

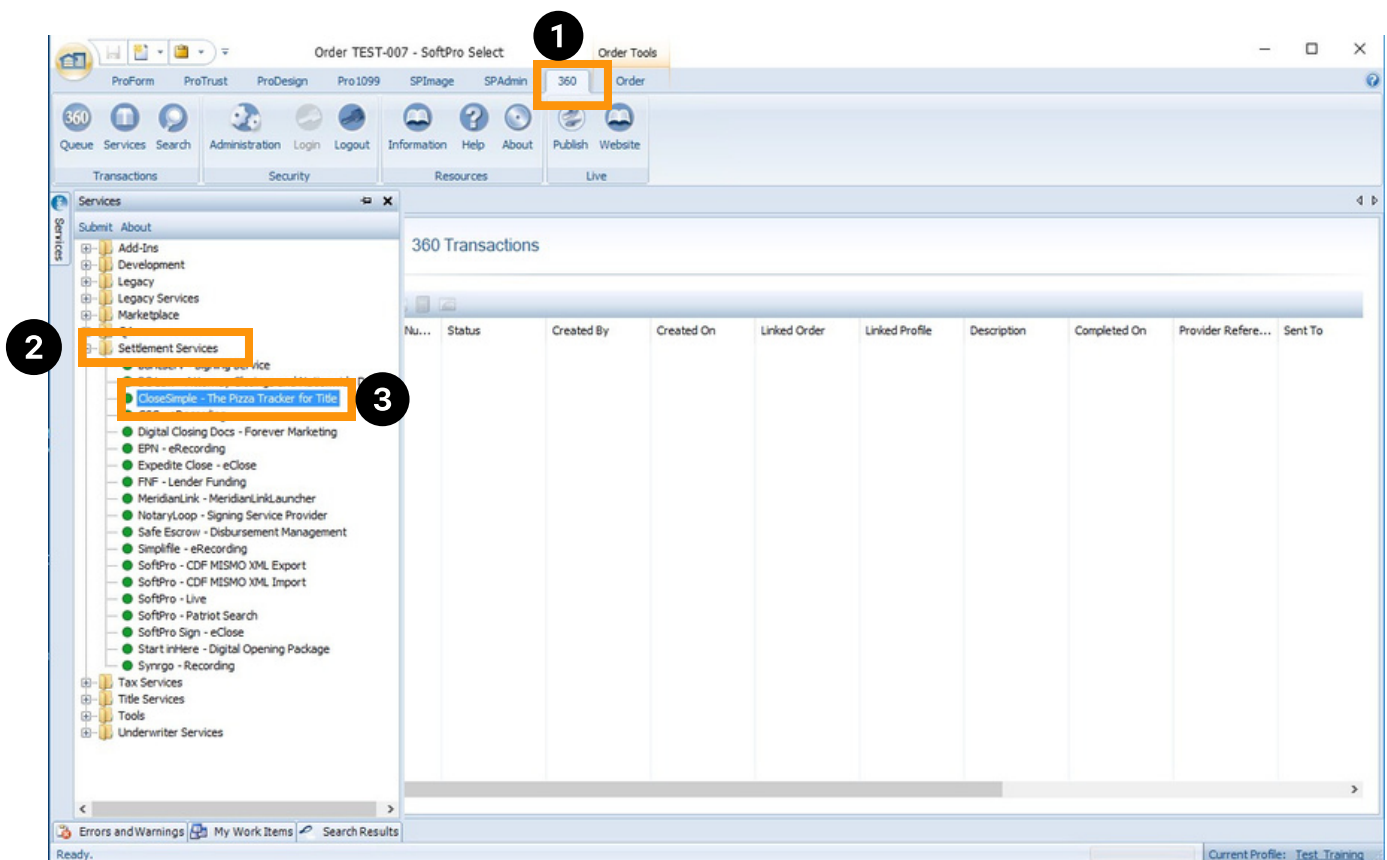


E-Sign Anything

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.

