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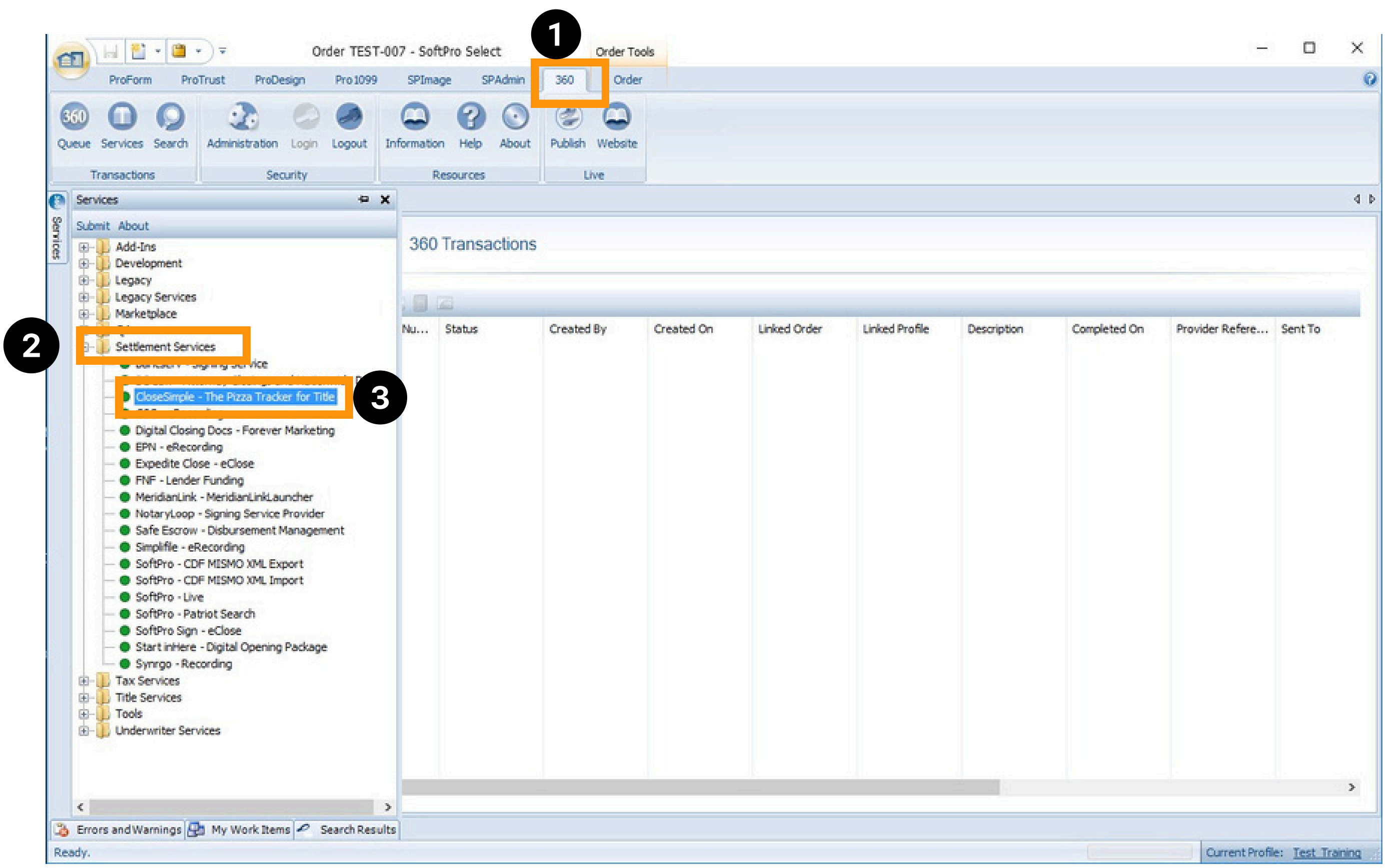
E-Sign Anything

CloseSimple's E-Sign Anything is an E-Signing solution that integrates directly with SoftPro to provide an affordable solution that allows users (primarily Escrow Processors/Officers and PreClosers/Paralegals) to tag and send any PDF without ever leaving their software. Signees are notified to sign via email (and text) and are reminded to sign via a reminder system until they do. Upon completion, documents are securely uploaded directly back into the software, and requestors are notified.

