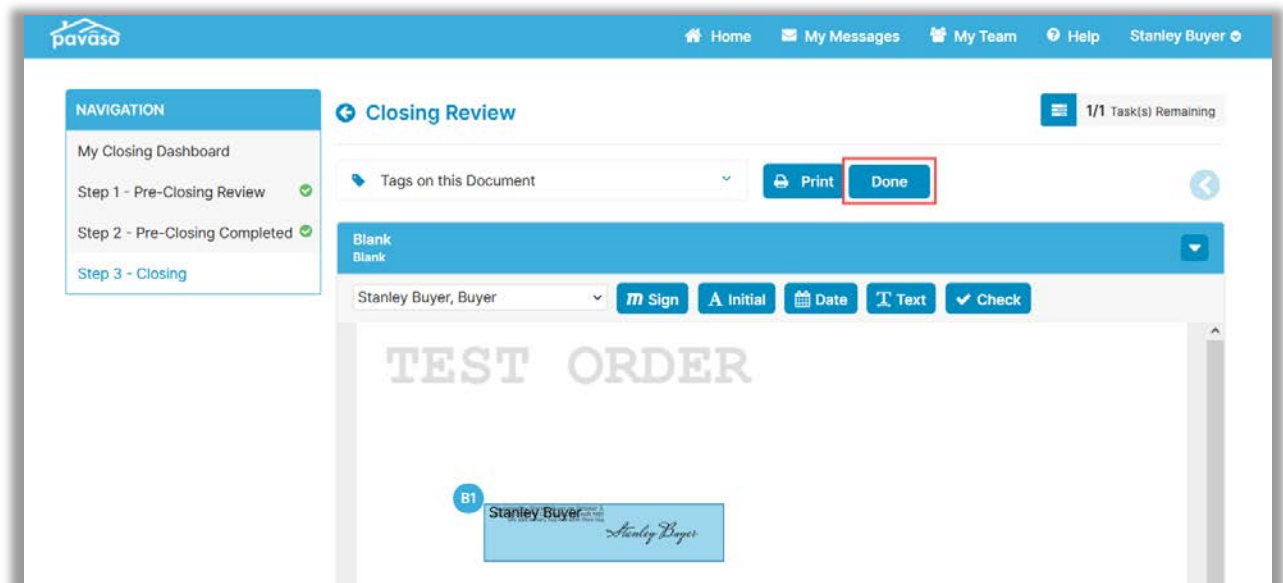


Selecting the **Click Here** link in the body of the email will bring the Signer into Pavaso and directly to the document pending action. If they sign into their Pavaso account on their own, the Signer must navigate to the appropriate order and document.

The Signer selects the signature tag to apply their signature. Since the Signer has already signed documents at closing, their signature is saved to their profile.

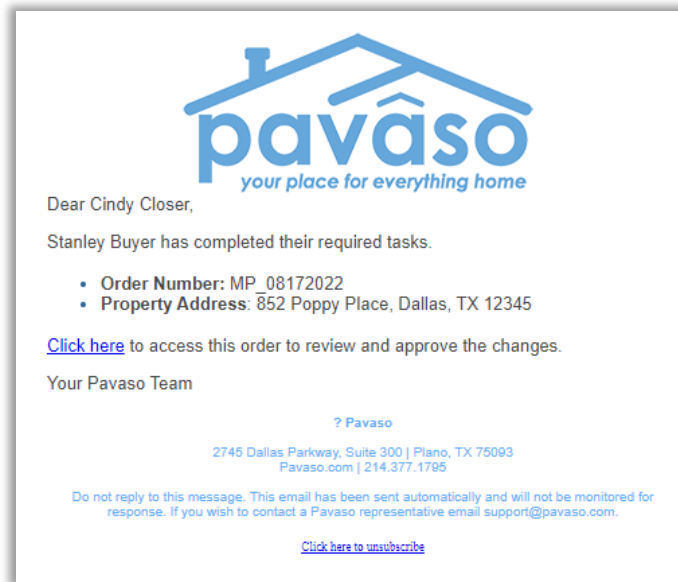


After the signature is complete, the Signer selects **Done**.

