



CertifID


Walkthrough Guide: Client Transfer Instructions

This guide shows you what your client sees throughout the CertifID process when they go through paying their Earnest Money Deposit.

Step 1

Create an account

Your client will start the process by going to the URL provided. They will create an account by inputting their first name and last name and phone number.

 PINPOINT

Welcome to Pinpoint EMD Pay

First Name

Middle Name [Optional]

Last Name

Must match your driver's license or government-issued ID.

Email

Phone

☐ By clicking Create Account, you agree to CertifiD, Inc. [Terms of Service](#) and [Privacy Policy](#) as well as our partner Cross River Bank's [Terms of Service](#) and [Privacy Policy](#).


Create Account

Already registered? [Click to Login](#)

Step 2

Authenticate account

They will receive an authentication code via text.

 PINPOINT

Now all you need to do is check your phone.

A text message with a 6-digit verification code has been sent to your mobile phone.

Code

Resend Code

Submit

Step 3

Complete transfer details

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

My Account

New Payment

Bank Account

Transactions

Logout

Contact Support
support@certifid.com
(616) 818-1668

PINPOINT

Select a purpose to get started

Earnest Money Deposit

Complete your transfer details

All fields marked with an asterisk (*) are required.

Amount

* Amount

* Re-Enter Amount

Property Address & Notes

* Street Address

Unit # / Apt #

Apt #, Suite, etc.

* City

* State

* Zip

Step 4

Verify Identity

Next, they will need to input their personal information for bank compliance and verify their identity.

My Account

New Payment

Bank Account

Transactions

Logout

Contact Support
support@certifid.com
(616) 818-1668

PINPOINT

Now we need to verify your identity and you will be ready to connect your bank account.

Now we need to verify your social security number and date of birth, and then we'll be ready to connect to your bank.

