

# Proof User Guide

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January 2025

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## 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.

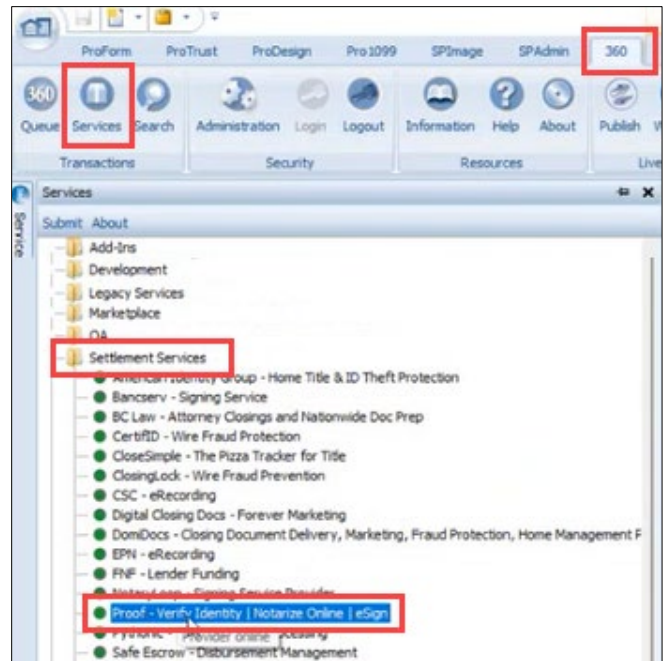
## Introduction

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,

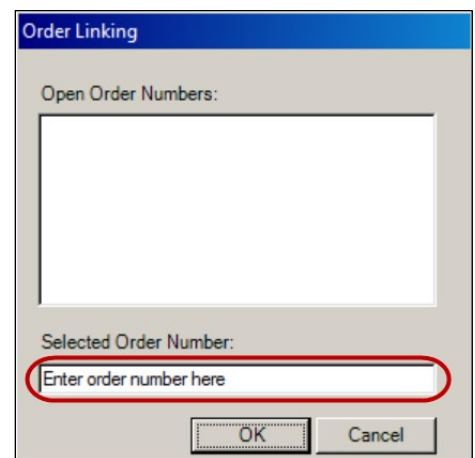
1. Select the **Services** button
2. Click the **Settlement Services** folder to expand
3. Double-click the **Proof – Verify Identity | Notarize Online | eSign** entry



## Selecting a ProForm Order

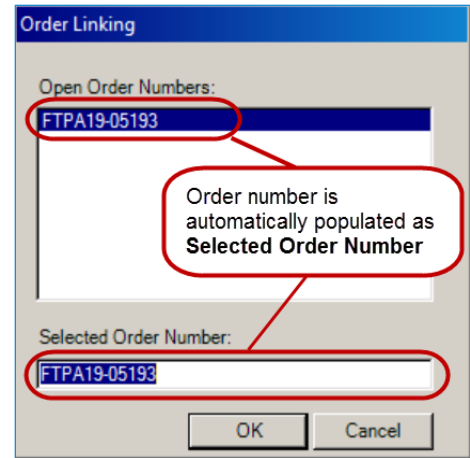
If an order is active, the order is automatically linked, and the integration opens to the **Welcome** screen. If an order is not open or multiple orders are open,

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



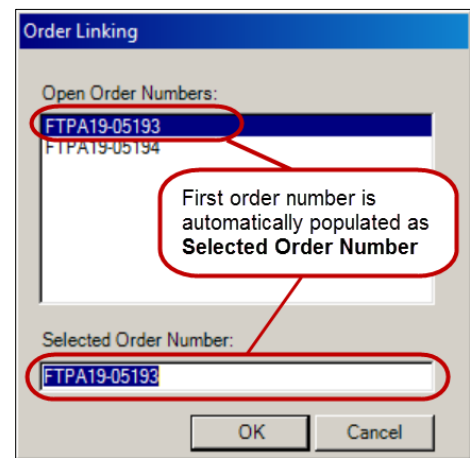
- If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

**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

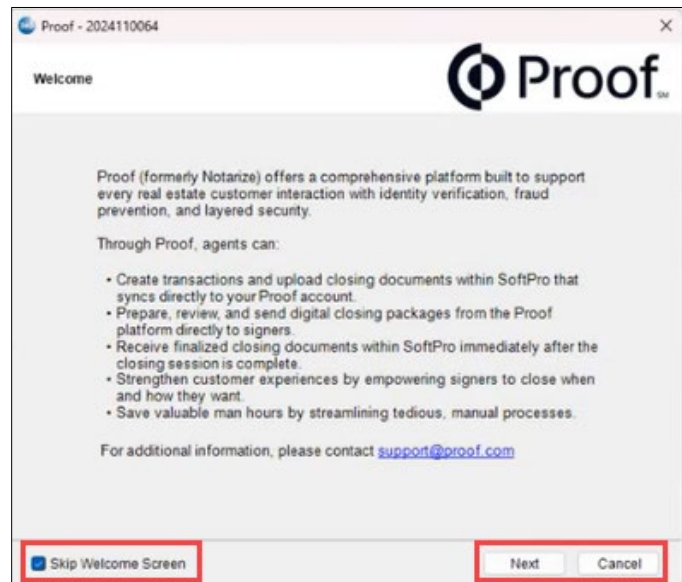
2. Press the **OK** button to continue



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.

