SoftPro Sign - eClose
User Guide

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History

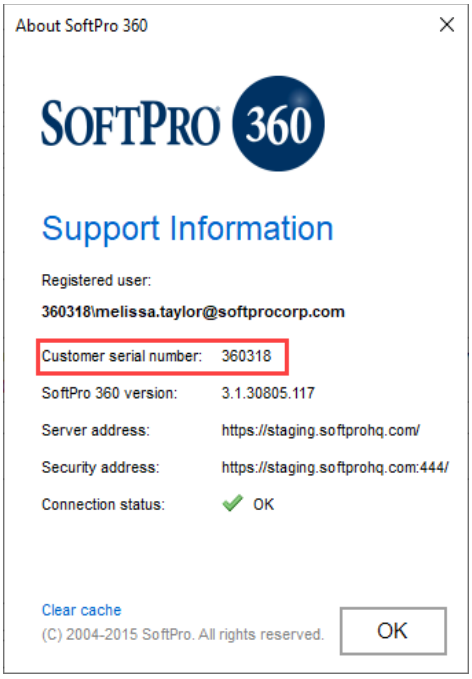
Date	Version	Details
07/2022	1.0	Initial Release
11/12/2024		Update to Delivery Method options

Introduction

SoftPro Sign - eClose provides an electronic closing fulfillment process for all parties to a transaction. Key benefits include secure electronic document delivery service and industry standard MFA consumer authentication, automation and manual work-flow support.

SoftPro users can create an e-sign package in SoftPro 360 and send it to **SoftPro Sign - eClose**, where recipients can log in from any location to complete the e-signing process. Once the signing process is completed by all the recipients, **SoftPro Sign - eClose** returns the e-signed package to 360 where the package can be imported to the linked order. 360 also supports Delivery with Consent and Delivery only delivery methods offered by **SoftPro Sign - eClose** for secure document delivery and audit trail documentation.

SoftPro Sign - eClose has been globally deployed and can be added to your Services menu at any time. However, an active account with Black Knight for **SoftPro Sign - eClose** is required to use the SoftPro 360 integration. Contact SoftPro for more information. Also, be prepared to provide your SoftPro 360 Customer Serial Number which you can find on the **About SoftPro 360** screen in ProForm.

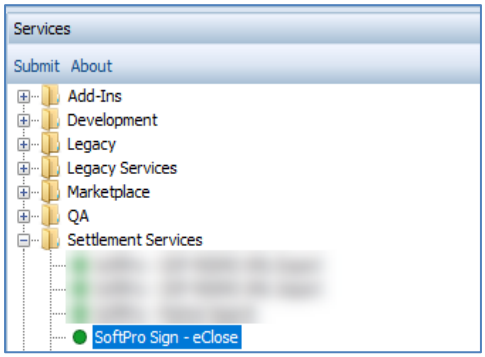


Currently only the use of Microsoft Edge and Google Chrome (i.e., Chromium based) are supported browsers

Launching eClose

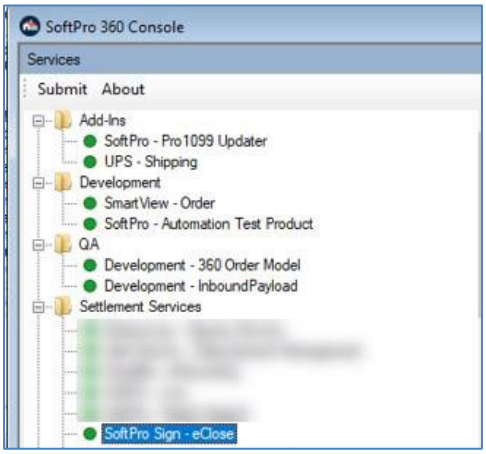
Select

From the **360 > Services menu**, double-click **SoftPro Sign - eClose** located under the Settlement Services folder.



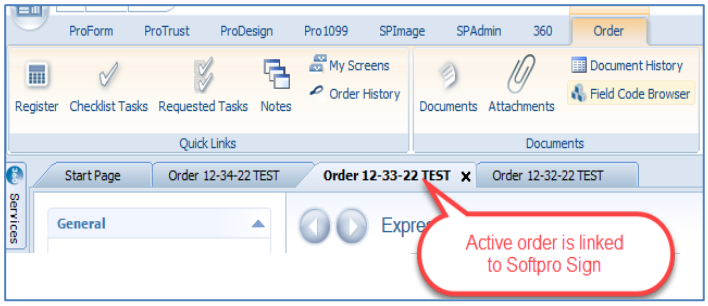
Standard and Enterprise

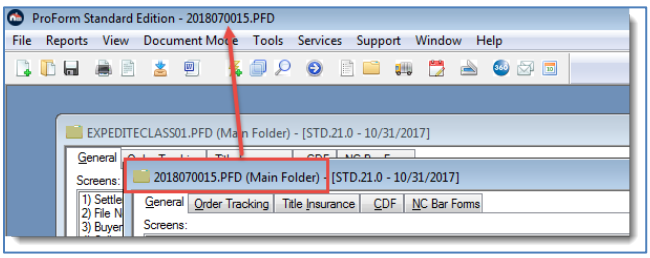
From the **Services** button on the ProForm toolbar, select **Settlement Services** and double-click **SoftPro Sign - eClose.**



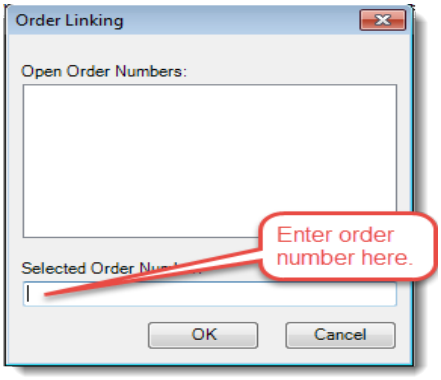
Order Linking

The active ProForm order is automatically linked to the **SoftPro Sign - eClose** service. If more than one ProForm order is open, the top order is linked.





If no order is open, the **Order Linking** screen opens for you to enter an order number manually.

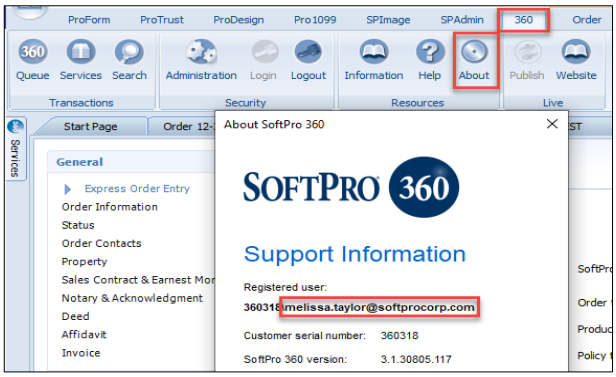


LogIn

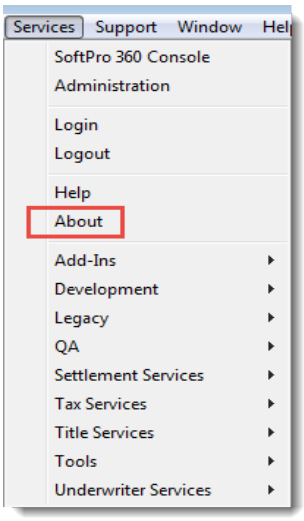
SoftPro Sign - eClose uses a **Single Sign-On** (SSO) process to authenticate SoftPro 360 users when the **SoftPro Sign - eClose** service is launched. As a result, you are not required to enter your **SoftPro Sign - eClose** user email and password.

Instead, your SoftPro 360 email address is sent automatically when you launch **SoftPro Sign - eClose**.

Your SoftPro 360 email address can be viewed in the **About** button in the **360** Ribbon.