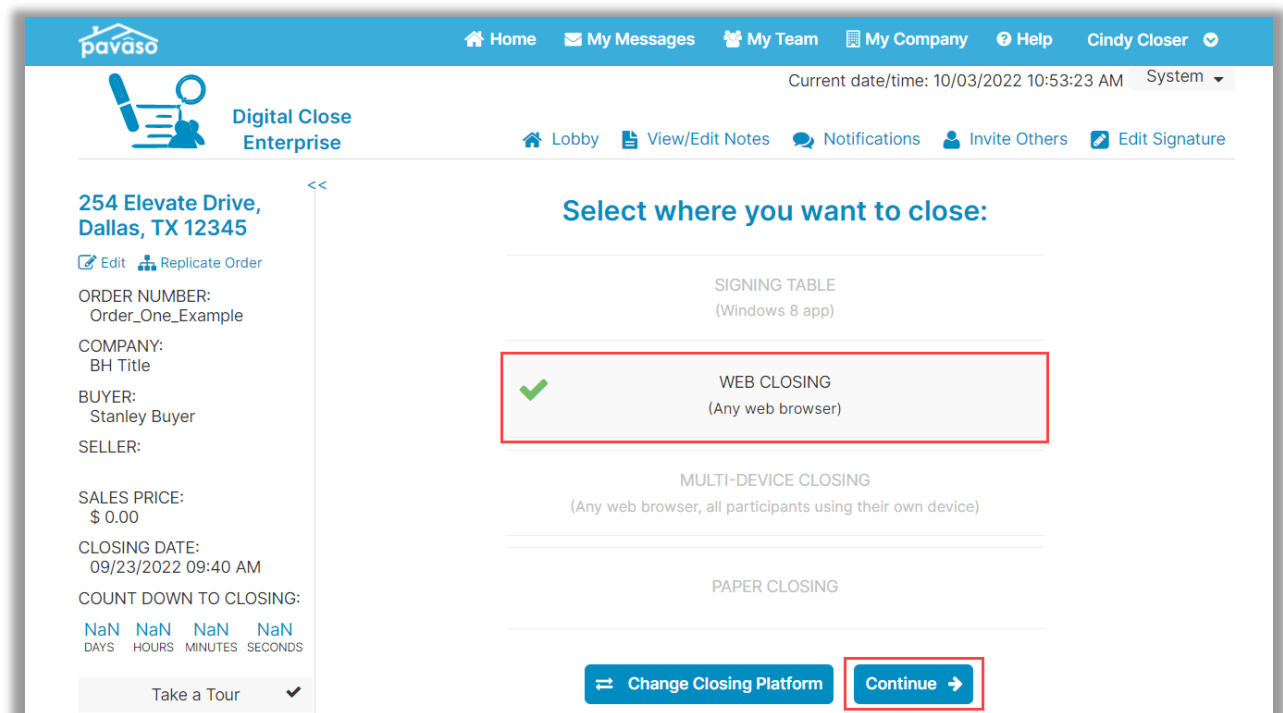


## Sign On Their Own – Closing Agent View – Finalizing Modifications

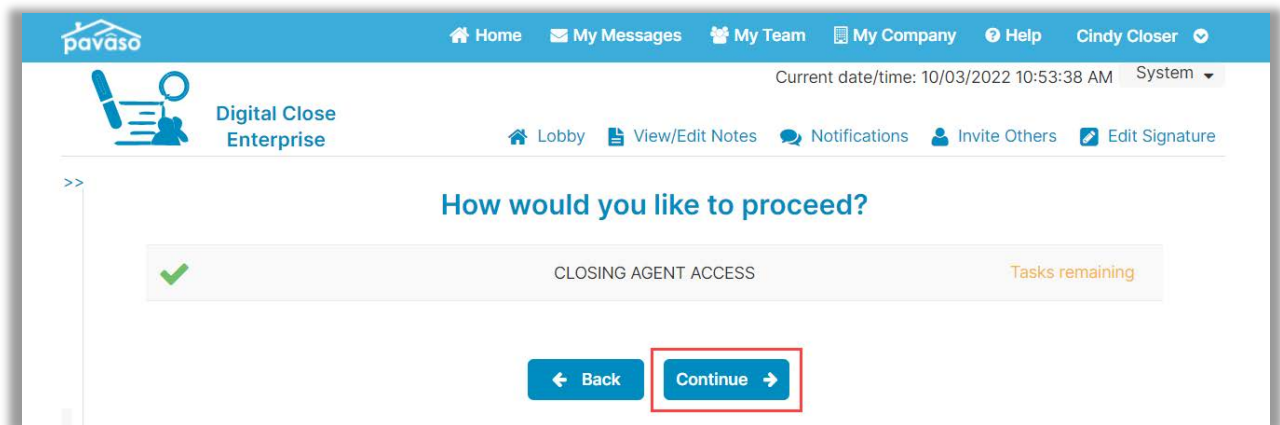
Once all the Signer's tasks are complete, the Closing Agent receives