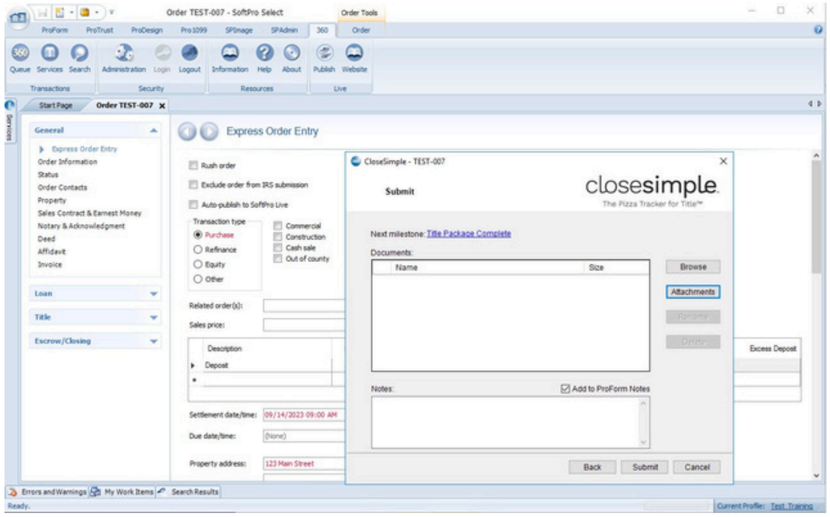
Instructions

1. Open the file that needs a document(s) signed. Then launch CloseSimple via 360 services.

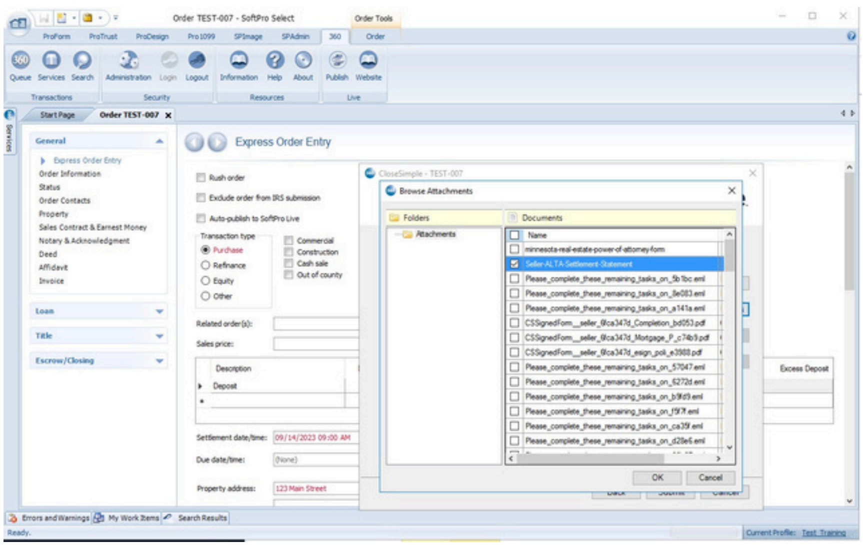


2.There are two options to select files in Softpro for signing:

