



Snapdocs for Lenders User Guide for Full eClosings

Welcome to Snapdocs

Snapdocs is a digital closing platform that allows you to process closings with your settlement partners easily and efficiently.

Table of Contents:

Check Eligibility	3
Creating a New Full eClosing	3
View the closing within Snapdocs	4
Prepare Your Borrower for the Virtual Signing Appointment	5
Snapdocs Team Sends Transaction to Title	5
Track closing progress	6-7
Borrower preview & eSign	
Signing appointment complete	
Access Signed Documents	8
Support	8

Check Closing Eligibility

Confirm with your legal team and the title agent that the transaction is eligible for RON.

Creating a New Full eClosing

To create a Full eClosing, or a Full eClosing with eNote, you will follow the same process as you would with any Hybrid closing.

To create the closing through Encompass, you will update the closing type to be **Full eClosing/ Full eClosing wit** company. Lender documents will automatically be pulled to Snapdocs via Encompass **eNote** and assign the settlements.

Closing type will be
Full eClosing or
Full eClosing with eNote

The screenshot shows the SnapDocs Custom Fields form. The form is titled "SnapDocs" and "SnapDocs Custom Fields". It contains two columns of input fields. The left column includes fields for Closing Type, Loan Number, Earliest Signing Date, Estimated Closing Date, Lock Expiration, Settlement Company, Settlement Agent, Settlement Agent Phone #, Doc Request Email, Escrow Settlement Email, Closer Name, Closer Email, Loan Officer Name, Loan Officer Email, Loan Processor Name, Loan Processor Email, Funding Team Email, Property Address, Property City, Property State, Property Zip, Signing Date, Signing Time, Signing Address, Signing City, Signing State, and Signing Zip. The right column includes a "Send To Snapdocs" button, Borr First Name, Borr Last Name, Borr Signature Name, Borr Mobile Phone #, Borr Alt Phone #, Borr Email, Borr Last 4 SSN, Borr Current Address, Borr Current City, Borr Current State, Borr Current Zip, Borr2 First Name, Borr2 Last Name, Borr 2 Signature Name, Borr2 Mobile Phone #, Borr2 Alt Phone #, Borr2 Email, Borr2 Last 4 SSN, Borr2 Current Address, Borr2 Current City, Borr2 Current State, and Borr2 Current Zip. A yellow arrow points from the text on the left to the "Closing Type" field.

View the closing within Snapdocs

The closing details page on Snapdocs displays closing information including property address, borrower information, signing details, and the closing activity audit trail.

Closings / Signer

Signer

123 Fake St Denver CO 80220

Full eClosing Open

Documents

- PREPARE CLOSING DOCUMENTS
- DOWNLOAD CLOSING PACKAGE
 - RON signing 5pg
Not downloaded by Settlement.
 - eSign Package 12pg
Consumer notified to sign on Wed, January 26th 2022 at 9:44am MST
- REFERENCE DOCUMENTS
- MANAGE SIGNED DOCUMENTS

Consumers

Sally Signer
(802) 222-2222
joe.siebert@snapdocs.com

- Notified to review**
8 days ago
- Reviewed closing documents
Not yet
- Completed eSigning
Not yet
- Completed signing appointment
Not yet

Closing Team

SETTLEMENT

- Clay Settlement**
clay@settlement.com
100 Montgomery St
San Francisco, CA 94014
- Suzy Settlement**
docs@settlement.com

SNAPDOCS LENDING INC.

- Testio Closer**
testio+closer@snapdocs.com

Closing

ESIGNING

Status Not sent until appointment date is set

eSigners Sally Signer Hasn't eSigned yet

Send an eSign reminder

SET SIGNING APPOINTMENT Pending

Please set the appointment or request a notary.

Available signing range No signing range provided.

Appointment date Settlement has not set a date yet

RON notary [Request notary](#)

Appointment status [Complete signing](#)

PARTICIPANTS

None

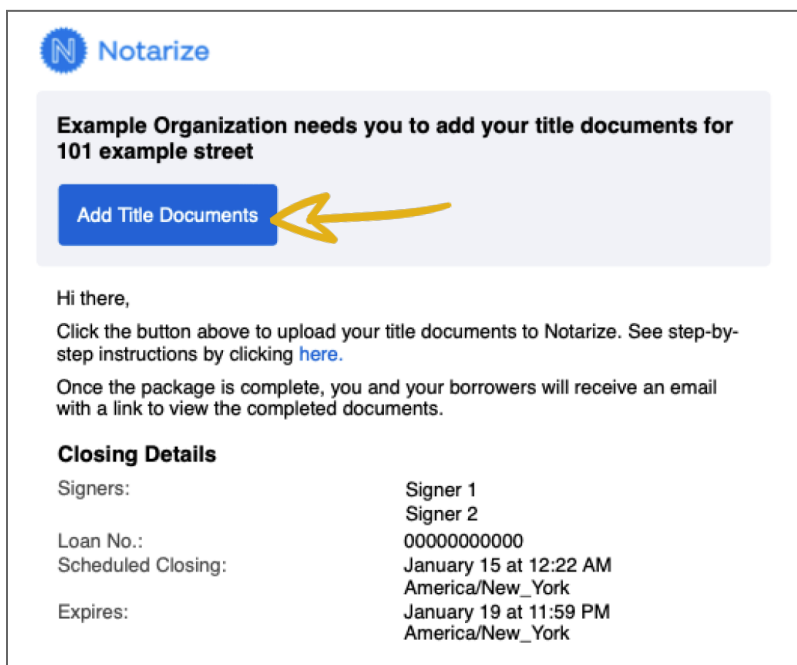
Prepare Your Borrower for the Virtual Signing Appointment

Ensure your borrower is set up for success prior to their scheduled signing appointment date with the following items:

- Strong internet connection
- Computer (laptop, desktop), iPad, or mobile device with camera
- Government Issued ID
- Up to date web browser (Google Chrome is recommended)

Snapdocs Team Sends Transaction to Title

The Snapdocs team will prepare the closing in Notarize and send it to the assigned title agent. The title agent will receive a notification via email prompting them to upload their title documents. Below is a screenshot of the email your settlement office will receive:



The title agent will access the closing in Notarize by clicking **Add Title Documents**.