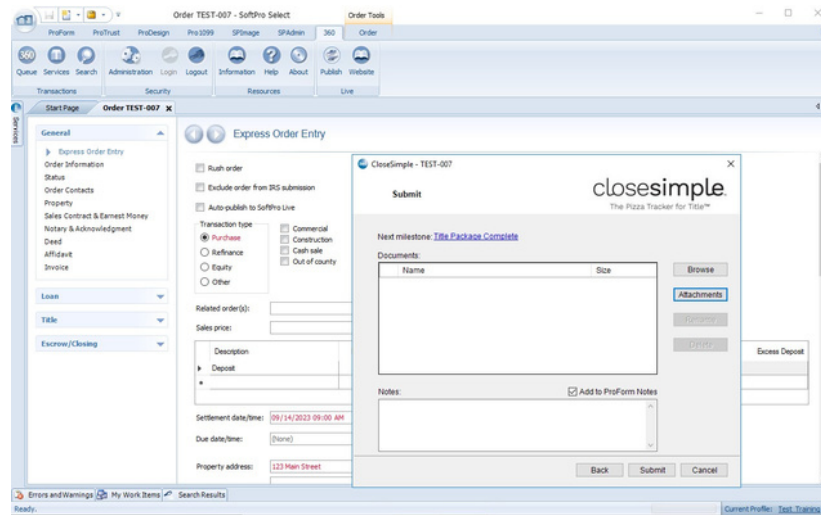
Instructions

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

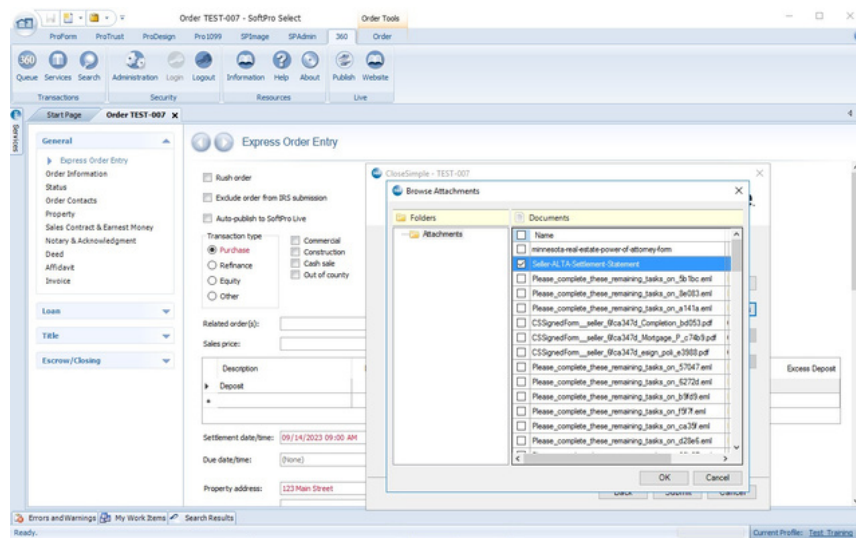


2. There are two options to select files in Softpro for signing:

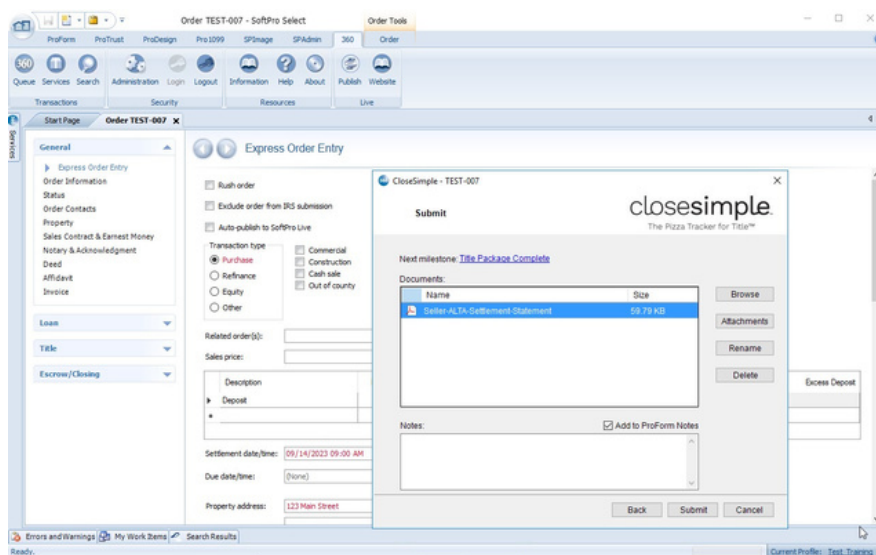
a. Select pdf files from file attachments



b. Browse for files on the Softpro workstation



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



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.

