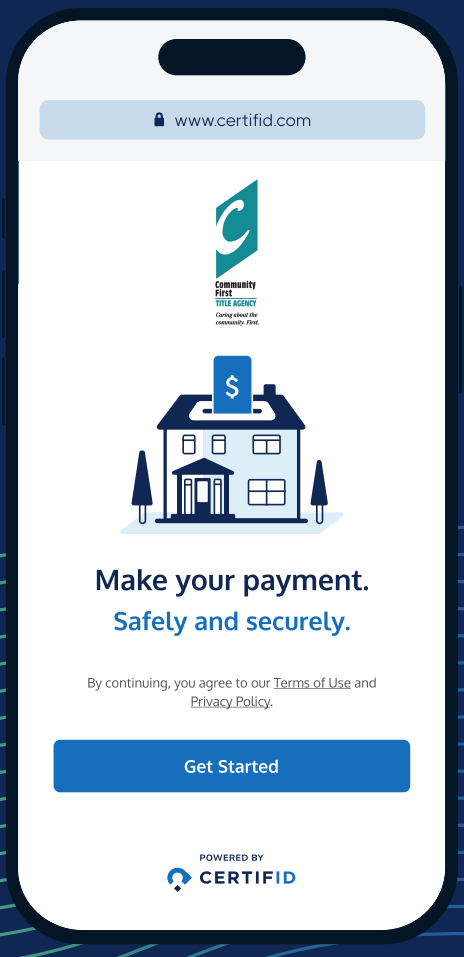
CERTIFID

CertifID Walkthrough Guide: Earnest Money Deposits

This guide shows you what your client sees throughout the CertifID process, and offers you troubleshooting solutions for certain scenarios they may run into.



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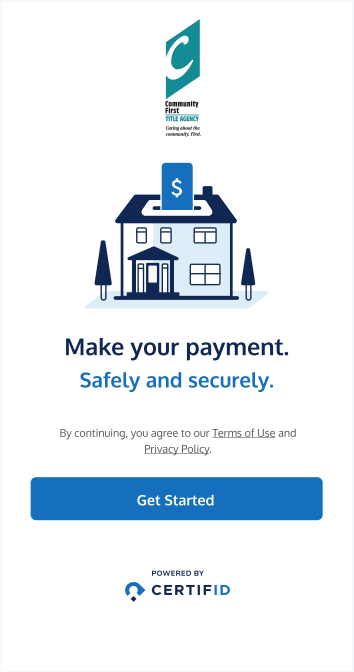
Earnest Money Deposits with CertifID

Step 1

Get started

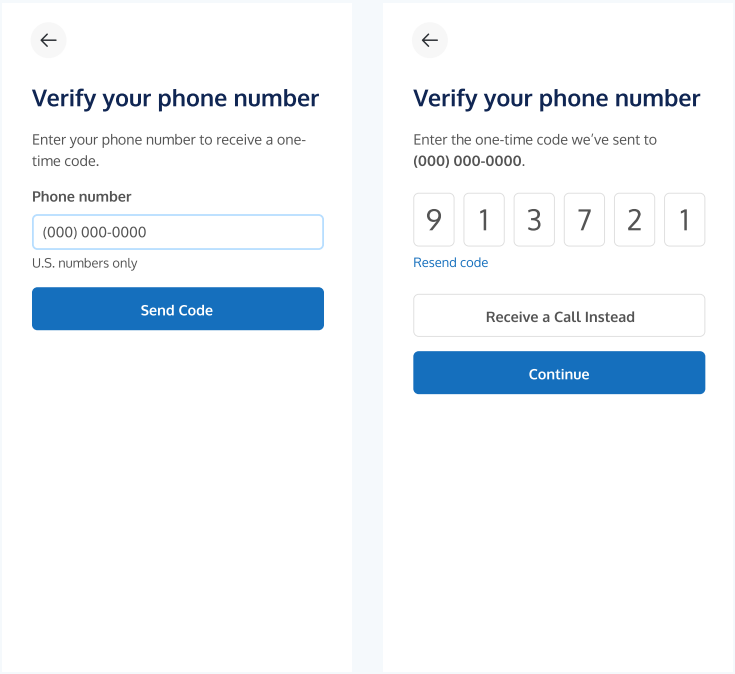
Your client will start the process by going to the URL provided. They will select the **'Get Started'** button to continue.