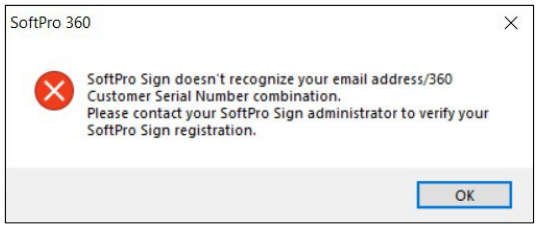
Or in the **Services** menu in Standard and Enterprise.



Registration with SoftPro Sign - eClose required

The SSO process requires you to be registered as a user in **SoftPro Sign - eClose**. If you are not registered or if your SoftPro 360 email address is different from the email address in your **SoftPro Sign - eClose** account, a message displays when you launch the service stating it doesn't recognize your email address.

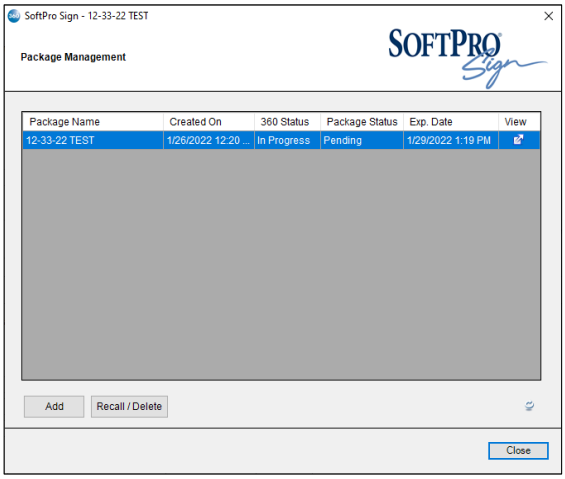
If this message is displayed, contact **SoftPro** to verify your **SoftPro Sign - eClose** registration.



Creating a Package

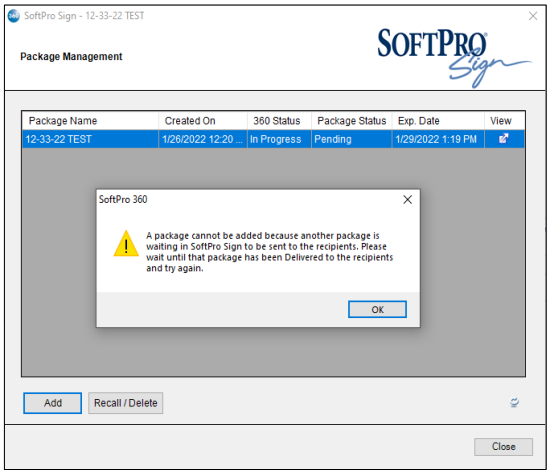
Launching the **SoftPro Sign - eClose** service opens the **Package Management** screen to allow you to view and manage any packages that have been submitted for the linked order.

Selecting the **Add** button opens the **Delivery Details** screen where a new package can be created.



If an existing Package has a **Pending** delivery status, a new package cannot be added.

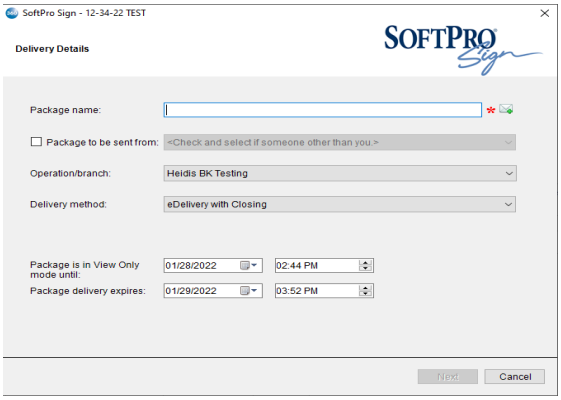
If no packages have been created for the linked order, the **Delivery Details** screen automatically opens.



Delivery Details Screen

In the **Delivery Details** screen you can configure the package name and from whom it is to be sent.

If applicable, and your **SoftPro Sign - eClose** account allows, you can also configure the operation or branch sending the package, the delivery method, the package expiration date and whether it will be printed and mailed to a recipient if the e-sign delivery process expires.



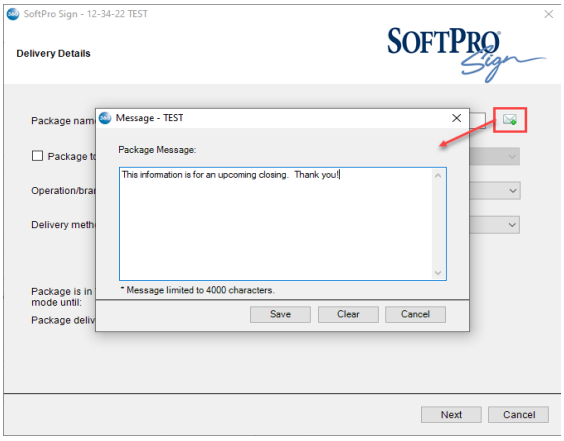
Package Name

A **Package Name** is required as indicated by the asterisk *. When you enter a name, the asterisk * disappears and the **Next** button is enabled, allowing you to proceed to the next screen. The **Package Name** must be unique for the linked order.

Package Message

The message icon allows you to add a package-level message.

Refer to the Messages section for more details on handling messages.

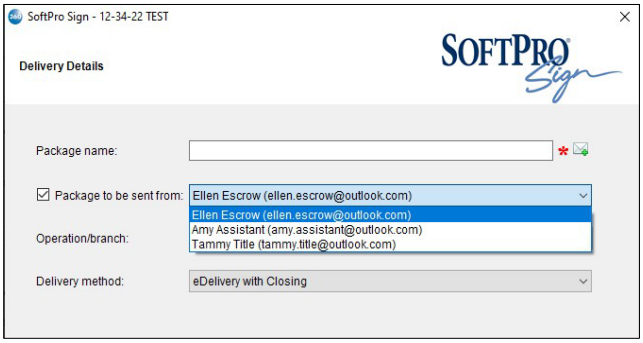


Package Sent From

When a package is ready to be viewed or signed, or is about to expire, **SoftPro Sign - eClose** sends an email to the **Recipient**. The full name, email address and phone number appear in the signature block for the person from whom the package is sent. See the Appendix for examples of these email notifications.

Select

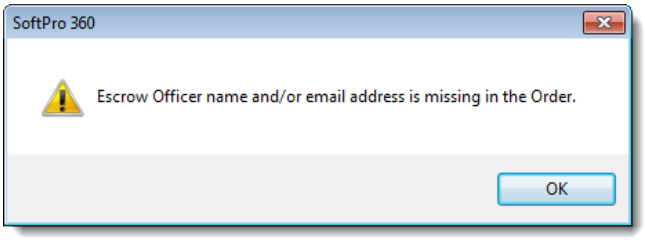
The package is sent from you unless the **Package to be sent from** check box is checked. When checked, the drop-down list displays the name and email address of the Escrow Officer/Closer, Pre-closer/Escrow Assistant and the Title Officer, if those people have been added to the linked order.



If one of these people has been selected for a package that selection persists for the next package added for the linked order.

Standard and Enterprise

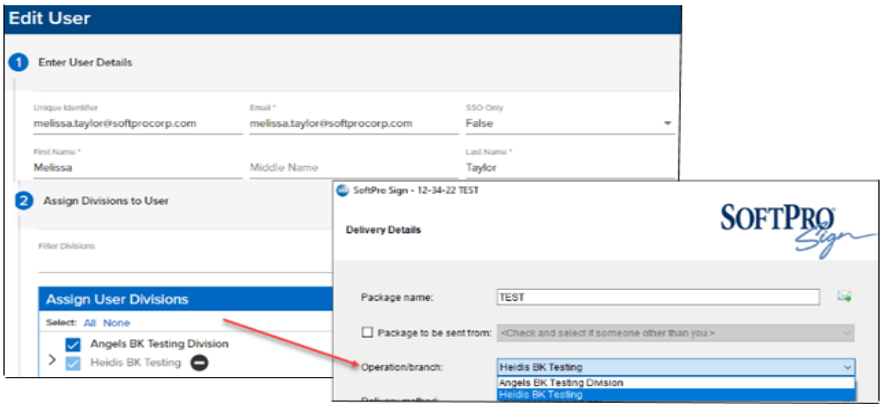
SoftPro Sign - eClose requires an email address for this feature. Standard and Enterprise only handle the name for the officer and closer fields. When launching **SoftPro Sign - eClose** from Standard or Enterprise, a message displays stating ***Escrow Officer names and/or email address is missing in the Order.***



Selecting the **OK** button returns you to the **Delivery Details** screen, and the **Package to be sent from** check box is disabled.