Company Name
Timeline: Residential Purchase/Sale
File Number: File Number 20241115
Property Address: 123 Property Street

E-Sign a Document

Assign a Task

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.

Assign a Task

Assign a Task

Task Type

Select a task type

Select a task type

E-Sign Anything

Form

Create an E-signing

Title
We need your e-signature

Message
Please complete this e-signing to help us keep your closing on track.

Select Documents

Select Signers [Refresh Signers](#)

Available

Search

Buyer Name com Portal User

Other Buyer Name com Portal User

Lender com Portal User

Listing Agent com Portal User

Selected

Search

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.

Create an E-signing

Title
We need your e-signature

Description
Please complete this e-signing to help us keep your closing on track.

☒ Send Reminders ☐ Ordered Signing



There's a new task to complete in the portal!

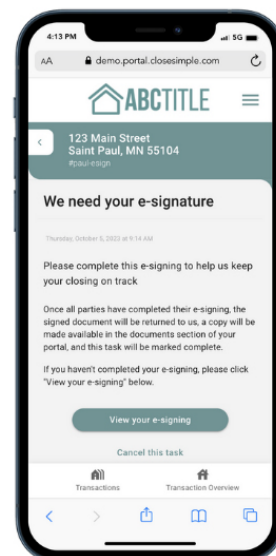
We need your e-signature

View and complete task

To help us ensure your closing happens on time, please complete this task as soon as possible.

Electronic Privacy Notice. This e-mail, and any attachments, contains information that is, or may be, covered by the Electronic Communications Privacy Act, 18 U.S.C. 2510-2521, and is also confidential and proprietary in nature. If you are not the intended recipient, please be advised that you are legally prohibited from retaining, using, copying, distributing, or otherwise disclosing this information in any manner. Instead, please reply to the sender that you have received this communication in error, and then immediately delete it. Thank you in advance for your cooperation.

Cyber Crime is real. Protect yourself! - Before wiring any funds or sending account information via email, call the intended recipient at a phone number you know is valid to confirm the instructions. In addition, be wary of changes to wiring instructions via email. All emails containing account numbers or statements that include disbursements for your real estate transaction will be sent securely.



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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.

The screenshot shows a 'Create an E-signing' dialog box. It has a title field with the text 'We need your e-signature' and a description field with the text 'Please complete this e-signing to help us keep your closing on track.' Below these fields are two toggle switches: 'Send Reminders' (which is turned on and highlighted with an orange box) and 'Ordered Signing' (which is turned off).

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.

The screenshot shows a 'Select Documents' dialog box. It has a search bar and a list of documents. The document 'ALTA-Settlement-Statement.pdf' is selected and highlighted in blue. Below the list is a button labeled '+ Upload from your computer'.

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.

The screenshot shows a 'Select Signers' dialog box. It has a 'Refresh Signers' button. Below it are two panels: 'Available' and 'Selected'. The 'Available' panel lists four signers: 'Other Buyer Name' (Buyer), 'Lender' (Lender), 'Listing Agent' (Listing Agent), and 'Seller Name' (Seller). The 'Selected' panel lists one signer: 'Buyer Name' (Buyer). Between the panels are four green arrows: '>', '>>', '<<', and '<'. Below the 'Selected' panel is a green button labeled 'Add Unlisted Signer'.

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.

The screenshot shows the 'Select Signers' interface with two panels: 'Available' and 'Selected'. The 'Available' panel lists roles like 'Other Buyer Name', 'Lender', 'Listing Agent', and 'Seller Name'. The 'Selected' panel shows a 'Buyer Name'. An orange box highlights the 'Add Unlisted Signer' button in the 'Selected' panel, with an arrow pointing to the 'Add Signer' modal. The modal contains fields for 'First Name' (Unlisted), 'Last Name' (Signer), and 'Email' (unlistedsigner@email.com). At the bottom are 'Cancel' and 'Add Signer' buttons.

