

Proof User Guide

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Table of Contents

History
Introduction
Accessing
Selecting a ProForm Order
Logging in7
The Product Management Screen
Adding a Product
Online eClosing (RON)
Reviewing Document on the Proof Website12
Refresh or Cancel an Existing Package12
Refreshing the Status
Cancelling a Package
Identity Verification Service13
eSign Package16
eSign & Identity Verification
Handling Documents Returned by Proof 22

History

Date	Version	Details
08/22/2024	v1.0	Initial Release
01/13/2025	v1.1	Document updated to include name/logo change, removal of certain features and addition of ID Verification and eSign.

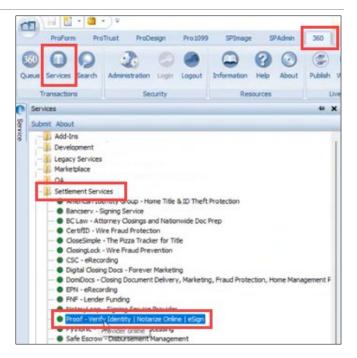
Introduction

The Proof integration provides SoftPro 360 users the ability to seamlessly create and track document packages for electronic signature, notarization and/or perform identity verification.

Accessing

From the 360 menu,

- 1. Select the Services button
- 2. Click the **Settlement Services** folder to expand
- 3. Double-click the Proof Verify Identity | Notarize Online | eSign entry



Selecting a ProForm Order

If an order is active, the order is automatically linked, and the integration opens to the **Welcome** screen. If an order is not open or multiple orders are open,

- 1. From the **Order Linking** window
 - If no order is open, enter the corresponding order in the **Selected Order Number** field.

Order Linki				
Open Ord	der Num	bers:		_
Selected	Order N	umber:		
Enter orde	er numbe	r here		
		OK	 Cancel	

 If a single order is open, the order number is shown in the Open Order Numbers field and the Selected Order Number

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

- If multiple orders are open, all order numbers appear in the Open Order Numbers field and the first order is displayed in the Selected Order Number field. Highlight an order in the Open Order Numbers field to select the applicable order
- 2. Press the **OK** button to continue

Order Linking Open Order Numbers: FTPA19-05193 FIPA19-05193 First order number is automatically populated as Selected Order Number: FTPA19-05193 OK Cancel

Order number is

automatically populated as Selected Order Number

Order Linking

Open Order Numbers:

Selected Order Number

FTPA19-05193

The **Welcome** screen displays providing information on the Proof vendor.

Check the **Skip Welcome Screen** check box to bypass this screen in the future.

Click the **Cancel** button to exit or **Next** to launch the product.

Welcome	🕐 Proot
er pr	Proof (formerly Notarize) offers a comprehensive platform built to support every real estate customer interaction with identity verification, fraud prevention, and layered security. Through Proof, agents can:
	Create transactions and upload closing documents within SoftPro that syncs directly to your Proof account. Prepare, review, and send digital closing packages from the Proof platform directly to signers. Receive finalized closing documents within SoftPro immediately after the closing session is complete. Strengthen customer experiences by empowering signers to close when and how they want. Save valuable man hours by streamlining tedious, manual processes.
F	For additional information, please contact support@proof.com

Logging in

The **Product Management** screen is shown. Log into the integration using the **Login** link in the upper right corner to create a package.

The **Remember Me** check box is automatically checked and the **API key**, once entered, is cached for subsequent visits.

Clicking the **OK** button opens the **Product Management** screen.

Product Name	Created On	Status	Signers		Exp. Date
	To add a pro	duct, click the	"Add" button below	E.	
	•		-	×	
		Please enter	r your API Key: 🕕		
	0.5				

The Product Management Screen

From the Product Management screen you can,

- Track existing packages by:
 - Product Name
 - Created On date
 - Status (from Proof)
 - o Signers
 - \circ Exp. Date
- Add to open the Product Selection screen and begin the workflow for adding a new package
- Cancel an existing package
- **Refresh** to retrieve the status for a package from Proof
- Back to return to the Welcome screen
- Close to exit the integration

			•	🌒 Pi	
Product Name	Created On	Status	Signers		Exp. Date

Adding a Product

From the **Product Management** screen, clicking the **Add** button opens the **Product Selection** screen where you can select one of the available products.

- Online eClosing (RON)
- Identity Verification
- eSign
- eSign & Identity Verification

Clicking the **Close** button returns you to the **Product Management** screen.

×
🛈 Proof
(RON) RDN solution lets you close Anywhere, Anytime,
tion verify customer identity with Proof "Identify"
ignature with Proof "Sign"
y Verification ust to your eSign requests with multiple identity is

Online eClosing (RON)

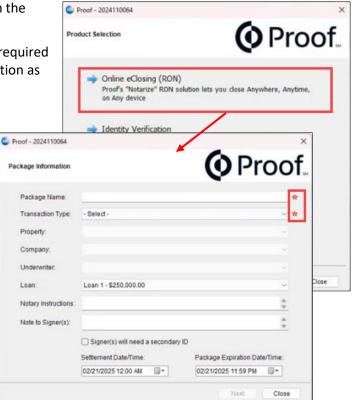
To initiate an Online eClosing (RON) package,

1. Click the Online eClosing (RON) entry to open the Package Information screen

From the **Package Information** screen, complete the required fields to submit a package and any additional information as needed.

