



Web Closing Guide

Revised: 8/31/2016

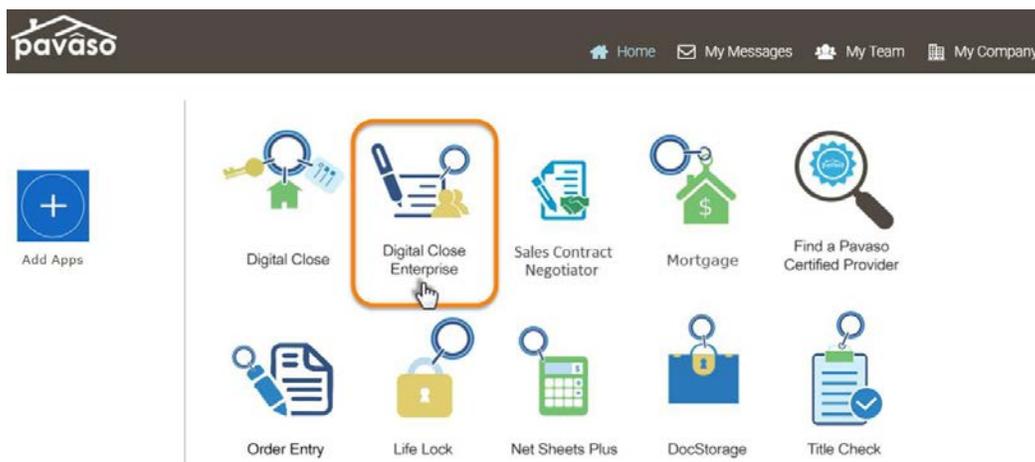
Digital Close Enterprise
Pavaso, Inc.

Starting the Web Closing Process

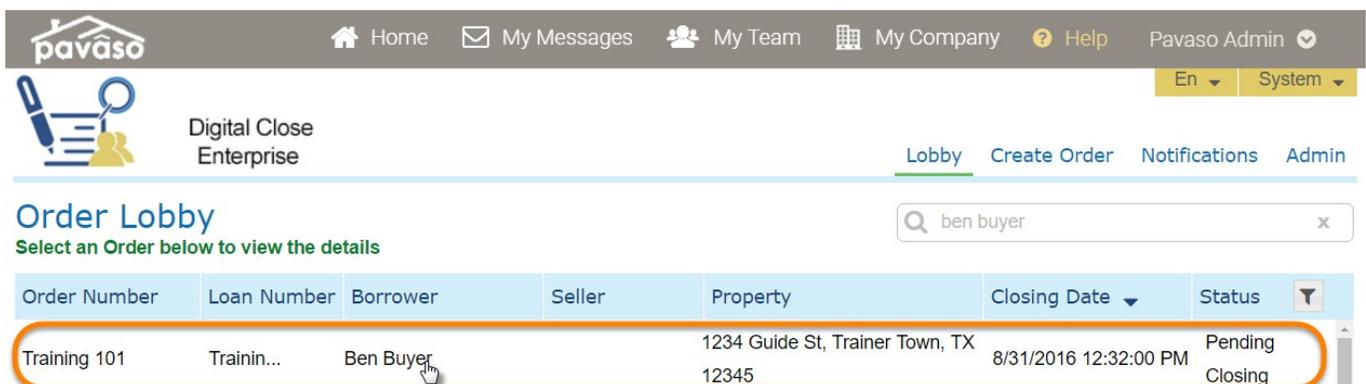
This first two-step section shows you how to access Web Close and select a closing platform.

Step 1 – Accessing Web Close

- To start the closing, make sure you are on the Pavaso website at Pavaso.com.
- After you [sign into](#) your Pavaso account, click on the Digital Close Enterprise application icon and enter your six-digit PIN.



- In the Order Lobby, find and click on the closing Order to open.



Step 2 – Selecting a Closing Platform

The Order will open up to the *Please select where you would like to conduct this closing* screen.