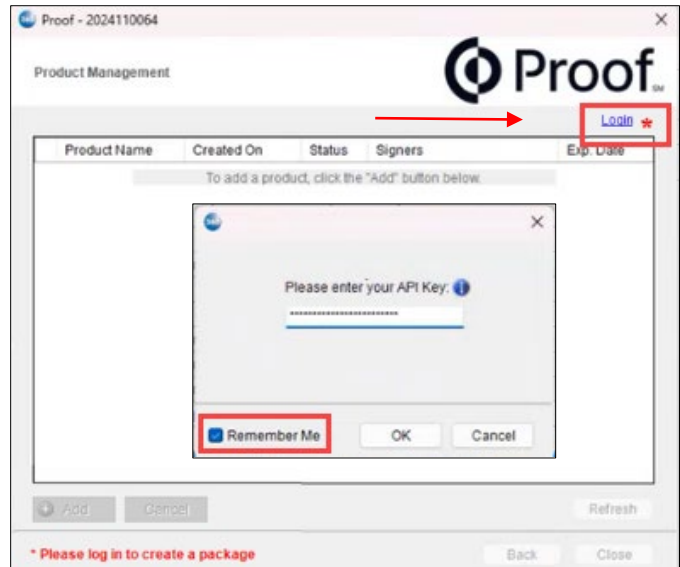


## Logging in

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.



## The Product Management Screen

From the **Product Management** screen you can,

- Track existing packages by:
  - **Product Name**
  - **Created On** date
  - **Status** (from Proof)
  - **Signers**
  - **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



## 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.



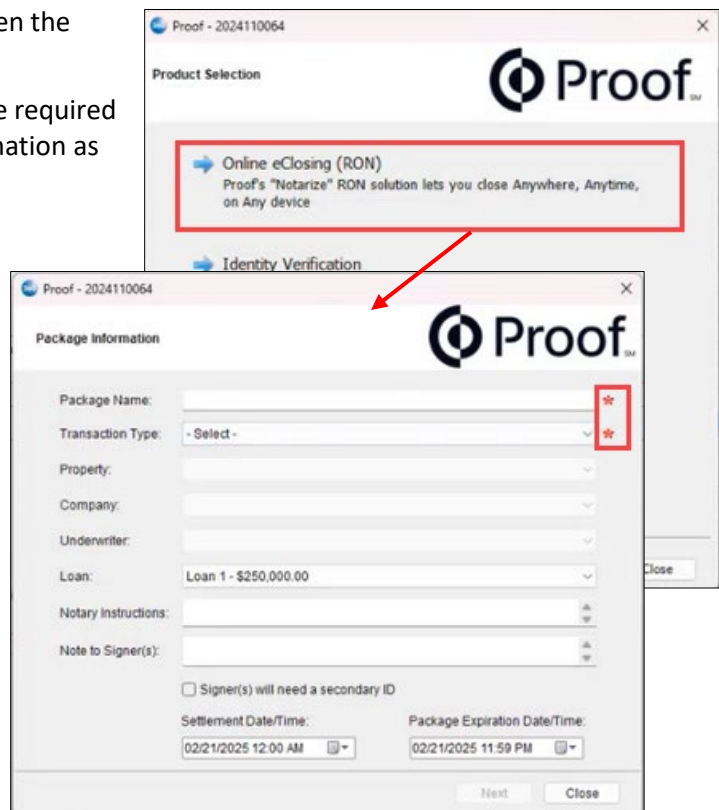
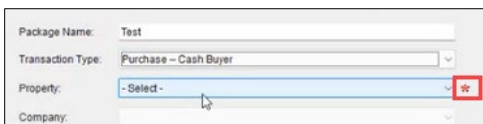
## Online eClosing (RON)

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.

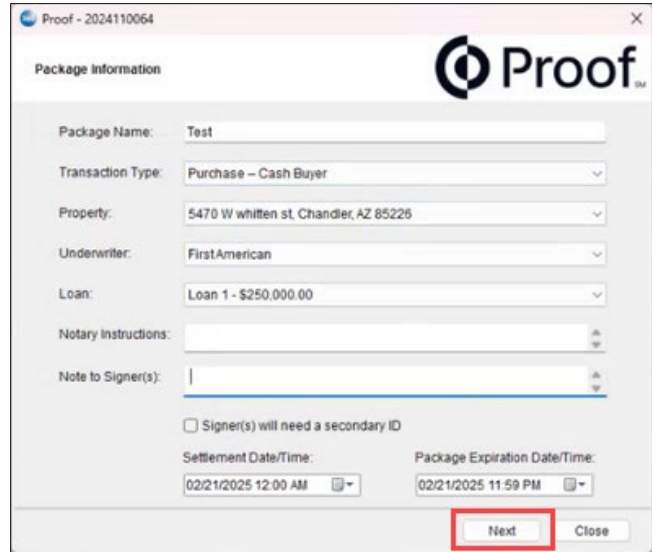
**NOTE:** All required fields are marked with a red asterisk **\***. Once a required field is populated and a field is enabled (i.e., **Property, Underwriter**), the asterisk is displayed.





2. Enter/select package information

- a. **Package Name** (required) enter a descriptive name
- b. **Transaction Type** (required)
  - i. **Purchase – Cash Buyer**
  - ii. **Purchase – Seller**
- c. **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



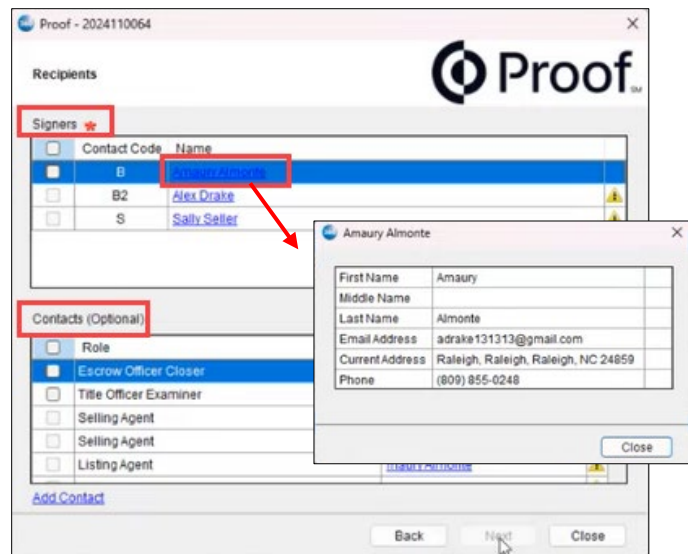
**NOTE:** The **Settlement Date/Time** and the **Package Expiration Date/Time** may be manually changed if needed.

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.