Operation/Branch

In the **SoftPro Sign – eClose** Admin module, a user is assigned to one or more **Divisions**. These **Divisions** are displayed in **Operation/branch** drop-down of the **Delivery Details** screen: If you have only one **Division** assigned to you in **SoftPro Sign - eClose**, then only one **Operation/branch** is displayed in the drop-down.



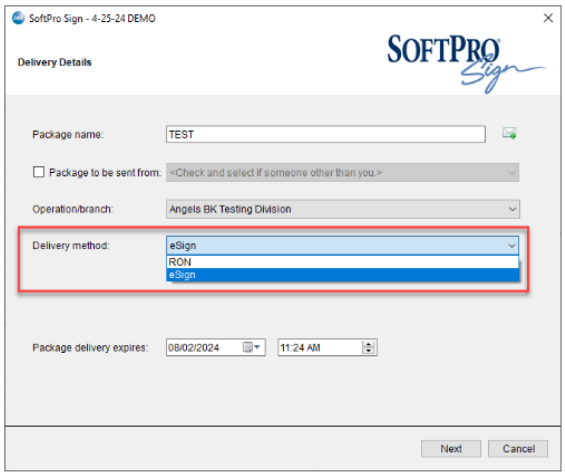
The **Operation/branch** selected determines the **Delivery methods** and other features you are permitted to select.

For smartview Users: If smartview is linked to the ProForm order, and more than one **Division** has been assigned to you, the **Operation/branch** drop-down defaults to that of the Escrow Officer in the ProForm order, provided the Escrow Officer's email address in Select matches the Escrow Officer's email address in **SoftPro Sign - eClose**.

Delivery Method

360 supports two **SoftPro Sign - eClose** delivery methods:

- **eSign**
  eSignatures on documents only. Does not allow for eNotary or wet signatures
- **RON** (Remote Online Notary)
  Includes the ability to send a combination of documents such as eNotary, Print & Sign (wet signature), and eSign



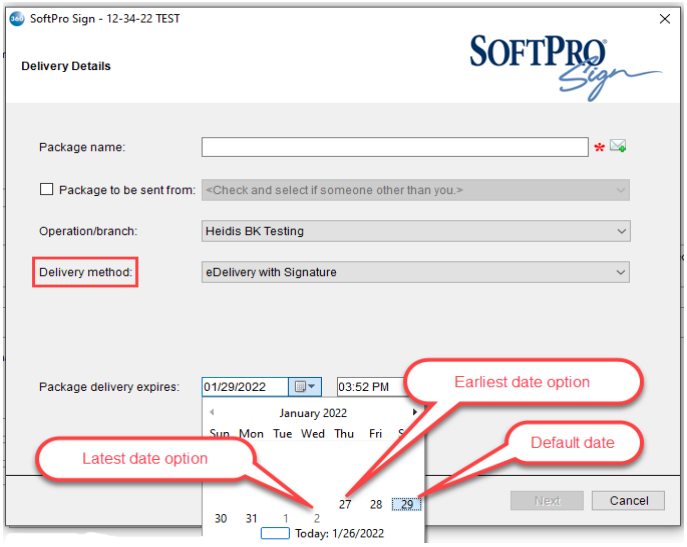
The **Delivery methods** for an **Operation/branch** are set up by Black Knight's customer implementation team and are displayed in the **Delivery method** drop-down.

Package Expiration

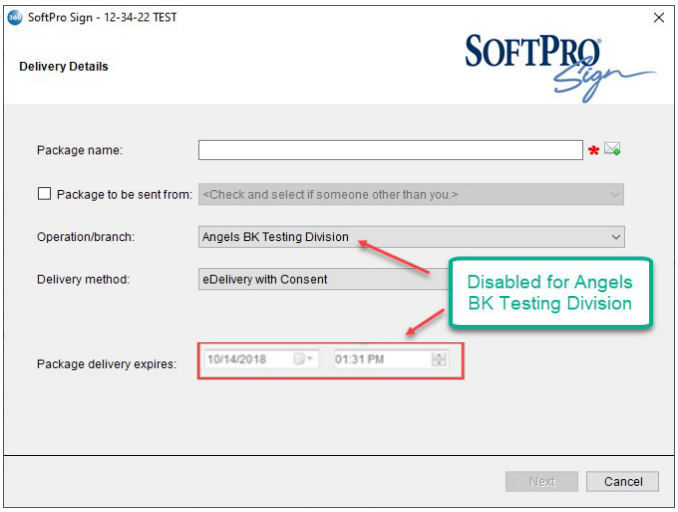
Setting the Package Expiration Date

- Required for eDelivery with Signature, eDelivery with Consent and eDelivery with Closing
- Default expiration dates and times are set up for an **Operation/branch** by Black Knight's customer implementation team.

- The earliest expiration date, latest expiration date and default expiration date and times are displayed in the **Package delivery expires** date picker.



- If permitted for the **Operation/branch**, you may change the **Package delivery expires** date from the default date displayed.
- If not permitted for the **Operation/branch**, the date picker is disabled, showing only the default package delivery expiration date and time.



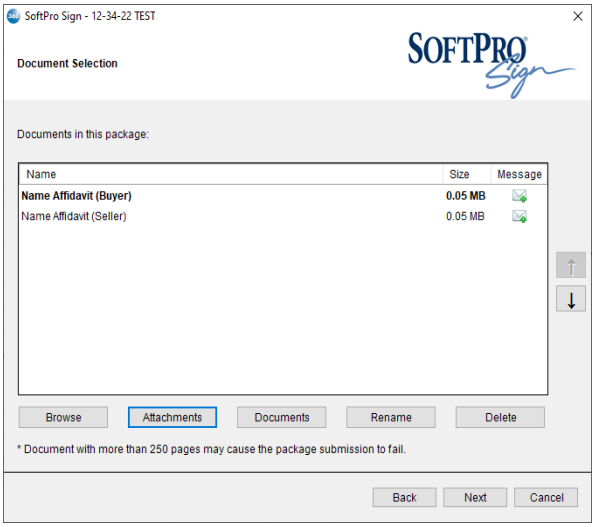
Document Selection

Adding a Document

Selecting the **Next** button on the **Delivery Details** screen opens the **Document Selection** screen.

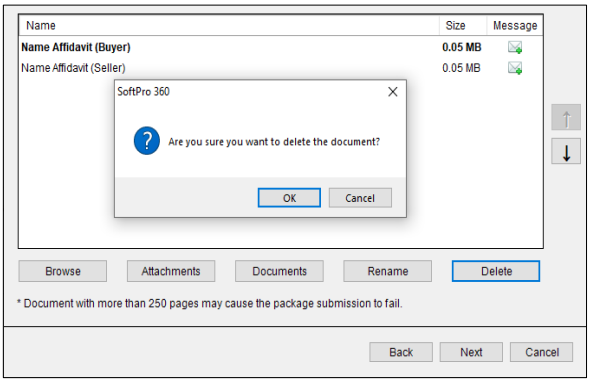
- **Browse** opens your desktop browser. Double-clicking a selected document adds it to the Documents grid.

