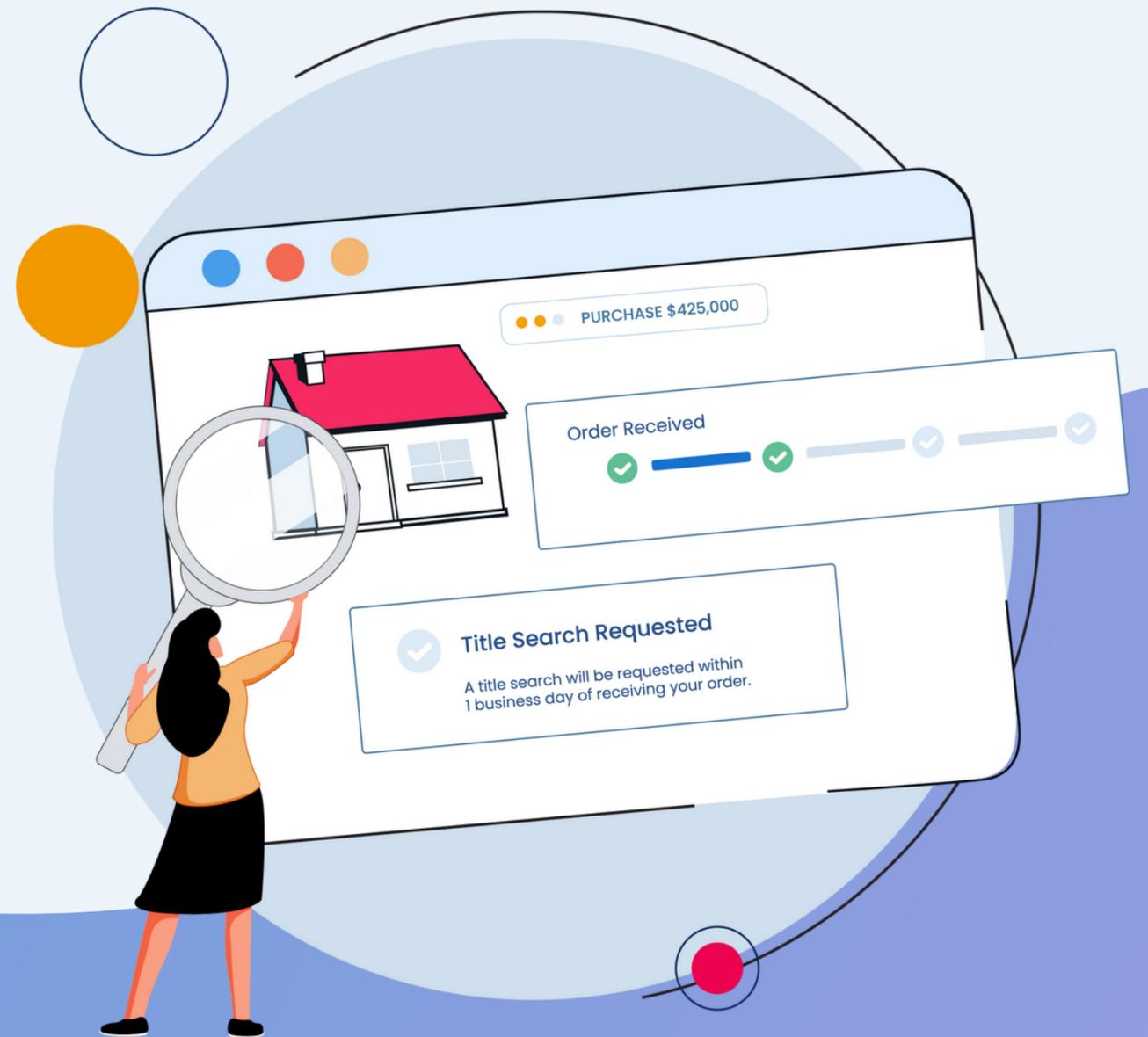




Getting Started with Blueprint

A document to guide Blueprint users through their title and closing experience





Hi there,
welcome to
Blueprint!

We're excited to be a part of your real estate closing experience. The Blueprint platform helps augment the traditional title and closing experience by providing insights into transaction milestones, alerting users to time-sensitive requests, and coordinating the closing with convenient mobile and remote signing options when available.

With this guide, you'll learn the essentials to getting started in the Blueprint platform, steps to completing your first real estate transaction with us, and tips for keeping your transaction on track.

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Logging into Blueprint

After you have been invited to Blueprint, you'll receive an email prompting you to create your password.



Welcome to Blueprint Title. Please create your password

You'll be directed to login next!