an email notification that the document is ready for review.



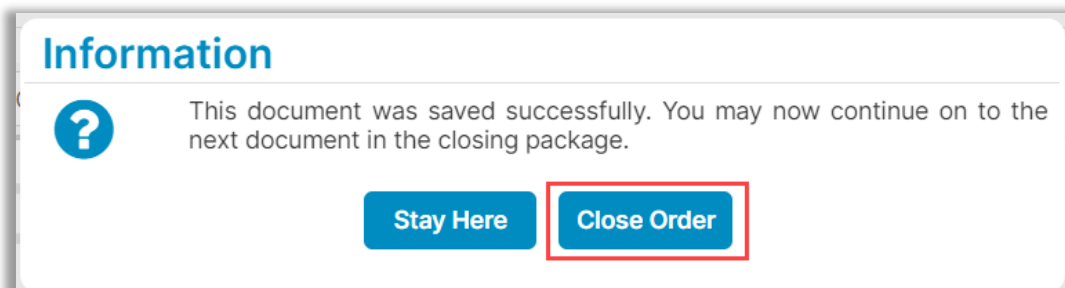
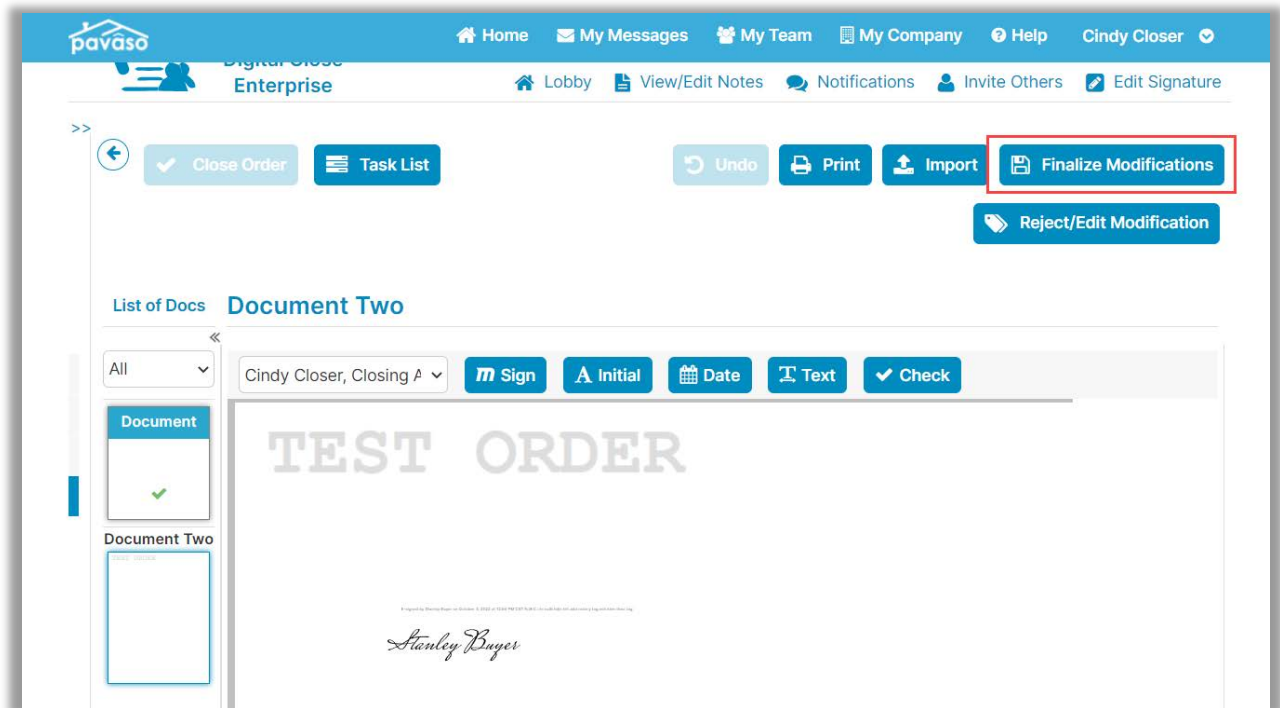
From within the order, choose **Web Closing**, then **Continue**.



