



Company Configuration Settings

Lender Companies

Revised: 10/19/2023

Pavaso, Inc.

Table of Contents

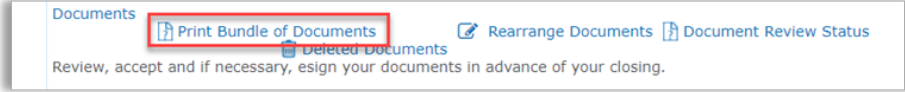
Lender Company Configuration Settings.....	3
Configuration Tab.....	3
Integrations Tab.....	8
Company Configuration Tab.....	8

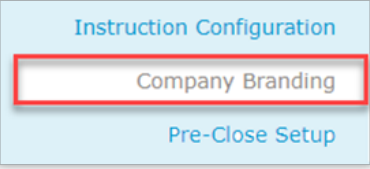
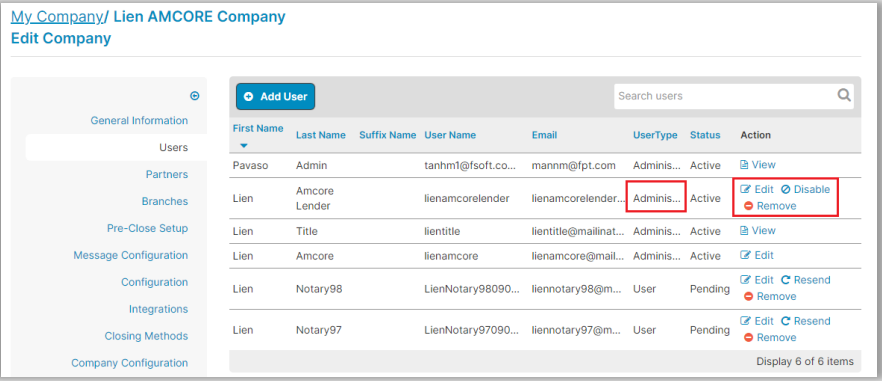
Company Configuration Settings

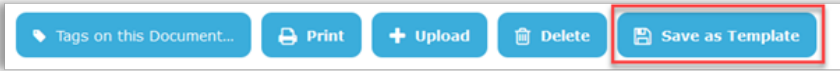
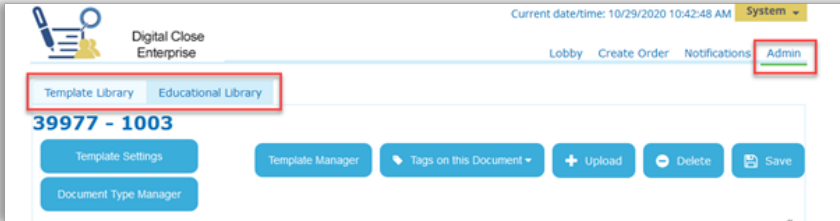
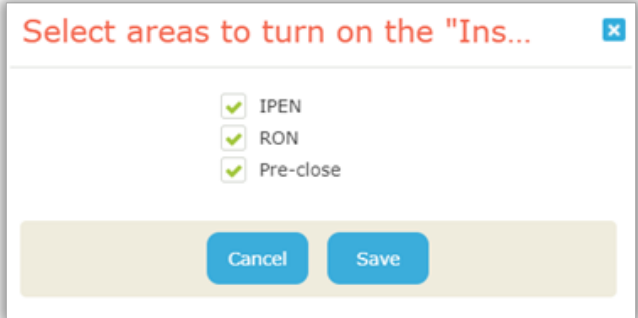
Lender Company Configuration Settings

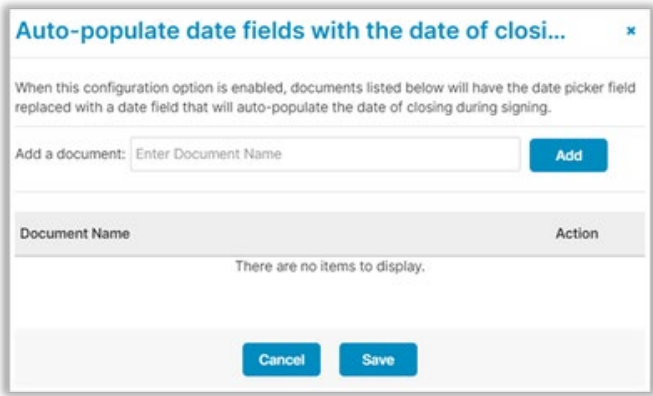
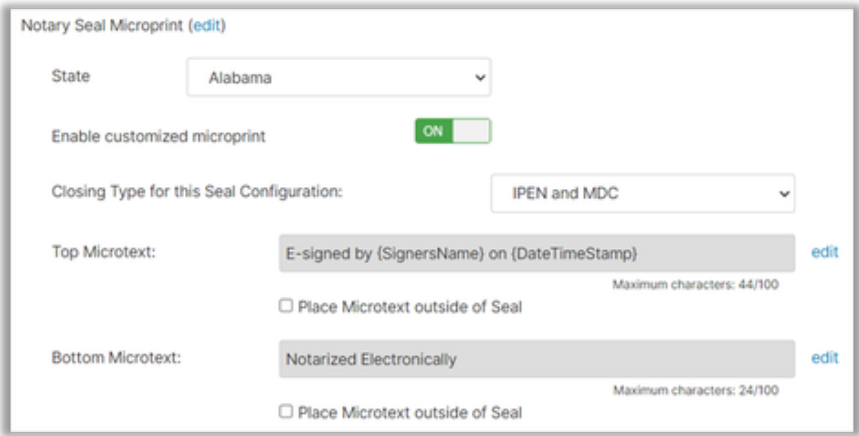
Descriptions are of the setting when it is turned ON.


