

Proof Lender Settings

How to manage users, permissions, and branding

Proof allows lender organizations to manage access, control permissions, and configure certain elements of the signing experience. These settings help ensure the right people can access transactions while maintaining appropriate oversight and security.

Most configuration is handled by an account administrator within your organization. Organization settings are typically available within the platform's administrative or organization settings area.

Adding users

Administrators can [add users to their organization](#) so team members can access transactions, review documents, or manage activity within the platform.

To add a user:

01

Navigate to your organization settings.

02

Select users.

03

Choose "Add User".

04

Enter the user's name and email address.

05

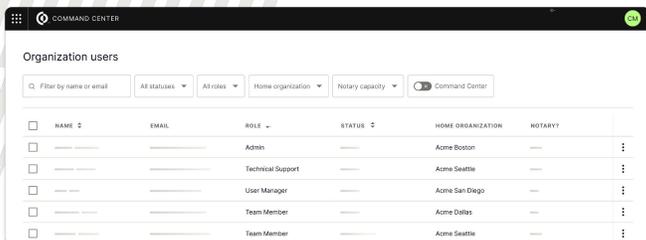
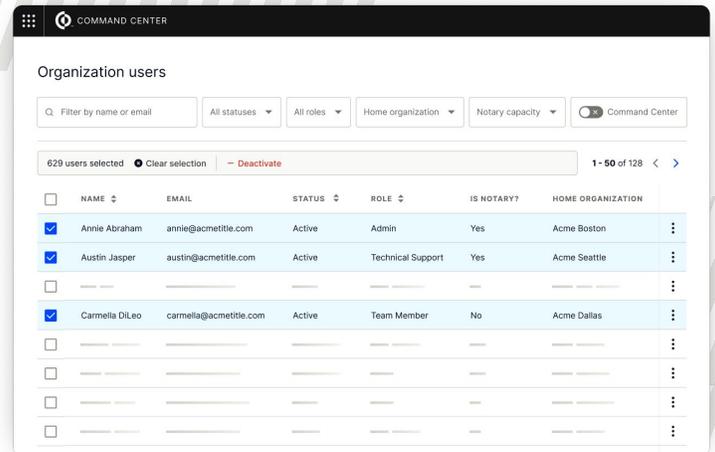
Assign the appropriate role or permissions.

06

Save the user profile.

Once added, the user will receive an email invitation to set up their account.

Adding users ensures the appropriate team members can access transactions and collaborate with title partners when needed.



User permissions

Permissions determine what each user can view or manage within the platform.

Administrators can assign roles based on a user's responsibilities. For example, some users may only need visibility into transaction status, while others may require broader access to documents or organization settings.

Adjusting permissions helps organizations:

- Maintain security and access control
- Ensure users only see relevant transactions
- Support internal oversight and compliance

If a user's responsibilities change, administrators can update permissions at any time.

Account administrators

Each organization designates one or more administrators who manage user access and account configuration. Administrators are responsible for adding users, adjusting permissions, and maintaining account settings for the organization.

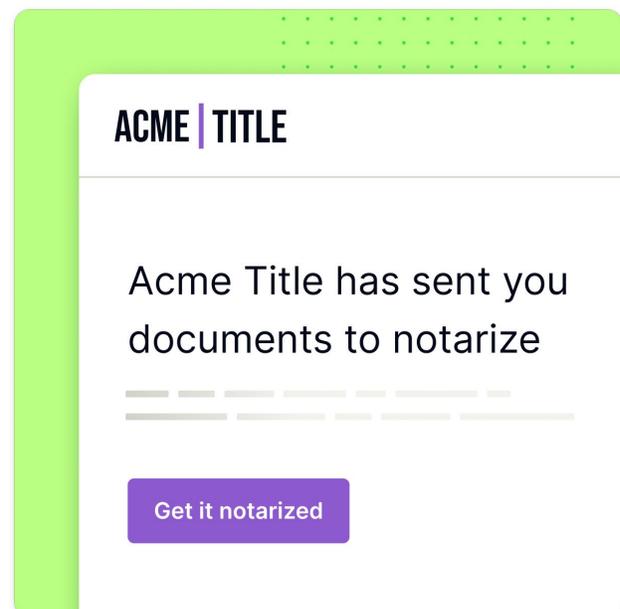
This helps ensure the right individuals can access transactions while maintaining appropriate internal oversight.

Branding

Organizations may have the option to [configure certain branding elements](#) that appear during the signing experience. This can include items such as organization name, contact information, or other identifying details associated with the transaction.