Select **Closing Agent Access**, then **Continue**.

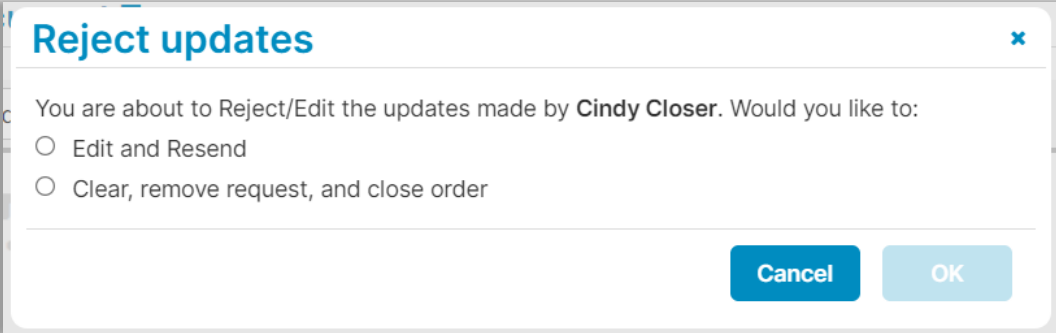


Select the document(s) that require(s) review. If correct, select **Finalize Modifications**, then **Close Order**.





If a document needs to be re-sent, select **Reject/Edit Modification** and choose one of the options. Selecting **Edit and Resend** sends the document back to the Signer. Selecting **Clear, remove request, and close order** will remove this document and the modification from the order entirely.

A dialog box titled "Reject updates" with a close button (x) in the top right corner. The text inside reads: "You are about to Reject/Edit the updates made by Cindy Closer. Would you like to:". Below this text are two radio button options: "Edit and Resend" and "Clear, remove request, and close order". At the bottom right of the dialog box are two buttons: "Cancel" (dark blue) and "OK" (light blue).

**Reject updates** ✕

You are about to Reject/Edit the updates made by **Cindy Closer**. Would you like to:

- ☐ Edit and Resend
- ☐ Clear, remove request, and close order

**Cancel** **OK**

Once complete, the document will display on the Post-Closing screen in the document list.

