



# RamQuest Integration Guide

RamQuest One (RQ1)

Closing Agent Guide

Revised: 03/20/2023

Pavaso, Inc.

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## Table of Contents

|   |                                     |
|---|-------------------------------------|
| Step 1 – Accessing Digital Close Enterprise ..... | 2                                   |
| Step 2 – Reviewing the Disclosure .....           | <b>Error! Bookmark not defined.</b> |
| Step 3 – Approving the Closing Disclosure .....   | <b>Error! Bookmark not defined.</b> |
| Buyer Reports an Issue .....                      | <b>Error! Bookmark not defined.</b> |
| Bypassing the Closer and Broker Approval.....     | <b>Error! Bookmark not defined.</b> |
| Pavaso Support.....                               | 2                                   |

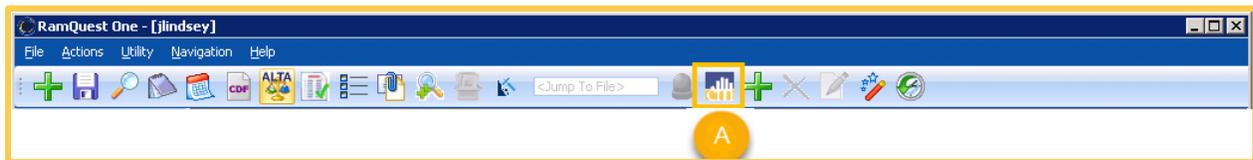
# Getting Started

## Request a Trading Partner Relationship (TPR)

A Trading Partner Relationship (TPR) must be established between you and Pavaso before orders can be sent between platforms. A TPR can be established via **Complete Closing Enterprise (CCE)**, or by accessing the dedicated **Closing Market** website:

1. Via **CCE**:
  - A. Select **Closing Market** from within **CCE**.
  - B. Choose **The Market**.
  - C. Search for **Pavaso**.
  - D. Select **Request**.

*Note:* Your request will be reviewed and approved by a member of **Pavaso Support**.
2. Via dedicated **Closing Market** website at [www.closingmarket.com](http://www.closingmarket.com).





## Order Creation Using Complete Closing Enterprise (CCE)

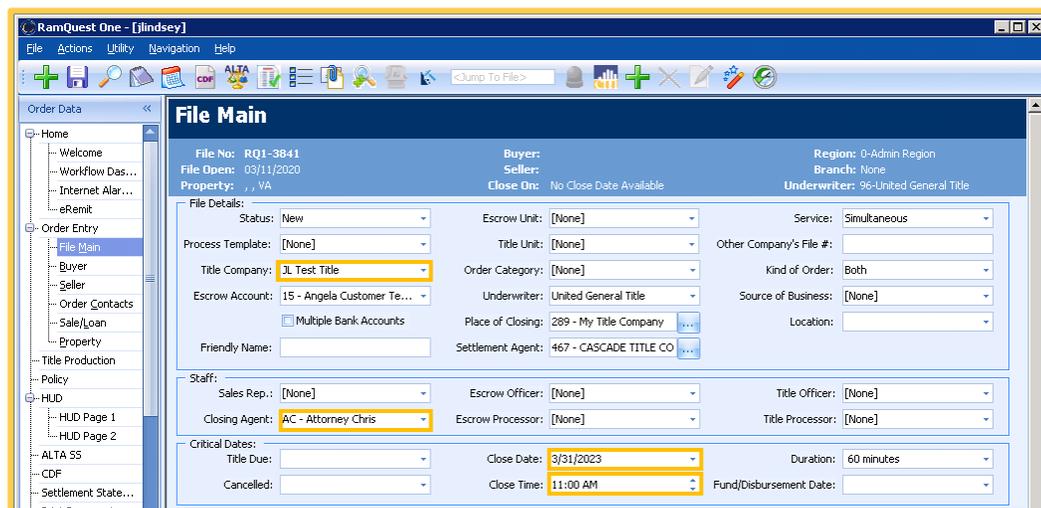
### Important Note

Prior to being able to submit documents to Pavaso via RamQuest, your Pavaso Implementation Specialist must configure your company appropriately. Email your Implementation Specialist or [implementation@pavaso.com](mailto:implementation@pavaso.com) with any questions.

