

USER GUIDE

# Verifying Identity with Closinglock

## Step 1

Open the email you received from Closinglock, and click **Login**. This will take you to the Closinglock Portal.

Closinglock Staging: Demo Title is using Closinglock Staging to securely and easily verify your identity as part of the closing process. Login to take action: <https://portal.staging.closinglock.com/Ddl/n0nZo>

**Request for Identity Verification from Demo Title Co (via Closinglock Staging) for 4545 South Lamar Boulevard, Austin, TX, USA (file: 56-34234342 SZ)**



Today at 1:45 PM



**ClosingLock <no-reply@staging.closinglock.com>**

To: sushma+sseller06@closinglock.com; Cc: Sushma Zoellner

**CAUTION: Email Originated Outside of Closinglock**



Sushma Zoellner (sushma@closinglock.com) at **Demo Title Co** has requested you verify your identity for your real estate transaction using **Closinglock Staging**. Closinglock Staging provides a secure portal for you to verify your identity prior to any funds transferring to/from the Demo Title Co escrow account.

Here are the details for this transaction:

**Property address:** 4545 South Lamar Boulevard, Austin, TX, USA  
**File number:** 56-34234342 SZ

To get started, simply visit **Closinglock Staging**, enter your email address (if not prefilled).

This email contains authenticated login links custom for your email account. To prevent others from accessing your account, **do not forward this email or share the links.**

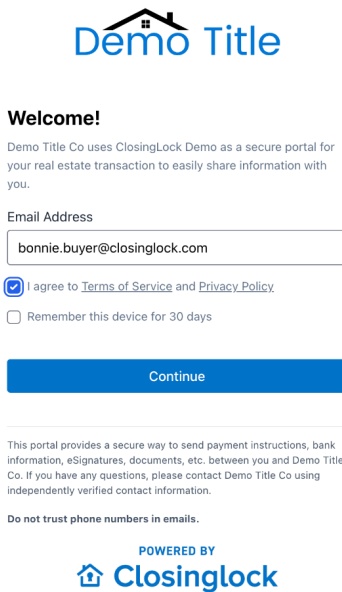
[Log In](#)

For your security, Sushma Zoellner is copied on this email. If you have any questions, please contact Demo Title Co directly.



## Step 2

Once you are in the Closinglock Portal, your email will automatically populate into the field. select **“I agree to the Terms of Services and Privacy Policy”** and click **Continue**.



**Demo Title**

**Welcome!**

Demo Title Co uses ClosingLock Demo as a secure portal for your real estate transaction to easily share information with you.

Email Address

bonnie.buyer@closinglock.com

I agree to [Terms of Service](#) and [Privacy Policy](#)

Remember this device for 30 days

**Continue**

This portal provides a secure way to send payment instructions, bank information, eSignatures, documents, etc. between you and Demo Title Co. If you have any questions, please contact Demo Title Co using independently verified contact information.

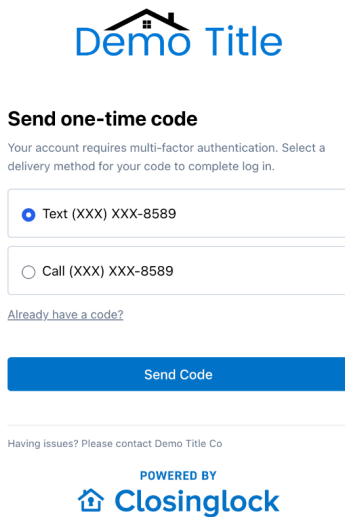
Do not trust phone numbers in emails.

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**Closinglock**



## Step 3

You will need to select a delivery method for your multi-factor authentication. This code can either be texted to your phone, or you can receive a phone call. Once you select your preferred method of delivery, click **Send Code**.

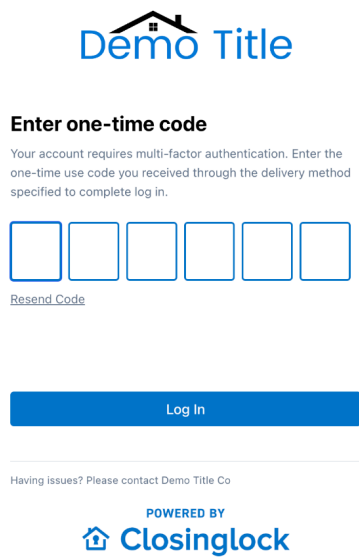



The screenshot shows a web interface for 'Demo Title'. At the top is the 'Demo Title' logo. Below it is the heading 'Send one-time code' followed by the instruction: 'Your account requires multi-factor authentication. Select a delivery method for your code to complete log in.' There are two radio button options: 'Text (XXX) XXX-8589' (which is selected) and 'Call (XXX) XXX-8589'. Below these is a link that says 'Already have a code?'. A blue button labeled 'Send Code' is positioned below the options. At the bottom of the form area, there is a link: 'Having issues? Please contact Demo Title Co'. Below the form is the text 'POWERED BY' followed by the 'Closinglock' logo.