NOTE: All required fields are marked with a red asterisk [★]. Once a required field is populated and a field is enabled (i.e., Property, Underwriter), the asterisk is displayed.

Package Name:	Test	
Transaction Type:	Purchase – Cash Buyer	~
Property:	- Select -	~ <mark>*</mark>



- 2. Enter\select package information
 - a. **Package Name** (required) enter a descriptive name
 - b. Transaction Type (required)
 - i. Purchase Cash Buyer
 - ii. Purchase Seller
 - Property drop-down populates all properties from the ProForm order if entered (required)
 - d. **Underwriter** drop-down populates with the available Underwriters (required)
 - e. **Loan** populates the loan information from the ProForm order if entered
 - f. Notary Instructions
 - g. Note to Signer(s)
 - h. Signer(s) will need a secondary ID
 - i. Settlement Date/Time populates with the date entered in the ProForm order
 - j. Package Expiration Date/Time populates the Settlement Date/Time allowing a 24-hour period
 - **NOTE**: The **Settlement Date/Time** and the **Package Expiration Date/Time** may be manually changed if needed.
- 3. Click the Next button to select Signers and Contacts

The **Recipients** screen populates with the Contacts entered in your ProForm order and are shown in the **Signers** or **Contacts** section depending upon the Contact Type.

- The Signers section shows the Buyers and/or Sellers; a selection here is required to continue.
- The Contacts section shows all other Contact types pertinent to the transaction (Escrow/Title Officers, Selling/Listing Agents); a selection here is optional.

You can click the **Name** link of a Signer or Contact to display the contact information (Name, Email Address, Current Address and Phone) for that recipient or if information is missing.

	ients			Oproof.
ne	rs 🌟	1.22		
	Contact Code	Name		
	B	Amagin Almonte		
	B2	Alex Drake		<u>.</u>
	S	Sally Seller	Amaury Almonte	A
nta	cts (Optional) Role		Email Address	Almonte adrake131313@gmail.com
	Escrow Officer	r Closer	Current Address Phone	Raleigh, Raleigh, Raleigh, NC 24859 (809) 855-0248
	Title Officer Ex	aminer	Fridde	(60.8) 025-0540
	Selling Agent			
	Selling Agent			Clo
	Listing Agent		DIAM'S A	Lumini Lumini
			10.02.000.00	

ackage Information		Proo
Package Name:	Test	
Transaction Type:	Purchase – Cash Buyer	v]
Property:	5470 W whitten st, Chandler, AZ 8	5226 ~
Underwriter:	FirstAmerican	~
Loan:	Loan 1 - \$250,000.00	~
Notary Instructions:		A
Note to Signer(s):	1	A V
	Signer(s) will need a secondary	d D
	Settlement Date/Time:	Package Expiration Date/Time:
	02/21/2025 12:00 AM	02/21/2025 11:59 PM

If a recipient is missing information, a **Warning** icon is displayed and the **Name** link also identifies the missing information with a red asterisk.

The fields in this screen are not editable. Editing of the contact must be done from within the ProForm order.

NOTE: In ProForm, if the Contact is an **Organization**, the information may pull from the **People** grid.

Recipi	ents			• •	Pro	00
Signer	5					
	Contact /	Alex Drake			×	
	B	First Name	Alex			4
- 643	c	Middle Name				~
		LastName	Drake			
		Email Address			*	
		Current Address	8			
Conta	cts (Optio	Phone			*	-
0	Role	* Missing data re	quired			1
	Escrow				-	
	Title Off			Ci	ose	
61	Sellinghy	010		MSHIELD CHARTS		4

A Signer or Contact may also be added on this screen. However, adding contact information here does not write back to the ProForm order. All fields are required as indicated.

4. Click the Add Contact link to add a new Contact

Once all required fields are completed, the following options are enabled.

- 5. Check the applicable check box
 - a. Show to Signer the Signers are notified the additional Contact(s) has/have been added.
 - Access to Package Additional Contact(s) have access to the signed package.
- 6. Click the Add button to complete
- 7. Check the corresponding check box for the **Signer** to receive and sign the package
- 8. If applicable, check the corresponding check for the **Contact(s)** to receive notifications and/or grant access to the signed package.
- 9. Click **Next** to continue to add documents