Step 2

Verify phone number

Your client will enter their phone number to receive the security code to validate their device. Once received, they will enter the code sent to them via phone call or text & select **'Continue'**.



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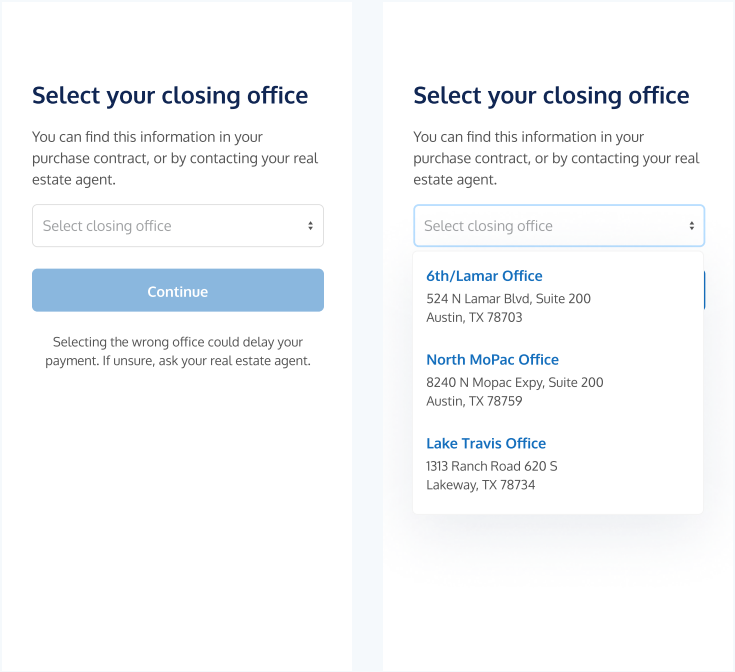
Step 3 (if applicable)

Select closing office

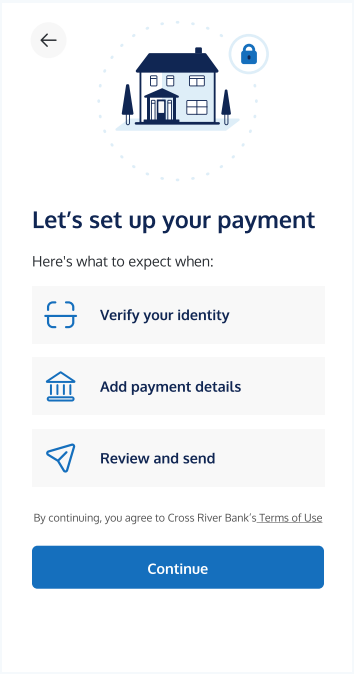
If your company has multiple closing offices, your client will select the office that is handling their closing.



Step 4

Review the overview

This is an overview of what they should expect throughout the CertifID process. Once they have reviewed these details, they will select the **'Continue'** button to continue.



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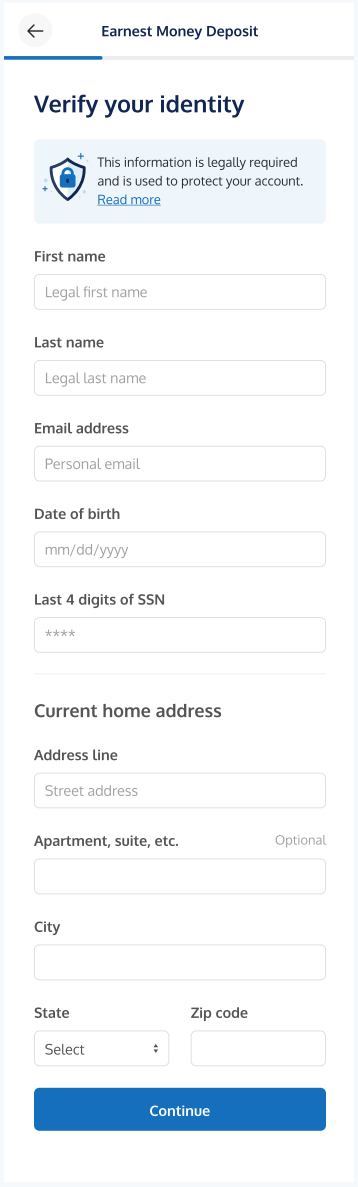
Step 5 (optional)

