



Snapdocs Settlement Agent Notifications

Welcome to Snapdocs! We're happy you're here.

This document explains the communications to the Settlement Office and/or Agent in the Snapdocs platform. Notifications will include the following:

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You have a new closing

Email Setting: Documents are ready for Settlement Office to download

Email triggers when: Closing documents are processed and available for Settlement Agent to download.

From: Snapdocs (help@snapdocs.com)

Subject: You have a new closing | [Lender Name]

Hybrid Closing

Good news! You have a new closing to complete

Hi Snapdocs Settlement,

You've just received a hybrid closing from LenderSync, powered by Snapdocs. This means many of the closing documents can be eSigned before you meet in person with the consumer.

Follow the four easy steps below and you'll enjoy a 20-minute closing!

Your four easy steps to a 20-minute closing

Completing this checklist will ensure you meet LenderSync's requirements for this closing.

- 1 Set the appointment**

The date, time, and location of the signing will automatically be sent to the consumer once it is set.
- 2 Print the slimmed down closing package**

These are the only lender documents you will need to get wet signed at the signing appointment.
- 3 Ensure eSigning is complete**

Prior to your signing appointment, remind the consumer to eSign. If they haven't eSigned by the time you meet in person, prompt them to eSign at the table.
- 4 Scan and upload signed documents**

After the signing has taken place, scan and upload the signed documents.

Simple, right? Let's get started.

Please verify or set the signing appointment


Email Setting: Settlement office hasn't set an appointment, and it's 24 hours before the earliest possible close date

Email trigger:

- It is 24 hours before closing date or time, and any one of signing date, time, and/or location are still missing
- If earliest signing date or signing date are already within 24 hours when closing is created: will fire 1 hour after closing docs are processed if signing date, time, and/or location are still missing

From: Snapdocs (no-reply@snapdocs.com)

Subject: [Last Name] [Loan Number], Please verify or set the signing appointment details | [Lender Name]



Hello,

Please verify or set the signing appointment details for the Borrower #Blue-03062021-JS closing.

[Set appointment details](#)

Borrower	Barry Borrower jenna.schofield+borrower@snapdocs.com 917-324-7282
File #	Blue-03062021-JS
Appointment	3/7/21 at 8:00am CST
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com

New Signing Appointment

Email Setting: Settlement office sets an appointment

Email triggers when: Lender or Settlement Agent sets the signing appointment.

From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], New Signing Appointment | [Lender Name]



Hi Snapdocs Settlement,

The appointment time and location for the Borrower order has been set. We have notified the borrower and notary about this update. For your reference, please see the updated appointment details below.



3/7/21 at 7:00am CST

at 1234 Signing Way, Grapevine, TX 76051

[View closing](#)

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Lender or Settlement Agent updates appointment time

Email Setting: Settlement office sets an appointment

Email triggers when: Lender or Settlement Agent updates the Consumer's appointment time.


From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number] Signing Details Updated | [Lender Name]



Hi Snapdocs Settlement,

The appointment time and location for the Borrower order have changed. We have notified the borrower and notary about this update. For your reference, please see the updated appointment details below.

	3/7/21 at 7:45am CST (updated) at 1234 Signing Way, Grapevine, TX 76051
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[View closing](#)

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Signing Appointment is Today

Email Setting: It's the day of the signing

Email triggers when: It's the day of the signing. Copy will indicate whether the Consumer has completed eSigning or not.

From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], Signing appointment is today | [Lender Name]



Hello,

The Borrower #Blue-03062021-JS closing is scheduled for 8:00 AM CST today. After the closing appointment, upload the signed funding package and mark the signing complete.

The borrower has not yet eSigned eligible documents. In order to ensure all closing documents are signed in full, please send a reminder to the borrower to complete the eSigning.

[View closing](#)

Borrower	Barry Borrower jenna.schofield+borrower@snapdocs.com 917-324-7282
File #	Blue-03062021-JS
Appointment	3/7/21 at 8:00am CST
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com


A user has added a message

Email Setting: [Consumer / Company Team Member / Participant / Signing Service Member] adds a message

Email triggers when: Any user sends a message to the Settlement Agent using the Activity messaging functionality.


From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], [User Name] has added a message | [Lender Name]



Hello,

Chris Closer has added a message to the [Borrower closing](#):



Chris Closer at LenderSync
This is a message

[View closing](#)

Reply to this email to create a comment, or sign-in and post a comment directly on the closing.

File # 1-03062021-JS
Appointment 3/7/21 at 7:00am CST
Location 1234 Signing Way, Grapevine, TX 76051
Lender team Chris Closer Closer
jenna.schofield+closer@snapdocs.com

Consumer completes eSigning

Email Setting: A consumer completes eSigning

Email triggers when: Consumer completes eSigning of eligible documents

From: Snapdocs (no-reply@snapdocs.com)

Subject: [Last Name], eSigning complete, signed documents available



Hello,

The Borrower #PURPLE-03062021-JS closing has successfully eSigned all eligible documents.