Recipients			(🗿 Pr	00
Signers					
Contac	Code Name				
	Add Contact			×	
C 8					4
0	Role	- Select -		× *	4
	FirstName			~~ *	
	Last Name			*	
	Email			*	
Contacts (Optic	Phone			*	
C Role	Show to Signer		Access to F	ackage	
Tit Of			Add	Close	
Selling	Acent		Selling Age	ant 2	A
Listing	and the second se		maury Alm		4
Listing			Alex Frank		
	-				
Add Contact					

ecip	pients		() Pi	00
igne	rs			
O	Contact Code	Name		
	В	Amaury Almonte		
	82	SIELDIAN		4
	1 5	Sally Seller		
onta	icts (Optional)			
onta	cts (Optional) Role		Name	
		Closer	Name Visior Rate	
0	Role			
	Role Escrow Officer		Victor Relig	<u>.</u>
	Role Escrow Officer Title Officer Exa Selling Agent Selling Agent		Visite Belle Nathan Debord Selling Agent Selling Agent 2	A.
	Role Escrow Officer Title Officer Exa Selling Agent		Nation Ratio Nation Debord Selling Agent	

From the Document Selection & Submission screen,

- 10. Add the documents to be included in the package using the,
 - **Browse** button to select a document via file explorer

-Or-

• Attachments button to select a document from the ProForm order

- 11. Select a **Requirement**; this is the service being requested for that document
 - o Notarization
 - o eSign
 - eSign with Supervision
 - Read-Only

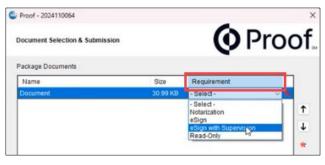
You can change the order of the documents by using the **Up/Down** arrows, **Rename** or **Delete** a document(s).

You also have the option of reviewing the package or not prior to submission by selecting the corresponding **Submission Options** radio button.

By default the **Review document package on Proof's web site prior to submitting for signing** option is selected.

12. Click the **Send** button

		Q	Proo
ackage Documents			
Name	Size	Requirement	
Browse Attachments	Documents	Rename	Delete
Submission Options			1
Contant da sum anti sa stude a su De	of's web site prior	to submitting for signi	ng
 Review document package on Pro 			



ocument Selection & Submission		0	Pro	C
ckage Documents				
Name	Size	Requirement		
ocument	30.99 KB	Notarization	×	
Browse Attachments	Documents	Rename	Delete	
	Documents	Rename	Delete	
Submission Options				
Submission Options	of's web site prior t	o submitting for signi		
Submission Options	of's web site prior t	o submitting for signi		
Browse Attachments Submission Options Review document package on Proc Submit document package to Proo	of's web site prior t	o submitting for signi		

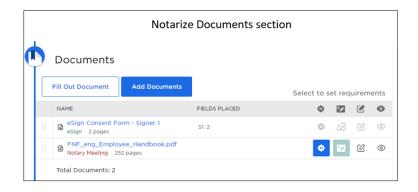
The data and documents are then sent to Proof and the **Product Management** screen is updated to show the newly submitted package with a **Status** of **Started**.

From here you can click **Back** to return to the **Product Management** screen, **Close** to exit the integration, **Refresh** to update the status of existing packages or **Add** a new package.

					Proo
	Product Name	Created On	Status	Signers	Exp. Date
	Test	12/20/2024	started	Amaury Almonte	02/22/2025
	Test 1	11/11/2024		Amaury Almonte	
!	Test 2	11/11/2024		Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
3	Test 3	11/12/2024	deleted	Amaury Almonte	
2	Test 4	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
3	Identity Verification	11/12/2024	deleted	AmauryAmonte	
	Identity Verification	11/18/2024	sent	Amaury Almonte	
	Test 5	11/25/2024	started	Amaury Almonte	

Reviewing Document on the Proof Website

Documents can be viewed in a draft state on the Proof website by clicking the Document Name on the Documents screen of the Notarize Documents section.



Refresh or Cancel an Existing Package

The **Product Management** screen is automatically updated whenever Proof sends an update for an existing package.

Refreshing the Status

You can retrieve the status of an existing package by using the **Refresh** button.

- 1. Select the package you wish to retrieve the update on
- 2. Click the Refresh button

The updated **Status** is then reflected.

	Product Name	Created On	Status	Signers	Exp. Date
T	est 1	11/11/2024	Claros	Amaury Almonte	
T	est 2	11/11/2024		Amaury Almonte	
K	dentity Verification	11/12/2024	deleted	Amaury Almonte	
T	est 3	11/12/2024	deleted	Amaury Almonte	
T	est 4	11/12/2024	deleted	Amaury Almonte	
Id	dentity Verification	11/12/2024	deleted	Amaury Almonte	
Id	dentity Verification	11/12/2024	deleted	Amaury Almonte	
Id	dentity Verification	11/12/2024	deleted	Amaury Almonte	
Ŀ	dentity Verification	11/18/2024	sent	Amaury Almonte	
T	est 5	11/25/2024	started	Amaury Almonte	
		11/25/2024	sent	Amaury Almonte	

Cancelling a Package

A package can be recalled or cancelled only when the **Status** shows as **Started**.