Verify identity

Your client will enter their personal details to validate their identity. Once they've entered all the required information, they will select **'Continue'**.



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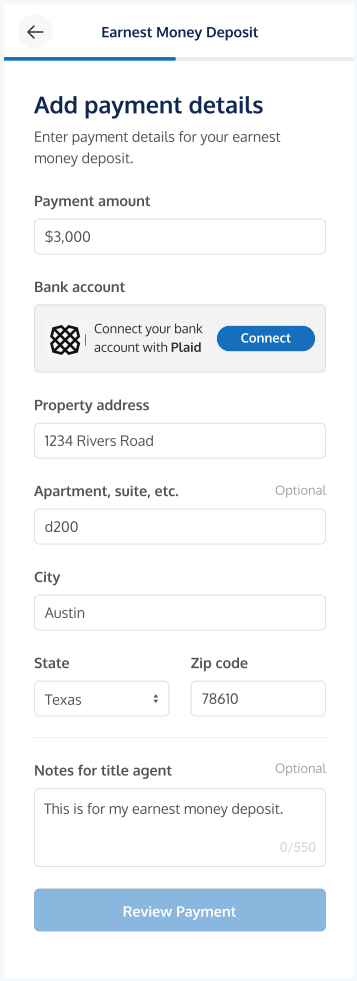
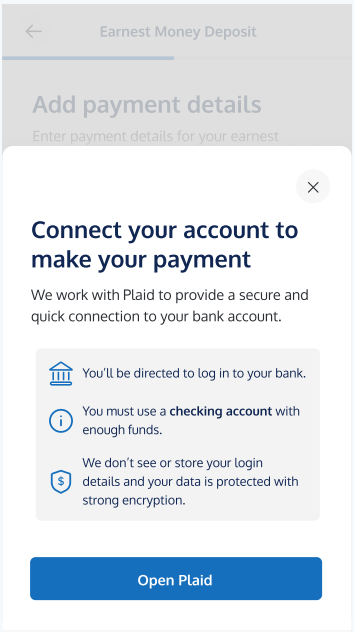
Step 6

Add payment details

Your client will fill out the add payment details page. If they would like to add any notes about their transfer they can add that in the optional notes section.

Next, they will connect their bank account with Plaid.





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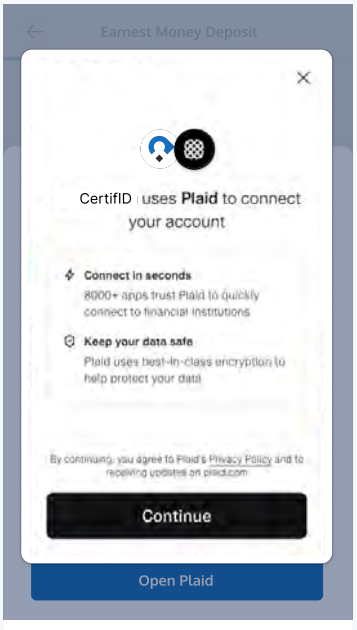
Step 7

Connect to Plaid

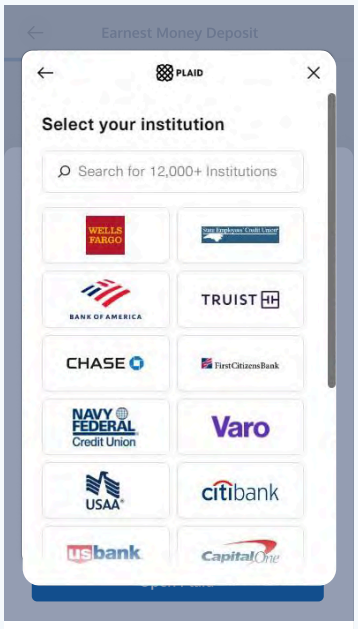
Next they will see the Plaid screen. Plaid is the most secure way to connect their bank account electronically. We do not share or store any banking credentials.