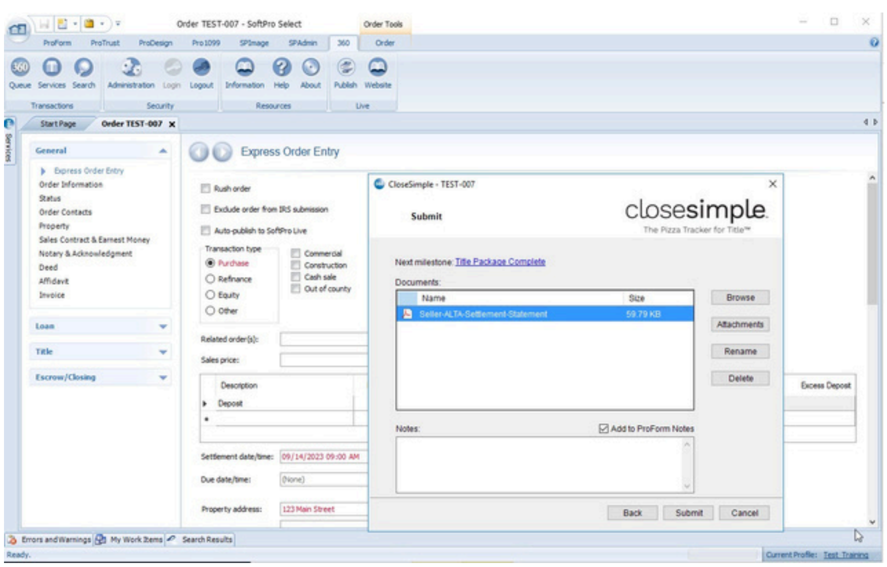
a. Select pdf files from file attachments



b. Browse for files on the Softpro workstation



3. After the files are selected, hit submit to launch CloseSimple.



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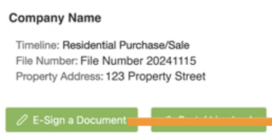
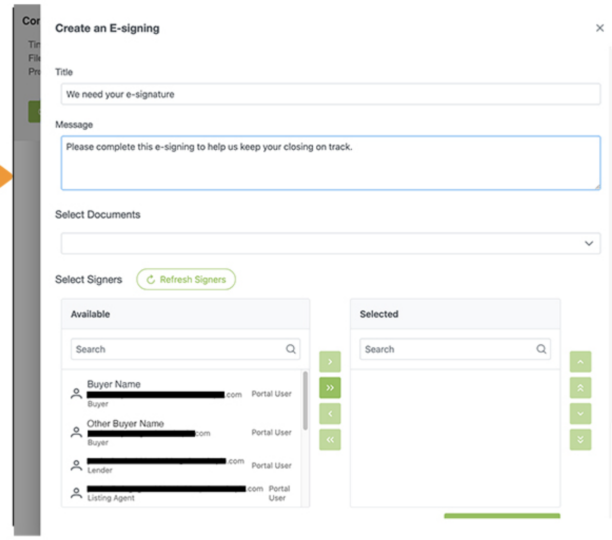
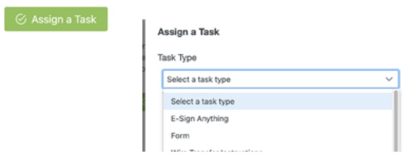
4. In the CloseSimple manual interface find the new E-Sign a Document button in the upper right hand corner. This will launch the create an e-signing page.