Personal Information

Last 4 Digits of Social Security Number
Social Security Number

Date of Birth
mm/dd/yyyy

Email

Address Associated with Bank Account

Street Address
Street Address

Unit # / Apt #
Unit # / Apt #

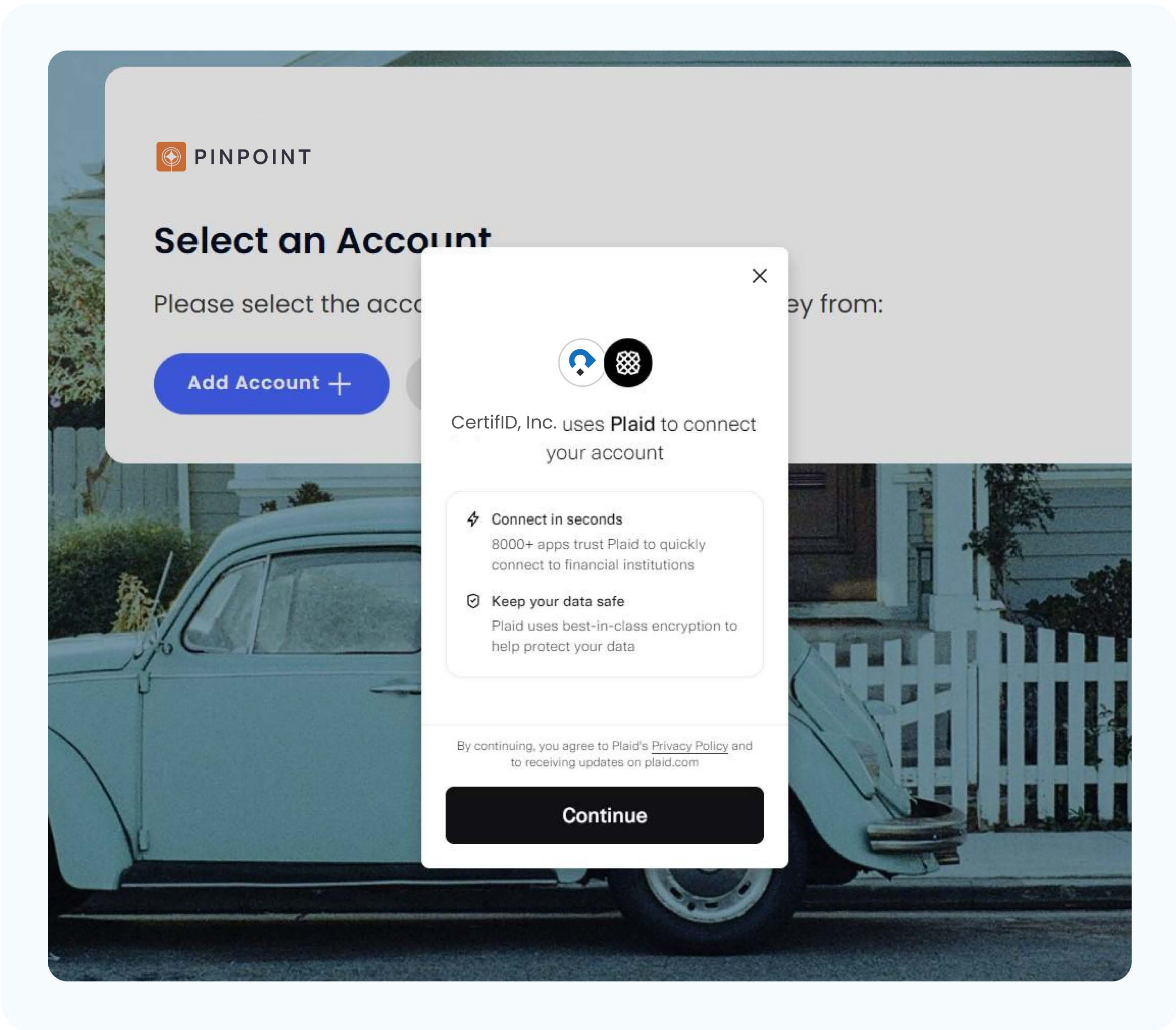
City
City

State

Step 5

Connect to Plaid

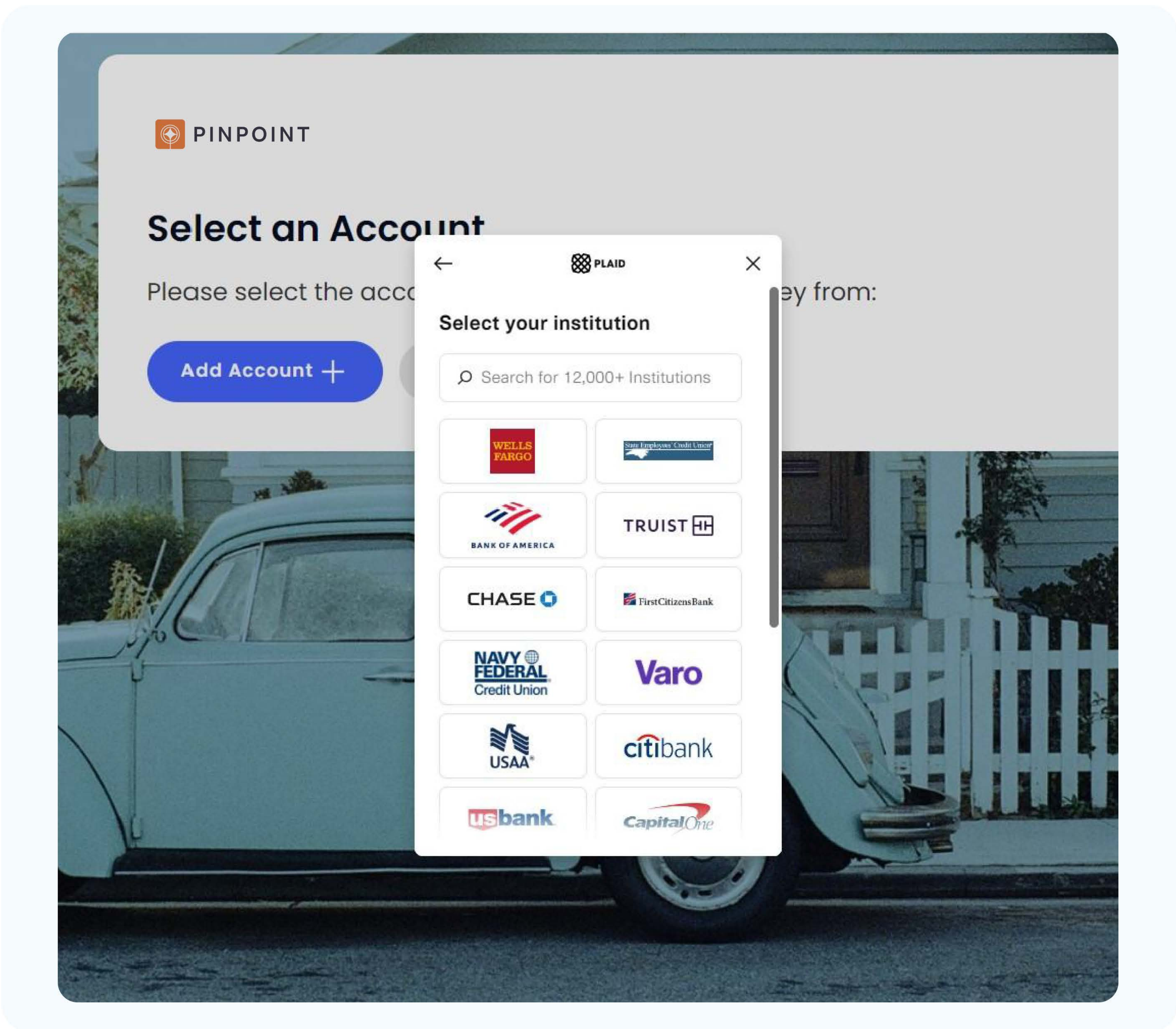
Next the will see the Plaid screen. Plaid is the most secure way to connect their bank account electronically. We do not share or store any banking credentials.



