



Test Order FAQ

Q: Do my test orders expire?

A: No. Test orders will remain live in the system for you to use once you create them.

Q: How many test orders can I create?

A: As many as you would like.

Q: Why doesn't my test user information match the images below?

A: The information provided below is shown as an example. These instructions will indicate when you can input different information.

Q: Why isn't lender information included in my test file?

A: When creating a Cash order in Pavaso as a test order, this allows you to cover just the title participation on an order. The steps indicated below detail the title involvement and mimic those that pertain to a lender transaction.

Test Order Creation Steps

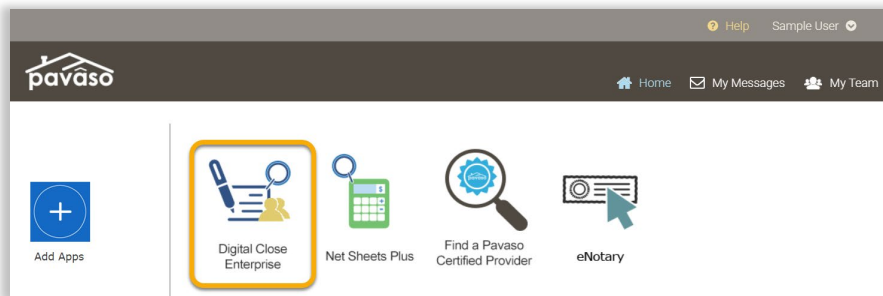
1. Log in using your Pavaso credentials. Bookmark the Pavaso login page: <https://www.portal.pavaso.com>

A screenshot of the Pavaso Sign In page. The page has a light gray background. At the top, the text "SIGN IN" is displayed in blue. Below this, a message reads: "Sign in to the Pavaso platform using your username and password. If you previously signed up using only an email address, enter it as your username." There are two input fields: the first contains "exampleusername" and the second contains "....." with a yellow eye icon to its right. Below the fields is a checkbox labeled "Remember me". At the bottom, there is a blue "Sign in" button and a blue link that says "Forgot password?".



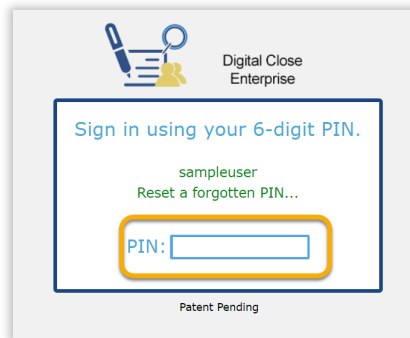
Creating a RON Test Order – Title Only

2. From your dashboard, select Digital Close Enterprise.



3. Enter your PIN.

Note: If you have not selected Digital Close Enterprise before, you may be prompted to create your PIN.



4. This is your Order Lobby. You may or may not already see orders from this view. At the top of the screen, select Create Order.





5. You will be prompted to enter the order specific information for your test file. All information shown are examples – you can modify this information to suit your needs.
- A. **Order Number:** The order number can be any variety of characters. However, your number must start with TEST.
 - B. **State:** Select the property state.
 - C. **Closing Date & Closing Time:** Modify the closing date and time of the signing.
 - D. **Test Order:** If this box is checked, the consumer security questions and ID validation will appear with test information. If this box remains unchecked, the security questions and ID validation will occur as they would during a live closing, meaning real information is required.
 - E. **Remote Closing and Video eNotary:** Check this box to enable remote online notarization (RON). If this checkbox is greyed out, RON may not be available for your state or company. Contact your Implementation Specialist.
 - F. **Loan Type:** For test orders, select Cash Only. This eliminates the need for lender information and allows you to move forward without notifying the lender.

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.'

Order Information

Order number (*) State (*) Order Template

Closing Date (*) Closing Time (*) Sales Price

Closing Type Signing Process for Consumer Remote Closing and Video eNotary

Test Order

Loan Information Loan Type

Loan Number Seller's File Number



Creating a RON Test Order – Title Only

6. The property address information is required. Below is an example.

Property

Street Address (*)
543 Evolution Avenue

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

Property Type Tax ID County
(Please select an item)

Legal Description

7. Buyer or seller information is required. **Important Note: If you use the same email associated with your Pavaso account, you will access Digital Close, not Digital Close Enterprise, when logging in to play your role as the signer.**

If the Test Order checkbox is enabled, test information can be entered in the address fields.