- 1. Select the package you wish to retrieve the update for
- 2. Click the Cancel button

The **Status** is then updated to **Deleted**.

oduct Management			<u>v</u>	Pro
			-	Lo
Product Name	Created On	Status	Signers	Exp. Date
Identity Verification	11/12/2024	deleted	Amaury Almonte	
Test 3	11/12/2024	deleted	Amaury Almonte	
Test 4	11/12/2024	deleted	Amaury Almonte	
Identity Verification	11/12/2024	deleted	Amaury Almonte	1
Identity Verification	11/12/2024	deleted	Amaury Almonte	
Identity Verification	11/12/2024	deleted	Amaury Almonte	
Identity Verification	11/18/2024	rent	Amaury Almonte	
Test 5	11/25/2024	started	Amaury Almonte	
Identity Verification	11/25/2024	sent	Amaury Almonte	
Test	12/20/2024	started	Amaury Almonte	02/22/2025
Dealiney Walnession	12/20/2024	sent	Amauly Almonte	
Test Package	12/20/2024	started	Amaury Almonte	
test	12/20/202	started	Amaury Almonte	12/27/2024
Add Cance				Ref

Identity Verification Service

To initiate an Identity Verification,

 Click the Identity Verification entry to open the Recipient's screen

The **Recipients** screen populates with the Contacts entered in your ProForm order and are shown in the **Signers** or **Contacts** section depending upon the Contact Type.

- The Signers section shows the Buyers and/or Sellers; a selection here is required to continue. NOTE: Only one recipient can be submitted for identity verification at a time.
- The Contacts section shows all other Contact types pertinent to the transaction (Escrow/Title Officers, Selling/Listing Agents); a selection here is optional.

You can click the **Name** link of a Signer or Contact to display the contact information (Name, Email

Proof - 2024110064		
Product Selection		O Proo
		ou close Anywhere, Anytime,
	Verification Id and verify customer ider	tity with Proof "Identify"
eSign Send docs	for eSignature with Proof	'Sign"
roof - 2024110064		(AD
roof - 2024110064	₽.	O Proof.
cipients	ß	OProof.
		OProof.
cipients mers 👷		ty Verification
cipients mers 👷 Contact Code Name	Ident	ty Verification zt -
cipients iners 👷 Contact Code Name B Amount Anton	Ident	ty Verification at - · · · · · · · · · · · · · · · · · ·
cipients ners * Contact Code Name B Articitat Code B2 Alex Drake	Ident Sete Sete	ty Verification at - · · · · · · · · · · · · · · · · · ·
cipients ners * Contact Code Name B Arthorizations B2 Alex Drake	Ident - Sele - S	ty Verification at - VA at - VA
Cipients Contact Code Name Contact Code Name B2 Alex Drake S Saity Seller	Ident - Sete - S	ty Verification at - VA at - VA
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cipients Contact Code Name Contact Code Name B2 Alex Drake S Saity Seller Nacts (Optional) Role	Ident S - Sele -	ty Verification
cipients Contact Code Name Contact Code Name B2 Alex Drake S Saily Seller ntacts (Optional)	Ident - Sele - S	ty Verification
cipients Contact Code Name Contact Code Name B2 Alex Drake S Saity Seller Ntacts (Optional) Role Escrow Officer Closer Title Officer Examiner	Ident S - Sele -	ty Verification
cipients Contact Code Name Contact Code Name B2 Alex Drake B2 Alex Drake S Sally Seller ntacts (Optional) Role Escrow Officer Closer Title Officer Examiner Selling Agent	Ident S - Sele -	ty Verification
cipients ners * Contact Code Name B2 Alex Drake B2 Alex Drake S Salty Seller ntacts (Optional) Role Escrow Officer Closer Title Officer Examiner	Ident S - Sele -	ty Verification
cipients ners * Contact Code Name B2 Alex Drake B2 Alex Drake S Sally Seller ntacts (Optional) Role Escrow Officer Closer Title Officer Examiner Selling Agent Selling Agent	Ident - Sele - S	ty Verification

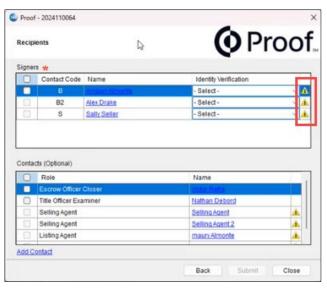
Address, Current Address and Phone) for that recipient or if information is missing.

A Warning 1 icon is displayed for all Signers,

• until the **Identity Verification** type is selected from the drop-down

and/or

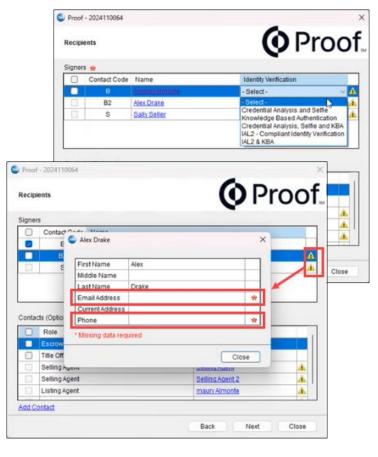
• if a recipient is missing information



- 2. Select the applicable Identity Verification type
 - Credential Analysis and Selfie
 - Knowledge Based Authentication
 - Credential Analsys, Selfie and KBA
 - IAL2 Compliant Identity Verification
 - o IAL2 & KBA

If the **Warning** icon remains, click the **Name** link to view the missing information identified with a red asterisk.