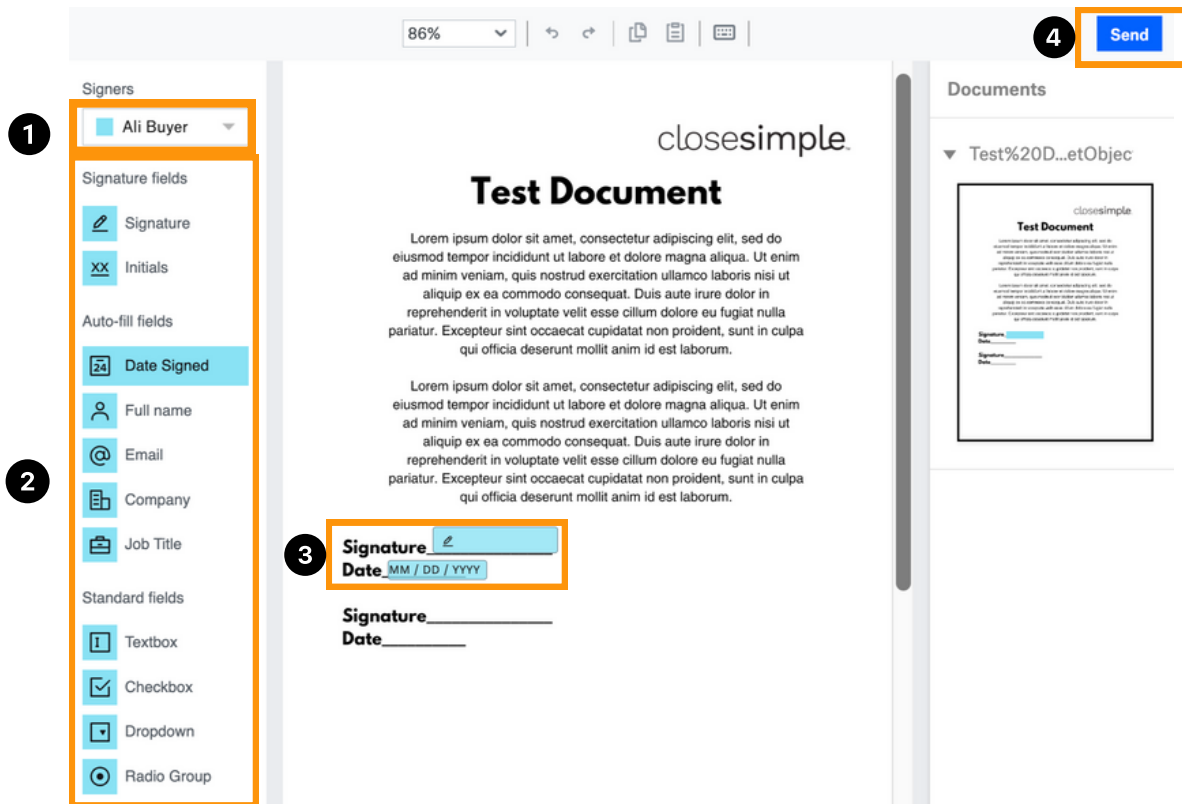
10. If you require the signers to sign in a specific order you can toggle on the *Ordered Signing* option next to Send Reminders.

The screenshot shows the 'Create an E-signing' form. It has fields for 'Title' (We need your e-signature) and 'Description' (Please complete this e-signing to help us keep your closing on track.). At the bottom, there are two toggle switches: 'Send Reminders' and 'Ordered Signing'. The 'Ordered Signing' toggle is highlighted with an orange box.

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

The screenshot shows the 'Selected' panel with a search bar and a list of signers. The first signer is 'Buyer Name' (Buyer) and the second is 'Seller Name' (Seller). They are numbered 1 and 2 respectively. To the right of the list are green up and down arrow buttons, and a large orange double-headed vertical arrow indicates the drag-and-drop functionality for reordering.

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.