Password

Submit Password

Once you've completed this step, you'll be able to log in by visiting blueprinttitle.com/ and clicking "login" or bookmark app.blueprinttitle.com/login. Next, review and agree to our Privacy Policy, Cookie Policy, Terms of Service, and Escrow Terms and Conditions to start your first transaction order. By law, Blueprint must explain our information-sharing practices, how users can "opt-out," and limit the disclosure of nonpublic personal information. When this information is updated, you'll be asked to review and agree.

Resetting Your Password

If you forget your password, you can request a reset by clicking the [“Need to Reset Your Password?”](#) link.

Sign In

EMAIL

amanda@blueprinttitle.com



PASSWORD

.....



Please login to proceed.

[Need to Reset Your Password?](#)

Sign In

By continuing, you agree to our [Terms of Service](#),
[Privacy Policy](#), and [Cookie Policy](#).

Dashboard Tour

After logging into your account, you'll land on the Transactions Dashboard. Here, you'll find a list of all your transactions with up-to-date information on each Condition, Last Completed Task, and Closing Date.

Transactions

New Transaction

CLOSING DATE

Filter by Closing Date

CONDITION

Select condition(s)

STATUS

Select status

SEARCH

Search transactions...

CONDITION ^{↑↓}	TRANSACTION	BUYER/BORROWER	SELLER	LAST COMPLETED TASK ^{↑↓}	CLOSING DATE ^{↑↓}
OFF TRACK	150 4th Avenue North, Nashville, TN 37219 Purchase Open	Client Tester	Emily Simpson	Title Search December 7th, 2022	December 9th, 2022 Friday
OFF TRACK	1234567 Main Street, Somewhere Town, FL 34230 Purchase Open	-	-	Earnest Money Deposit December 2nd, 2022	December 2nd, 2022 Friday
CLEAR TO CLOSE	21 Ruth Avenue, Newton, NC 28658 Purchase Open	Jacky Bruce + 1	Seller Tester	Seller Closing Documents November 30th, 2022	November 23rd, 2022 Wednesday
ON TRACK	1 Main Street, Miramar, FL 33025 Refinance Open	Jacky Bruce	Joshua Client	Title Commitment December 6th, 2022	December 23rd, 2022 Friday
ON TRACK	1 Main Street, Naples, FL 27455 Purchase Open	Client Tester	-	Title Search December 7th, 2022	December 23rd, 2022 Friday

Conditions

CONDITION ↑↓

OFF TRACK

OFF TRACK

CLEAR TO CLOSE

ON TRACK

ON TRACK

The Condition column on the Transactions Dashboard includes:

- On Track
- Off Track
- Clear to Close
- Closed
- Canceled
- On Hold

Each communicates the overall state of a transaction as it moves toward its closing date.

On Track signals a transaction and its milestone tasks are aligned with the projected closing date.

Off Track signals that the closing date is approaching but a required task to close is pending. If the task can't be completed before the scheduled closing, the closing date may need to be moved. To uncover why a transaction is marked as Off Track, you can navigate to the Status Tracker Milestones and explore which tasks are outstanding.

Conditions

CONDITION ↑↓

OFF TRACK

Clear-to-Close indicates that the Blueprint team has finished all tasks required to clear title and prepare the file for pre-closing.

OFF TRACK

Closed indicates that the transaction has been finalized and the title policies issued.

CLEAR TO CLOSE

Canceled marks transactions that have been canceled.

ON TRACK

On Hold displays when a party requests the Blueprint operations team to place a hold on a transaction that isn't ready for closing.

ON TRACK



TIP: To place an order on hold, remove a hold on an order, or cancel an order, create a support ticket using the in-app Support button at the bottom right hand side of your dashboard.

Last Completed Task

LAST COMPLETED TASK ↑↓

Title Search
December 7th, 2022

Earnest Money Deposit
December 2nd, 2022

Seller Closing Documents
November 30th, 2022

Title Commitment
December 6th, 2022

Title Search
December 7th, 2022

The Last Completed Task column provides additional quick details about the progress of each transaction.

Here you'll see a short description and the date of the most recently completed task, highlighting the most recent activity conducted by anyone associated with the transaction.

To get more details and see the other recently completed tasks, click on the property address of a transaction to open the Transaction Details Page.

Dashboard Alerts

 You have 1 new document request from the Blueprint Team.

[Go to Requests](#)

 You have a document that requires your signature. A delay could occur without your attention.

[Sign Document](#)

When a transaction requires action on your behalf, you'll see alert messages like this on both the main dashboard and transaction pages.

Click on the alert link to take action, like uploading, downloading, reviewing, or signing a document. If a signature is required, you'll be taken to a page to click to sign.

You can also access these documents and take action by navigating to the individual transaction and scrolling down to the Documents Section on the Transaction Details Page.