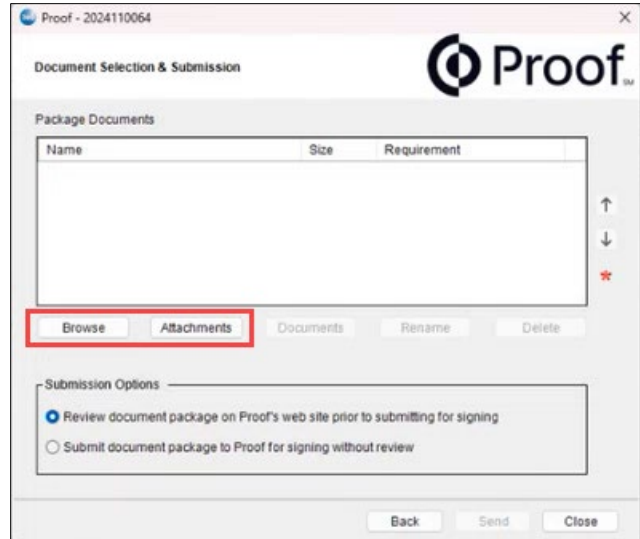
From the **Document Selection & Submission** screen,

10. Add the documents to be included in the package using the,

- **Browse** button to select a document via file explorer

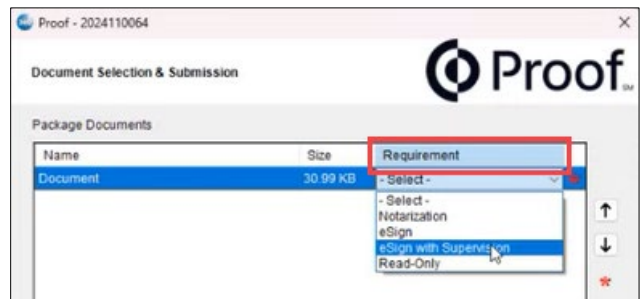
**-Or-**

- **Attachments** button to select a document from the ProForm order



11. Select a **Requirement**; this is the service being requested for that document

- **Notarization**
- **eSign**
- **eSign with Supervision**
- **Read-Only**

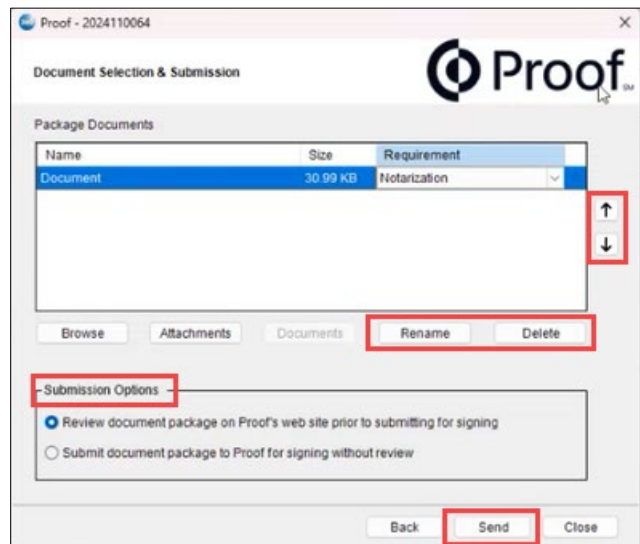


You can change the order of the documents by using the **Up/Down** arrows, **Rename** or **Delete** a document(s).

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

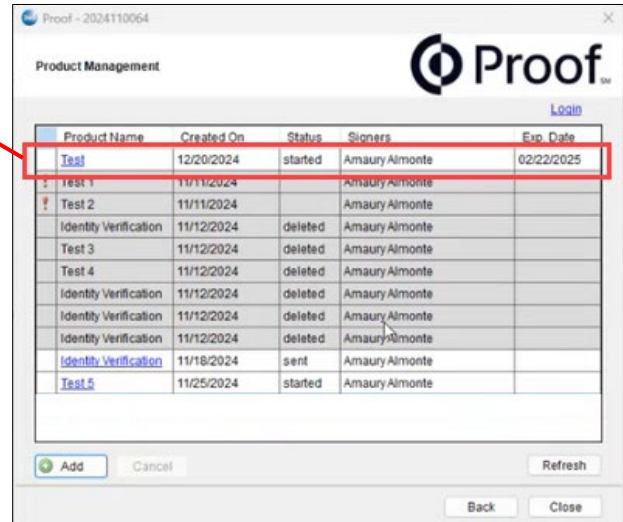
By default the **Review document package on Proof's web site prior to submitting for signing** option is selected.

12. Click the **Send** button



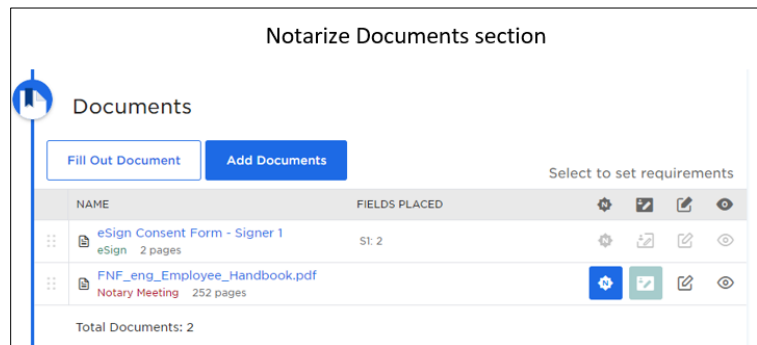
The data and documents are then sent to Proof and the **Product Management** screen is updated to show the newly submitted package with a **Status of Started**.

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.