The fields in this screen are not editable. Editing of the contact must be done from within the ProForm order.



A Signer or Contact may also be added on this screen. However, adding contact information here does not write back to the ProForm order. All fields are required as indicated.

O Proof

3. Click the Add Contact link to add a new Contact

Once all required fields are completed, the following options are enabled.

- 4. Check the applicable check box
 - a. Show to Signer the Signers are notified the additional Contact(s) has/have been added.
 - Access to Package Additional Contact(s) have access to the signed package.
- 5. Click the **Add** button to complete
- 6. Check the corresponding check box for the **Signer**
 - **NOTE:** Only one person can be selected at a time for Identity Verification.
- If applicable, check the corresponding check for the Contact(s) to receive notifications and/or grant access to the signed package.
- 8. Click Submit

The request is then sent to Proof and the **Product Management** screen is updated to show the newly submitted request with a **Status** of **Sent**.

From here you can click **Back** to return to the **Product Management** screen, **Close** to exit the integration, **Refresh** to update the status of existing requests or **Add** a new request.

	ode Name		Identity Verifica	tion
	Add Contact			× eifie
E				
	Role	- Select -	~	*
	First Name			*
	Last Name			*
_	Email			*
ntacts (Open	Phone			*
Rie	Chevrolet et al.			
Lacrov-	Show to Signer		Access to Packa	99
Title Of			Add Cld	se
Selling Age	ant		Selling Agent	
Selling Age			Selling Agent 2	
Listing Age			maury Almonte	
Liseny Aye	Filt		THERE COLUMN	
Contact				
			Back	Submit Clo
			Dack	Cito
of - 202411006	54			
			~	-
ipients				Prod
			V V	1100
iers				
Contact C	ode Name		Identity Verifica	tion
В	-		Credential Anal	
82	Alex Drake		- Select -	
S	Sally Seller		- Select -	
<u></u>	- Addition of the second se			6
Role			Name	
Escrow Off	ficer Closer		Victor Refre	
Title Officer	r Examiner		Nathan Debord	
Selling Age	ent		Selling Agent	4
Calling I	ent		Selling Agent 2	
Selling Age	ent		maury Almonte	2
Listing Age				
Listing Age				1
Listing Age				
Listing Age				Submit Clo
Listing Age				Submit Clo
				Submit Clo
Listing Age				Submit Clo
Listing Age			Back	
Listing Age	64		Back	
Listing Age	64		Back	
Listing Age	64		Back	Proc
Listing Age	64 nent		Back	Proc
Contact	64 nent created On	Status	Back	Proc
Listing Age Contact Co	64 nent created On atten 12/20/2024	sent	Back	Proc
Listing Age	64 nent created On atom 12/20/2024 12/20/2024	Contraction of the local distance of the loc	Back Experts Amaury Almonte Amaury Almonte	Proc
Listing Age Contact	64 nent created On abox 12/20/2024 12/20/2024 11/11/2024	sent	Back Signers Amaury Almonte Amaury Almonte	Proc
Listing Age	64 nent created On alion 12/20/2024 12/20/2024 11/11/2024 11/11/2024	sent started	Back Back Signers Amaury Almonte Amaury Almonte Amaury Almonte	Proc
Listing Age	64 nent 12/20/2024 12/20/2024 11/11/2024 11/11/2024 ation 11/12/2024	sent started deleted	Back Signers Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte	Proc
Listing Age	64 nent Created On ation 12/20/2024 12/20/2024 11/11/2024 11/11/2024 ation 11/12/2024	sent started deleted deleted	Back Signers Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte	Proc
Listing Age	64 ee Created On ation 12/20/2024 12/20/2024 11/11/2024 ation 11/12/2024 11/12/2024 11/12/2024	sent started deleted deleted deleted	Back Electronic Signers Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte	Proc
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Listing Age	64 e Created On abon 12/20/2024 12/20/2024 11/11/2024 11/11/2024 11/12/2024 11/12/2024 ation 11/12/2024 ation 11/12/2024 ation 11/12/2024	sent Started deleted deleted deleted deleted deleted deleted	Back Signers Amaury Almonte Amaury Almonte	Proc
Listing Age Contact	64 e Created On aboo 12/20/2024 12/20/2024 11/11/2024 11/11/2024 11/12/2024 11/12/2024 ation 11/12/2024 ation 11/12/2024 ation 11/12/2024	sent started deleted deleted deleted deleted deleted	Back Signers Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte Amaury Almonte	Proc

Proof - 2024110064

Add Cancel

Recipients

Page 15 | 22

Back

Refresh

Close

eSign Package

To initiate an eSign package,

1. Click the eSign entry to open the eSign Package Information screen

From the **eSign Package Information** screen, complete the required fields (identified with a red asterisk) to submit a package and any additional information as needed.