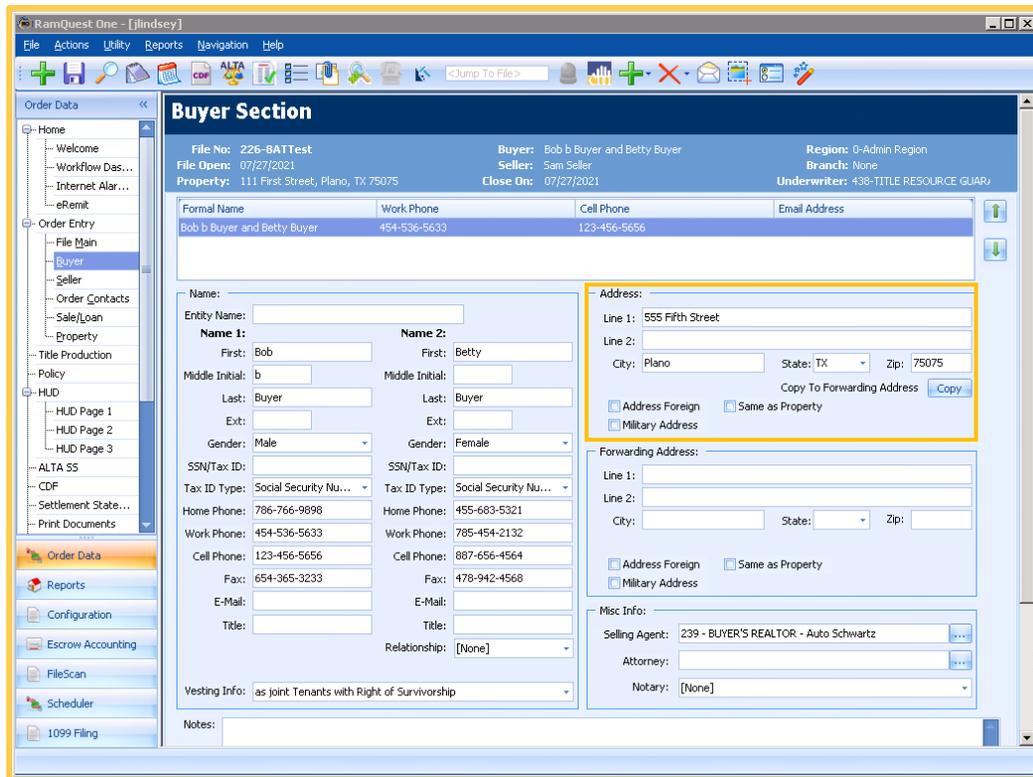
Access the **RamQuest One (RQ1)** application and complete required fields in **Order Data**.

**Note:** Ensure there is a Title Company and Closing Agent associated with the order. Otherwise, the order will not be pushed to Pavaso.

The system requires both **Close Date** and **Close Time**. If these fields are left blank in **Order Data**, there will be an opportunity to revise in the **Closing Market** portal.



If this will be a Remote Online Notarization (RON) signing, ensure the Buyer/Seller Address is a physical location, ideally one that the party has lived at for six (6) months. This address, as well as the Signer's name, is required for Knowledge Base Authentication (KBA) Validation.



Each Signer must have a valid email address. This email is used to send the account creation email to the user once the order is present on **Pavaso**. Signers may share an email address if necessary. These email addresses can be modified on **Pavaso** if needed. Any changes made on **Pavaso** will not be sent back to the file in **RamQuest**.

**Buyer Section**

File No: 226-BATTest  
 File Open: 07/27/2021  
 Property: 111 First Street, Plano, TX 75075

Buyer: Bob b Buyer and Betty Buyer  
 Seller: Sam Seller  
 Close On: 07/27/2021

Region: 0-Admin Region  
 Branch: None  
 Underwriter: 438-TITLE RESOURCE GUAR

| Formal Name                 | Work Phone   | Cell Phone   | Email Address |
|-----------------------------|--------------|--------------|---------------|
| Bob b Buyer and Betty Buyer | 454-536-5633 | 123-456-5656 |               |

Name:  
 Entity Name:

Name 1:  
 First: Bob  
 Middle Initial: b  
 Last: Buyer  
 Ext:   
 Gender: Male