If the Test Order checkbox is not enabled, Fred's real personal information must be entered in the address field. This will be required to generate the security questions.

Note: Apartment units should exclude the # sign and any other special characters.

Buyer ■ This is a company, LLC, or group account

Email Address Username
fredfriend@gmail.com

Buyer First Name (*) Buyer Middle Name Buyer Last Name (*)
Fred Friend

Cell Phone Street Address (*) City (*)
123 Happy Highway Plano

State (*) Zip Code (*)
Texas 12345

International Phone Number
+1-United :

Add another Buyer

8. The above is also true for the seller section. It is not required to have both borrower and seller on an order.



Creating a RON Test Order – Title Only

Seller This is a company, LLC, or group account

Email Address: fredfriend@gmail.com Username: []

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

Cell Phone: [] Street Address (*): 123 Happy Highway City (*): Plano

State (*): Texas Zip Code (*): 12345

International Phone Number: +1-United! [] []

[Add another Seller](#)

9. Scroll to the **Closer** section. Select your company from the drop down.

Closer for Both

Company Company: (Please select an item) Closer Email Address (*): (Please select an item) Username: []

Other (Please select an item) Middle Name: [] Last Name (*): []

BH Lender City: [] Cell Phone: []

BH Title State: (Please select an item)

Zip Code: []

Is this Closer the Notary for this Order?

Yes No (Please fill in the Notary details below) Unknown Notary or Alternate Platform

[Add another Closer](#)

10. Select your name from the list. If eNotarization will occur during this test, select **Yes** in the notary section and confirm your state.



Creating a RON Test Order – Title Only

Closer for: Both

Company

Company: BH Title

Other

Closer Email Address (*): (Please select an item)

- cindycloser@mailinator.com
- eddieescrow@mailinator.com
- elevatedutah@mailinator.com
- maggiemanager@mailinator.com
- sampleuser@mailinator.com
- staceycloser@mailinator.com
- testnotary@mailinator.com

First Name (*):

Street Address:

Zip Code:

Username:

Last Name (*):

Cell Phone:

Is this Closer the Notary for this Order?

Yes No (Please fill in the Notary details below) Unknown Notary or Alternate Platform

[Add another Closer](#)

10. The **Additional Party** section will include Loan Officers, Loan Processors, and Title Holders if they are necessary for this test order.

Additional Party

As Role: (Please select an item)

Email Address:

Username:

First Name:

Middle Name:

Last Name:

[Add another Party](#)

11. Select Submit at top or bottom of the Order Details screen.

12. You will then be directed back to the inside of the order.



The screenshot displays the Pavaso Digital Close Enterprise interface. At the top, there is a navigation bar with links for Home, My Messages, My Team, Help, and Sample User. The current date/time is 03/03/2018 08:43:20 AM. Below the navigation bar, there are tabs for Lobby, View/Edit Notes, Notifications, Invite Others, and Edit Signature. The main content area is divided into two columns. The left column contains order details: address (123 Rainbow Road, Phoenix, AZ 12345), Order Number (TEST_SU_03032018), Buyer (Test Order Buyer), Seller (Test Order Seller), Sales Price (\$ 0.00), Base Loan Amount (N/A (Cash Only)), Note Amount (N/A (Cash Only)), Closing Date (03/03/2018 08:38 AM), and a Countdown to Closing timer (0 days, 0 hours, 0 minutes, 0 seconds). There are buttons for 'Take a Tour', 'Pre-Closing Review', and 'Closing Setup'. The right column features a 'Release Order' button, a warning message 'This order is not completely configured!', and sections for 'Pre-Closing', 'Documents', 'Education', 'CFPB Resources', and 'Other'. The 'Documents' section includes a table with columns 'Reviewed', 'Accepted', and 'Date Due', listing 'Title Documents' and 'Loan Documents'. The 'Education' section includes a link to 'Click to learn more: Initial Escrow Disclosure'.

You have now created a test order!

For additional assistance on uploading documents, consumer review, and closing on Pavaso, please refer to the following material:

[Session 1](#): Document uploading/tagging/inviting the borrowers

[Session 2](#): The consumer(s) review

[Session 3](#): Closing on Pavaso

[Remote Online Notarization \(RON\) Training](#): All aspects of a RON closing on Pavaso

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](#)