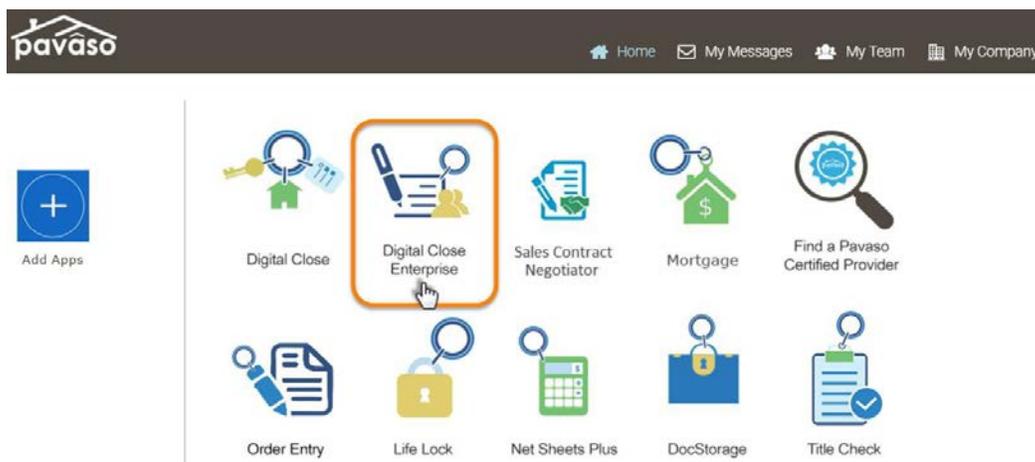
Note: The Order must be in Pending Closing status for this screen to appear.

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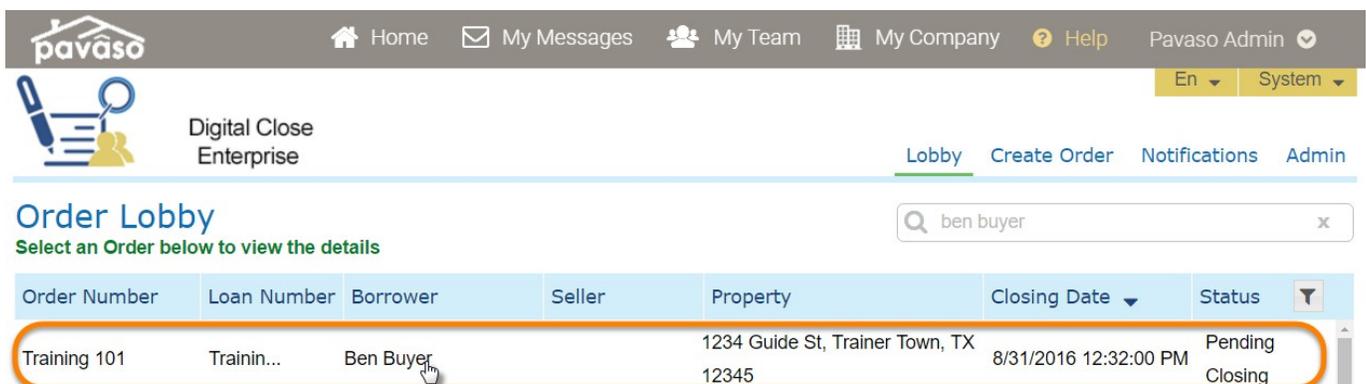
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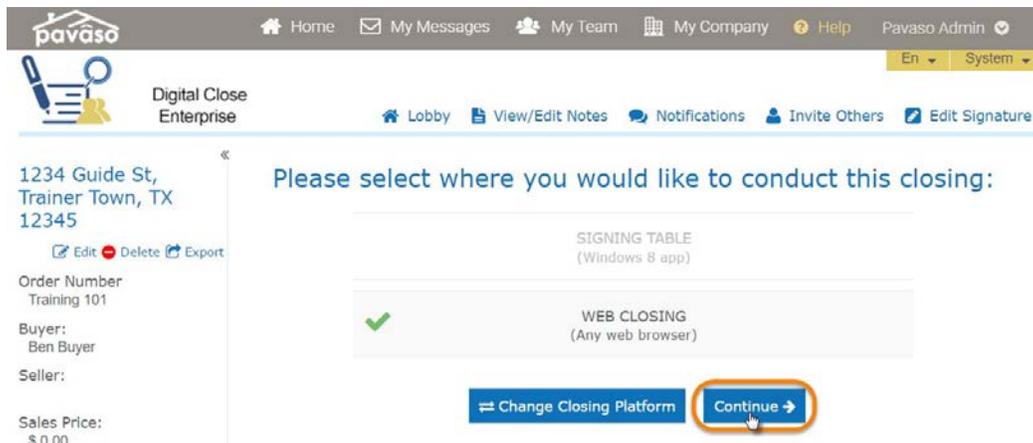


Step 2 – Selecting a Closing Platform

The Order will open up to the *Please select where you would like to conduct this closing* screen.