Documents

 Download All

 Upload File

NAME

UPLOADED ON

ACTIONS

View Document

 **Seller Signed Documents**
164813796616481[...].pdf

03/24/2022 at 12:06 PM



 **Seller Signing Package**
1648062923Survey - Test.pdf

03/23/2022 at 3:15 PM



Dashboard Filtering

CLOSING DATE CONDITION STATUS SEARCH

Filter by Closing Date Select condition(s) ▼ Select status ▼ 🔍 Search transactions...

When viewing the transactions overview dashboard, you have the option to filter by the Closing Date, Status (Canceled, Closed, New, On Hold, and Open), Condition (On Track, Off Track, Clear to Close, Closed, Canceled) or search by a keyword like the property address number, street name, state, or the name of an involved party or company.



TIP: Generally, when searching by a filter, less is more. Use one or two keywords first before searching by a full address. If you are searching by state, be sure to try the abbreviated version as well as the full name. The search bar will filter based on how the order was submitted.

Dashboard Filtering Options

Closing Date. Pick a day or select a range based on today, tomorrow, next 7 days, next 30 days, this month, or last month.

CLOSING DATE STATUS STATE SEARCH

Filter by Closing Date Select status Select state(s) Search transa

Select Range MONDAY, NOVEMBER 7, 2022

NOVEMBER 2022							DECEMBER 2022						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
		1	2	3	4	5					1	2	3
6	7	8	9	10	11	12	4	5	6	7	8	9	10
13	14	15	16	17	18	19	11	12	13	14	15	16	17
20	21	22	23	24	25	26	18	19	20	21	22	23	24
27	28	29	30				25	26	27	28	29	30	31

Clear Apply

Status dropdown menu.

STATUS

Select status ^

- Select All (5)
- Cancelled
- Closed
- New
- On hold
- Open

Condition dropdown menu.

CONDITION

Select condition(s) ^

- Select All (5)
- On Track
- Off Track
- Clear to Close
- Closed
- Cancelled

Filer transactions using a string of numbers or key words in the address.

CLOSING DATE STATUS STATE SEARCH

Filter by Closing Date Select status Select state(s) main | x

TRANSACTION	COMPANY	ROLE	STATE	STATUS [↑] _↓	CLOSING DATE _↓
432 Main St, Tampa, FL 34233 Refinance		Loan Processor	FL	Information Gathering (New)	August 12th, 2022 Friday

Transaction Details Page

After clicking on an individual transaction's address, you'll land on the Transaction Details Page. At the top of each Transaction Details Page, you'll see a Progress Card, Recent Documents Uploaded Alerts, Recent Tasks Completed Alerts, and a Status Tracker.

The screenshot displays the Transaction Details Page for a specific property. At the top, a blue navigation bar contains the Blueprint Title logo, a search bar with the text "Search transactions...", and navigation links for "TRANSACTIONS" and "HI, CLIENT". Below the navigation bar, a blue "Clear to Close" card shows a progress indicator with three stages: "CLEAR-TO-CLOSE", "CLOSING", and "POST-CLOSING". The card indicates a "Scheduled Closing" on "November 23rd, 2022". To the right of the card, the property address is displayed: "21 Ruth Avenue, Newton, NC 28658 Catawba County". Below the address, two alert boxes show "0 RECENT DOCUMENTS UPLOADED" and "0 RECENT TASKS COMPLETED". A status tracker below the address shows a progress bar with seven stages: "Information Gathering", "Title Clearing", "Closing Preparation", "Closing", "Recording", "Funding & Disbursement", and "Policies Issued". The "Title Clearing" stage is currently active. Below the status tracker, three detailed task cards are visible: "Title Search Received" (completed), "Title Commitment" (in progress), and "Requirements for Clear Title" (in progress).

Clear to Close
Scheduled Closing
November 23rd, 2022

● CLEAR-TO-CLOSE ● CLOSING ● POST-CLOSING

21 Ruth Avenue, Newton, NC 28658 Catawba County

0 RECENT DOCUMENTS UPLOADED 0 RECENT TASKS COMPLETED

Information Gathering | **Title Clearing** | Closing Preparation | Closing | Recording | Funding & Disbursement | Policies Issued

Title Search Received
The title search results were received on November 18th, 2022 and are being reviewed by our Title Team.