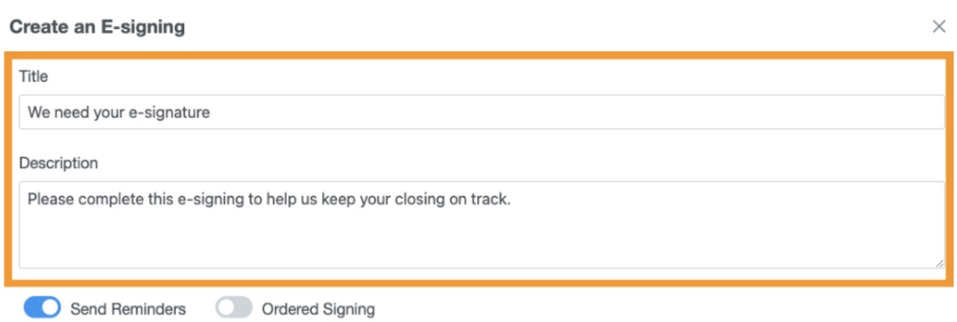


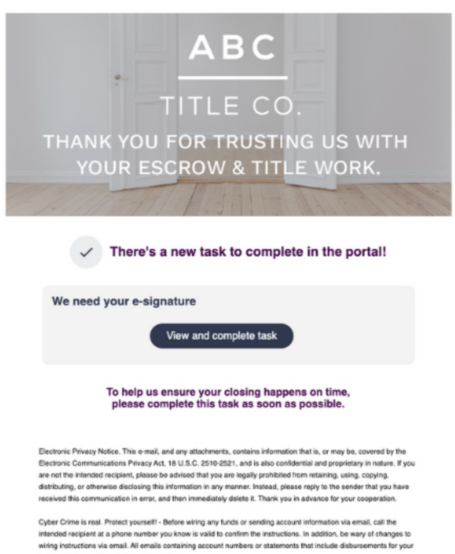


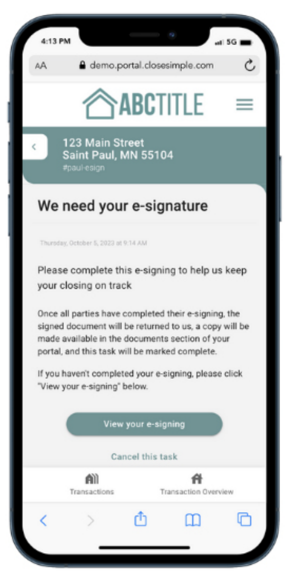
If Adhoc Tasking is enabled for the company, this process will differ slightly. Instead of the E-Sign a Document button, it will have the Assign a Task button, and the E-Sign option will be available from a dropdown menu.



5.To help the signer understand what needs to be signed, there is a name and description for the signing that can be customized. That name will be displayed as the task title in the portal and the description will be displayed within the task. The name and description will also be added to the notification email sent to the signers.







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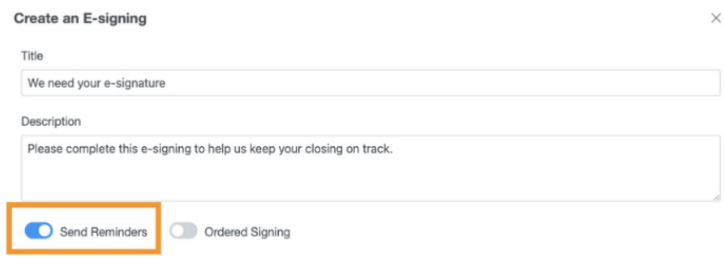
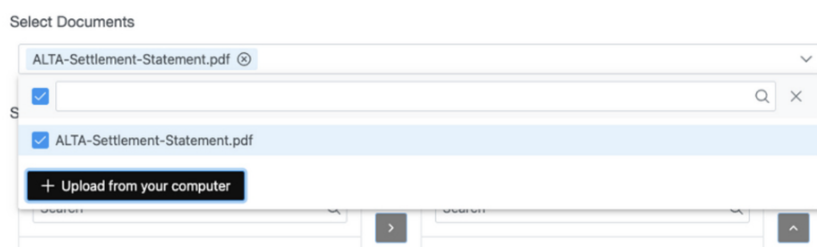
6. If the *Send Reminders* option is selected, reminders will be sent every 48 hours to any party that has not yet completed their signing.