**pavaso** Home My Messages My Team My Company Help Cindy Closer

Current date/time: 09/30/2022 10:04:01 AM System

**Digital Close Enterprise** Lobby Notifications

**234 Ever Lane, Dallas, TX 12345**

View eVault Archive

ORDER NUMBER:  
Order\_One\_Example

COMPANY:  
BH Title

BUYER:  
Stanley Buyer

SELLER:

SALES PRICE:  
\$ 0.00

CLOSING DATE:  
09/30/2022 11:28 AM

ACTUAL CLOSING  
COMPLETED:  
09/30/2022 11:28 AM

**Post Closing**

**TrailFix**


**Documents**  
The documents listed below are the signed copies of your closing package.

	Date Completed	
Audit Log This Audit Log contains all of the activity from this Digital Closing up to the completion of the closing process.		
AuditReport	N/A	Download Print
Complete Package		
Bundle of all Documents	N/A	Download Print
Order Documents		
Document One	09/30/2022	Download Print
Document Two	09/30/2022	Download Print
Additional Order Documents		Add Documents
Journal Entries		
Journal Entries	09/30/2022	Download

The actions are also captured in the Audit Log.

TEST ORDER

**Order Audit Log**



<b>Digital Close Order #:</b>	Order_One_Example
<b>Property Address:</b>	234 Ever Lane Dallas, TX 12345
<b>Settlement Agent:</b>	BH Title - Cindy Closer
<b>Borrower(s):</b>	Stanley Buyer
<b>Report Generated Date:</b>	September 30, 2022 12:03:17 PM
<b>Central Daylight Time</b>	

User	Action	Platform	IP Address	Date
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 12:03 PM
Cindy Closer	Cindy Closer notarized Document Two	Digital Close Enterprise	68.230.42.174	09/30/2022 12:02 PM
Stanley Buyer	Buyer Stanley Buyer signed in document Document Two	Digital Close Consumer	68.230.42.174	09/30/2022 12:02 PM
Cindy Closer	Accepted the Remote Online Notary Disclaimer	Digital Close Enterprise	68.230.42.174	09/30/2022 12:00 PM

**Legal Compliance Disclaimer:**

Pavaso does not warrant or represent that the documents signed or notarized using the Software comply with federal, state or county laws, rules, or regulations relating to the execution, notarization, or recordation of documents, including, without limitation, whether such documents are properly notarized or can be electronically recorded in the applicable county recorder offices. Pavaso shall have no obligation to confirm whether such documents, or the execution or notarization thereof, comply with any applicable federal, state or county laws, rules, or regulations (including, without limitation those concerning the commission, appointment or duties of a notary public), and such obligation shall be solely that of Licensee.

Cindy Closer	Change ClosingDate	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Edit Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Configure Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:45 AM
Cindy Closer	Upload Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:39 AM
Cindy Closer	Package reopened for modification because Need additional signature	Digital Close Enterprise	68.230.42.174	09/30/2022 11:35 AM
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM
Cindy Closer	The previous Seal with key 05a66bfb-	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM

## eRecording and TrailFix

If documents are sent to be eRecorded after the closing has completed, the TrailFix button will disable while the documents are being processed. Once the eRecording process is complete, the option will enable.

The screenshot shows the Pavaso Digital Close Enterprise web application. The top navigation bar includes links for Home, My Messages, My Team, My Company, Support Center, and the user name Cindy Closer. The current date/time is 02/28/2023 11:14:58 AM. The main header displays the Pavaso logo and the text "Digital Close Enterprise". On the left sidebar, there are links for View, eVault, Archive, and eRecording. The main content area shows the address "852 Left Lane, Dallas, TX 12345" and a "TrailFix" button highlighted with a red box. Below this, there is a section titled "Documents" with the text "The documents listed below are the signed copies of your closing package." A table lists the documents:

	Date Completed	
Audit Log		
This Audit Log contains all of the activity from this Digital Closing up to the completion of the closing process.		
	AuditReport	N/A
Complete Package		
	Bundle of all Documents	N/A
Order Documents		
	Note	02/28/2023
Additional Order Documents		Add Documents

On the left sidebar, there is a "Post Closing" button.

## Pavaso Support

**Business Hours:** Monday – Saturday, 7 a.m. – 8 p.m. CST

**Email:** [support@pavaso.com](mailto:support@pavaso.com)

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

**24/7 Online Help Library:** Log in to your Pavaso account and select **Help** next to your name.