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

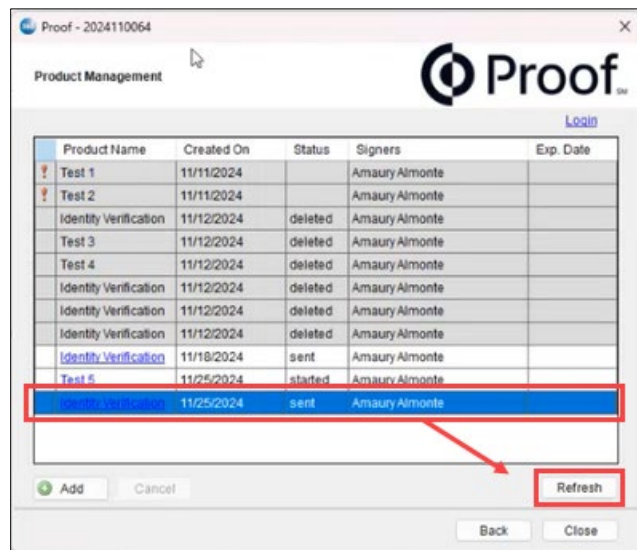
The **Product Management** screen is automatically updated whenever Proof sends an update for an existing package.

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.

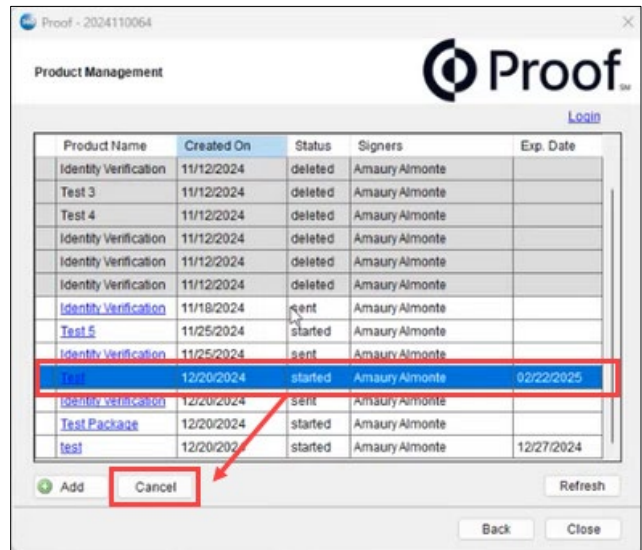


Canceling a Package

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

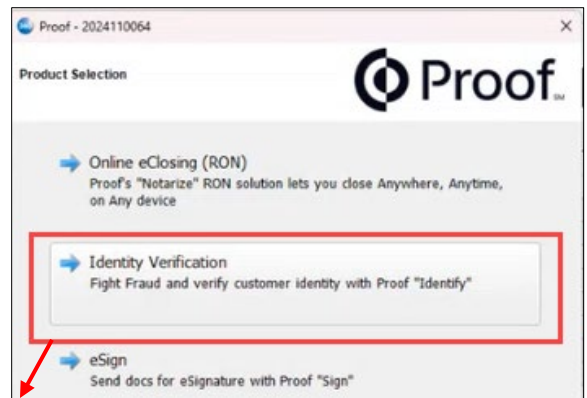
The **Status** is then updated to **Deleted**.



**Identity Verification Service**

To initiate an Identity Verification,

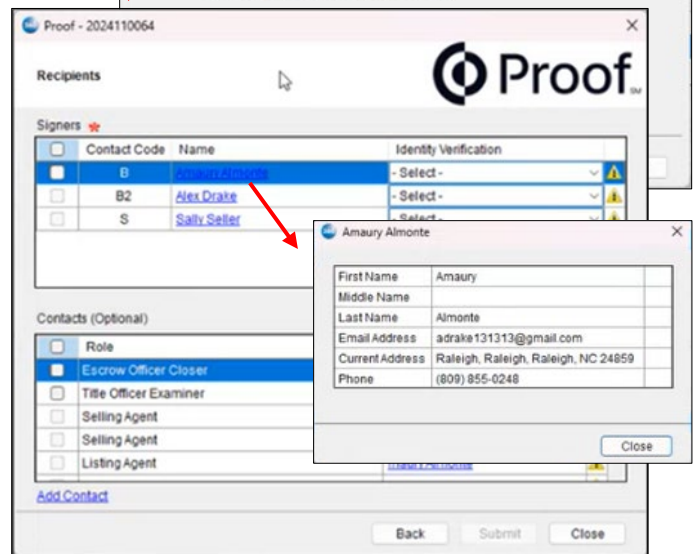
1. Click the **Identity Verification** entry to open the **Recipient's** screen




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



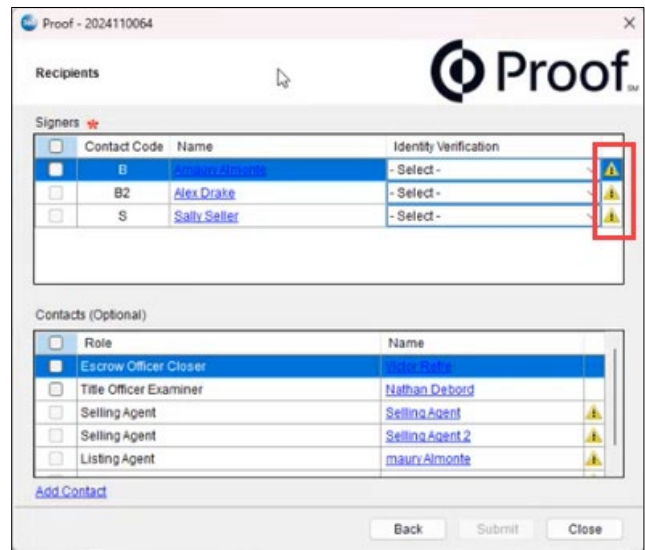
Address, Current Address and Phone) for that recipient or if information is missing.