These settings help ensure borrowers recognize the organization involved in the transaction and understand who to contact if questions arise.

Branding configuration may vary depending on your organization's setup.

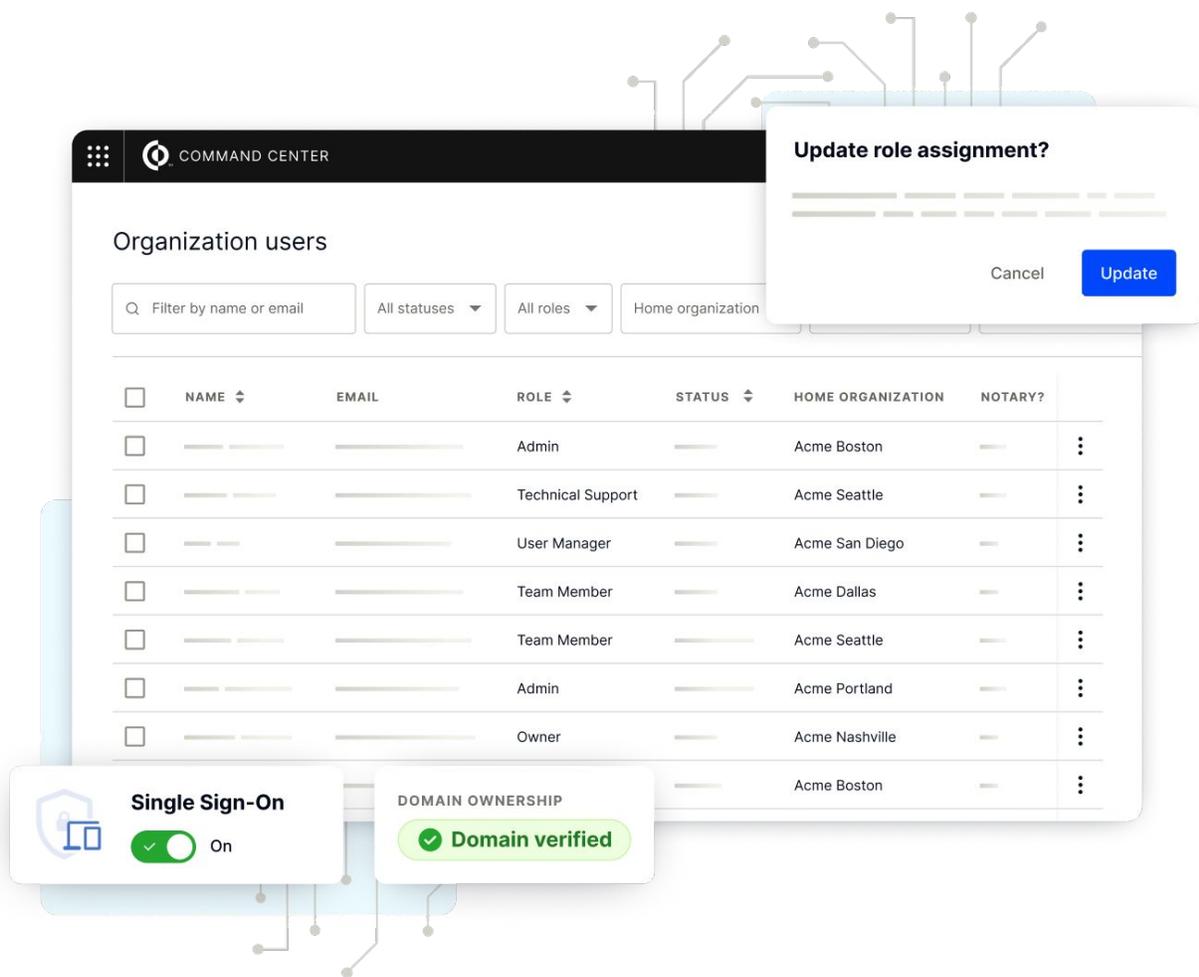


Managing your organization on the Proof platform

Managing users, permissions, and branding helps ensure the right people in your organization can access transactions while maintaining appropriate oversight and security.

By keeping account settings up to date, lenders can support smooth coordination with title partners, maintain visibility into closings, and ensure borrowers experience a consistent, trusted signing process.

For additional guidance on platform configuration or onboarding, contact your Proof support or implementation team.



About Proof

Proof connects trusted identity to high-stakes digital actions. Organizations use Proof to verify identity, authorize actions like signing and notarization, and preserve defensible records they can stand behind. Proof operates the Notarize Network, the largest on-demand network of trusted notaries available 24/7. Learn more at proof.com.