Name 2:  
 First: Betty  
 Middle Initial:   
 Last: Buyer  
 Ext:   
 Gender: Female

Address:  
 Line 1: 555 Fifth Street  
 Line 2:   
 City: Plano State: TX Zip: 75075  
 Address Foreign  Same as Property  
 Military Address

Forwarding Address:  
 Line 1:   
 Line 2:   
 City:  State:  Zip:   
 Address Foreign  Same as Property  
 Military Address

Misc Info:  
 Selling Agent: 239 - BUYER'S REALTOR - Auto Schwartz  
 Attorney:   
 Notary: [None]

Vesting Info: as joint Tenants with Right of Survivorship

Notes:

Lender details are not required, but strongly recommended. The property and county information fields must be completed before documents are sent to **Pavaso**.

**Property**

File No: 226-BATTest  
 File Open: 07/27/2021  
 Property: 111 First Street, Plano, TX 75075

Buyer: Bob b Buyer and Betty Buyer  
 Seller: Sam Seller  
 Close On: 07/27/2021

Region: 0-Admin Region  
 Branch: None  
 Underwriter: 438-TITLE RESOURCE GUAR

| Address1         | Address2 | City  | State | Zip   | County | Amount       | Loan Number | Lender            |
|------------------|----------|-------|-------|-------|--------|--------------|-------------|-------------------|
| 111 First Street |          | Plano | TX    | 75075 | Collin | \$350,000.00 | 4444        | ABC Bank - Lender |

Property Details **Brief Legal Details**

All properties to appear on all Settlement Statements

Property:  
 Property Type: 2 - Residential  
 Address 1: 111 First Street  
 Address 2:   
 City: Plano  
 State: TX Zip Code: 75075  
 County: Collin

Tax Identifiers:

Taxes:

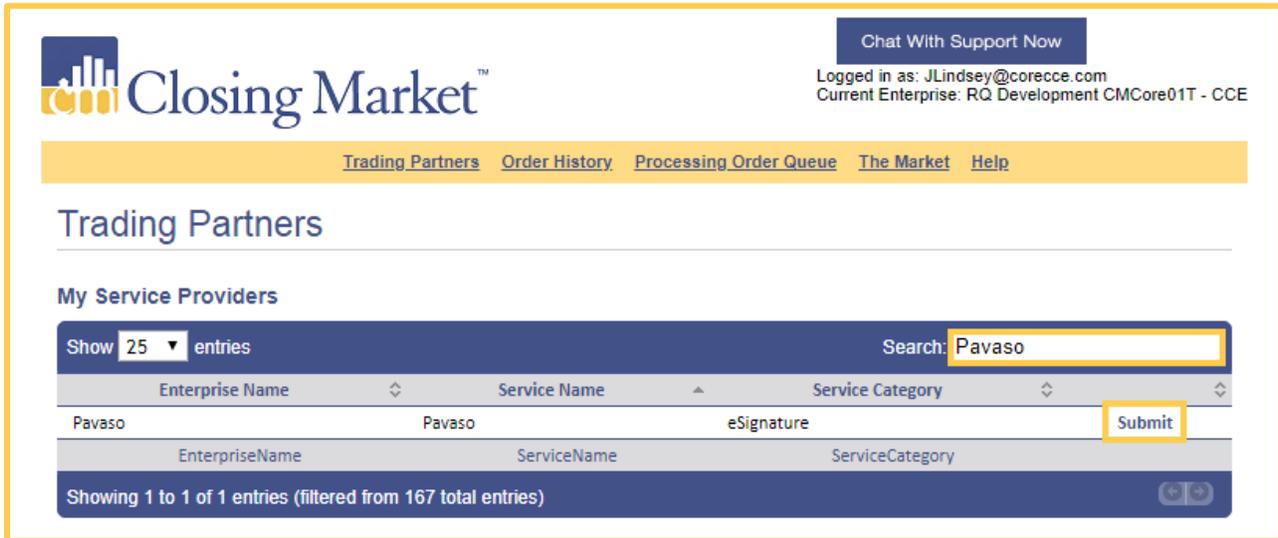
| Tax Category          | Payee                | Tax Amount |
|-----------------------|----------------------|------------|
| City Property Taxes   | <input type="text"/> | \$0.00     |
| County property Taxes | <input type="text"/> | \$0.00     |
| Assessment Taxes      | <input type="text"/> | \$0.00     |
| School Property Taxes | <input type="text"/> | \$0.00     |
| HOA Dues              | <input type="text"/> | \$0.00     |
| Other taxes           | <input type="text"/> | \$0.00     |

Brief Legal Description:  
 111 First Street, Plano, TX  
 Override Auto Brief Legal Description

Once **Order Entry** is complete, select the **Closing Market** icon.



