

Creating an Order



The Create Order functionality allows you to manually create a new Order and upload its documents all in one place.

Note: This article is for creating Orders due to no LOS integration, cash closings, etc.

Accessing the “Create Order” screen

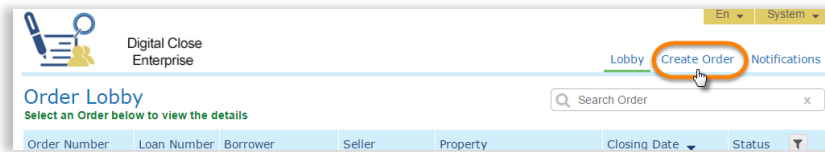


Sign in using your 6-digit PIN.

boblender@mailinator.com
Reset a forgotten PIN...

PIN:

1. On your Home Dashboard, click on the Digital Close Enterprise application icon and enter your six-digit PIN.



2. In the Digital Close Enterprise Order Lobby, click on the “Create Order” link on the upper right of the page.

Order Information

1. Fill in the Order Information details while paying attention to the following:

Closing Type Options:

- Digital Closing – Full enclosing in which loan document will need to be esigned and/or enotarized.
- Closing Disclosure – Only includes early/closing disclosures for borrower review and approval.
- Paper Closing – Full papered closing without an enclosing alternative.

Signing Process for Consumer Options:

- Approve All, Sign Once – This option allows all

documents to be signed at once during the enclosing

- Sign Each – This option requires each document be esigned individually.

Note: Disregard the Order Templates drop down.

Loan and Property Information

1. Fill in the loan and property information details, as needed.

Buyer and/or Seller

1. Fill in the Buyer and/or Seller details while paying attention to the following:

Email Address:

If the email address entered has an existing Pavaso account, you will see a “User Selection” pop-up in which you can select the existing account or create a new one.

Checkbox Option:

If you check this box, an *Add Company, LLC, or Group Account as Buyer* pop-up will appear. Fill out the Company and Company Contact (authorized signer) details and click on the “Save” button. This information will populate in the Buyer section.

Closer

1. Fill in the Closing Agent and/or Mobile Closer details while paying attention to the following:

Closer Email Address (drop down):

You will see a “User Selection” pop-up, when selecting a Closer email address from the drop down, in which you can select the existing account or create a new one.

Closer Email Address (Other):

If the email address entered has an existing Pavaso account, you will see a “User Selection” pop-up in which you can select the existing account or create a new one.

Is this Closer the Notary for this Order?

- **Yes** – If the Closer is a current Pavaso eNotary, you will see a “Place of Notarization” pop-up.
- **No** – This option will ask the “Place of Notarization” and will require additional notary’s information as well.
- **Unknown Notary or Alternate Platform** – Use this option if the notary is unknown or if the notarization will be done through with Docverify.

Notary Validation Result Pop-Up:

If the “Notary Validation Result” pop-up appears, it means that the Notary entered is not registered as an eNotary through Pavaso. If you proceed, make sure the Notary completes the eNotary online registration in his or her account to avoid wet notarizing during closing.

Lender

1. Fill in the Lender details while paying attention to the following:

Lender Email Address (drop down):

You will see a “User Selection” pop-up, when selecting a Closer email address from the drop down, in which you can select the existing account or create a new one.

Lender Email Address (Other):

If the email address entered has an existing Pavaso account, you will see a “User Selection”

pop-up in which you can select the existing account or create a new one.

Closing Location

1. Fill in the closing location details.

Additional Party

1. In this section, you can add any additional parties that you would like to give **full** Order access to.
2. If you’d like to add documents later, click on the “Submit” button to finish creating the order. If not, continue with the rest of this article.