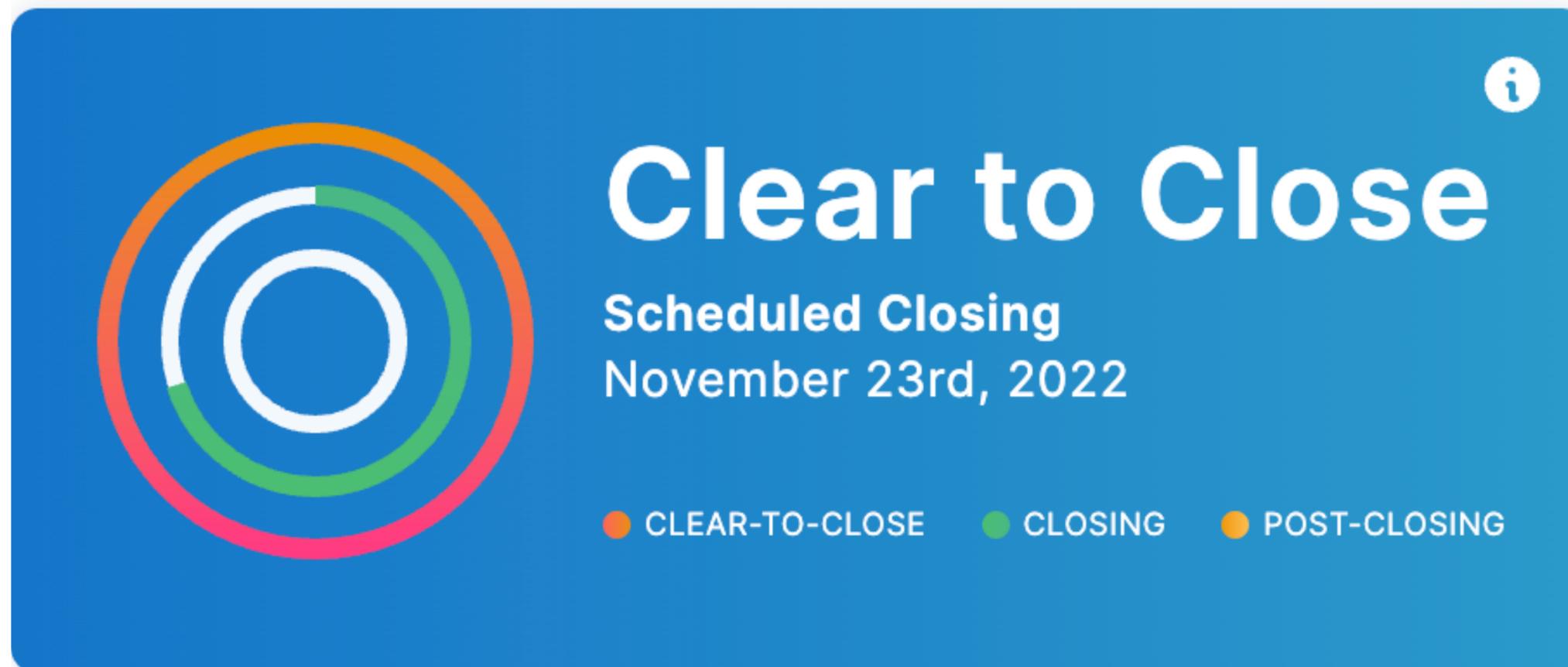
Title Commitment
Once the title search package has been received, it will be reviewed and used to prepare a Preliminary Title Opinion or Title Commitment within 1 business day of receipt.

Requirements for Clear Title
We are working on the items that must be cleared prior to the transfer of ownership and issuance of the final policy(s). [Click here for a detailed list.](#)

Progress Card

The Progress Card displays the transaction's condition, scheduled closing date, and momentum toward completing the three primary phases of a transaction.

Each phase correlates to a group of Milestone Tasks in the Status Tracker: Clear-to-Close, Closing, and Post Closing. The rings fill up as tasks in a phase are completed. The number of associated tasks and the time it takes to complete them will vary depending on each transaction's contract, title, lender, and other requirements.



← Condition

← Closing Date

← Phases

Recent Documents Uploaded

When a new document is available, you'll see the alert update to the number of pending documents requiring action or available for your review.

Click on the alert, and you'll be taken to the Documents section, where you can view, download, upload, and sign the document. One thing that Blueprint cannot change about the closing process is the number of documents needed to process a transaction. Still, we are focused on making it easy to access and review all the relevant documents in one place.

0 RECENT DOCUMENTS UPLOADED

Documents

Download All

Upload File

NAME	UPLOADED ON	ACTIONS
 Contract 1670266480EOM-F[...].SSIE---Copy.png	12/05/2022 at 1:54 PM	
 Wire Instructions 1670428967dummy.pdf	12/07/2022 at 11:02 AM	

Recent Tasks Completed

Click on Recent Tasks Completed under the property address to see which tasks were recently completed, their associated Milestone, and the date and time it was completed.

New tasks appear with a gold star next to them.

Priority tasks like Earnest Money Deposit Received, Mortgage Payoff Statement Received, and Final Settlement Statement Created are bolded to highlight their significance in the closing process or if action will be needed by a party associated with the transaction.