Enter Pavaso in the **Search** field and choose **Submit**.



Select the appropriate property from the drop-down menu.

**Note:** The **Closing Date** and **Closing Time** fields are required. These can be changed on Pavaso if needed once the order is submitted.



If the closing date entered has passed, the following error displays. The date must be either the current date or a future date.

**File Number:** HH06232020

**Property:** 456 Starkiller Base , Endor, Delta, TX, 888888

**Closing Date:** 7/31/2019 \*The close date is in the past. You may need to adjust the filter in the Pavaso Lobby to find the order.

**Closing Time:** 5:00 AM

[New Signing Package](#)

The Closing Agent entered for the order will receive an email notification once the order is recognized by **Pavaso**. The individual submitting the order does not need to match the Closing Agent information on the order.

Select the appropriate Signers from the list.

**Signers** Pavaso accounts can only be created for parties with an email address.

|                                     | Type          | Business      | First   | Last      | Email                        | Actions              |
|-------------------------------------|---------------|---------------|---------|-----------|------------------------------|----------------------|
| <input type="checkbox"/>            | Agent         | Bank of Texas |         |           | lharris@ramquest.com         | <a href="#">Edit</a> |
| <input type="checkbox"/>            | Agent         |               | Randy   | Hamilton  |                              | <a href="#">Edit</a> |
| <input type="checkbox"/>            | Agent         |               | Lisa    | Smith     | lharris@ramquest.com         | <a href="#">Edit</a> |
| <input type="checkbox"/>            | Agent         |               | Deborah | Margraf   | dm@ramquest.com              | <a href="#">Edit</a> |
| <input type="checkbox"/>            | Agent         |               | Edwina  | Hollywood | eh@ramquest.com              | <a href="#">Edit</a> |
| <input checked="" type="checkbox"/> | Buyer         |               | Han     | Solo      | hansolo@hotmail.com          | <a href="#">Edit</a> |
| <input checked="" type="checkbox"/> | Buyer         |               | Leia    | Organa    | RebellionGeneral@hotmail.com | <a href="#">Edit</a> |
| <input checked="" type="checkbox"/> | Closing Agent |               | Jane    | Zoe       | newperson@email.com          | <a href="#">Edit</a> |

When the order is submitted to **Pavaso**, the **Pavaso** order number will be designated as the file number in **RamQuest**. Subsequent submissions from the same **RamQuest** file number will completely replace any previous submissions with this same number. This includes any changes that were made to the order on **Pavaso**. If this occurs, a message will display indicating that the current file will be overwritten.

**Important Message:**

- Resubmitting this order will completely overwrite the initial submission and create a new order in Pavaso.

Please use the [Pavaso](#) website to continue your order.

Using the **File Number Alias** option, users may submit and associate multiple **Pavaso** signing packages to a single **RamQuest** order file. This feature may be used to create separate buyer(s) and seller(s) signing packages.

Once all selections are complete, choose **New Signing Package**.

The screenshot shows the Pavaso interface with the following elements:

- Top left: Closing Market logo.
- Top right: "Chat With Support Now" button, user login info: "Logged in as: hhelgesen@corecra.com", "Current Enterprise: RQ Development CMCore01T - CCE".
- Navigation bar: Trading Partners, Order History, Processing Order Queue, The Market, Help.
- Header: Pavaso logo with tagline "your place for everything home".
- Form fields:
  - File Number: HH06232020
  - Property: 456 Starkiller Base, Endor, Delta, TX, 888888
  - Closing Date: 7/31/2020
  - Closing Time: 5:00 AM
- Bottom center: "New Signing Package" button highlighted with a yellow box.

Enter a **File Number Alias** in the field attached to the file name.