- **Attachments** opens:
  - Smartview folder tree and documents list for Select/smartview users,
  - Attachments folder tree and documents list for Select users, and
  - Attachments documents list for Classic users.
- **Documents** opens the SmartView folder for Impact users.
- ↑ ↓ allows you to change the order of the documents as they will appear to a **Recipient.**

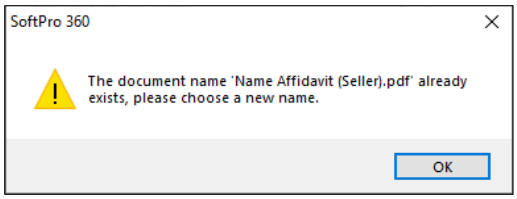


Renaming and Deleting a Document

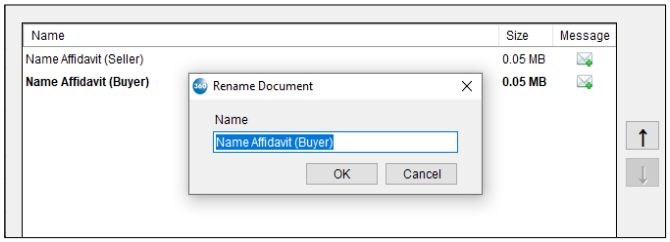
- **Rename** opens a dialogue box for you to enter a new name for the selected document.
- **Delete** removes the selected document from the package. A message box opens to confirm that you want to delete the document.



- **SoftPro Sign - eClose** requires each document to have a unique name. If you try to add a document with the same name a message displays stating same.



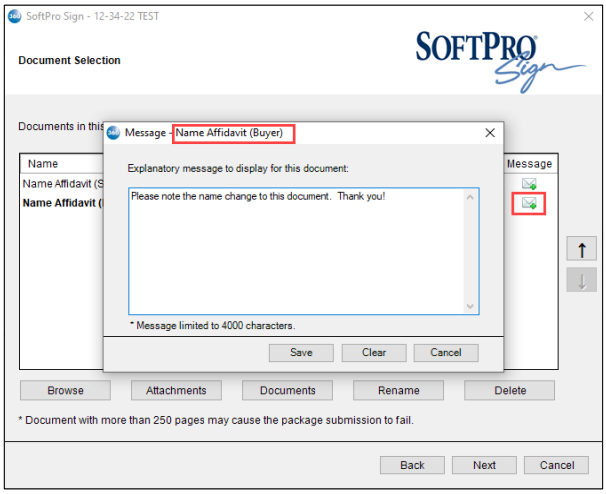
- Clicking **OK** closes the message box and opens the **Rename Document** dialogue box to allow you to change the document name and add it to the grid.



Adding a Document Message

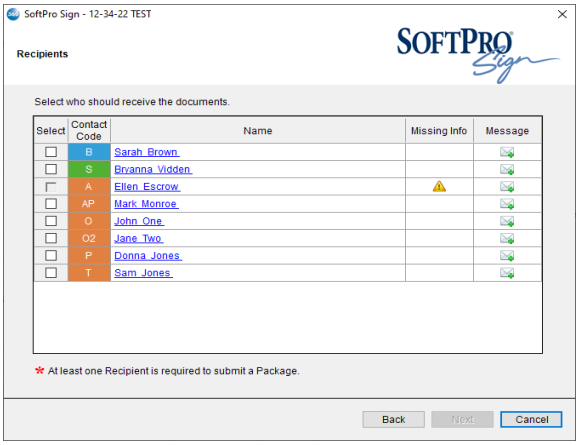
Selecting the message icon adds a message that is displayed to all **Recipients** signing the document.

See the Messages section for more information.



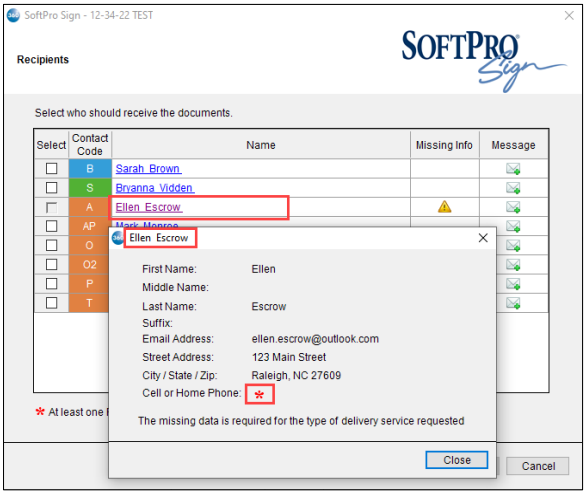
Recipients

Contacts



Selecting **Next** on the **Documents Selection** screen opens the **Recipients** screen which displays the names of the individual Buyer/Borrowers and Sellers, the Corporate officers/signees for Organization Buyer/Borrowers and Sellers, and the People for all other Contacts in the linked order.

Missing Info



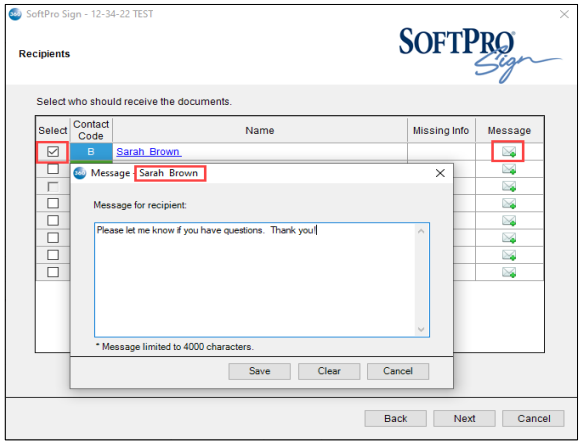
A person may not have sufficient information in the linked order to send a package. The ⚠ icon indicates that required information is missing. You will not be able to select that person as a **Recipient** for the package or add a message for that person until the required information entered in the linked order.

Clicking on the Name of a person opens an information box and identifies the missing information with an asterisk *.

All packages require **Recipient's** First Name, Last Name, Email Address (correctly formatted) and a Cell or Home Phone number.

Selecting a Recipient

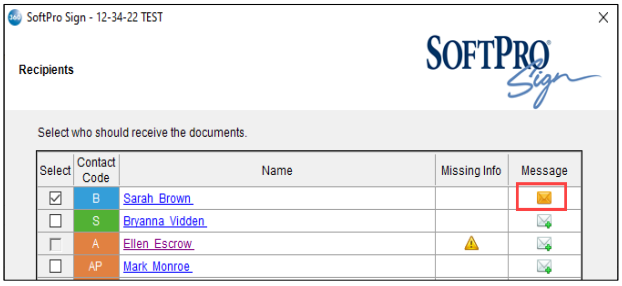
At least one Recipient is required to submit a package to **SoftPro Sign - eClose**. Selecting a Recipient enables the **Next** button.



Recipient Message

When a Recipient has been selected, the message icon is enabled, allowing you to send a message to the Recipient.

Clicking the **Save** button closes the Message box. The icon indicates that a message has been saved.



Messages

SoftPro Sign - eClose provides three levels of messaging for a package:

- Package level: viewable by all **Recipients**
- Document level: viewable by the **Recipients** signing that document
- Recipient level: viewable only by that **Recipient**

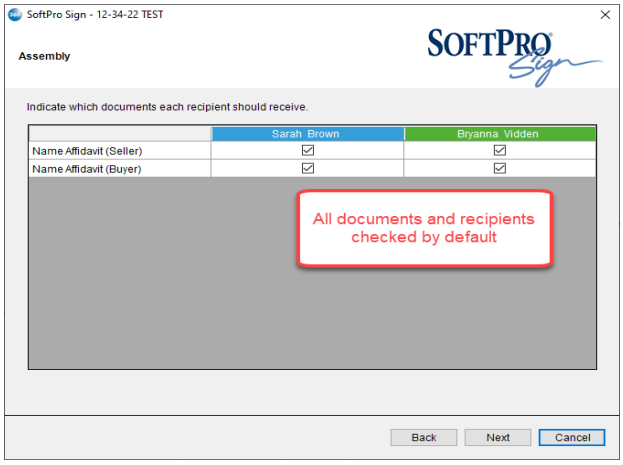
Entering a message, enables the **Save** and **Clear** buttons.

- **Save** - saves the message and closes the **Message** box. When a message has been saved the message icon changes to .
- **Clear -** deletes the entire message without the need to manually delete it.
- **Cancel** - closes the **Message** box without saving any changes.