Note: The Order must be in Pending Closing status for this screen to appear.

- If you have not already selected Web Closing, click on it and a green check mark will appear to the left of it.
- If the green check mark is on Signing Table, click on the “Change Closing Platform” button and then on Web Closing.
- Click on the “Continue” button.



Buyer Access

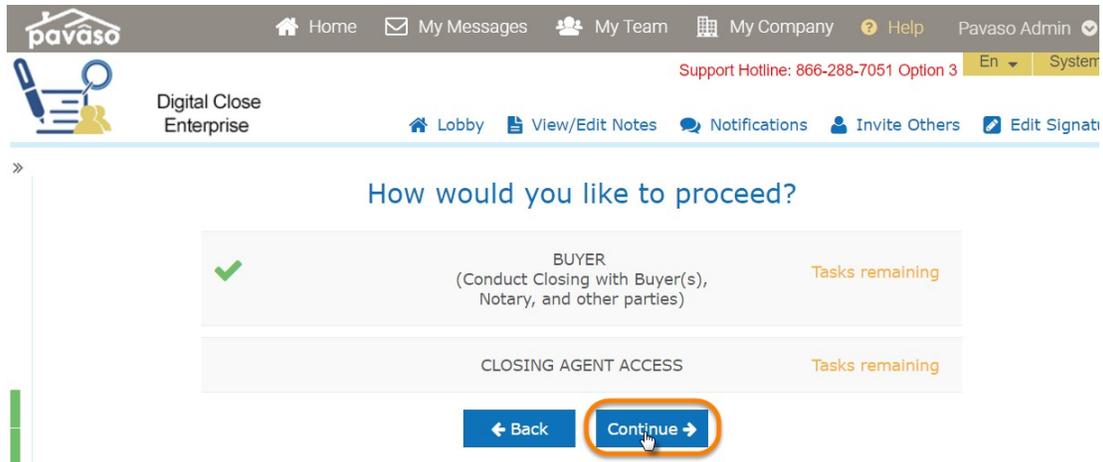
The next five steps in this section covers validating credentials and capturing signatures for all parties.

The Buyer Access is the access used for closing with the Buyers present. Each Buyer will need to know their six digit PIN in order to sign into this access and begin closing.

Note: This access is the only access that will allow any e-notarizations to be completed.

Step 3 – Entering Buyer Access

- Click on Buyer Access (a green check mark will appear) and then on the “Continue” button.



Step 4 – E-Notary Information

If there are documents that need to be e-notarized, Web Closing will ask for the e-Notary's information according to the following:

- If the Closing Agent is the assigned e-Notary, Web Closing will not ask for credentials.
- If an e-Notary is not assigned or the present Closing agent is not the correct assigned e-Notary, Web Closing will ask for the present e-Notary's credentials.
- If the e-Notary is to be changed, click on the "Change Notary" button and enter the e-Notary's credentials.

Note: Only Notaries that have been registered with Pavaso and have Pavaso accounts will be able to e-notarize.

- If you proceed without an e-Notary, click on the "Proceed without eNotary" button and enter the assigned e-Notary's email, first, and last name.

Note: Proceeding without an e-Notary, will require you to print and wet sign all the documents that require Notarization.

- Click on the "Continue" button after you have made one of the e-Notary choices above.

The screenshot shows the Pavaso Digital Close Enterprise interface. At the top, there is a navigation bar with the Pavaso logo and links for Home, My Messages, My Team, My Company, Help, and Pavaso Admin. Below this, there is a secondary navigation bar with links for Lobby, View/Edit Notes, Notifications, Invite Others, and Edit Signature. The main content area displays a message: "A Notary is required to complete this Closing" followed by "Please enter your pavaso account to validate". There are two input fields: "UserName" with the value "tanyatitle@mailinator.com" and "Password" with masked characters. Below the fields are three buttons: "Back", "Proceed without eNotary", and "Continue". The "Continue" button is highlighted with an orange circle and a mouse cursor.