The screenshot shows the Pavaso interface with the following elements:

- Header: Pavaso logo with tagline "your place for everything home".
- Form fields:
  - File Number: HH06232020
  - Property: 456 Starkiller Base, Endor, Delta, TX, 888888
  - Closing Date: 7/31/2020
  - Closing Time: 5:00 AM
- Bottom center: "File Number Alias" field highlighted with a yellow box, containing "HH06232020 - Seller" and a close button (x).

Select documents that should be included in this signing package.

**Documents** *Select all documents that need to be signed on the initial order. Additional documents cannot be added to the order using the integration.*

|                                     | Description                            | Document Name                          | Move |
|-------------------------------------|--|--|------|
| <input type="checkbox"/>            | 1986 Tax Reform Req                    | 1986 Tax Reform Req                    | ↓    |
| <input checked="" type="checkbox"/> | Aff - Inducement (7-09)                | Aff - Inducement (7-09)                | ↑ ↓  |
| <input type="checkbox"/>            | Assignment - DT wReq                   | Assignment - DT wReq                   | ↑ ↓  |
| <input type="checkbox"/>            | CLTA Preliminary Report Ex A (2-10)    | CLTA Preliminary Report Ex A (2-10)    | ↑ ↓  |
| <input checked="" type="checkbox"/> | Cmt (ALTA 6-06)                        | Cmt (ALTA 6-06)                        | ↑ ↓  |
| <input type="checkbox"/>            | End ALTA C JR1                         | End ALTA C JR1                         | ↑ ↓  |
| <input checked="" type="checkbox"/> | End ALTA Construction Loan B           | End ALTA Construction Loan B           | ↑ ↓  |
| <input type="checkbox"/>            | End CForm 19-06 Contiguity-MultiP L    | End CForm 19-06 Contiguity-MultiP L    | ↑ ↓  |
| <input type="checkbox"/>            | End CForm 19.1-06 Contiguity-SingleP L | End CForm 19.1-06 Contiguity-SingleP L | ↑ ↓  |
| <input checked="" type="checkbox"/> | End CLTA 116.5.1 (6-06)                | End CLTA 116.5.1 (6-06)                | ↑ ↓  |
| <input type="checkbox"/>            | End CLTA 116.5.2-06 (6-06)             | End CLTA 116.5.2-06 (6-06)             | ↑    |

Select All

Submit

You can rearrange the document order by using the arrows in the **Move** column.

**Documents** *Select all documents that need to be signed on the initial order. Additional documents cannot be added to the order using the integration.*

|                                     | Description                            | Document Name                          | Move |
|-------------------------------------|--|--|------|
| <input type="checkbox"/>            | 1986 Tax Reform Req                    | 1986 Tax Reform Req                    | ↓    |
| <input checked="" type="checkbox"/> | Aff - Inducement (7-09)                | Aff - Inducement (7-09)                | ↑ ↓  |
| <input type="checkbox"/>            | Assignment - DT wReq                   | Assignment - DT wReq                   | ↑ ↓  |
| <input checked="" type="checkbox"/> | CLTA Preliminary Report Ex A (2-10)    | CLTA Preliminary Report Ex A (2-10)    | ↑ ↓  |
| <input checked="" type="checkbox"/> | Cmt (ALTA 6-06)                        | Cmt (ALTA 6-06)                        | ↑ ↓  |
| <input type="checkbox"/>            | End ALTA C JR1                         | End ALTA C JR1                         | ↑ ↓  |
| <input type="checkbox"/>            | End ALTA Construction Loan B           | End ALTA Construction Loan B           | ↑ ↓  |
| <input checked="" type="checkbox"/> | End CForm 19-06 Contiguity-MultiP L    | End CForm 19-06 Contiguity-MultiP L    | ↑ ↓  |
| <input type="checkbox"/>            | End CForm 19.1-06 Contiguity-SingleP L | End CForm 19.1-06 Contiguity-SingleP L | ↑ ↓  |
| <input type="checkbox"/>            | End CLTA 116.5.1 (6-06)                | End CLTA 116.5.1 (6-06)                | ↑ ↓  |
| <input type="checkbox"/>            | End CLTA 116.5.2-06 (6-06)             | End CLTA 116.5.2-06 (6-06)             | ↑    |

Select All

**Note:** You can make changes to the document name if desired, however, if you are utilizing templates on Pavaso, the name and page count must match the corresponding template. If the name is changed here, the appropriate template may not populate once the order reaches Pavaso.