- 2. Enter\select package information
 - a. **Package Name** (required) enter a descriptive name
 - Property drop-down populates all properties from the ProForm order if entered
 - c. **Loan** populates the loan information from the ProForm order if entered
 - d. Note to Signer(s)
 - e. eSign Window Start Date/Time populates with the current date and may be changed; indicates to Proof when they can anticipate scheduling the signing
 - f. eSign Window Expiration Date/Time select if needed
- 3. Click the Next button to select Signers and Contacts

The **Recipients** screen populates with the Contacts entered in your ProForm order and are shown in the **Signers** or **Contacts** section depending upon the Contact Type.

C	Proof - 2024110064	
P	roduct Selection	O Proof
he	 Online eClosing (RON) Proof's "Notarize" RON solution lets on Any device 	you close Anywhere, Anytime,
	 Identity Verification Fight Fraud and verify customer identify 	intity with Proof "Identify"
	eSign Send docs for eSignature with Proof	"Sign"
Proof - 202411006 e Sign Package Inf		• Proof.
Package Name		*
Property:	- Select -	~
Loan:	None	~
Note to Signer	\$).	* *
	eSign Window Start Date/Time: eSign V	Nindow Expiration Date/Time:
	12/20/2024 12:00 AM	
		Next Close

- The **Signers** section shows the Buyers and/or Sellers; a selection here is required to continue.
- The **Contacts** section shows all other Contact types pertinent to the transaction (Escrow/Title Officers, Selling/Listing Agents); a selection here is optional.

You can click the **Name** link of a Signer or Contact to display the contact information (Name, Email Address, Current Address and Phone) for that recipient or if information is missing.

If a recipient is missing information, a **Warning** 1 icon is displayed and the **Name** link also identifies the missing information with a red asterisk.

The fields in this screen are not editable. Editing of the contact must be done from within the ProForm order.

Proof - 2024110064 OProof. Recipients Signers 🙀 Contact Co **B**2 Sally Selle Amaury Aln First Name Amaury Middle Name Contacts (Optional Last Name Email Address adrake131313@gmail.com Role Current Address Raleigh, Raleigh, Raleigh, NC 24859 Phone (809) 855-0248 Title Officer Examin Selling Agent Selling Agent Close Listing Agent Add Contact Back Close

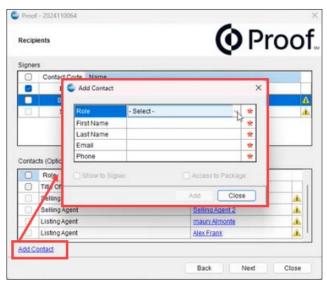
Recipients			0	Proof
Signers				
Contact	Alex Drake			×
B	First Name	Alex		
	Middle Name			
	Last Name	Drake		
	Email Address			*
	Current Address			
Contacts (Optio	Phone			*
Role	* Missing data re-	auired		
Escrow				
Title Off			Close	
and the second se	Gree			

A Signer or Contact may also be added on this screen. However, adding contact information here does not write back to the ProForm order. All fields are required as indicated.

4. Click the Add Contact link to add a new Contact

Once all required fields are completed, the following options are enabled.

- 5. Check the applicable check box
 - a. Show to Signer the Signers are notified the additional Contact(s) has/have been added.
 - Access to Package Additional Contact(s) have access to the signed package.
- 6. Click the **Add** button to complete



Page 17 | 22

- 7. Check the corresponding check box for the Signer to receive and sign the package
- 8. If applicable, check the corresponding check for the **Contact(s)** to receive notifications and/or grant access to the signed package.
- 9. Click Next to continue to add documents

From the Document Selection & Submission screen,

10. Add the documents to be included in the

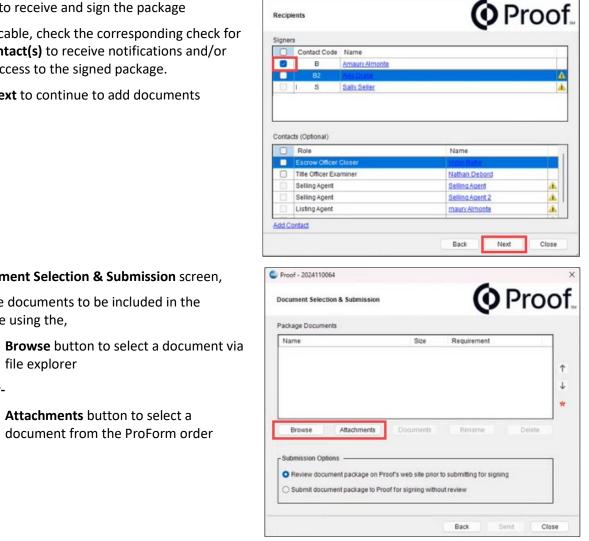
package using the,

file explorer

0

-Or-

0



Proof - 2024110064

Attachments button to select a

document from the ProForm order

The **Requirement** is populated for you with **eSign** (that is the only available option for this product).

You can change the order of the documents by using the Up/Down arrows, Rename or Delete a document(s).

You also have the option of reviewing the package or not prior to submission by selecting the corresponding Submission Options radio button.

By default the Review document package on Proof's web site prior to submitting for signing option is selected.