NOTE: If a saved message is opened, changing the message enables the **Save** button, and the **Clear** button deletes the message entirely. When a previously saved message has been cleared, the **Save** button saves the empty message and the message icon returns to .

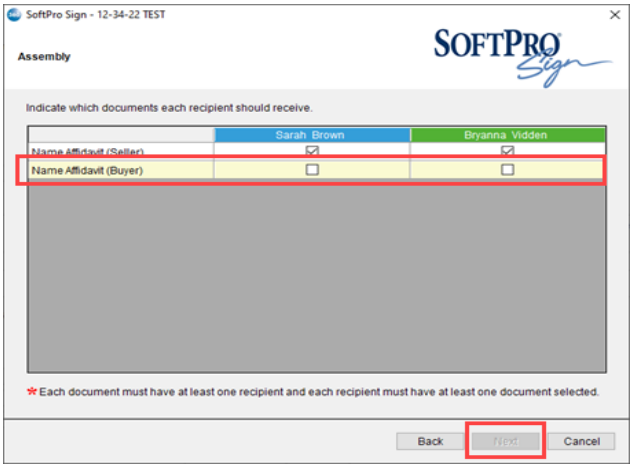
Assembly

Selecting **Next** on the **Recipients** screen opens the **Assembly** screen. This screen displays a grid with the selected **Documents** and **Recipients**.



Each document must have at least one recipient checked and each recipient must have at least one document checked.

If a recipient is not checked and at least one document checked, the **Next** button is disabled and the problem cells are highlighted.



If no **Recipients** will be viewing a document or a **Document** doesn't need to be viewed by any **Recipient,**

- Click the **Back** button to return to the Recipients screen where you can unselect the **Recipient**

-Or-

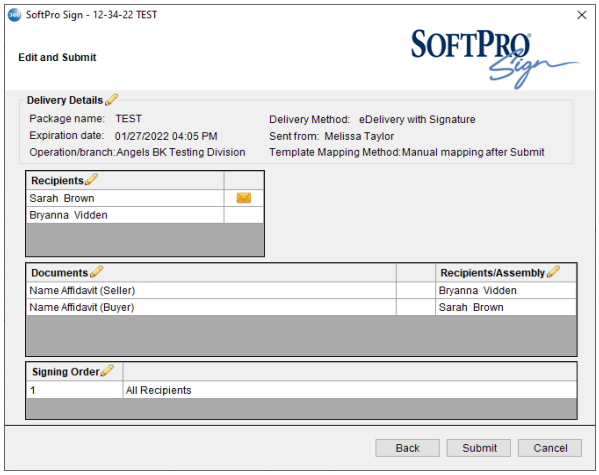
- Return to the Document Selection screen where you can delete the **Document** from the package.

Edit and Submit

Selecting the **Next** button on the **Assembly** screen, opens the **Edit and Submit** screen.

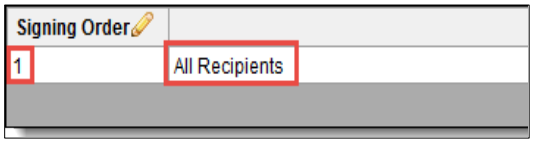
This screen displays the **Delivery Details**, **Recipients, Documents** and **Assembly** you selected. Selecting the **Edit** icon next to a heading, opens that screen where you can make changes.

Selecting **Next** through the wizard screens returns you to the **Edit and Submit** screen.



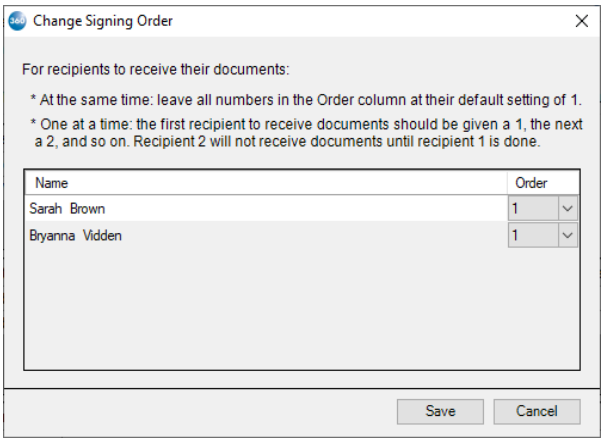
Signing Order

By default, a package to be e-signed is sent so that each signer receives notification of the e-sign package at the same time. The **Signing Order** section appears only for the **Delivery with Signature** Delivery Method.

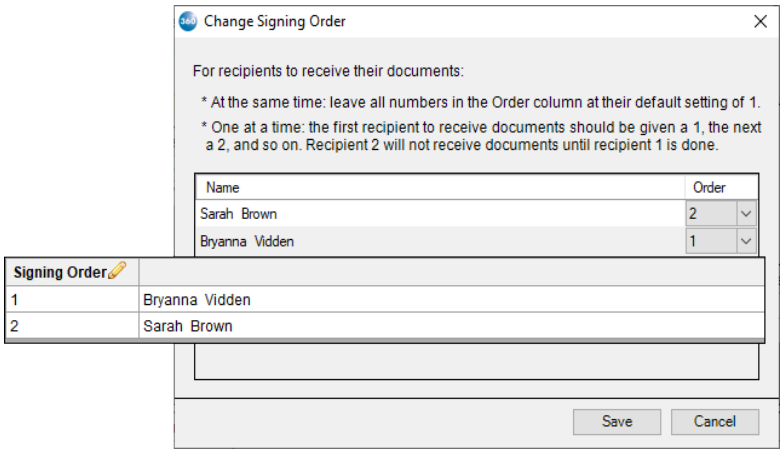


When the **Signing Order** is 1 for all **Recipients**, each signer can access and complete the e-sign process at any time, independent of whether another signer had completed his or her e-sign package.

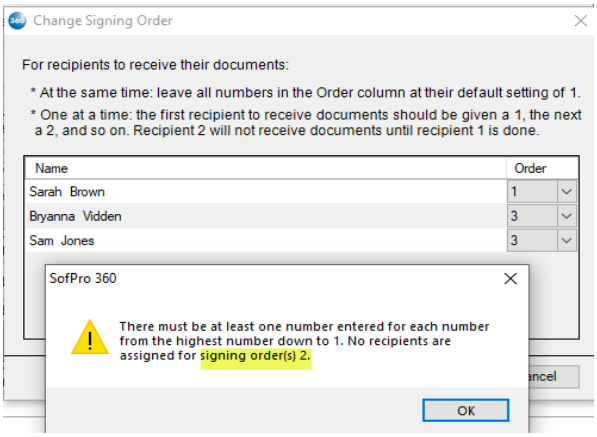
The **Signing Order** can be changed by selecting the **Edit** in the **Signing Order** section of the **Edit and Submit** screen. This opens the **Change Signing Order** screen.



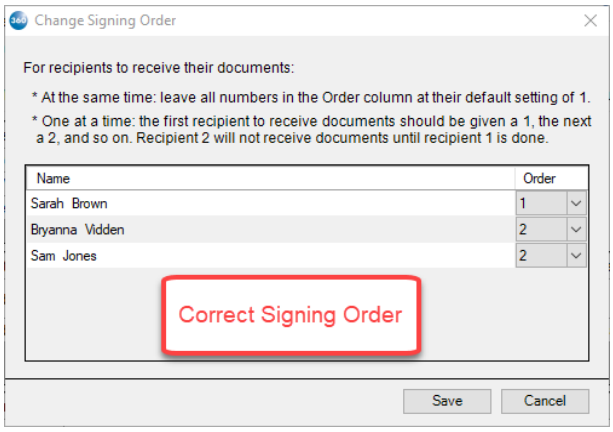
If you change the signing order using the **Order** dropdown and select **Save**, the changes appear in the **Signing Order** grid of the **Edit and Submit** screen.



At least one **Recipient** must have a signing order of 1, and there must be at least one number entered for each number from the highest number down to 1. If a signing order number is missing, when you click **Save**, a message displays identifying the missing signing order number.