A **Warning**  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



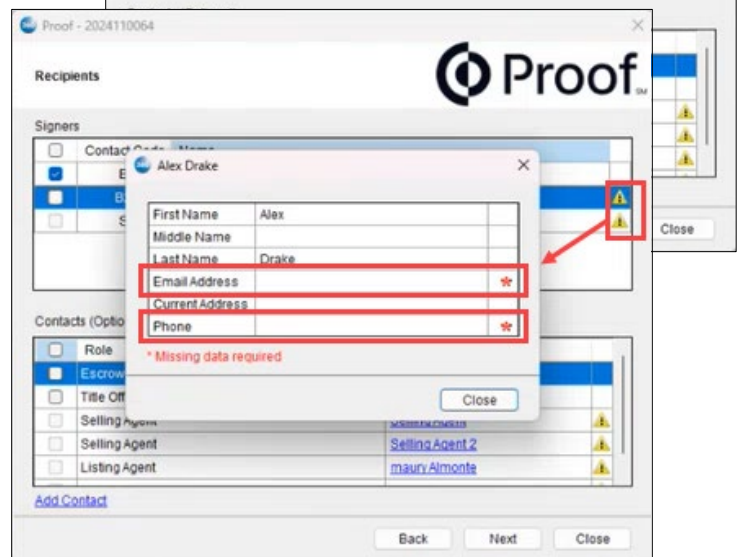
2. Select the applicable **Identity Verification** type

- **Credential Analysis and Selfie**
- **Knowledge Based Authentication**
- **Credential Analysis, Selfie and KBA**
- **IAL2 – Compliant Identity Verification**
- **IAL2 & KBA**



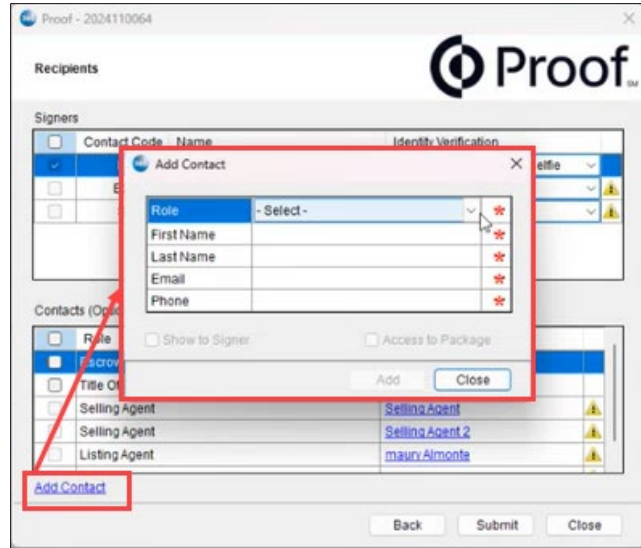
If the **Warning** icon remains, click the **Name** link to view the missing information identified with a red asterisk.

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

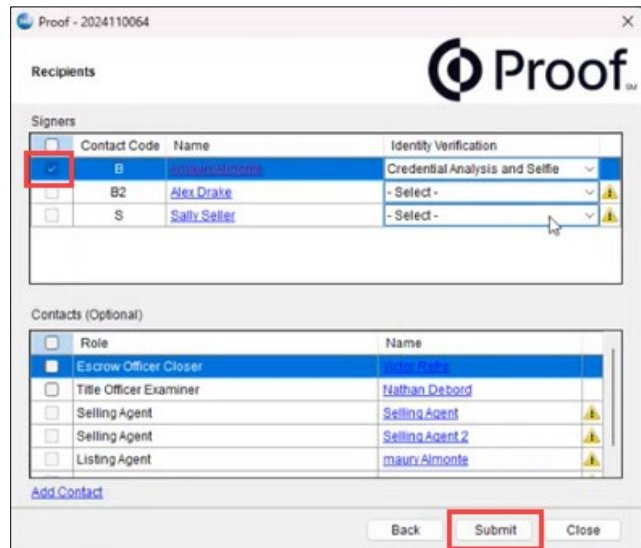


A Signer or Contact may also be added on this screen. However, adding contact information here does not write back to the ProForm order. All fields are required as indicated.

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.
  - b. **Access to Package** – Additional Contact(s) have access to the signed package.
5. Click the **Add** button to complete

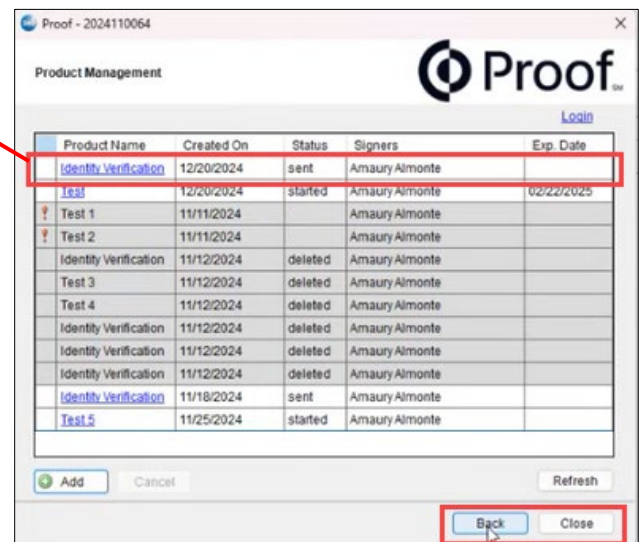


6. Check the corresponding check box for the **Signer**  
**NOTE:** Only one person can be selected at a time for Identity Verification.
7. If applicable, check the corresponding check for the **Contact(s)** to receive notifications and/or grant access to the signed package.
8. Click **Submit**



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.



## 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
  - b. **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.

The top screenshot shows the 'Product Selection' screen with the following options:

- Online eClosing (RON): Proof's "Notarize" RON solution lets you close Anywhere, Anytime, on Any device
- Identity Verification: Fight Fraud and verify customer identity with Proof "Identify"
- eSign**: Send docs for eSignature with Proof "Sign"