Step 5 – E-Notary Digital Signature

- Click on the “Edit” link to setup the e-Notary’s signature.

The screenshot shows the Pavaso Digital Close Enterprise interface for setting up a signature. The top navigation bar is the same as in the previous screenshot. The main content area displays the message "Please setup signature for notary". Below this, there is a section for "Notary: Tanya Title" with two input fields: "Initials" and "Full Signature". To the right of the "Initials" field, there is an "Edit" link highlighted with an orange circle and a mouse cursor. At the bottom of the form, there are two buttons: "Back" and "Continue".

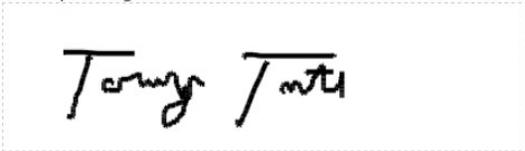
- To capture a signature, draw the e-Notary signature and initials using a stylus, mouse, or finger.
- You can click on the “Delete” link to re-draw.
- When finished, click on the “Adopt” button to save and then on the “Continue” button.

Your Full Name: Your Initials:

Draw

By clicking "Adopt", I agree that the signature and initials will be the electronic representation of my signature and initials on all closing documents.

Draw your signature [Delete](#)



Draw your Initials [Delete](#)



Step 6 – Buyer Sign In

All Buyers present are required to enter their six digit PIN. The Buyer Sign In screen will show a list of all the Buyers associated with the Order.

- Have each Buyer enter his or her six digit PIN in the corresponding fields next to his or her name and click on the “Continue” button.

Home My Messages My Team My Company Help

Support Hotline: 866-288-7051 Option 3 En S

Digital Close Enterprise Lobby View/Edit Notes Notifications Invite Others Edit Si

We need to confirm all of the signing parties are present
Please input the 6-digit PIN you created to access the Digital Close application on Pavaso.

Ben Buyer (benbuyer@mailinator.com)

Step 7 – Buyer Digital Signature

- Click on the “Edit” link to setup the Buyer’s signature.



- To capture a signature, draw the e-Notary signature and initials using a stylus, mouse, or finger.
- You can click on the “Delete” link to re-draw.
- When finished, click on the “Adopt” button to save and then on the “Continue” button.



Viewing Tasks

The next three steps in this section will help you understand the Task List and List of Docs.

Step 8 – Overview of Tasks

In this next screen, a task list will appear on the screen showing an overview of the number of actions each user will need to complete during the closing.

- After going over the tasks, click on the “Start Closing” button to continue.

Support Hotline: 866-288-7051 Option 3 En

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

This overview explains the number of actions each user will need to complete during this closing.
You can access this same information by clicking on **TASK LIST** once you have started the closing.

User (Role)	Review	Print	Import	Sign	Req. Fields	Notarize
Ben Buyer (Buyer)				✓		
Connie Closer (Closing Agent)						
Tanya Title (Notary)						1

Back Start Closing

Step 9 – Opening the Task List

On the next screen, you can use the “Task List” button to open a pop-up with a more detailed task list.

Digital Close Enterprise Lobby View

Buyer Complete Task List

List of Docs Title Tag Document

In the pop-up, there are two tabs: User and Document

User Tab:

The User tab shows the number of tasks remaining for each signer (Buyer, Closing Agent, Notary, etc.)

- Click on the red numbers to see what specific documents are incomplete by the corresponding signer.

Document Tab:

The Document tab shows the number of signers needing to complete tasks for each document.

- Click on the red numbers to see which specific signer(s) need to complete tasks for the corresponding document.

Note: A green check mark means that all tasks have been completed for each corresponding signer.

- Click on the “Close” button when finished.

The screenshot shows a window titled "Task List" with a close button (x) in the top right corner. Below the title bar are two tabs: "User" and "Document". A green message states: "The number in a box indicates the number of remaining items to be completed. A check indicates that all items have been completed." Below this is a table with the following data:

User (Role)	Review	Print	Import	Sign	Req. Fields	Notarize
Ben Buyer (Buyer)				✓		
Tanya Title (Notary)						1

A "Close" button is circled in orange at the bottom right of the window.