0 RECENT TASKS COMPLETED

Recent Tasks Completed ×

★ SELLER CLOSING DOCUMENTS FOR REVIEW	CLOSING PREPARATION	NOVEMBER 30, 2022 @ 11:28 AM
★ SELLER SIGNED DOCUMENTS	CLOSING	NOVEMBER 30, 2022 @ 11:28 AM
★ SELLER CLOSING COMPLETED	CLOSING	NOVEMBER 30, 2022 @ 11:28 AM
★ BUYER CLOSING SCHEDULED	CLOSING PREPARATION	NOVEMBER 30, 2022 @ 11:25 AM

The Status Tracker

The Status Tracker includes transaction milestones: Information Gathering, Title Clearing, Closing Preparation, Closing, Recording, Funding & Disbursement, and Policies Issued. Under each Milestone are the relevant Transaction Tasks required to complete that Milestone.

The Milestones remain consistent, while Tasks Cards below will change based on the contract, state, lender, title, and other requirements. One Milestone may be reached independently of the others, so the first milestone doesn't have to be completed before you see the progress bars move on other milestones.

The screenshot displays a 'Status Tracker' interface. At the top, a horizontal bar contains seven milestone cards: 'Information Gathering' (with a green checkmark), 'Title Clearing' (highlighted in light blue), 'Closing Preparation', 'Closing', 'Recording', 'Funding & Disbursement', and 'Policies Issued'. An orange arrow labeled 'Milestones' points to this bar. Below the milestones, three task cards are shown under the 'Title Clearing' milestone. The first card, 'Title Search Received' (with a green checkmark), states: 'The title search results were received on November 18th, 2022 and are being reviewed by our Title Team.' The second card, 'Title Commitment' (with a light blue checkmark), states: 'Once the title search package has been received, it will be reviewed and used to prepare a Preliminary Title Opinion or Title Commitment within 1 business day of receipt.' The third card, 'Requirements for Clear Title' (with a purple icon), states: 'We are working on the items that must be cleared prior to the transfer of ownership and issuance of the final policy(s). [Click here for a detailed list.](#)' An orange arrow labeled 'Transaction Tasks' points to these three cards.

Transaction Tasks

Transaction Tasks will vary depending on each transaction's requirements and may periodically update to reflect changes in those requirements. Each Task card displays an icon representing when the task is not started, pending, and completed.



A few Transaction Task cards have enhancements like hyperlinks that provide more information when you hover over the link or click. Below is a link showing when a Borrower Intake Form was requested and the name of the borrower.

A screenshot of a transaction task card. The card has a purple refresh icon on the left. The main text reads 'Borrower Intake Forms (Requested)' followed by 'Borrower intake form(s) have been requested from [1 borrower](#).' A dark blue tooltip is positioned over the link, displaying a list: '1. Jacky Bruce (Created November 30th, 2022)'. The card has a blue border and a purple-to-blue gradient bar at the bottom.

Requirements for Clear Title

Under the Title Clearing Milestone is the Requirements for Clear Title Task. Clicking the hyperlink will trigger a panel to slide from the right-hand side of your screen with a list of all completed and pending tasks.



Requirements for Clear Title

We are working on the items that must be cleared prior to the transfer of ownership and issuance of the final policy(s). [Click here for a detailed list.](#)

Requirements for Clear Title



- ✓ **Obtain Primary Mortgage Payoff:** The seller has a mortgage that has to be paid off at closing. We are reaching out to the seller's lender to obtain a payoff statement to confirm the amount owed.
- ✓ **Obtain Secondary Mortgage Payoff:** The seller has a secondary mortgage that has to be paid off at closing. We are reaching out to the seller's lender to obtain a payoff statement to confirm the amount owed.
- ✓ **The Property has a Home Owners Association:** This property is in a subdivision with a homeowner's association. We are reaching out to the homeowner's association to make sure the owner's account is current and determine if any transfer fees will be required to be paid at closing.

Documents

Under the Status Tracker is the Documents section.

Uploaded documents will have a green check mark next to them with the file upload date and actions available. Users may be able to view, upload, download, and electronically sign documents. View any document by clicking on its file name. The document will open in a new tab in your browser.

Download All

Upload File

NAME	UPLOADED ON	ACTIONS
 Seller Signed Documents 164813796616481[...]d_documents.pdf	03/24/2022 at 12:06 PM	
 Seller Signing Package 1648062923Survey - Test.pdf	03/23/2022 at 3:15 PM	
 Seller Signing Package 1648062349Survey - Test.pdf	03/23/2022 at 3:05 PM	
 Seller Signed Documents 164806309416480[...]d_documents.pdf	03/23/2022 at 3:18 PM	
 Seller Signing Package 1646165938Survey - Test.pdf	03/01/2022 at 3:18 PM	
 Seller Final Settlement Statement 1653582280Test.pdf	05/26/2022 at 12:24 PM	

Closing Appointment

Closing Appointment

Your closing appointment will be displayed here once it is scheduled.