Step 6

Select a financial institution

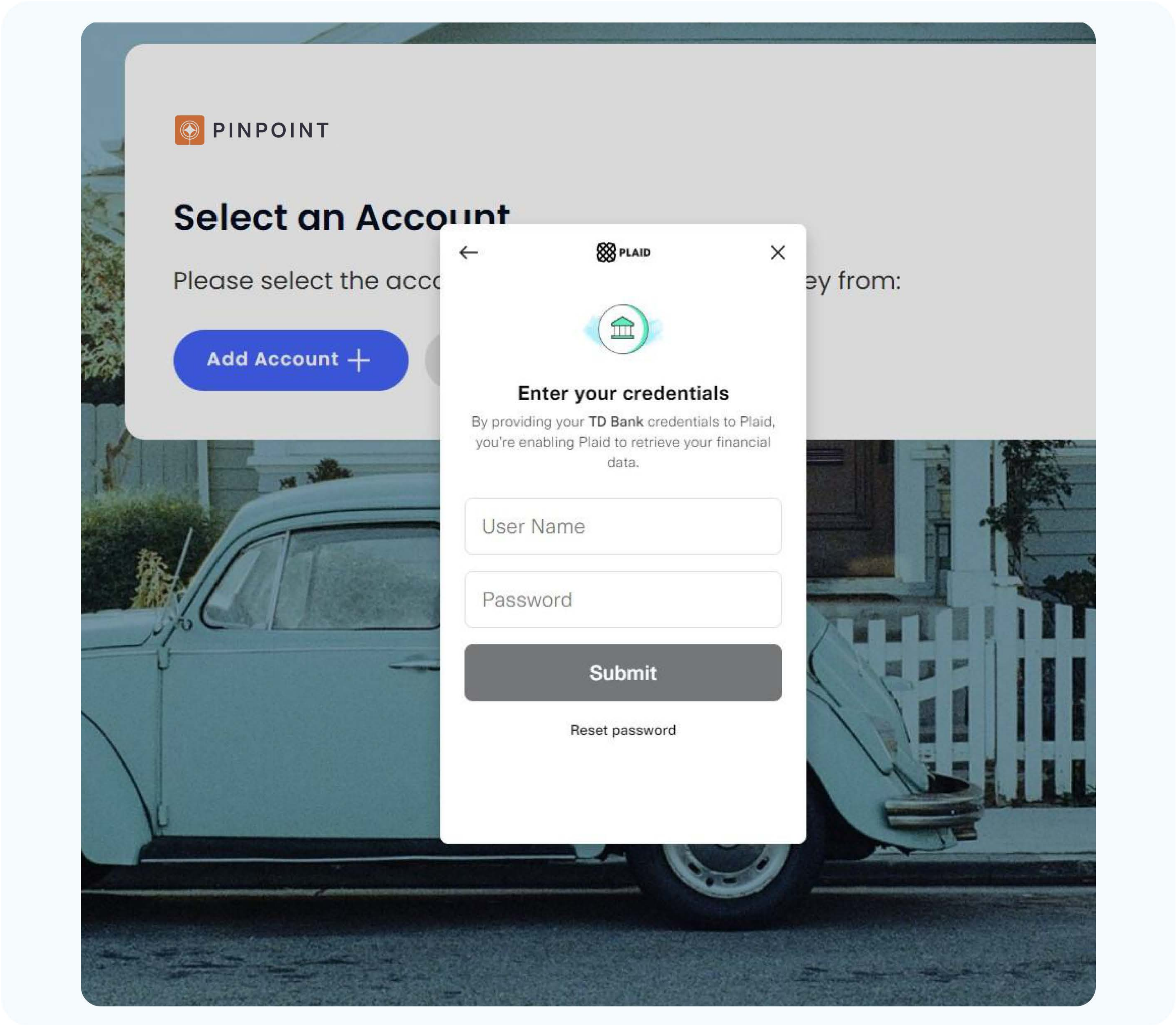
Plaid allows us to connect to over 16,000 financial institutions. What they will see first are the most banks used on our platform. If they do not see their bank, they can click in the search bar and type in the name of the bank.