## Step 4

Once you enter the 6-digit code click **Log In**.




  
**Enter one-time code**  
Your account requires multi-factor authentication. Enter the one-time use code you received through the delivery method specified to complete log in.

[Resend Code](#)

[Log In](#)

Having issues? Please contact Demo Title Co

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 **Closinglock**



## Step 5

Once you are in the Closinglock Portal, you see your title company's branch information. To the left, you will see action items. Click on **Verify Identity** to continue.

The screenshot shows the Closinglock portal interface. At the top left is the Closinglock logo. At the top right is a user profile for 'clyde.seller+718@closinglock.com'. The main content area has a 'Good morning' greeting with a hand icon. Below this is a 'Take action' section with '0 of 2 complete' items: 'Verify Identity' (Complete identity verification) and 'Send Wire Instructions' (Send bank information to receive funds). To the right, there are two information cards. The first is for the 'COMPANY', 'Demo Title Co', located in Austin, TX, with contact info (512) 580-5555 and austin\_contact@demotitle.com, accompanied by the Demo Title logo. The second is for the 'PROPERTY', '10606 Parkfield Drive, Austin, TX, USA', with file number Client\_ID\_Verification\_Test and no closing date provided, accompanied by a street view image of the property.

## Step 6

After you click the Verify Identity button, you will be directed to the Closinglock client Identity Verification tool, which is powered by Persona. Select **Get Started**, then select **the type of Government ID you will be verifying.**

< Back

### Verify your identity

Identity checks are required when transferring funds related to the closing process. Click the Get Started button to complete this quick and easy process.

Get Started

### Here's what to expect

- 01 All you need is a government issued ID
- 02 We will never ask for credit card information to complete the verification.
- 03 If you are prompted to photograph a barcode, note that your ID might have more than one. The correct barcode is typically larger with a more complex pattern.



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### Upload a photo ID

We require a photo of a government ID to verify your identity.

Choose 1 of the following options

- Driver License >
- State ID >
- Passport >

## Step 7

If you are completing the Identity Verification on a **computer**, you will then be asked to scan the QR code. If you are on mobile, then skip to Step 8.

Use your phone

×

### Scan this code with your phone's camera

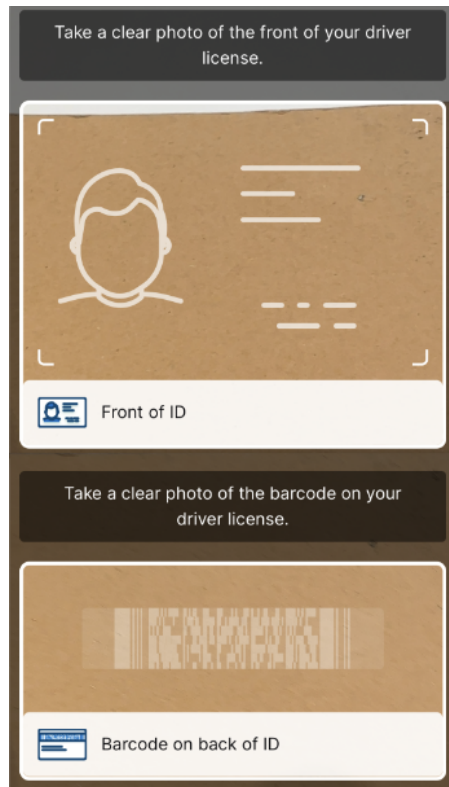
Use the QR code to complete this  
verification on your mobile device.





## Step 8

Take a clear photo of the front of your ID, then take a clear photo of the barcode on the back of your ID..



## Step 9

Type your Name, Birthdate, SSN, Phone Number and Address in the fields provided.

**Just the basics** ×

Nothing fancy, just a few things to verify your identity.