11. Click the Send button

ocument Selection & Submission		13	Q	Pro	00
sckage Documents			-		
Name	Size	Requ	irement		
locument	30.99	KB eSign		÷)
					1
					4
Browse Attachments	Document	R	name	Delete	
	Document	R	iname	Delete	
Submission Options					
Submission Options Review document package on P	roof's web site p	rior to submit	ting for signi		
Browse Attachments Submission Options Review document package to Pr Submit document package to Pr	roof's web site p	rior to submit	ting for signi		

Page 18 | 22

The data and documents are then sent to Proof and the **Product Management** screen is updated to show the newly submitted package with a **Status** of **Started**.

From here you can click **Back** to return to the **Product Management** screen, **Close** to exit the integration, **Refresh** to update the status of existing packages or **Add** a new package.

				V	Proo
	Product Name	Created On	Status	Signers	Exp. Date
	Test Package	12/20/2024	started	Amaury Almonte	
	Identity Verification	12/20/2024	sent	Amaury Almonte	
	Test	12/20/2024	started	Amaury Almonte	02/22/2025
!	Test 1	11/11/2024		Amaury Almonte	
?	Test 2	11/11/2024		Amaury Almonte	
1	Identity Verification	11/12/2024	deleted	Amaury Almonte	
	Test 3	11/12/2024	deleted	Amaury Almonte	
	Test 4	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/18/2024	sent	Amaury Almonte	
	Test 5	11/25/2024	started	Amaury Almonte	

eSign & Identity Verification

To initiate an eSign package with Identity Verification,

1. Click the eSign & Identity Verification entry to open the eSign Package Information screen

From the **eSign Package Information** screen, complete the required fields (identified with a red asterisk) to submit a package and any additional information as needed.



2. Enter\select package information

- a. **Package Name** (required) enter a descriptive name
- Property drop-down populates all properties from the ProForm order if entered
- c. **Loan** populates the loan information from the ProForm order if entered
- d. Note to Signer(s)
- eSign Window Start Date/Time populates with the current date and may be changed; indicates to Proof when they can anticipate scheduling the signing
- f. eSign Window Expiration Date/Time select if needed
- 3. Click the Next button to select Signers and Contacts

The **Recipients** screen populates with the Contacts entered in your ProForm order and are shown in the **Signers** or **Contacts** section depending upon the Contact Type.

- The **Signers** section shows the Buyers and/or Sellers; a selection here is required to continue. **NOTE**: Only one recipient can be submitted for identity verification at a time.
- The **Contacts** section shows all other Contact types pertinent to the transaction (Escrow/Title Officers, Selling/Listing Agents); a selection here is optional.

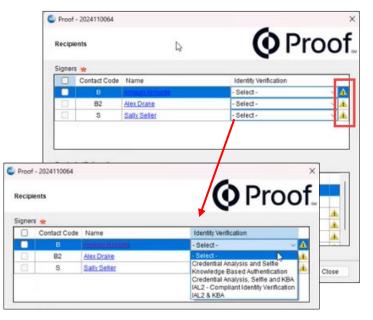
You can click the **Name** link of a Signer or Contact to display the contact information (Name, Email Address, Current Address and Phone) for that recipient or if information is missing.

A Warning 1 icon is displayed for all Signers,

• until the **Identity Verification** type is selected from the drop-down

and/or

- if a recipient is missing information
- 9. Select the applicable **Identity Verification** type
 - Credential Analysis and Selfie
 - Knowledge Based Authentication
 - Credential Analsys, Selfie and KBA
 - IAL2 Compliant Identity Verification
 - o IAL2 & KBA



Sign Package Inform	ation	🕽 Proo
Package Name:		
Property:	- Select -	v
Loan:	None	~
Note to Signer(s):	(*
	eSign Window Start Date/Time: eSign Win	dow Expiration Date/Time:
	12/20/2024 12:00 AM	

If the **Warning** icon remains, click the **Name** link to view the missing information identified with a red asterisk.

The fields in this screen are not editable. Editing of the contact must be done from within the ProForm order.

A Signer or Contact may also be added on this screen. However, adding contact information here does not write back to the ProForm order. All fields are required as indicated.

- 10. Check the corresponding check box for the **Signer**
 - **NOTE:** Multiple Signers can be selected when utilizing the eSign & Identity Verification service.
- 11. If applicable, check the corresponding check for the **Contact(s)** to receive notifications and/or grant access to the signed package.
- 12. Click Next to select Documents

From the Document Selection & Submission screen,

- 13. Add the documents to be included in the package using the,
 - **Browse** button to select a document via file explorer

-Or-

 Attachments button to select a document from the ProForm order

Recipients				🛈 Proo		
Signer	rs					
	Contact C	Alex Drake			×	
-	c	First Name	Alex			
6.0		Middle Name				
		Last Name	Drake			
		Email Address			*	
		Current Address			_	
Conta	cts (Optio	Phone			*	
0	Role	* Missing data re-	quired			
	Escrow					
	Title Off			Clos	e l	
	Sellinghy			MERINANNEIS	A	
	Selling Ag			Selling Agent 2	<u>A</u>	
	Listing Ag	ent		maury Almonte	4	