Step 10 – List of Documents

On the left side of the screen, there is a List of Docs section. This section shows a thumbnail view of all the Order’s documents. Each document thumbnail has a color-coded tab according to the following:

1. **Blue Tab:** Indicates that all document required tasks (signatures, dates, text, etc) are complete. Unless the tab indicates otherwise, no other action is required.
2. **Orange Tab:** Indicates that the document needs a digital signature by someone other than a Notary (Buyer, Closing Agent, Lender, etc).
3. **Brown Tab:** Indicates that the document needs a Notarial signature.
4. **Green Tab:** Indicates that the document is marked for wet signature and either needs to be printed or imported back.

Note: A green check mark on any thumbnail means that all tasks have been completed and no further action is required for that particular document.

You can use the drop down to view either All, Completed, or Incomplete documents.

- Select Incomplete from the drop down to begin tasks.
- Click on the first thumbnail to open the document and complete the required tasks.

Clicking on a document thumbnail will make each of the pages in that document a thumbnail as well. Once all the page thumbnails are displayed, you will see the page needing a signature highlighted with a “Sign Here” banner.

- Click on that page thumbnail.

Digital Signatures

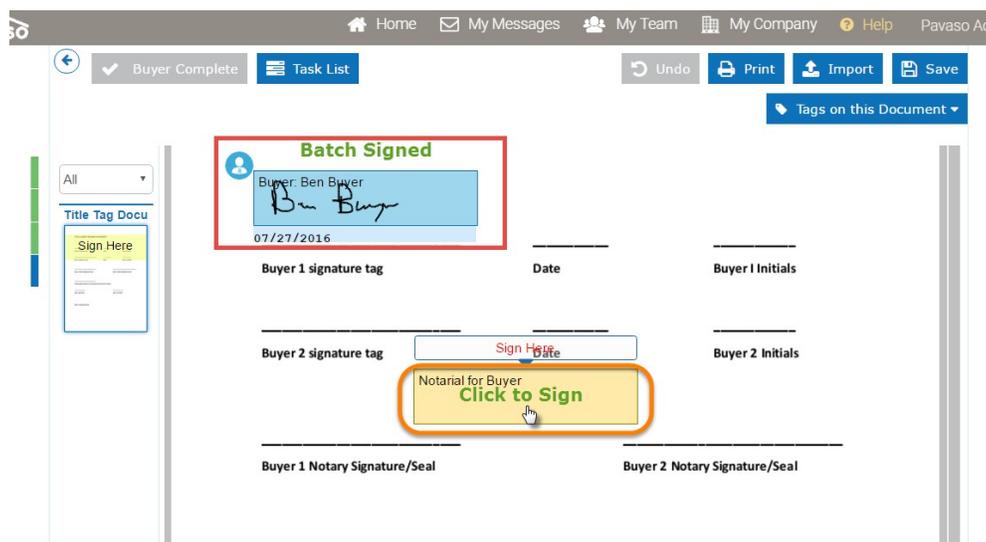
This next two-step section demonstrates how to apply signatures and complete additional tags.

Step 11 – Applying Digital Signatures or Initials

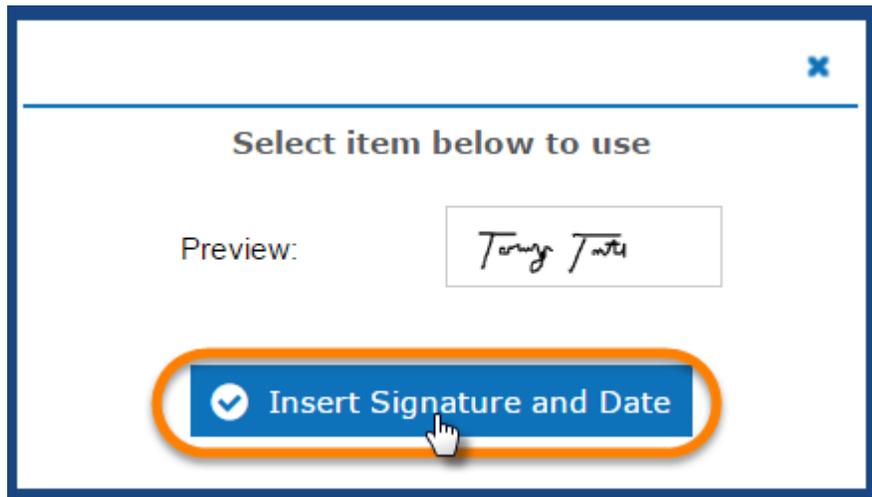
Any documents that were reviewed and accepted by the Buyer(s) will be batched signed automatically. For those documents that were not accepted, the Buyer(s) must manually apply his or her digital signature and/or initials.