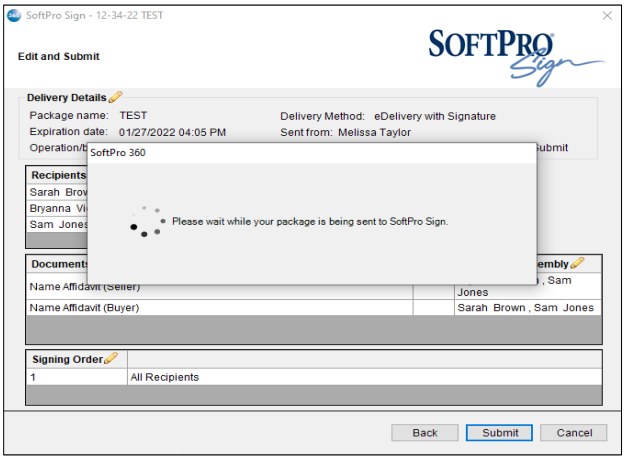


In this example, the signing order is corrected to show the second and third recipients indicating they cannot sign until the first recipient signs.



Submit

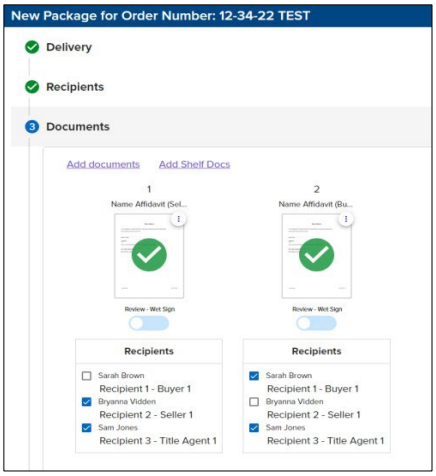
Selecting the **Submit** button sends the package to **SoftPro Sign - eClose.**



After Submission

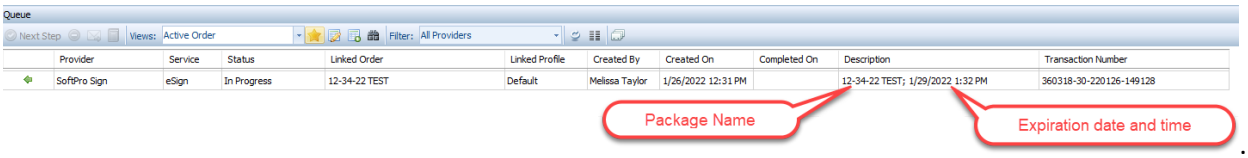
Once a package is submitted to **SoftPro Sign - eClose**, the Package Management screen opens displaying the details of the package.

If you have been re-directed to the **SoftPro Sign - eClose** website to complete the signature templating, the **Package Management** screen remains open in 360.



360 Queue

The **360 Queue** displays the transaction details. The **Description** field displays the Package Name and the Package Expiration date and time.



Transaction Status

The status field will display one of the following statuses:

- **In Progress**: A package has been submitted and is waiting to be viewed or signed by all **Recipients.**
- **Ready**: An **eSign** or **RON** package has been signed and returned.
- **Completed**:
  - For **eSign** and **RON**, the returned package has been reviewed and accepted into the linked order
- **Rejected**:
  - For **eSign** or **RON**, one of the **Recipients** has opted out of viewing the package in **Expedite™** causing the package to be rejected for all **Recipients**
  - For **eSign** or **RON** one of the Recipients has consented to view the package but has declined to esign a document
  - For any **Delivery Method**, a package fails to post successfully in **Expedite™**
  - The **Recipient** who has opted out of the e-sign process or declined to e-sign a document will is displayed in the **Transaction Log.**

- **Canceled**: The transaction has been Deleted or Recalled by a 360 user.
- **Processing**: An error has occurred. You will need to contact SoftPro support for assistance.

Toolbar features

- You can access the Package Management screen by double clicking on an **In Progress** transaction or selecting the **Next Step** button.
- You can cancel a transaction from the **360 Queue** by selecting the transaction and the clicking the **Cancel** icon.

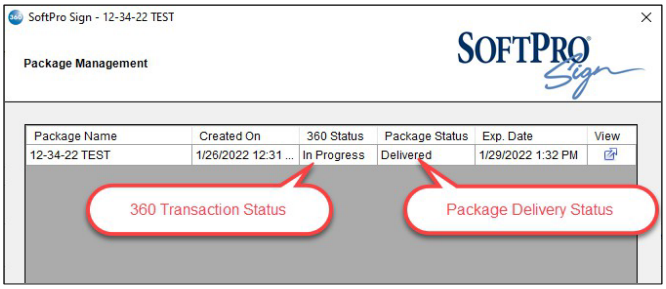
Tracking a Package

In addition to providing the transaction status for a package, 360 also provides the delivery status as reported from **SoftPro Sign - eClose**. You can track the progress of a transaction by viewing the current status in the **Package Management** screen or by viewing the history of the package's progress in its **Transaction Log**.

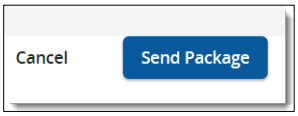
Package Management Screen

Double-click an **In Progress** transaction in the **360 Queue** or click the **Next Step** button opens the **Package Management** screen to display the **360 Status** and the **Package Status**.

SoftPro Sign - eClose updates the **Package Status** as **Recipients** access, view, sign and complete a package.



The following delivery statuses may be displayed for a package:



- **Pending**: An **eSign** package has been submitted to **Expedite™**, but the package hasn't been sent to the **Recipients** for signing. This may be because a 360 user hasn't completed the signature templating or that the signature templating has been completed, but the 360 user hasn't clicked **Send Package** in **Expedite™**.
- **Delivered**
  - **eSign**: The templates have been added and the package has been posted in **Expedite™** for delivery. If the Signing Order is 1 for all recipients, an email has been sent to all recipients with a link to start the signing process. If the Signing Order is not 1 for all recipients, then only the first **Recipients(s)** have received an email with the link to start the signing process. The remaining **Recipient(s)** will receive an email when the prior **Recipient** has completed the signing process. **Note**: If you completed the templating in **Expedite™** and sent the package for delivery, it may take a few minutes for the status message in the **Package**

Management screen to change to **Delivered** due to a delay in **Expedite™** sending the updated status message to 360.

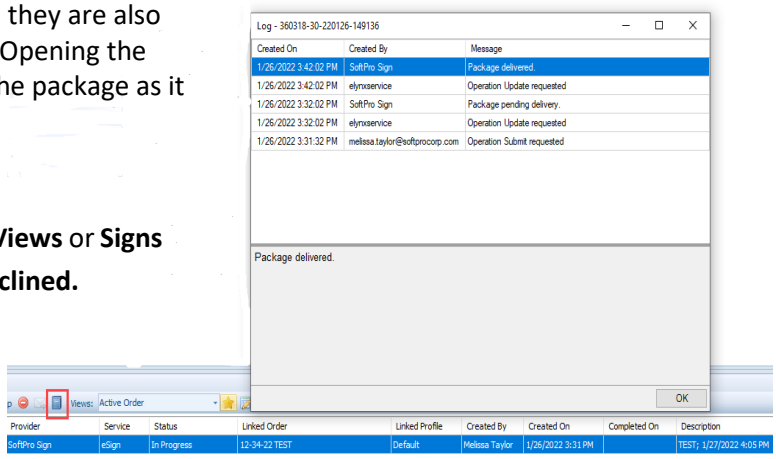
- **Viewed First**
  - A **Recipient** has viewed a document in the package.
- **All Viewed**
  - All **Recipients** have viewed all the documents in the package.