**First name** **Last name**

**Birthdate**

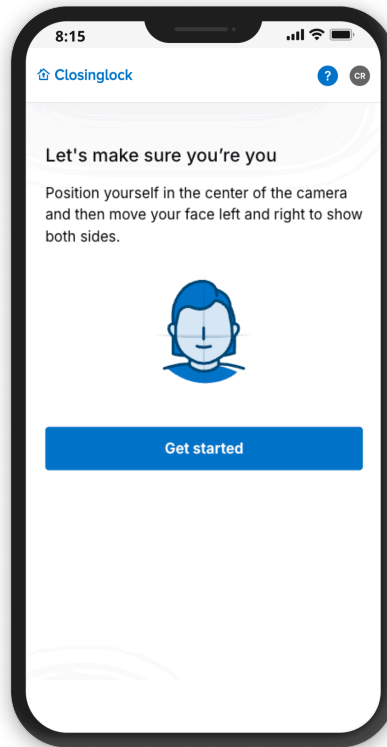
**SSN**

**Phone number**

**Address**

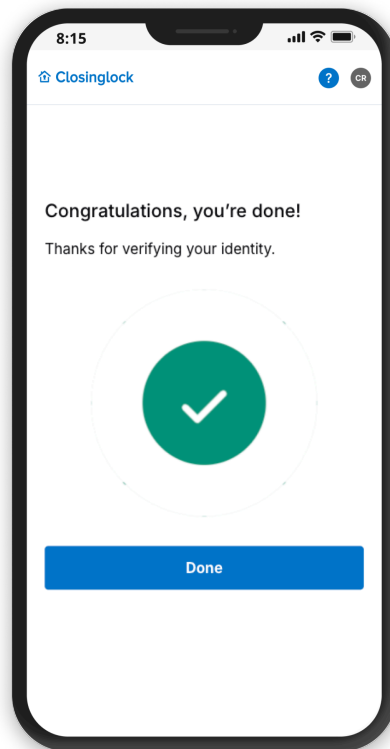
## Step 10

After entering your details, you *may* be prompted to submit a real-time photo through selfie verification. *This verification method is only for certain identity verifications to enhance security.*

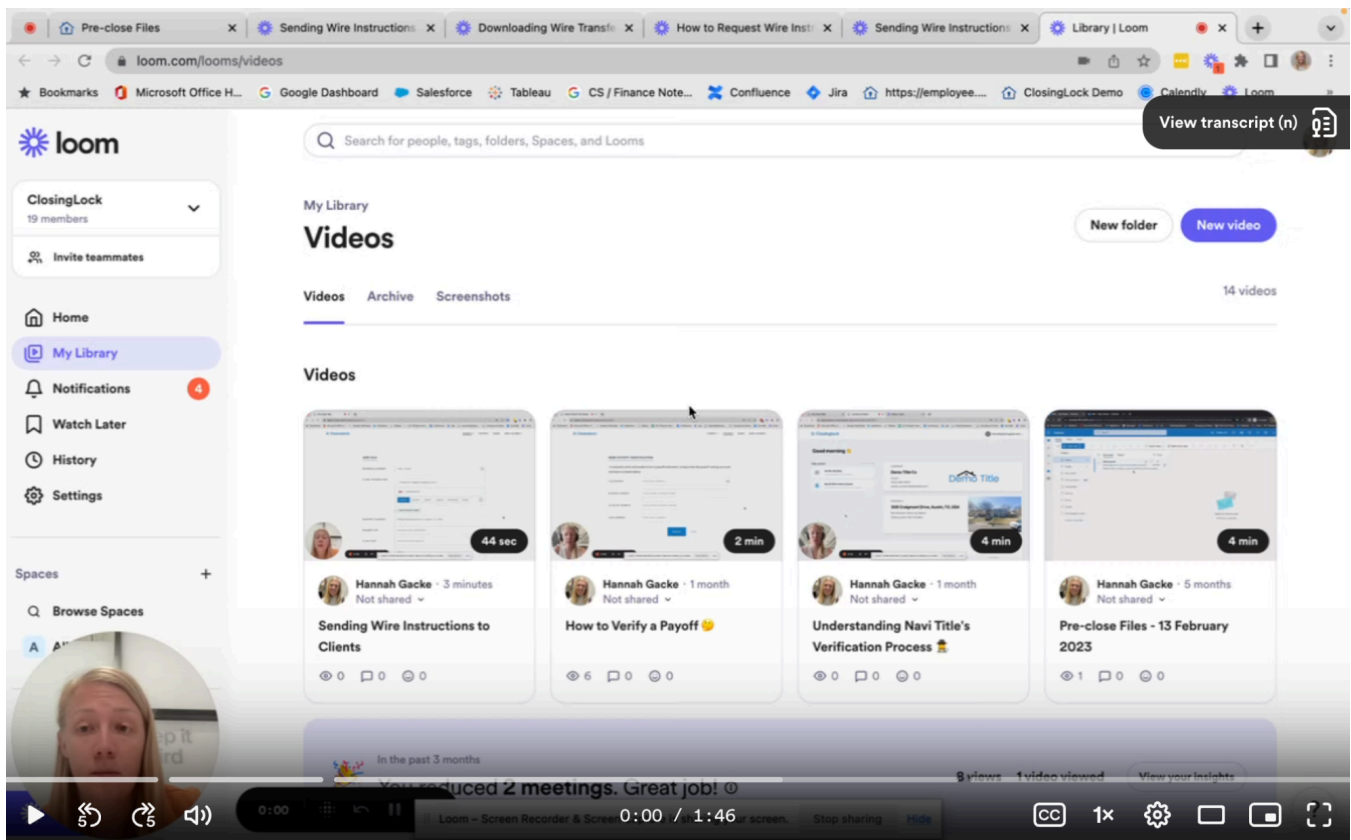


## Step 11

All set! Nicely done. If you have any questions, don't hesitate to reach out to the ClosingLock support team at [support@closinglock.com](mailto:support@closinglock.com).



## VIDEO TUTORIAL



## Verifying Identity