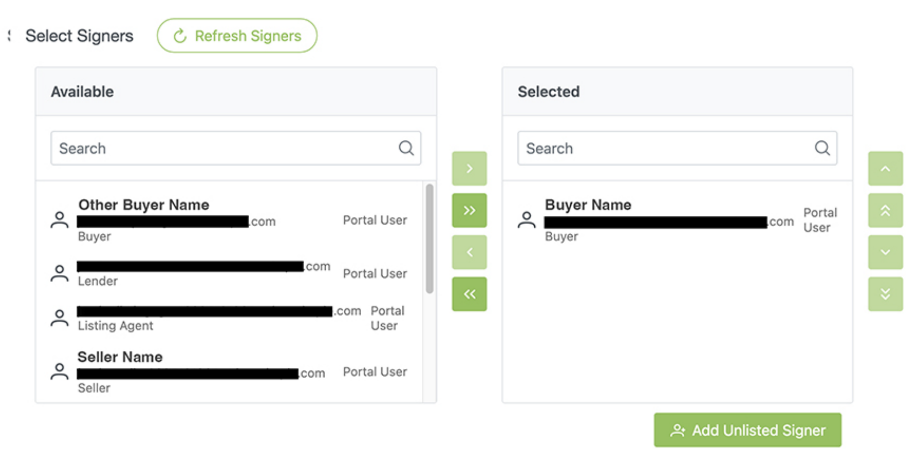


7. Next, you will select your document(s). If you selected a document in Softpro, it will automatically be selected in this field. If you would like to use a document from your desktop, you can click the drop down arrow, click the *Upload from your computer* button, and select the documents you wish to have signed. Selecting multiple documents will be combined into a single signing package automatically.

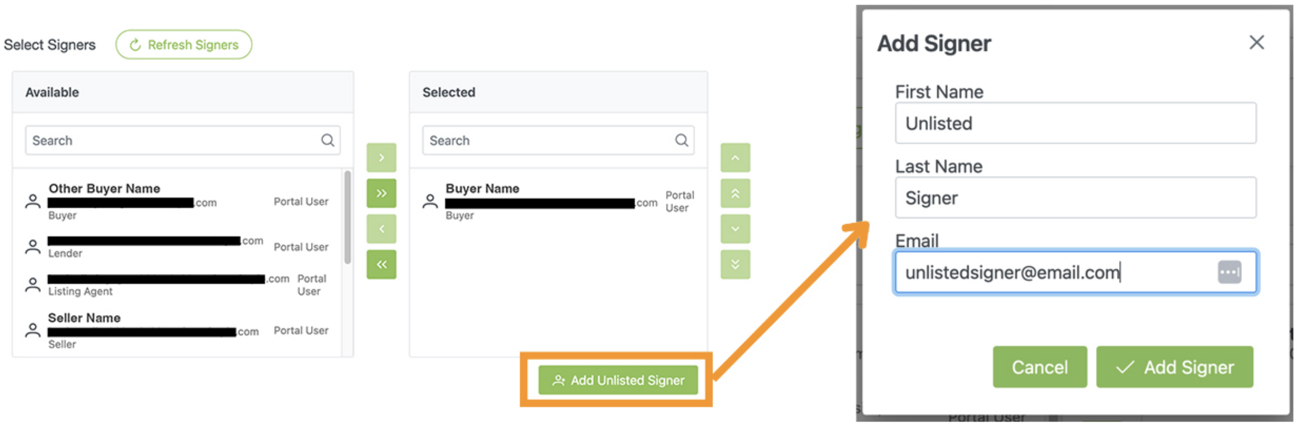


8. Select signers for the document(s). The list will display all users with access to the current file in the portal (registered and unregistered) and their role. Click on the user that you need and then select the arrow on the right to move them from Available > Selected.

Note: Selecting multiple users will result in a single document with multiple signers. If you wish to have separate signings for each person, create a separate signing for each by selecting a single signer, complete the document tagging and then launch the create an e-signing dialog again.

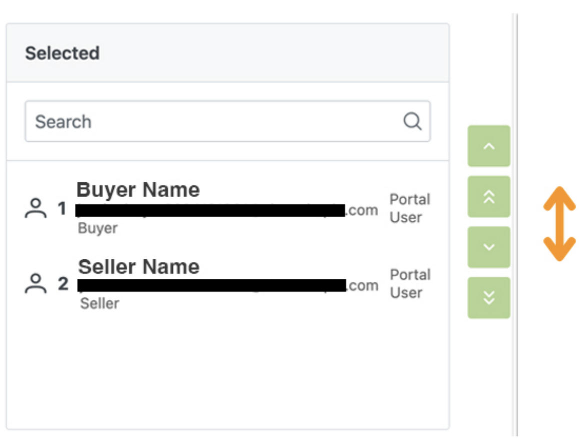


9. If you wish to request a signing from a user who is not listed on the file, hit the *Add Unlisted Signer* button, provide the required information, and then click add signer. The additional signer is now selected. To remove a selected signer simply click the checkbox next to their name. When you are finished selecting signers click the X to close the signers dropdown.