			(Drace)		
ecipients			🛈 Proo		
igne	rs				
0	Contact Code	Name	Identity Verification		
	В		Credential Analysis and Selfie	~	
U.	B2	Alex Drake	- Select -	~ /	
	S	Sally Seller	- Select -	× /	
onta	cts (Optional)				
onta			Name		
onta	cts (Optional) Role Escrow Officer	Closer	Name Victor Refe		
	Role	A PARTICIPATION OF A PARTICIPATIONO OF A PARTICIPATICA PARTICIPATIONO OF A PARTICIPATIONO OF A PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATICA PARTICIPA			
	Role Escrow Officer	A PARTICIPATION OF A PARTICIPATIONO OF A PARTICIPATICA PARTICIPATIONO OF A PARTICIPATIONO OF A PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATICA PARTICIPA	<u>Victor Refra</u>		
	Role Escrow Officer Title Officer Exa	A PARTICIPATION OF A PARTICIPATIONO OF A PARTICIPATICA PARTICIPATIONO OF A PARTICIPATIONO OF A PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATICA PARTICIPA	Nathan Debord	<u>A</u>	
	Role Escrow Officer Title Officer Exa Selling Agent	A PARTICIPATION OF A PARTICIPATIONO OF A PARTICIPATICA PARTICIPATIONO OF A PARTICIPATIONO OF A PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATICA PARTICIPA	Nathan Debord Selling Agent	_	
	Role Escrow Officer Title Officer Exa Selling Agent Selling Agent Listing Agent	A PARTICIPATION OF A PARTICIPATIONO OF A PARTICIPATICA PARTICIPATIONO OF A PARTICIPATIONO OF A PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATICA PARTICIPA	Nathan Debord Selling Agent Selling Agent 2	4	
	Role Escrow Officer Title Officer Exa Selling Agent Selling Agent	A PARTICIPATION OF A PARTICIPATIONO OF A PARTICIPATICA PARTICIPATIONO OF A PARTICIPATIONO OF A PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATIONO OFFARICA PARTICIPATICA PARTICIPA	Nathan Debord Selling Agent Selling Agent 2	4	



Page 21 | 22

The **Requirement** is populated for you with **eSign** (that is _ the only available option for this product).

You can change the order of the documents by using the **Up/Down** arrows, **Rename** or **Delete** a document(s).

You also have the option of reviewing the package or not prior to submission by selecting the corresponding **Submission Options** radio button.

By default the **Review document package on Proof's web site prior to submitting for signing** option is selected.

14. Click the Send button

The data and documents are then sent to Proof and the **Product Management** screen is updated to show the newly submitted package and Identity Verification request with a **Status** of **Started** and **Sent**, respectively.

From here you can click **Back** to return to the **Product Management** screen, **Close** to exit the integration, **Refresh** to update the status of existing packages or **Add** a new package.

Proof - 2024110064		-	_	
Document Selection & Submission	D2	0	Pr	oot
Package Documents				
Name St	e Requ	irement		
Document 30	99 KB eSign	1		~
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				T
				Ľ
Enclose and the second second				
Browse Attachments Docume	ents Re	ename	De	lete
	Re	ename	De	lete
Browse Attachments Docume -Submission Options	ents Re	ename	De	lete
				lete
-Submission Options	e prior to submit	ting for sign		lete
Submission Options Review document package on Proof's web site	e prior to submit	ting for sign		lete
Submission Options Review document package on Proof's web site	e prior to submit	ting for sign	ng	lete
Submission Options Review document package on Proof's web site	e prior to submit	ting for sign		Close
Submission Options Review document package on Proof's web site	e prior to submit	ting for sign	ng	
Submission Options Review document package on Proof's web site	e prior to submit	ting for sign	ng	
Submission Options Review document package on Proof's web site Submit document package to Proof for signing	e prior to submit	ting for sign	ng Send	

	Product Name	Created On	Status	Signers	Exp. Date
	test	12/20/2024	started	Amaury Almonte	12/27/2024
	Test Package	12/20/2024	started	Amaury Almonte	
	Identity Verification	12/20/2024	sent	Amaury Almonte	-
	Test	12/20/2024	started	Amaury Almonte	02/22/2025
1	Test 1	11/11/2024		Amaury Almonte	
	Test 2	11/11/2024		Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
1	Test 3	11/12/2024	deleted	Amaury Almonte	
	Test 4	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/12/2024	deleted	Amaury Almonte	
1	Identity Verification	11/12/2024	deleted	Amaury Almonte	
	Identity Verification	11/18/2024	sent	Amaury Almonte	

Handling Documents Returned by Proof

Once Proof has processed the documents submitted with the package, or the results of the identity verification document, the status can be manually checked, and the user can manually retrieve the executed documents into the ProForm Order. The method to manually check the status of a package is detailed in the previously discussed *Document Selection & Submission* screen using the *Refresh* button.

If the user is utilizing Select, then the user has the option to automatically retrieve executed documents into their ProForm Order by an Accept Automation process.