Once your transaction has reached the Closing Milestone, you'll receive an email notification about the type of closing appointment your transaction requires. Closing appointment types include:

- Mobile Notary Signing - one of our affiliated and vetted mobile signing agents will be assigned to your closing.
- Remote Online Notarization - if available in your region and for your transaction type, you may request a remote online notarization (RON) appointment via our preferred vendor Notarize.
- eSigning - Depending on your role, you may only be required to provide an electronic signature.
- Manual Signing Types - if you elect to use your own notary or are closing in a state requiring an attorney to be present, it'll be designated a manual signing. An internal process is required to approve the use of another notary before closing. Personal notaries must be vetted before closing by providing Blueprint with credentialed documents.

[Read more about the different types of electronic closings.](#)

Closing Appointment

When the closing appointment has been set, you'll see the signing type, the parties involved in the closing, and the closing date. If another party scheduled a time and day that doesn't work for you or you need to reschedule, click "I CANNOT SIGN ON THIS DAY" at the bottom of the Closing Appointment section.

Closing Appointment

Your Closing Appointment has been confirmed. Please view the details of your appointment below.

SIGNING TYPE

eSign

ADDITIONAL PARTIES

Sam Smith (Buyer)

 Sam@mailbox.com

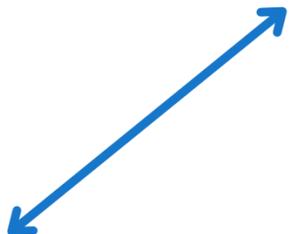
SIGNING DATE

May 27th, 2022



Any changes to the time or date of the closing appointment must be communicated with your closing team at Blueprint Title via the "Support" button at the bottom of the Portal.

[CONTINUE EDITING](#) [REJECT APPOINTMENT](#)


I CANNOT SIGN ON THIS DAY

User Settings

Click on your user name at the top right-hand corner of your screen to access your settings.

HI, AMANDA 

Settings

Sign out

Personal Settings

Here, you can update your basic user information and reset your password. For more details on advanced user settings for administrators refer to the Advanced User Settings in Blueprint section of this guide.

FIRST NAME

LAST NAME

EMAIL

PASSWORD

CONFIRM PASSWORD

Update

Communication Settings

To update when you receive email notifications about your transactions, navigate to “Communication Settings.” Toggle the on/off button to update your communication preferences. These communications will be set to “on” by default.

Please choose which notifications you would like to receive throughout the transaction process.

ON



Title Commitment Prepared

You will receive an email once the title commitment has been prepared and uploaded for the appropriate parties to review.

ON



Mortgage Payoff Statement Received

You will receive an email once the Mortgage Payoff Statement is available on the Portal.

ON



Earnest Money Deposit Received

You will receive an email once the Buyer's Earnest Money Deposit is received.

ON



Funds Disbursed

You will receive an email once all funds for this transaction have been disbursed.

ON



Policies Issued & Transaction Completed

You will receive an email once title policies are created and uploaded.

Admin User Settings

There are two user types in Blueprint:

1. Admin
2. Basic

All users have access to Personal and Communication settings, but there are more settings options for Admin users managing multiple transactions.

From the Admin view, you can see all transactions associated with your company even if you aren't added as a contact on that transaction.

Under these user settings, you'll find additional options unavailable to Basic users.

These settings options include:

- Company Settings
- Company Users
- Personal Settings
- Communication Settings
- Consent Forms
- API

Company Settings

Under Company Settings, address details can be edited, but company name can't.

Settings

I buy houses that are gross, LLC

- COMPANY SETTINGS
- COMPANY USERS
- PERSONAL SETTINGS
- COMMUNICATION SETTINGS
- CONSENT FORMS

COMPANY NAME

I buy houses that are gross, LLC

Address

ADDRESS LINE 1

123 12th Avenue North

ADDRESS LINE 2

CITY

Nashville

STATE

Tennessee

ZIP CODE

37203

Update

Company Users

Find and review all client users and their roles here. Resend the invitation to new users to allow them to create a Blueprint account and sign in. To add or remove a user, reach out to your Account Manager or create a support ticket.

Users

ROLE	SEARCH	
Select role(s) 	 Search users...	
ABC DEF abcdef@ilovegrosshouses.com	Admin	Invite User

Communication Settings

Admin users have access to the same communication preferences as Basic users.

COMPANY SETTINGS

COMPANY USERS

PERSONAL SETTINGS

COMMUNICATION SETTINGS

CONSENT FORMS

Please choose which notifications you would like to receive throughout the transaction process.