Optional – Adding Documents to your Order

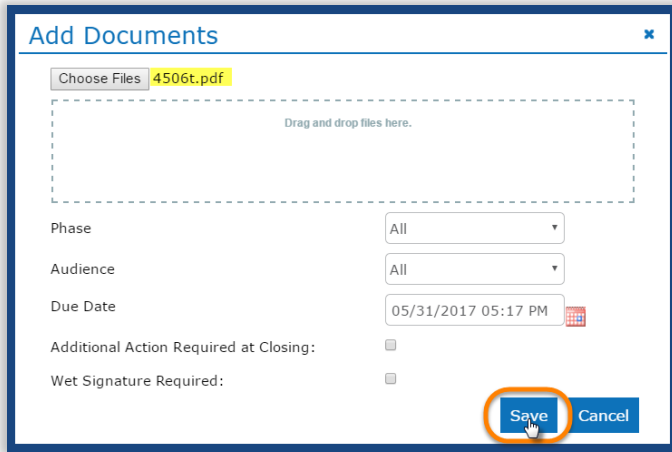
1. In the “Uploaded Order Documents” section, click on “Add Documents.”

2. Click on the “Choose (Browse) Files” button twice and open the PDF document to be uploaded. You may also choose to drag and drop files in the designated areas.

Note: Only PDF documents can be uploaded into Pavaso.

Document Details

1. Back on the “Add Documents” pop up, you will now see the name of the file you are uploading. Here, you can also select the following document settings:



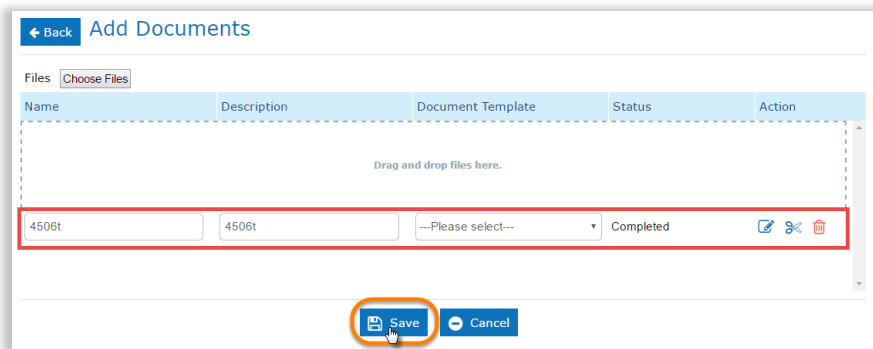
- **Phase:** Leave as default “All”
- **Audience:** Leave as default “All”
- **Due Date:** Use the calendar icon to select when this document is due if necessary.
- **Additional Action Required:** Use the check box to set the document for special attention or requirement.
- **Wet Signature Required:** Use the check box to set the document for wet signature.

Note: The system will apply any changes made here to the entire PDF. If the PDF contains multiple documents and needs to be split, then it is recommended to proceed without changing these settings. You will be able to do change the settings, per document, after splitting.

2. Click “Save” when finished.

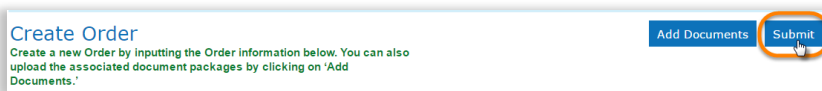
Additional Document Actions

1. Once saved, the “Add Documents” screen will allow you to edit or use the following document actions, if needed:



- **Name**
- **Description**
- **Document Template:** Use the drop-down arrow to apply a template.
- **Edit Icon:** Use this button to go back and edit the document details.
- **Scissors Icon:** Use this splitting tool to split the document. See [Splitting a PDF file](#)
- **Trash Icon:** Use this button to delete the document.

2. When finished, click on the “Save” button.



3. Click on the “Submit” button either at the top or bottom of the “Create Order” screen.

Contact Pavaso

Phone: 1-866-288-7051, option 3

Email: support@pavaso.com

Hours: 7 AM – 8 PM CST, Monday-Friday