Once all applicable documents are selected and in the proper order, select **Submit**.

**Documents** *Select all documents that need to be signed on the initial order. Additional documents cannot be added to the order using the integration.*

|                                     | Description                            | Document Name                          | Move |
|-------------------------------------|--|--|------|
| <input type="checkbox"/>            | 1986 Tax Reform Req                    | 1986 Tax Reform Req                    | ↓    |
| <input checked="" type="checkbox"/> | Aff - Inducement (7-09)                | Aff - Inducement (7-09)                | ↑ ↓  |
| <input type="checkbox"/>            | Assignment - DT wReq                   | Assignment - DT wReq                   | ↑ ↓  |
| <input type="checkbox"/>            | CLTA Preliminary Report Ex A (2-10)    | CLTA Preliminary Report Ex A (2-10)    | ↑ ↓  |
| <input checked="" type="checkbox"/> | Cmt (ALTA 6-06)                        | Cmt (ALTA 6-06)                        | ↑ ↓  |
| <input type="checkbox"/>            | End ALTA C JR1                         | End ALTA C JR1                         | ↑ ↓  |
| <input checked="" type="checkbox"/> | End ALTA Construction Loan B           | End ALTA Construction Loan B           | ↑ ↓  |
| <input type="checkbox"/>            | End CForm 19-06 Contiguity-MultiP L    | End CForm 19-06 Contiguity-MultiP L    | ↑ ↓  |
| <input type="checkbox"/>            | End CForm 19.1-06 Contiguity-SingleP L | End CForm 19.1-06 Contiguity-SingleP L | ↑ ↓  |
| <input checked="" type="checkbox"/> | End CLTA 116.5.1 (6-06)                | End CLTA 116.5.1 (6-06)                | ↑ ↓  |
| <input type="checkbox"/>            | End CLTA 116.5.2-06 (6-06)             | End CLTA 116.5.2-06 (6-06)             | ↑    |