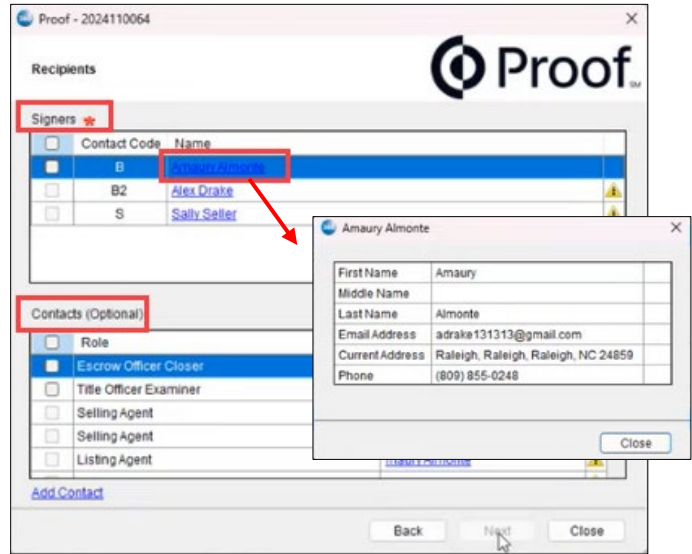
The bottom screenshot shows the 'eSign Package Information' screen with the following fields:

- Package Name:  \*
- Property:
- Loan:
- Note to Signer(s):
- eSign Window Start Date/Time:
- eSign Window Expiration Date/Time:



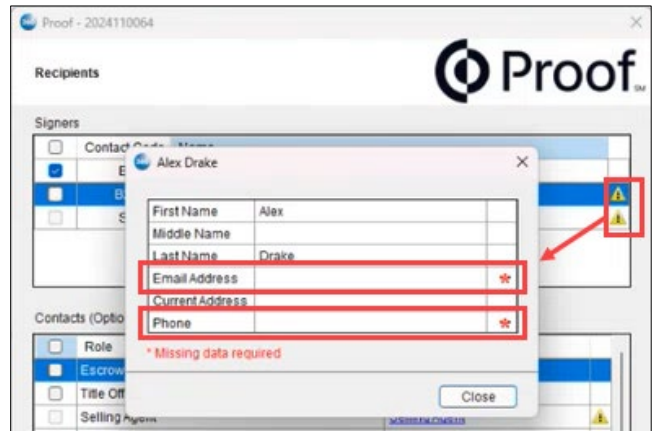
- The **Signers** section shows the Buyers and/or Sellers; a selection here is required to continue.
- The **Contacts** section shows all other Contact types pertinent to the transaction (Escrow/Title Officers, Selling/Listing Agents); a selection here is optional.

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** ⚠️ 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.

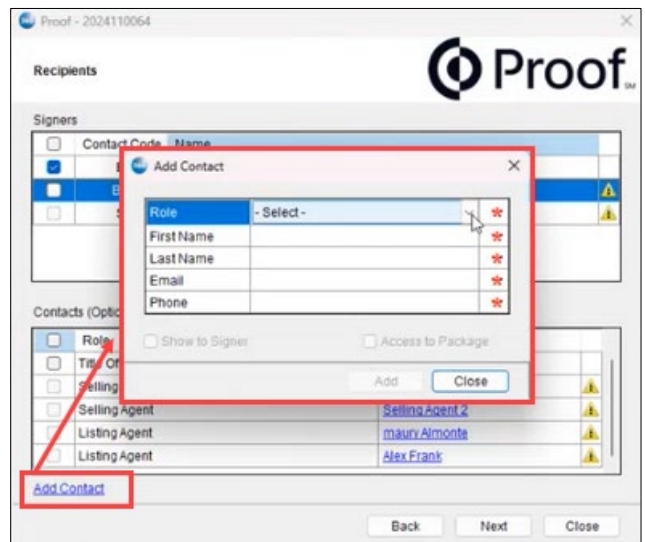


A Signer or Contact may also be added on this screen. However, adding contact information here does not write back to the ProForm order. All fields are required as indicated.

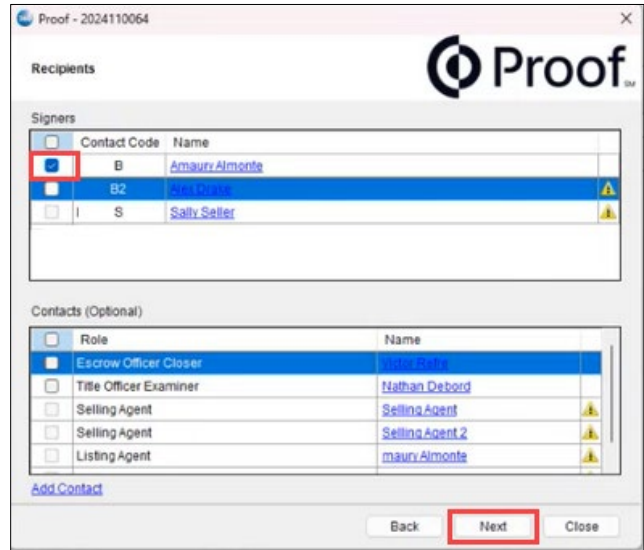
4. Click the **Add Contact** link to add a new Contact

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.
  - b. **Access to Package** – Additional Contact(s) have access to the signed package.
6. Click the **Add** button to complete

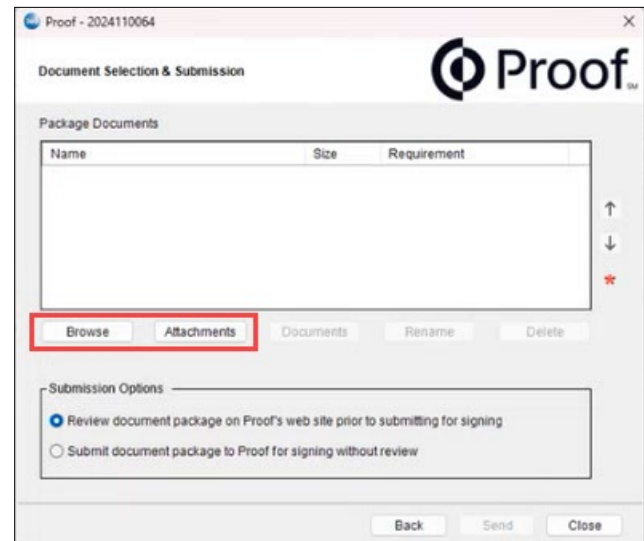


7. Check the corresponding check box for the **Signer** to receive and sign the package
8. If applicable, check the corresponding check for the **Contact(s)** to receive notifications and/or grant access to the signed package.
9. Click **Next** to continue to add documents