Configuration Tab

Setting	Description	Primary	Company
Allow Pre-Drawn Signature	<p>Pre-Drawn font signatures can be selected instead of the Signer signing digitally with their mouse, touchscreen, etc.</p> <ul style="list-style-type: none"> • <i>Sub-option:</i> Hide draw signature <ul style="list-style-type: none"> ○ This hides the option to draw a signature and requires the Consumer to select a pre-drawn option. 	X	X
Enable Multi-Stage Order Approval	<p>When enabled, the Release Order button will show for the Lender to select. When the Release Order button is selected, the Title user(s) on the order will be notified that the order is available on Pavaso.</p> <p>When disabled, Title user(s) on an order will be immediately notified of a new order sent by a Lender and can access the order.</p>	X	X
Auto-Invite Parties	<p>When an order is created, all parties (Consumer and Non-Consumer) will automatically be invited to view the order.</p> <p>Note: <i>Multi-Stage Order Approval must be disabled to use this function.</i></p>	X	X
Print Bundle of Documents	<p>From within Closing Setup, a link will show to allow for a set of documents to be printed. This package will not include digital tags or current signatures and will not mark documents as required for wet sign.</p> 	X	X
Show IE warning: Web Closing Signature Drawing	<p>An error displays indicating the user must stay within the boundaries of the signature box when establishing a digital signature.</p>	X	X
Retention Policy: Delete orders after X months	<p>Select edit to modify the number of months before orders are deleted. As a reminder, orders deleted are not truly removed from the platform – they are only removed from the UI for the user. Orders can be retrieved with Development’s help as requested.</p> <ul style="list-style-type: none"> • <i>Sub option:</i> Make this setting visible to Company Admins <ul style="list-style-type: none"> ○ If not enabled, this setting is only available to System Admins. 	If Permitted	If Permitted
Document Review	<ul style="list-style-type: none"> ○ Enable the Early Disclosure phase in the order. This should not be enabled for any customers except Evolve. 	X	X

Apply Company Branding	<p>The Company Branding tab will appear in the menu when enabled.</p> 	X	
Lock Signing Process of Order to:	<p>The designation made in configuration will apply to all orders for this company. The option can be modified per order in Order Details.</p> <ul style="list-style-type: none"> • <i>Sub option:</i> Approval All, Sign Once Sign Each <ul style="list-style-type: none"> ○ Approval All allows Signers to approve/confirm a document during Pre-Closing Review and signatures will apply to the document(s) during closing. ○ Sign Each requires each document to be signed individually during closing, regardless of documents approved/confirmed by the Signer during Pre-Closing Review. 	X	
Lock “Closing Type” of Order to:	<p>The designation made in configuration will apply to all orders for this company. The option can be modified per order in Order Details.</p> <ul style="list-style-type: none"> • <i>Sub option:</i> Digital Closing Paper Closing Disclosure <ul style="list-style-type: none"> ○ Digital Closing is the selection that allows for RON, MDC, and RIN to be options for closing. Generally, all orders will be of this type. ○ Paper requires ALL documents to be printed and imported back in to Pavaso. No digital signing can occur and this designation cannot be changed once the order is created. <p>Closing Disclosure is not enable for any customer at this time.</p>	X	X
Allow Company Admin access to Branch orders	<p>Company Admins will see all orders associated with all company branches, not just the companies they are part of. If this setting is disabled, the Admin will only see orders for the company they are part of.</p>	X	
Allow Company Admins ability to edit user information of other Company Admins	<p>Company Admins company admin can edit user information of other Company Admins in the Users tab below.</p> 	X	X
Enable Push to Pending Closing	<p>This setting allows the Conductor to move the order to Pending Closing status despite the status of the Consumer’s document review. The Consumers are required to use a security code to check in to the session.</p>	X	X