Select All

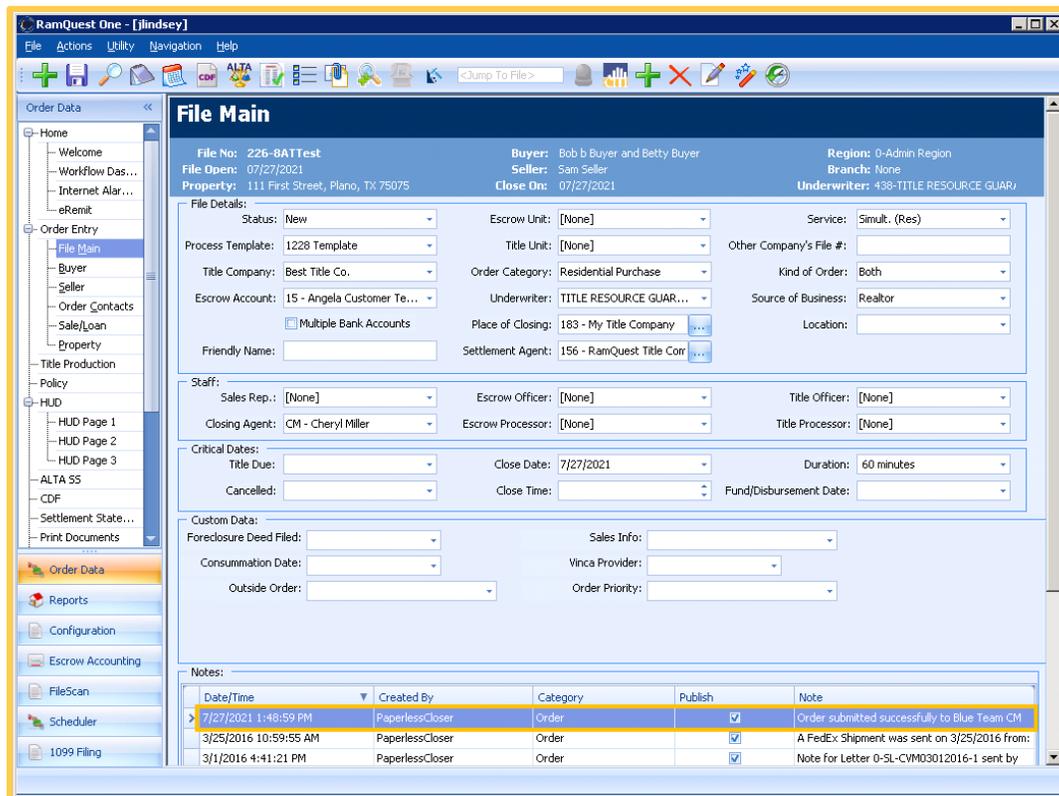
**Submit**

You will be redirected back to the list of all submitted orders. Any File Number Aliases are recorded in the internal log, which tracks updates and provides file history.

**Submitted Packages**

| File Number       | Date              | Order No | Placed By       | Signers  | Documents   | Actions                | Status    |
|-------------------|-------------------|----------|-----------------|--|---|------------------------|-----------|
| HH06232020-123    | 6/23/2020 9:59 AM | 7646     | Hailey Helgesen | Luke Skywalker (thelastjedi@gmail.com)   | No documents Selected.  | <a href="#">Update</a> | Active    |
| HH06232020-123    | 6/23/2020 9:58 AM | 7645     | Hailey Helgesen | Han Solo(hansolo@hotmail.com)<br>Leia Organa (RebellionGeneral@hotmail.com)<br>Jane Zoe(newperson@email.com) | Cmt (ALTA 6-06)   | Update                 | Overriden |
| HH06232020-Buyer  | 8/13/2020 1:39 PM | 10261    | Hailey Helgesen | Han Solo(hansolo@hotmail.com)<br>Leia Organa (RebellionGeneral@hotmail.com)<br>Jane Zoe(newperson@email.com) | Assignment - DT wReq<br>Cmt (ALTA 6-06)<br>End CForm 19-06 Contiguity-MultiP L<br>End CLTA 116.5.1 (6-06) | <a href="#">Update</a> | Active    |
| HH06232020-Seller | 8/13/2020 1:42 PM | 10262    | Hailey Helgesen | Jane Zoe(newperson@email.com)  | Aff - Inducement (7-09)<br>Cmt (ALTA 6-06)<br>End ALTA Construction Loan B<br>End CLTA 116.5.1 (6-06)     | <a href="#">Update</a> | Active    |

Any published documents or packages associated with the order are notated in the **Notes** section at the bottom of the **Order Data** screen.



- Applicable document/document packages associated with the order are located on the **Published Documents** tab on the **Web Publishing** screen at the bottom of the **Order Entry** screen.
- Upon publication, notes are added to the Order Log at the bottom of the **Order Entry** screen.
-  Closing Agent will receive an email notification from Pavaso once the order is created successfully.

## Locating and Modifying Your Order on Pavaso

Log in to your Pavaso account and select **Digital Close Enterprise** from the dashboard.



If needed, you can search for your order by choosing the dates range and the available search criteria.

The screenshot shows the Pavaso Digital Close Enterprise interface. At the top, there is a navigation bar with 'Home', 'My Messages', 'My Team', 'Help', and 'Candy Closer'. The current date/time is 07/28/2022 12:26:38 PM. Below the navigation bar, there are tabs for 'Lobby', 'Create Order', 'Notifications', and 'Admin'. The main heading is 'Order Lobby' with a sub-heading 'Select an Order below to view the details'. A search filter box is highlighted with a yellow border, containing 'Display orders from: 4/29/2022 to: 7/28/2022' and 'Search Criteria: Loan Number'. Below the search box, there are 'Open' and 'Closed' tabs. A table of orders is displayed with the following columns: ORDER NUMBER, LOAN NUMBER, BORROWER, SELLER, NOTARY, COMPANY, PROPERTY, SCHEDULED CLOSING DATE, ACTUAL CLOSING DATE, and STATUS. The table contains one row with the following data: ORDER NUMBER: DemoExa..., LOAN NUMBER: Stanley Buyer, BORROWER: Stanley Buyer, SELLER: Stanley Buyer, NOTARY: Candy Closer, COMPANY: Magic Title (TEST), PROPERTY: 852 Element Avenue, Dallas, TX 12345, SCHEDULED CLOSING DATE: 7/20/2022 9:47:00 AM, ACTUAL CLOSING DATE: (blank), and STATUS: New. A 'View Archived Orders' link is located at the bottom left of the table.