Step 8

Select a financial institution

Plaid allows us to connect to over 16,000 financial institutions. What they will see first are the most used banks on our platform. If they do not see their bank, they can click in the search bar and type in the name of the bank.



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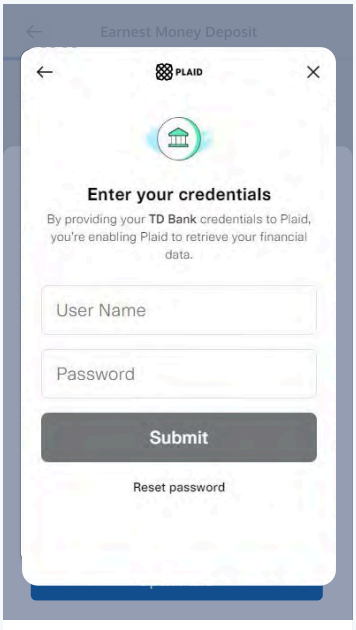
Step 9

Sign in to bank account

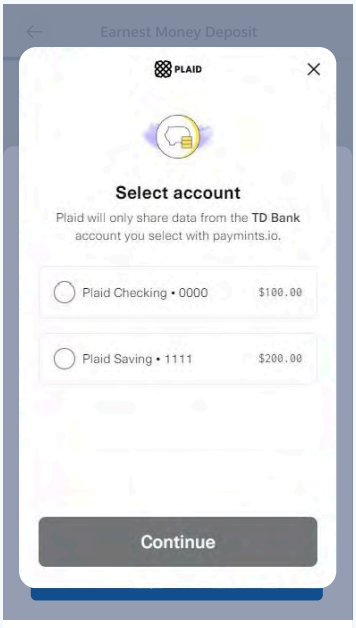
After they select their financial institution, they will need to log in to their bank using their online banking credentials. This will allow them to view all of their accounts which are eligible to make a transfer on our platform.



Step 10

Select account

Next, they will need to select the account that they would like to use to make the transfer.



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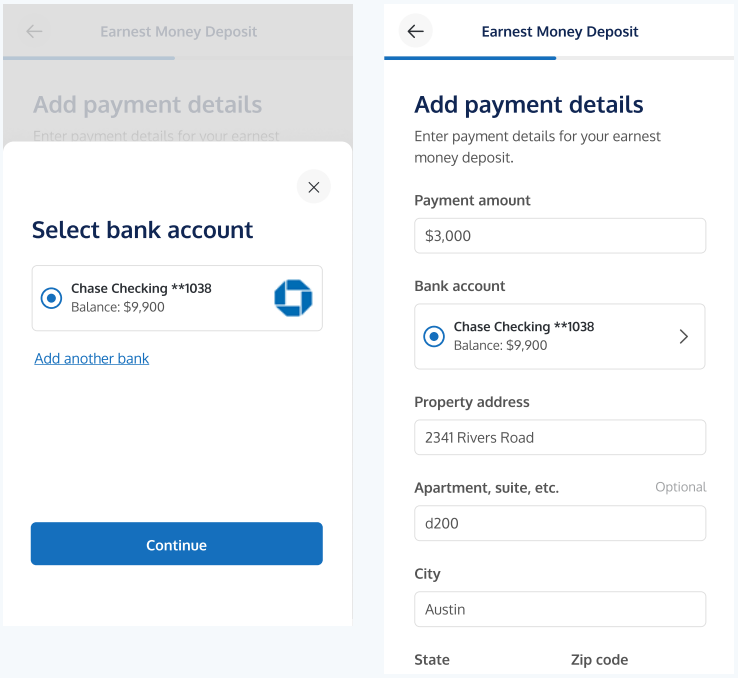
Step 11