Step 7

Sign in to bank account

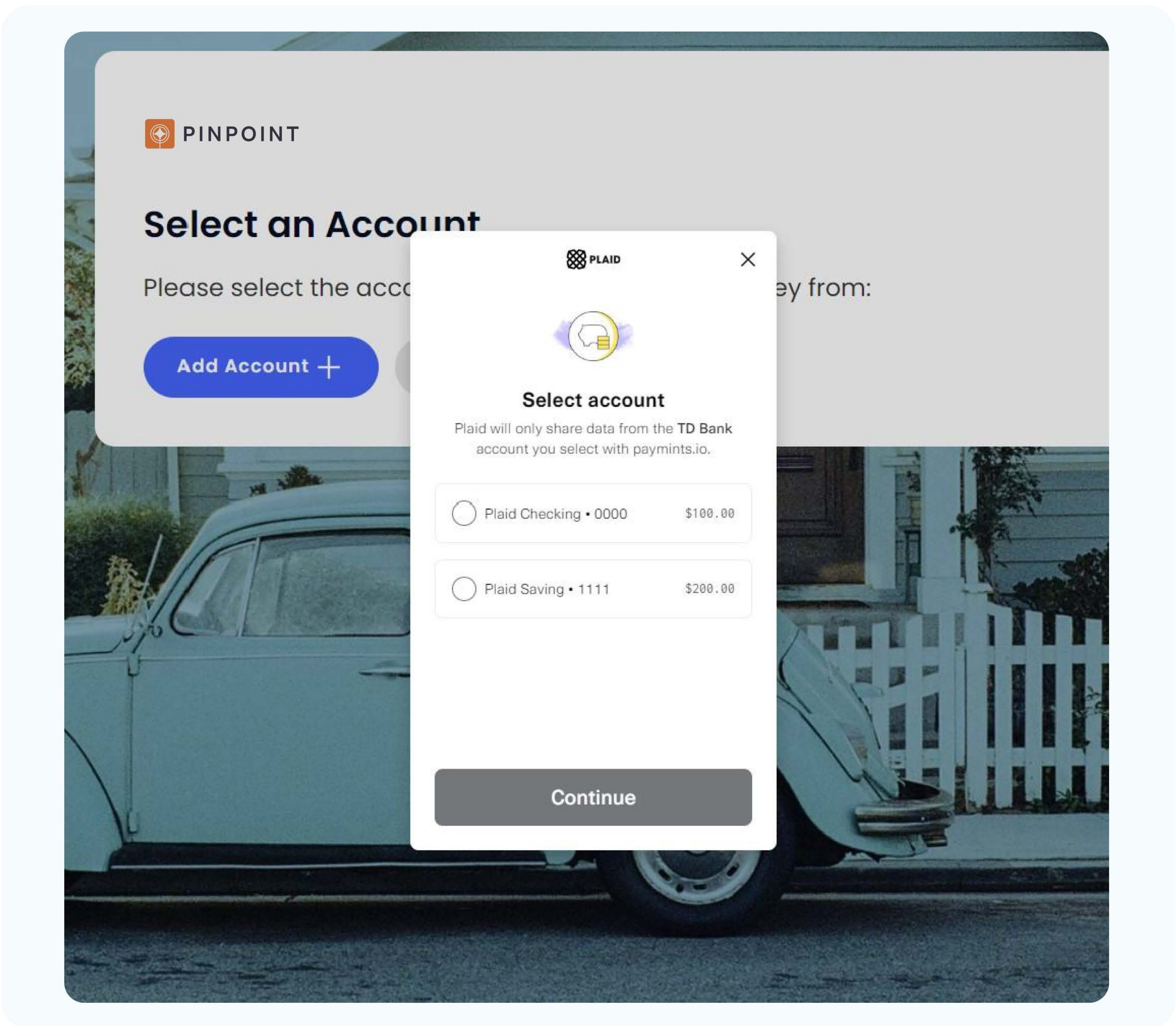
After they select their financial institution, they will need to log in to their bank using their online banking credentials. This will allow them to view all of their accounts which are eligible to make a transfer on our platform.