Your order will appear in the Lobby with the status of **New**. Select anywhere on the order to open it.

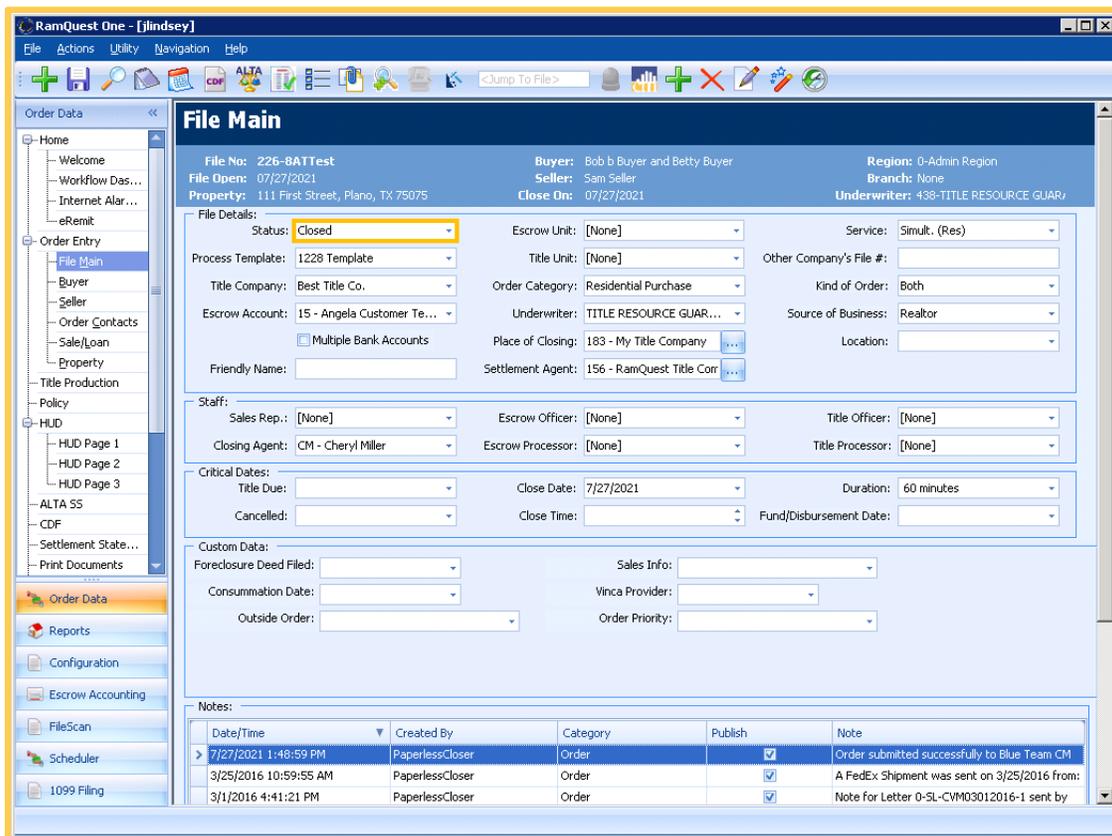
**Note:** Users may or may not see the order based on role and order permissions.

This screenshot is identical to the one above, showing the Pavaso Order Lobby interface. The same search filters and table are present. A yellow rectangular box highlights the single row in the table, which contains the order details: DemoExa..., Stanley Buyer, Stanley Buyer, Stanley Buyer, Candy Closer, Magic Title (TEST), 852 Element Avenue, Dallas, TX 12345, 7/20/2022 9:47:00 AM, (blank), and New.

If completing a RON signing, the Signer’s ID images will be stored on Pavaso a maximum of 48 hours. This setting is configurable in your company settings.

Once the order has closed on Pavaso, documents and the associated Audit Log will be passed back to FileScan.

Change the status of the order to **Closed** in **Order Data**.



## Pavaso Support

**Support Hours:** <https://pavaso.com/contact/>

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

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

[View Our 24/7 Online Help Library](#)