ON



Title Commitment Prepared

You will receive an email once the title commitment has been prepared and uploaded for the appropriate parties to review.

ON



Mortgage Payoff Statement Received

You will receive an email once the Mortgage Payoff Statement is available on the Portal.

ON



Earnest Money Deposit Received

You will receive an email once the Buyer's Earnest Money Deposit is received.

ON



Funds Disbursed

You will receive an email once all funds for this transaction have been disbursed.

ON



Policies Issued & Transaction Completed

You will receive an email once title policies are created and uploaded.

Personal Settings

Admin users have access to the same Personal Settings as Basic users.

FIRST NAME

LAST NAME

EMAIL

PASSWORD

CONFIRM PASSWORD

Update

Consent Forms

To view the most recent consent forms you've signed, go to the Consent Forms tab and download the documents.

COMPANY SETTINGS COMPANY USERS PERSONAL SETTINGS COMMUNICATION SETTINGS **CONSENT FORMS**

Consent Forms

NAME	VERSION	CONSENTED ON	ACTIONS
API Terms	1	October 5th, 2022	↓
Consent to do Business Electronically	1	October 5th, 2022	↓
Privacy Policy	3	October 10th, 2022	↓
Cookie Policy	2	October 10th, 2022	↓

API

If you have access to Blueprint's API, this is where you will find the tokens. To get access to our API, contact our support team or reach out to your Account Manager.

Tokens

NEW TOKEN

NAME	CREATED BY	LAST USED AT	ACTIONS
Primary API Token	Darren	-	REMOVE TOKEN
Secondary API Token	Darren	-	REMOVE TOKEN

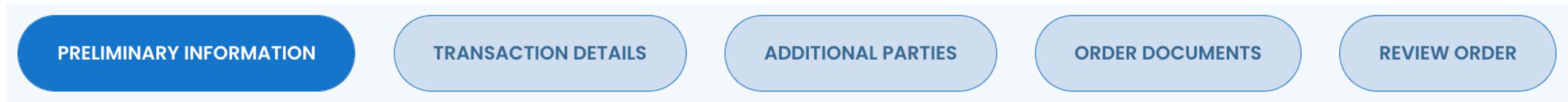
Callbacks

NEW CALLBACK

URL	CREATED BY	ACTIONS
https://webhookcallback.com/api	Darren	...

Submitting a New Transaction

To place your first transaction order, click the “Create New Transaction” button on the top right corner of your dashboard.



You'll be guided through a five-step submission process:

1. Preliminary Information
2. Transaction Details
3. Additional Parties
4. Order Documents
5. Review Order

Submitting a New Transaction: Step 1

First, enter in all the Preliminary Information which includes transaction type (purchase or refinance), purchase price, and property address. For properties without addresses, users can override the Google Maps suggestion and type in any value like a parcel identification number.

Enter Transaction Details

WHAT KIND OF TRANSACTION IS THIS? *

WHO IS THIS TRANSACTION FOR? *

Enter Property Address Information

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

ZIP CODE

COUNTY

Opening a New Transaction: Step 2

Next, provide more details about the transaction like the financing, if an assignment contract is involved, if it is a double close, your designated role, and the anticipated closing date.

Enter Transaction Details

HOW DO YOU THINK THIS TRANSACTION WILL BE FINANCED?

Cash / Not sure yet

Loan

WHAT TYPE OF TRANSACTION IS THIS?

Standard

Assignment

Double Close A-B

Double Close B-C

WHAT IS YOUR ROLE IN THE TRANSACTION?

Search... 

WHEN ARE YOU HOPING TO CLOSE?



Next Step

Opening a New Transaction: Step 3

The third step requires you to add all known parties to the transaction. Enter in as much detail as you can to keep your transaction on track.

Enter Additional Transaction Parties

Adding contact information here **greatly increases** the speed at which your transaction is opened and processed. Please consider adding the information of all parties that you know.

ROLE

Search...



FIRST NAME

LAST NAME

EMAIL

PHONE NUMBER

Add Another Party

Previous

Next Step

Opening a New Transaction: Step 4

Next, upload your purchase and sale agreement, assignment contract, and other documents relevant to the transaction.

Upload Order Documents

UPLOAD PURCHASE & SALE AGREEMENT

[↑ Upload](#)

ADDITIONAL FILES

[↑ Upload](#)

IF YOU HAVE ANY ADDITIONAL INFORMATION WE NEED TO KNOW ABOUT THIS TRANSACTION, YOU CAN LEAVE IT BELOW

[Previous](#)

[Next Step](#)

Opening a New Transaction: Step 5

Finally, review your order details and hit submit to place your order!

Your new order will be displayed on your Transactions Overview Dashboard. If you notice any mistakes or need a party removed or added to your transaction, click the “Support” button on your dashboard or email support@blueprinttitle.com.