- **Signing**
  - **eSign:** At least one, but not all, of the recipients has signed the package
- **Signed**
  - **eSign:** All **Recipients** have signed the package
- **Expired**
  - **eSign**: At least one of the **Recipients** failed to complete the e-sign process before the package expiration date and time.
- **Declined**
  - **eSign**

Transaction Log

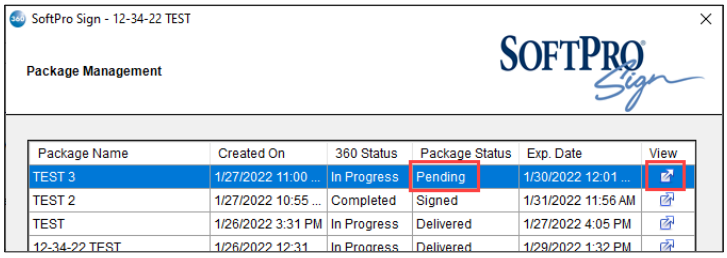
As 360 receives package status updates, they are also sent to the package's **Transaction Log**. Opening the **Transaction Log** will show a history of the package as it moves to completion.

The **Transaction Log** will display the Recipient's name when that **Recipient Views** or **Signs** the package, or when the package is **Declined.**



Viewing a Pending Package

If you have sent a package to **SoftPro Sign - eClose** but have closed out of the website without completing the signature templating, you can access the package again by clicking the **View** icon.



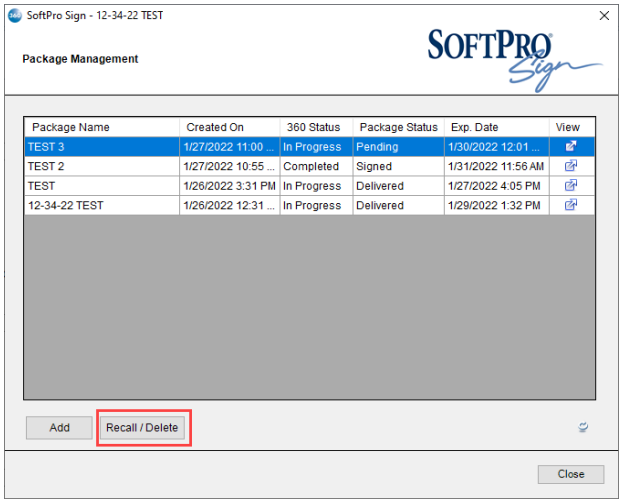
Selecting the View icon for a **Pending** package opens your default browser to the **SoftPro Sign - eClose** website page where you can continue adding signature templates to the documents.

NOTE: Viewing a package in **SoftPro Sign** after it has been posted for delivery, will be available in a future release.

Canceling a Package

There are two ways to cancel a package in **SoftPro Sign - eClose**. You can delete a pending package, or you can recall a package that has been posted for delivery to the **Recipients**. 360 handles this with the **Recall/Delete** button on the **Package Management** screen.

The **Recall/Delete** button is disabled for a selected package if the 360 Status or Package Status makes it ineligible or if the Operation/branch configuration in **SoftPro Sign - eClose** does not permit packages to be recalled.



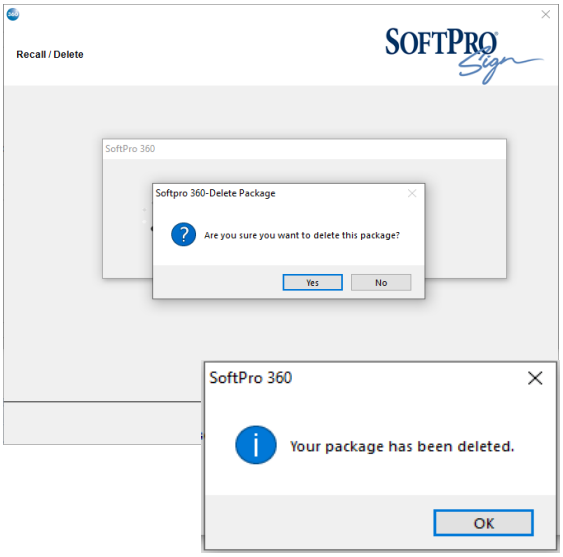
Deleting a Pending Package

When you select a Pending Package and the **Delete** icon or the **Recall/Delete** button, 360 will display a confirming message.

Selecting,

- **Yes** deletes the package and a message displays stating same
- **No** closes the **Recall/Delete** screen

Deleting a pending package deletes the package completely from Transaction Workspace in **SoftPro Sign - eClose**.

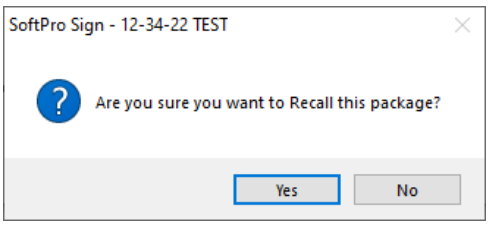


Recalling a Delivered Package

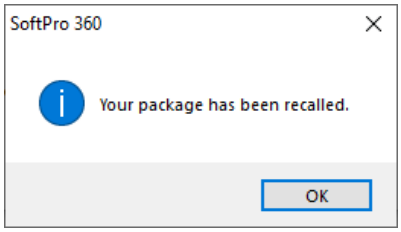
Recalling a package in 360 operates the same way as deleting a package. A package can only be recalled if it has a 360 Status of **In Progress.** It cannot be recalled if the 360 transaction status is **Rejected**, **Canceled** or **Completed**.

A package can be recalled if it has a 360 transaction status of In Progress or a Package Status as follows:	eDelivery with Signature eDelivery with Closing	eDelivery with Consent	eDelivery only
Delivered	✓	✓	✓
First View	✓	✓	✓
View All	✓	✗	✗
Declined	✓	✗	N/A
Signed	✗	N/A	N/A

When a delivered package is recalled, 360 displays a confirmation message.



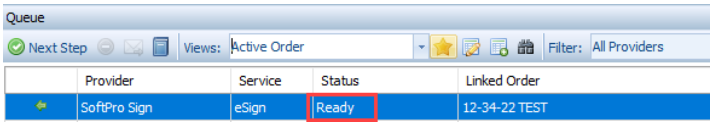
Selecting **Yes** will recall the package in **SoftPro Sign - eClose** and 360 will display this message:



Selecting **No** will close the Recall/Delete screen. In the **SoftPro Sign - eClose** website, a recalled package will still be viewable in **Transaction Workspace** but will have a **Recalled** status. In the **SoftPro Sign - eClose** website, a recalled package is still be viewable in **Transaction Workspace** but is displayed with a **Recalled** status.

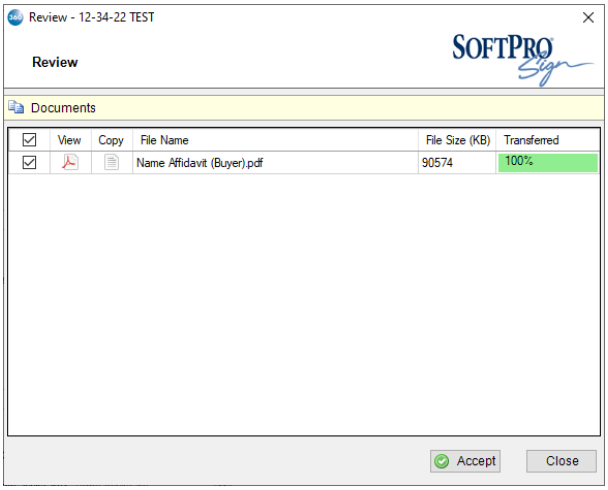
Importing a Signed Package

When a **Delivery with Signature** package has been e-signed by all **Recipients**, **SoftPro Sign - eClose** sends the documents to 360, and the transaction status in the 360 Queue changes to **Ready.**



Double-clicking on the transaction or selecting the transaction and clicking the **Next Step** button opens the **Review** screen.

- All documents are returned in .pdf format and are checked by default.
- Selecting opens the document in your default .pdf reader application.
- Selecting adds an image of the document to your clipboard.
- Selecting **Accept** adds the documents to the linked order's Attachments or, for smartview users, to the linked smartview order.