Step 8

Select account

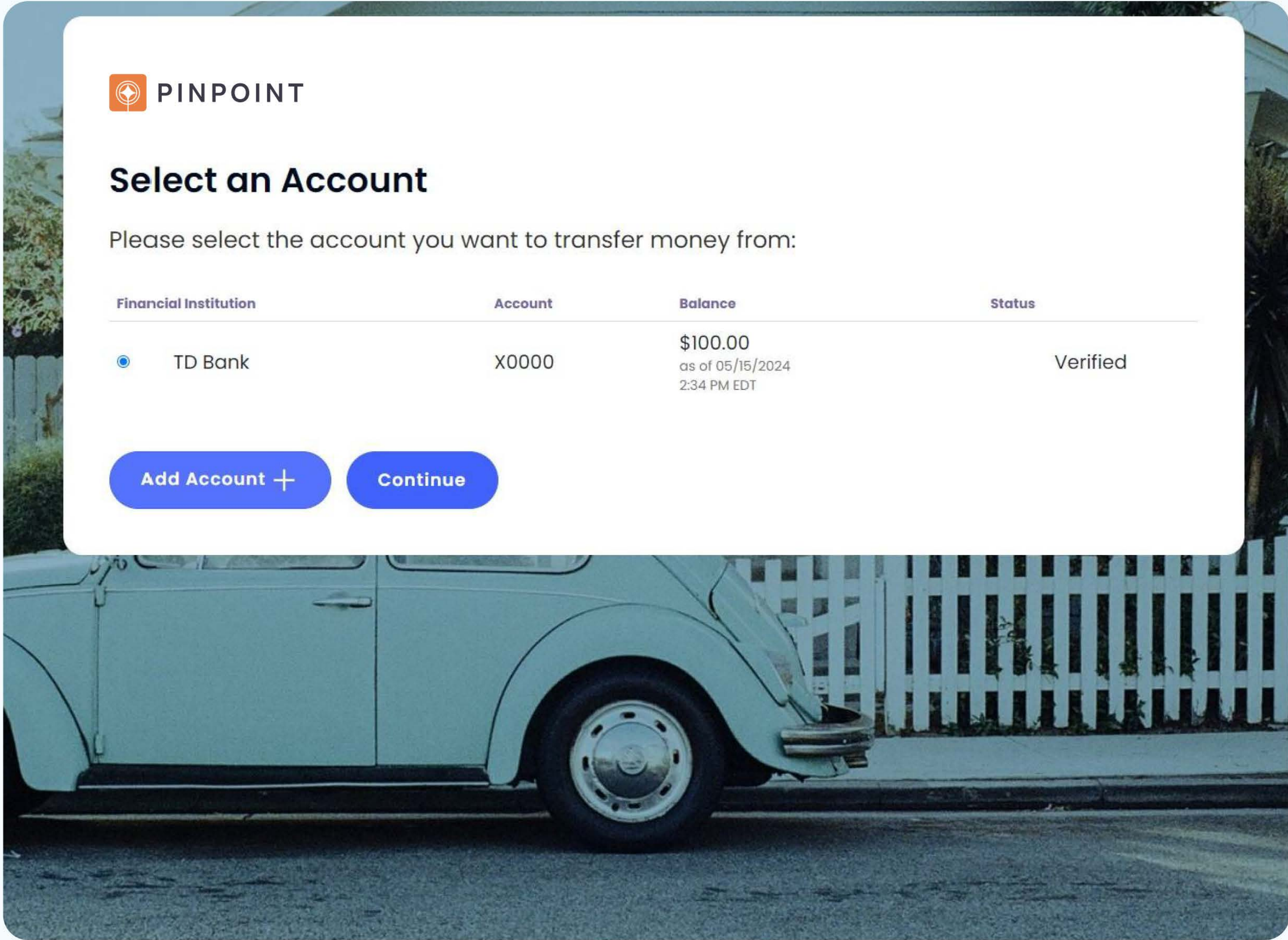
Next, they will need to select the account that they would like to use to make the transfer.