Hide Dashboard for Non-Consumer Roles	When enabled, the user will be redirected to Digital Close Enterprise without having to select the application from the dashboard.	X	If Permitted
Payload resubmissions replace all loan documents in existing non-closed order for same loan number	<ul style="list-style-type: none"> • Sub option: If existing order is in Pending Closing status, create new order instead <ul style="list-style-type: none"> ○ Sub option: Remove title documents 	X	X
Enable White Text Tags	<ul style="list-style-type: none"> ○ Pavaso can read embedded white text on incoming documents to automatically place digital tags according to the white text placement and coding. 	X	X
Make Save as Template and the Template Library available only for Company Admins	<p>Only Company Admins will see the Save as Template button during Pre-Closing Review. When disabled, all users associated with this company will see the Save as Template option.</p>  <p>Only Company Admins will see the Admin link from the Order Lobby and the Template and Educational Library. When disabled, all users associated with this company will see these options.</p> 	X	X
Enable InstaTags	<p>InstaTags, released Summer of 2020, allows for flexible tagging for all participants. Digital tags do not need to be placed in advance of the closing for the user to complete. The InstaTag Toolbar allows users to tag “on the fly”.</p> <ul style="list-style-type: none"> • <i>Sub option:</i> Select affected areas • The InstaTag Toolbar is available for IPEN, RON, and during Pre-Close. 	X	X

Send CD and LE to Title for review before borrower	<ul style="list-style-type: none"> This setting is tied to the Early Disclosure phase of the order, specifically NexBank's order flow. 	X	
Consumer Must Agree eConsent	The Consumer must agree to the eConsent during the signing process. If this setting is disabled, the consumer will not be prompted to agree to an eConsent, and this step will not display during the signing process.	X	X
Auto-populate date fields with the date of closing (edit)	<p>Documents that have a date tag not associated with a signature tag (date picker) will be replaced with a date tag that will automatically complete with today's date. Each document must be configured in the sub-option.</p> 	X	
Only allow signing on the scheduled closing date	<p>The closing date in Order Details will dictate when the signing can occur for this order. If the signing is attempted before or after the designated closing date, the signing cannot occur.</p> 	X	X
Do not allow System Administrator on Order Details	System Admins cannot be added as a user specifically on order details.	X	X
Do not allow Closing Agents to configure documents	Closing Agent users cannot make any changes to tags or documents in an order.	X	X
Allow Order Update During Signing	If a signing is currently in progress, a new order submitted via payload can be sent and update the existing order.	X	X

Update From label in all emails (edit)	<p>The From label in outbound emails can be updated. If no change is made to this setting, emails will come from noreply@pavaso.com.</p> 	X	
Require Consumers to reset password on next login	Each time a Consumer logs on to Pavaso, they will be required to create a new password.	X	X
Revert order status to Under Review if docs are added	When a new order is submitted via payload, the order status reverts to Under Review (if the status is past this point) to allow for the consumer to review and confirm documents.	X	X
Allow all users to see all orders	All users in this company can see orders for this company. When disabled, the default viewing settings apply: Company/Primary Admins can see all orders, and Users can only see orders they are associated with specifically.	X	X
Enable Custom Text Tags	Custom Text Tags allow companies to create default/static tags to be used across all orders. Click here for more information.	X	X
Require all tasks completed during same session	All tasks are required during the signing session. All users, including Title Holders, must complete their tasks during the signing.	X	X

Integrations Tab

Setting	Description	Primary	Company
Enforce SSO Login	<ul style="list-style-type: none"> <i>Sub-option:</i> Default role for SSO Users <ul style="list-style-type: none"> ○ Closing Agent ○ Lender 	X	X
Enable Web Hook Calls (Edit API information)	<p>Order validation/failure API calls are available to integration users.</p> <ul style="list-style-type: none"> <i>Sub option:</i> Edit API Information <ul style="list-style-type: none"> ○ Customer's API information entered in these fields. <i>Sub option:</i> Order Submission Validation Email Addresses (edit) <ul style="list-style-type: none"> ○ Configure the email addresses of users who should receive notifications of particular API calls. 	X	X
eClosing (ClosingVue)	<ul style="list-style-type: none"> The company must have an established company within ClosingVue prior to enabling this setting. The PRI must also be entered in the company's PRI field on Pavaso. Once enabled, this option prompts the user to establish connection to ClosingVue. 	X	X
Enable Quiq Chat (edit configuration)	Enables Quicken's support chat feature. Should not be enabled for any customer at this time.	X	X

Company Configuration Tab

Setting	Description	Primary	Company
Auto-archive orders	When enabled, closed orders will be archived automatically after the specified number of days.	X	X
Allow post closing doc deletion after download	After documents are downloaded from the order, they can be deleted from the post-closing screen.	X	X
Auto-Delete Documents	<p>When enabled, all documents will be deleted after ___ days.</p> <p><i>Note:</i> This config option will NOT delete the audit log and any RON recording(s)</p>	X	X

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](#)