Review the Order Details

PROPERTY ADDRESS

19028374 Main Street
Lovely Place, FL 34286

ORDER DOCUMENTS

Purchase & Sale Agreement: PurchaseAgreement.doc

Previous

Submit

Scheduling a Closing

Before a closing is scheduled, ensure all the parties required to sign are added to the transaction. Reach out to the support team if any party is missing.

The transaction will move into the Closing milestone when it is ready for closing. Our team members will review your transaction details to ensure that your transaction meets the appropriate closing type requirements. In most cases, signers will receive an email letting them choose a time and day for their closing. If you've already communicated your preferred closing time and day to our team, you'll receive an email confirming that preference with additional closing day details.

The details of the following emails will vary depending on which closing type is chosen.

Generally, follow-up emails will have your notary's contact information, instructions to prepare for the closing, and where to find answers to FAQs.



Note: If you are scheduled for a mobile loan signing or RON, please be advised that the notary professional may not answer questions that constitute legal advice or make any changes to the closing documents. If you have any questions or concerns that the notary is unable to answer, reach out to Blueprint or your attorney.



What to Bring to Your Closing Appointment

Lenders may occasionally request two forms of IDs for your closing. Be sure to check your email instructions for more information and details. Unless otherwise noted, one form of ID is sufficient.

Depending on the state, certain real estate documents may require a witness. Check the details of your follow-up emails to see if it's required.

For attorney and manual closings, please contact the attorney for more information.



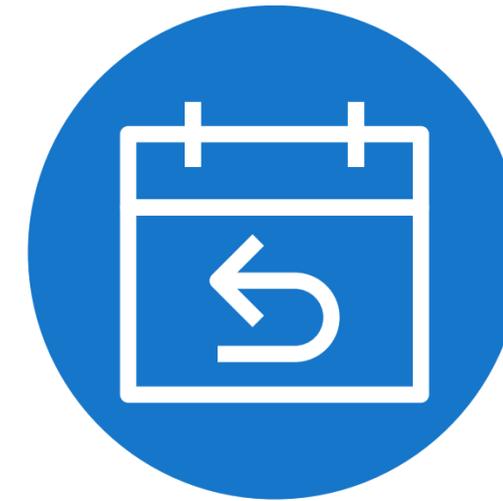
Identification

(may need 2 forms for certain transactions)



A Witness

(depending on the state and type of real estate document)



Canceling & Rescheduling Appointments

If you need to cancel or reschedule your closing appointment, click the “Support” button on the bottom right-hand corner of your dashboard. Fill out the information and provide a message with the new time and day.

Our support team will reschedule your appointment on your behalf.

Signing parties are not notified when an appointment is canceled, but they will receive a notification when a new appointment is scheduled.

Tips for Keeping Your Transaction on Track

The Status Tracker is tied into our transaction processing system. As our team or other parties associated with the transaction complete tasks within that system, the tracker is following and updating those tasks. Once all tasks are completed for a particular stage, progress will automatically update. For most stages, you will also receive email notifications when a milestone has been reached.

Still, you may have some questions about certain Transaction Tasks and how quickly your transaction will move from one milestone to the next.

To keep your transaction on track and close as quickly as possible, follow these tips:

- Provide as much information about the property as possible upfront.
- Add all parties involved in the transaction as soon as possible so each individual completes the required actions in a timely manner.
- Add all the appropriate contracts and documentation related to the transaction before submitting.
- Consult an attorney in your state if you are new to complex real estate transactions to create proper contract templates. As a neutral third party, Blueprint must abide by state laws, underwriter rules, and other regulations when coordinating closings on behalf of our clients and their counterparties. If the details of contracts or documents don't contain the required information, we won't be able to move forward until the problem is resolved. Processes may also vary from one state to another or according to our underwriter's rules. Our title and escrow team will reach out if there are any concerns or changes needed.
- Keep track of your dashboard alerts and email notifications. Missing an alert to upload, sign, or respond to another required action can cause delays.
- Encourage your buyers and sellers to complete Blueprint's information sheets as soon as possible. Learn more about Seller's Information Sheets and Buyer's Information Sheets.

Contacting Support

When is support available?

Support is available from 8 AM CST to 6 PM CST. Typically, responses are delivered within one business day. If you have questions outside of support hours, the team will respond the next business day.

How do I contact support?

Email support@blueprinttitle.com or click the “Support” button within Blueprint. Submissions sent through these two options will be replied to via email. Our system is also capable of replying to texts we receive but we cannot initiate outgoing texts.

Who provides support?

Outside of the specific people assigned to work your transaction, all operations team members are capable of answering questions about your file. If a member of your assigned transaction team is not available, anyone on Blueprint’s title and closing team will be happy to assist.