Note: E-Notary signatures do not batch sign, and instead, must, be applied manually.

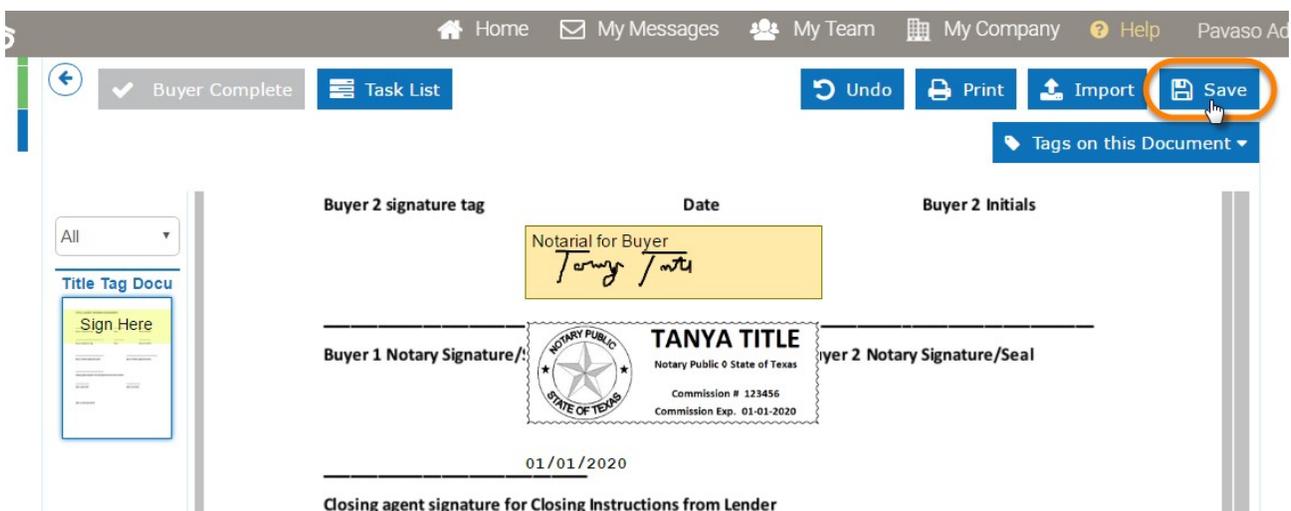
- To sign or e-notarize, each signer must find and click inside his or her corresponding tag.



- In the pop-up, click on the “Insert Signature/Initials and Date” button.



- If the document has additional tags that aren't for signature and/or initials, continue on to Step 12. If it does not, click on the “Save” button in the upper right corner.



- In the Information pop-up, click on the “Next Document” button and repeat this step for all remaining incomplete documents.

Note: All e-Notary signatures must be completed with the Buyer(s) present and signed in. Once the Buyer(s) leaves and you back out of Buyer Access, you will not be able to e-Notarize in Closing Agent Access.

Buyer Complete

This one-step section explains how to complete the Buyer portion of the Web Closing Process.

Step 15 – Completing the Buyer Portion of the Closing

Once all document tasks have been signed and e-notarized, an Information pop-up will appear.

- Click on the “Buyer Complete” button.
- If the pop-up does not appear, click on the “Buyer Complete” button in the upper left corner of the screen.

Note: The “Buyer Complete” button becomes enabled when all required signatures and Buyer tasks have been completed.

- If the “Buyer Complete” button is grayed out or not enabled, then there are still tasks remaining. Repeat steps 9 or 10 in Viewing Tasks to verify what documents need to be completed.

Warning: Tasks may include e-notarizations which **MUST** be completed in the Buyer Access while the Buyers are present. You will not be able to e-notarize outside of the Buyer Access.

- If all documents and tasks (signatures, imports, etc.) have been completed by all parties (Buyer, Closing Agent, etc.), the Document List screen appears indicating that the Closing Has Been Completed.
- If there are Closing Agent tasks (imports, texts, etc.) remaining, the How Would You Like to Proceed screen appears.