From the **Document Selection & Submission** screen,

10. Add the documents to be included in the package using the,
  - o **Browse** button to select a document via file explorer
  - Or-
  - o **Attachments** button to select a document from the ProForm order



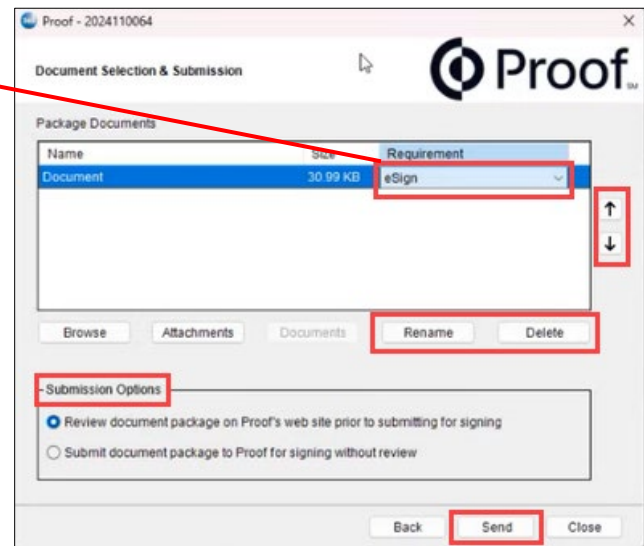
The **Requirement** is populated for you with **eSign** (that is the only available option for this product).

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.

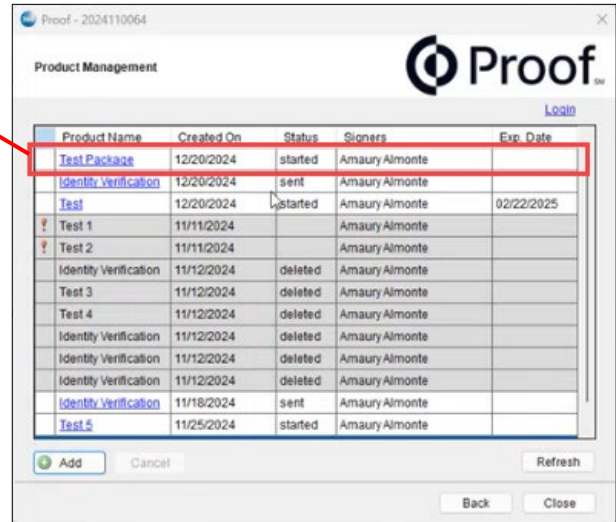
By default the **Review document package on Proof's web site prior to submitting for signing** option is selected.

11. Click the **Send** button



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.



### eSign & Identity Verification

To initiate an eSign package with Identity Verification,

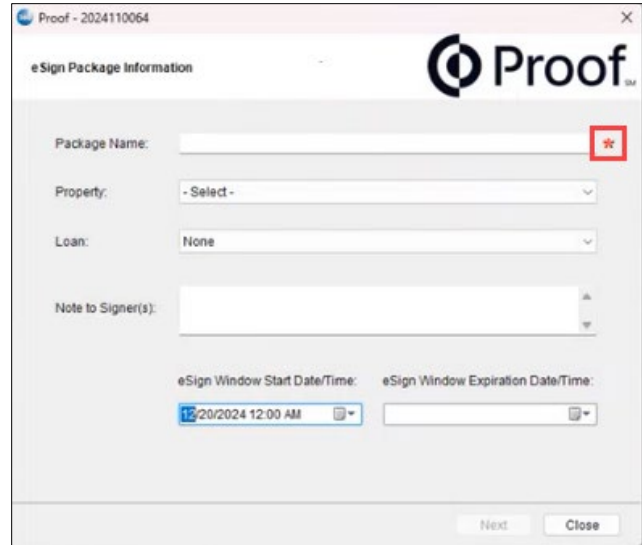
1. Click the **eSign & Identity Verification** entry to open the **eSign Package Information** screen

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
- b. **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.

- 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**  icon is displayed for all **Signers**,

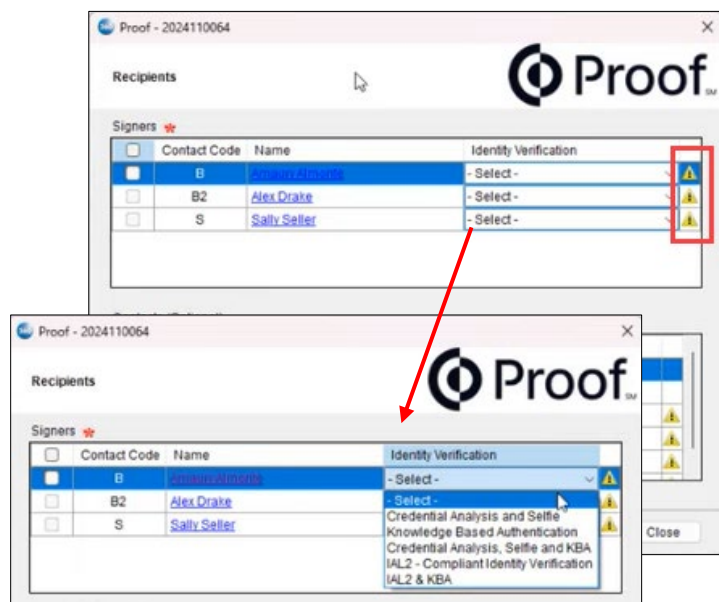
- until the **Identity Verification** type is selected from the drop-down