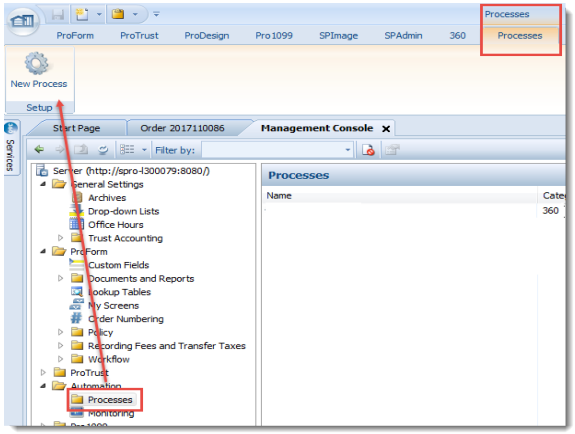


Once documents have been accepted into the linked order, the **360 Queue** displays the transaction status as **Completed** and the transaction can no longer be accessed from the **360 Queue**. However, the **Transaction Log** can still be opened to view the transaction history.

Automation

Workflow Automation is available in Select version 4.3.2 (4.2.41028.5) or higher. Automation for **SoftPro Sign - eClose** transactions can be enabled to handle e- signed packages returned to 360. Only users with **SPAdmin** access can create an automation process.

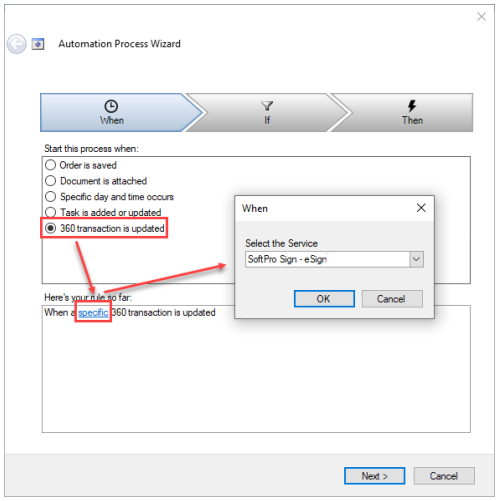
Automation processes are created in **SPAdmin** by clicking the **Processes** subfolder under **Automation** and clicking on **New Process Setup** in the **Processes** ribbon, or right clicking on the **Processes** subfolder and clicking on **New Processes.**[2]



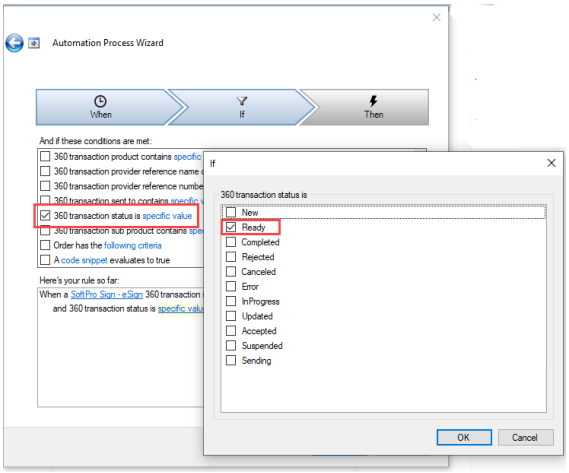
A full explanation of the **Automation** process is beyond the scope of this User Guide. For more information, access the **Processes** subfolder in the **Management Console** of **SPAdmin,** and click the **F1** key to open the online **F1 Help** guide for **Select Automation.**

To automate the acceptance of an e-signed package, set up the Process as follows:

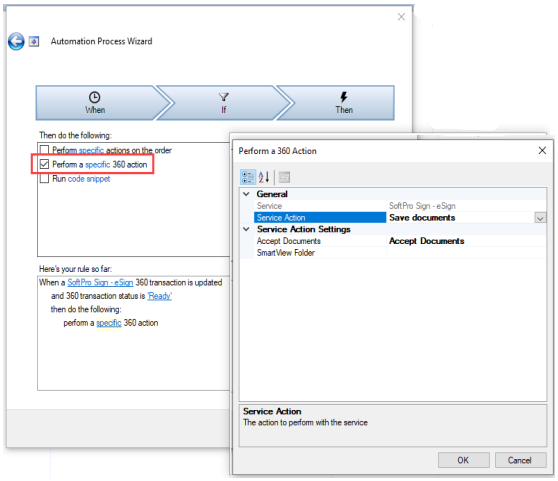
1. **When**
    a. A 360 transaction is updated
    b. And the service is **Softtpro Sign – eSign**



2. **If**
    a. The 360 transaction status is updated
    b. And the updated status is **Ready**

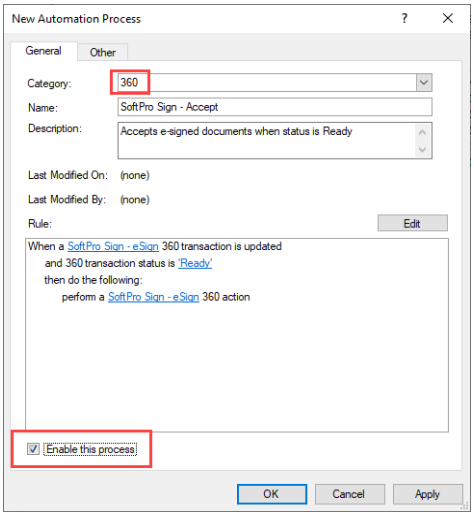


3. **Then**
    a. Perform a specific 360 action
    b. Where the **Service Action** is to **Save Documents**
    c. And the **Service Action** is **Accept Documents**



Clicking the **Finish** button closes the **Automation Process Wizard** and opens the New Automoation Process screen to configure the Process.

Select the **360 category** (optional), enter a **Name** (required), check the **Enable the Process** check box and click **OK.**



Appendix – Sample Emails

Email to Recipient: New Package

Heidis BK Testing Document Delivery Service - Electronic delivery of a package was successful for transaction 12-34-22 TEST

HB Heidis BK Testing <techsupport@bkfs.com>
To Sarah Brown

SOFTPRO Sign

Heidis BK Testing
SoftPro® Sign Document Delivery

Hello Sarah,

This email has been sent by **Heidis BK Testing** for transaction 12-34-22 TEST. You have been sent a signature package which requires your review and signature.

SIGN DOCUMENT

In order to complete the registration/login process to retrieve your documents electronically, you may receive a one-time code via your mobile phone or landline when you click on the link. By clicking on the link, you consent to receive autodialed or prerecorded calls or texts to a mobile phone or landline, for purposes of receiving one-time codes to access your account.

If the link above does not work, please copy and paste or type the address below in your browser's address bar:
https://softprosign.ctest1.expedite.bkicloudtest.com/signing/212946

If you have any questions about the contents of this package please reach out to:
Melissa Taylor
Heidis BK Testing
melissa.taylor@softprocorp.com
(919) 796-3351

This is an auto-generated message; please do not reply to this message. The Heidis BK Testing document delivery service is powered by Black Knight.

Email to Recipient: Package Expiration Warning

Heidis BK Testing Document Delivery Service - Timeframe for electronic signature is nearing expiration for transaction 12-27-22 TEST

HB Heidis BK Testing <techsupport@bkfs.com>
To Sarah Brown

SOFTPRO Sign

Heidis BK Testing
SoftPro® Sign Document Delivery

Hello Sarah,

This email has been sent by **Heidis BK Testing** document delivery service to let you know that the timeframe to electronically sign a package is nearing expiration for transaction 12-34-22 TEST.

One or more recipients have not completed the electronic signature process.

The option for recipients to sign electronically will expire in 4 Hours, after which the package will no longer be available for electronic signature.

SIGN DOCUMENT

If the link above does not work, please copy and paste or type the address below in your browser's address bar:
https://softprosign.ctest1.expedite.bkicloudtest.com/signing/208820

If you have any questions about the contents of this package please reach out to:
Melissa Taylor
Heidis BK Testing
melissa.taylor@softprocorp.com
(919) 796-3351

This is an auto-generated message; please do not reply to this message. The Heidis BK Testing document delivery service is powered by Black Knight.