[View closing](#)

File #	PURPLE-03062021-JS
Appointment	TBD
Location	Not set
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com Anu Walia anu+closings@snapdocs.com

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Original Closing Package is updated

Email Setting: Original Closing Package is updated

Email triggers when: Lender removes closing documents from closing and uploads a new package

From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], Documents have changed | [Lender Name]

Hybrid Closing

The documents on this closing have been updated

Hi Snapdocs Settlement,

The closing documents on this closing have been updated and replaced. Please be sure to download and use the newly updated documents at the signing appointment.

[Print updated documents](#)

Your four easy steps to a 20-minute closing

Completing this checklist will ensure you meet LenderSync's requirements for this closing.

- 1 Set the appointment**

The date, time, and location of the signing will automatically be sent to the consumer once it is set.
- 2 Print the slimmed down closing package**

These are the only lender documents you will need to get wet signed at the signing appointment.
- 3 Ensure eSigning is complete**

Prior to your signing appointment, remind the consumer to eSign. If they haven't eSigned by the time you meet in person, prompt them to eSign at the table.
- 4 Scan and upload signed documents**

After the signing has taken place, scan and upload the signed documents.


Rush documents are added

Email Setting: Rush documents are added (standard, not configured)

Email triggers when: Lender uses “Add rush documents” feature.

From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], Documents have changed | [Lender Name]



The documents on this closing have been updated

Hello Snapdocs Settlement,

The closing documents on this closing have been updated. Please be sure to download and use the newly updated documents at the signing appointment.

[Print updated documents](#)

Borrower	Barry Borrower jenna.schofield+borrower@snapdocs.com 917-324-7282
File #	04022021-JS-2
Appointment	4/6/21 at 10:00am CDT
Location	1234 Signing Way, Grapevine, TX 76051
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com

Consumer opts out of eSigning

Email Setting: Consumer opts out of eSigning

Email triggers when: Consumer clicks “I’d rather not eSign” on the Consumer Dashboard and opts out of the eSigning process

From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], Has opted out of esigning | [Lender Name]



Hello,

The Borrower #PURPLE-03062021-JS closing has opted out of the hybrid esigning process. Please print the full funding package and complete the transaction as a wet signing.

[View closing, download documents](#)

File #	PURPLE-03062021-JS
Appointment	TBD
Location	Not set
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com Anu Walia anu+closings@snapdocs.com


Consumer opts in to eSigning

Email Setting: Standard (not configured)

Email triggers when: Consumer clicks “I want to eSign” button on the Consumer Dashboard. (This button only appears when the Consumer has previously opted out of eSigning on a hybrid closing.)

From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], Signing Type Update | [Lender Name]



Hello Suzy,

Barry Borrower on the Borrower #PURPLE-03062021-JS closing recently changed the closing from a full wet to a hybrid signing. The borrower has been sent an email directing them to eSign their documents.

The wet sign package has been updated and is ready to be downloaded.

[View closing details](#)

Borrower	Barry Borrower jenna.schofield+borrower@snapdocs.com 917-324-7282
File #	PURPLE-03062021-JS
Appointment	TBD
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com

The signing type has changed on a closing

Email Setting: The signing type has changed on a closing

Email triggers when: Settlement Agent or lender changes the signing type from hybrid to wet

From: Snapdocs (help@snapdocs.com)

Subject: [Last Name] [Loan Number], Signing Type Changed | [Lender Name]

Hello,

Chris Closer at Snapdocs Settlement has changed the Borrower #1-03062021-JS closing from a hybrid to full wet closing. The wet sign package has been updated and is ready to be downloaded.

[View closing details](#)

File #	1-03062021-JS
Appointment	3/6/21 at 4:15pm CST
Location	1234 Signing Way, Grapevine, TX 76051
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com

Incomplete Closing

Email Setting: Settlement office hasn't added a signing status yet and it's 2 hours after the appointment

Email triggers when: Settlement office hasn't added a signing status yet and it's 2 hours after the scheduled appointment time

From: Snapdocs (no-reply@snapdocs.com)

Subject: [Last Name] [Loan Number], Incomplete closing | [Lender Name]



Hello,

The closing process is incomplete. Please upload the signed funding package and mark the closing as complete.

[View closing, add status](#)

File #	1-03062021-JS
Appointment	3/6/21 at 4:15pm CST
Location	1234 Signing Way, Grapevine, TX 76051
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com Anu Walia anu+closings@snapdocs.com

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eSign Incomplete

Email Setting: Standard (not configured)

Email triggers when: Settlement Agent uploads wetsign documents but the Consumer has not completed eSigning

From: Snapdocs (no-reply@snapdocs.com)

Subject: [Last Name] [Loan Number], Esign Incomplete | [Lender Name]



Hello Suzy,

The wet sign appointment was recently marked as complete on the Borrower #Blue-03062021-JS closing but the eSign portion is still incomplete. The borrower has been sent a reminder email directing them to eSign their documents. To prevent further delays, please remind the borrower to complete the eSign portion as soon as possible.

[View closing details](#)

File #	Blue-03062021-JS
Appointment	3/7/21 at 8:00am CST
Location	Not set
Lender team	Chris Closer Closer jenna.schofield+closer@snapdocs.com Anu Walia anu+closings@snapdocs.com