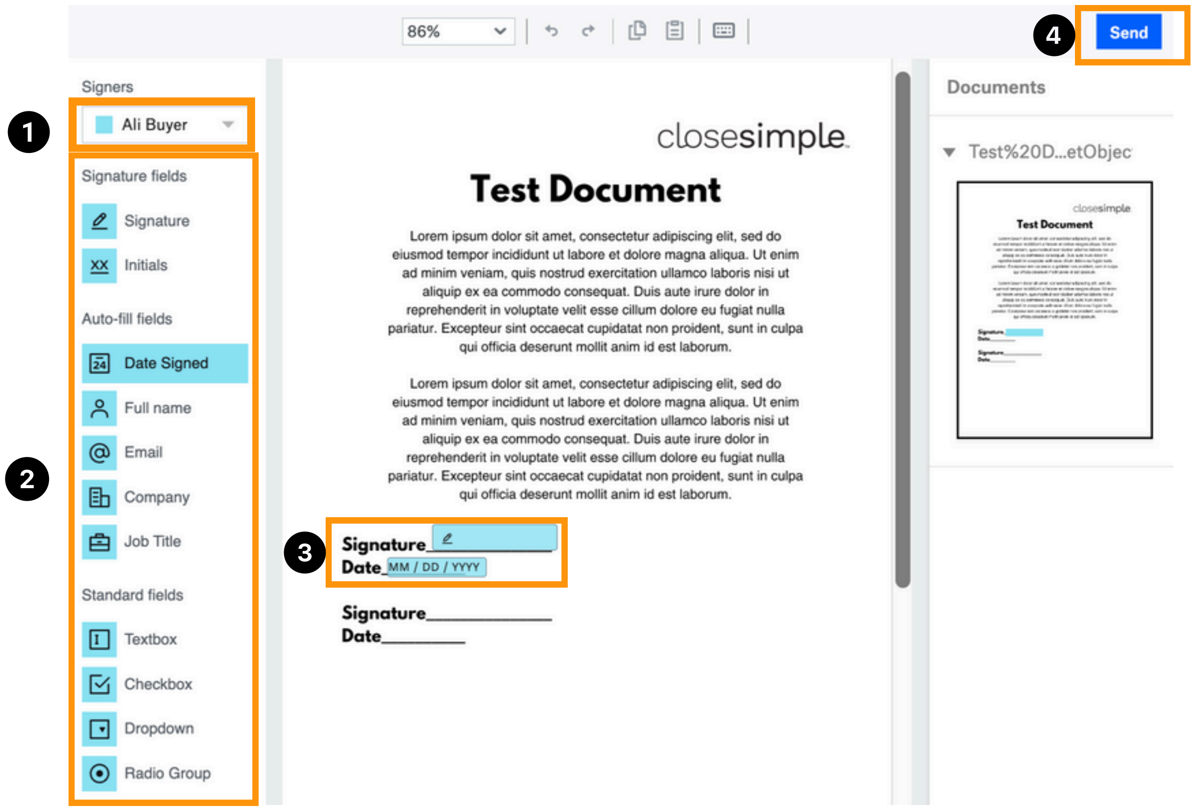


10. If you require the signers to sign in a specific order you can toggle on the *Ordered Signing* option next to Send Reminders.

Numbers will then appear next to the recipients names and you can drag and drop the contacts into the correct order.



9. The tagging interface will now be displayed. The first signer will automatically be selected in the “Signers” dropdown (box 1). You can drag and drop any of the tags within (box 2) to the place they are needed within the document (box 3). To move a tag already placed, simply click and drag. Once all tags for all documents and signers have been placed, click send to create the signing request and deliver notifications to signers(box 4).



See additional documentation below for what the user experience will be like.

Once all signatures have been completed the documents will be remitted to SoftPro and available in the Attachments Folder. A notification will be sent to the Escrow Officer and Processor.

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