and/or

- if a recipient is missing information

9. Select the applicable **Identity Verification** type

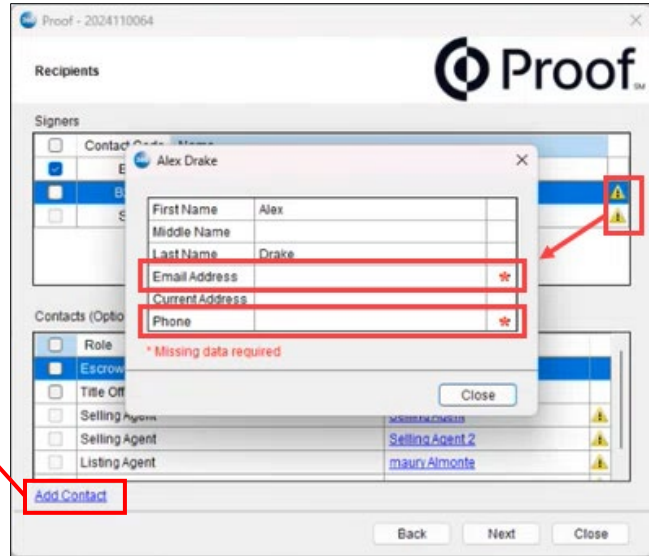
- **Credential Analysis and Selfie**
- **Knowledge Based Authentication**
- **Credential Analysis, Selfie and KBA**
- **IAL2 – Compliant Identity Verification**
- **IAL2 & KBA**



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.

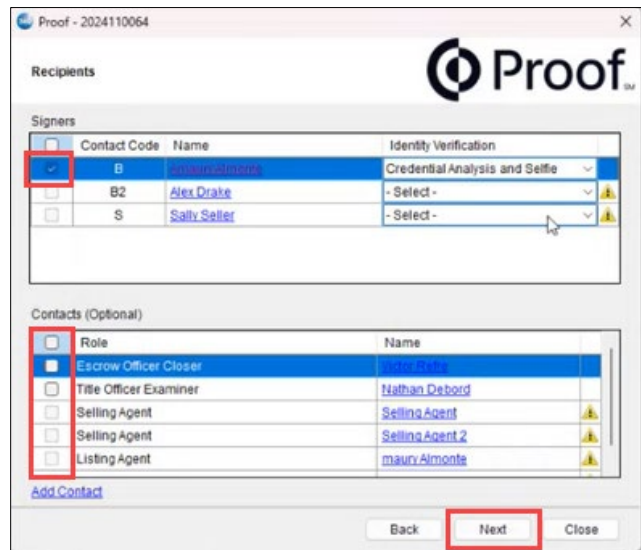
A Signer or Contact may also be added on this screen. However, adding contact information here does not write back to the ProForm order. All fields are required as indicated.



- 10. Check the corresponding check box for the **Signer**

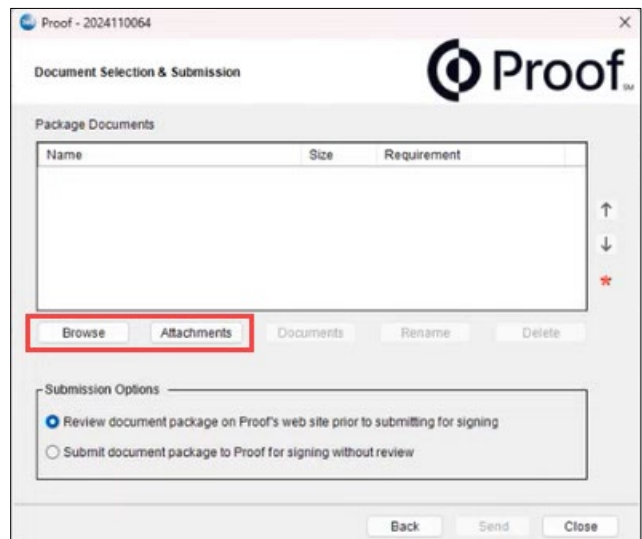
**NOTE:** Multiple Signers can be selected when utilizing the eSign & Identity Verification service.

- 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,
  - o **Browse** button to select a document via file explorer
  - Or-
  - o **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).

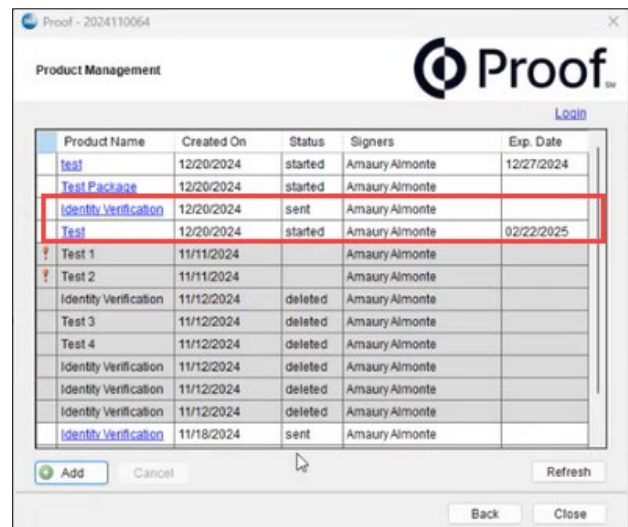
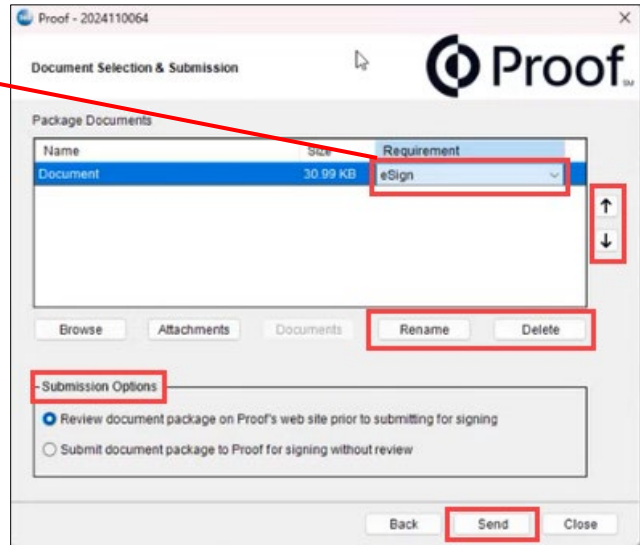
You also have the option of reviewing the package or not prior to submission by selecting the corresponding **Submission Options** radio button.

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

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.



## 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.