Review account selection

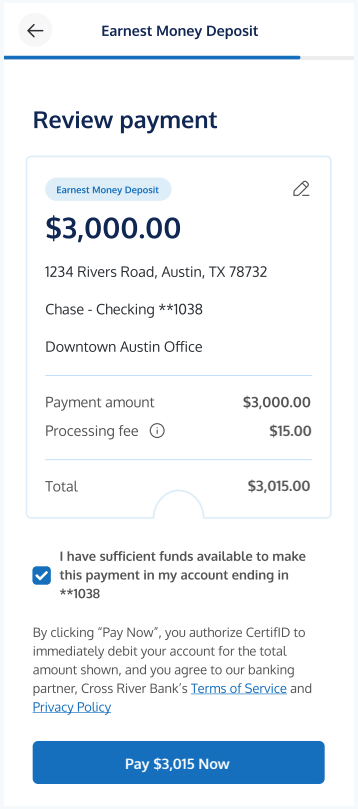
Once the account has been selected, they can select, "Continue," to move to the next step.



Step 12

Review payment

Next, they can review the payment details and if all of the information is correct they can click on “Pay Now”.



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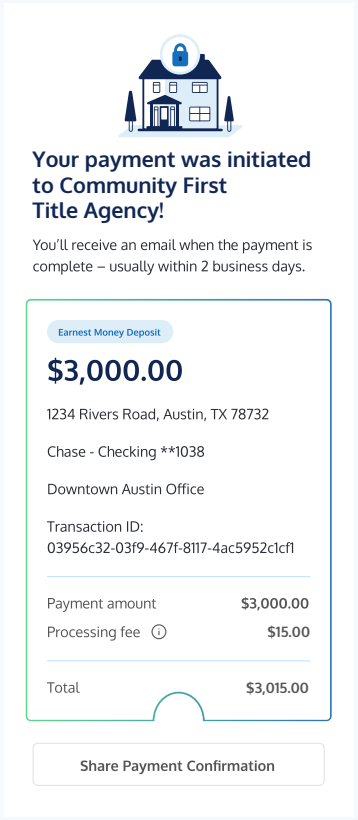
Step 13

Review account selection

Once they click on “Pay Now” both them and you as the Title Company, will receive email notifications that the transfer has been initiated.

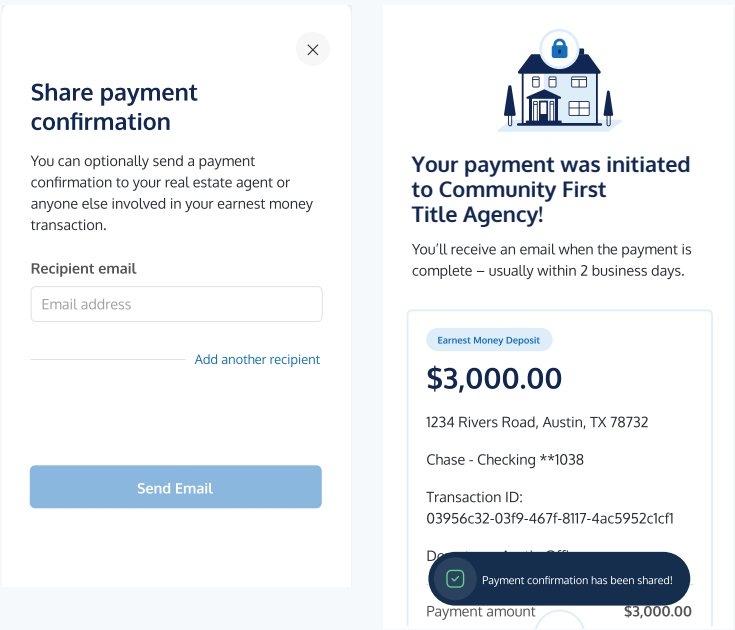
They will also receive an email notification when the transfer arrives in your account.



Step 14 (optional)

Add additional email recipients

They can also add additional email recipients if they would like to send the transfer details to anyone else involved in the closing.



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