Step 9

Review account selection

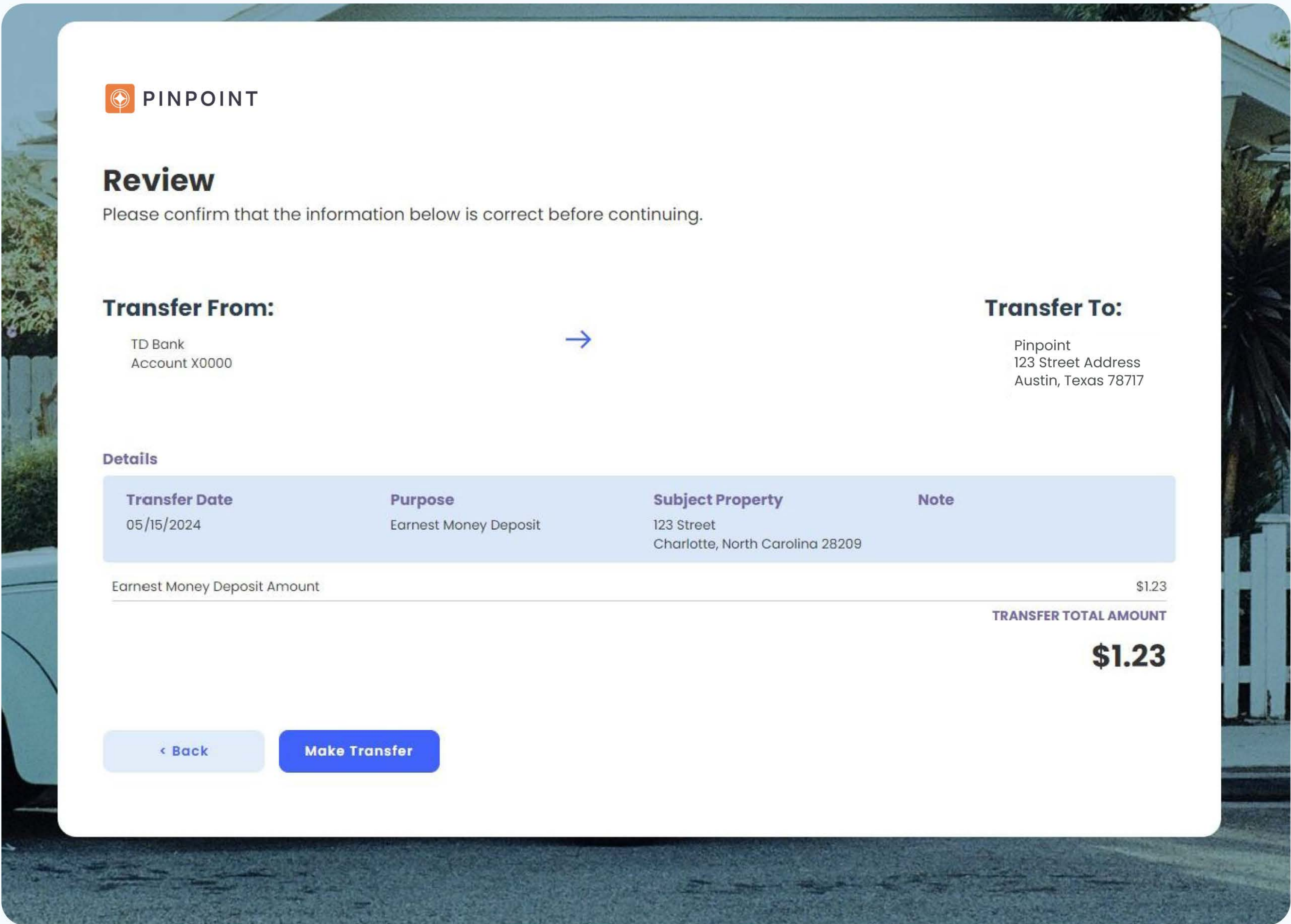
Once their account has been selected they can select “continue” to move on to the next step.



Step 10

Review transfer details

Next, they can review the transfer details and if all of the information is correct they can click on “Make Transfer”.



Step 11

Add additional email recipients

Once they click on “Make Transfer” 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.

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