Track closing progress

Monitor the status of the closing on Snapdocs using the consumer progress log on the upper-right hand of the closing page.

Consumers	Consumers
<p>Troy Aaster (415) 555-5555 troyaaster@gmail.com</p> <ul style="list-style-type: none"><input type="radio"/> Notified to review Not yet<input type="radio"/> Reviewed closing documents Not yet<input type="radio"/> Completed eSigning Not yet<input type="radio"/> Completed signing appointment Not yet	<p>Troy Aaster (888) 888-8888 troyaaster@gmail.com</p> <ul style="list-style-type: none"><input checked="" type="radio"/> Notified to review 8 months ago<input checked="" type="radio"/> Reviewed closing documents 8 months ago<input checked="" type="radio"/> Completed eSigning 1/1 have eSigned - 8 months ago<input checked="" type="radio"/> Completed signing appointment 8 months ago

During this process, your borrower will receive two emails.

1. An email from Snapdocs prompting the borrower to review and eSign their eNote and hybrid documents:



Hi Troy,

Please review your closing documents on your preferred device before the appointment. If you have any questions, please contact your lender or settlement agent in this signing platform.

After you finish reviewing, please eSign your documents.

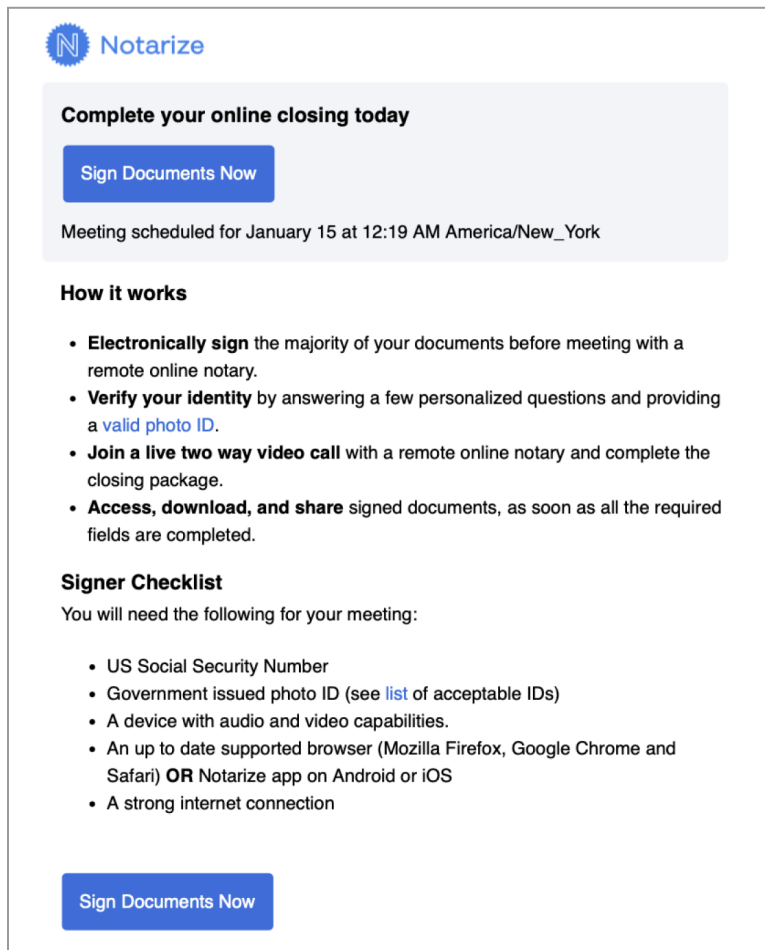
[Review & eSign documents](#)

This link will expire in 1 days.

For questions, please visit our [support page](#). Your file number is 123456789.

Thank you,
Snapdocs Lending Inc.

2. An email from Notarize prompting the borrower to login to their virtual signing appointment with the notary.



The image shows a screenshot of an email from Notarize. At the top left is the Notarize logo, which consists of a blue circle with a white 'N' inside, followed by the word 'Notarize' in a blue sans-serif font. Below the logo is a light blue rectangular box containing the text 'Complete your online closing today' in bold black font. Underneath this box is a blue button with the text 'Sign Documents Now' in white. Below the button, the text 'Meeting scheduled for January 15 at 12:19 AM America/New_York' is displayed. The main body of the email has a white background. It starts with the heading 'How it works' in bold black font, followed by a bulleted list of four steps: 1. 'Electronically sign' the majority of documents before meeting with a remote online notary. 2. 'Verify your identity' by answering personalized questions and providing a valid photo ID. 3. 'Join a live two way video call' with a remote online notary and complete the closing package. 4. 'Access, download, and share' signed documents as soon as all required fields are completed. Below the list is the heading 'Signer Checklist' in bold black font, followed by the text 'You will need the following for your meeting:'. This is followed by another bulleted list of five items: 1. US Social Security Number. 2. Government issued photo ID (see list of acceptable IDs). 3. A device with audio and video capabilities. 4. An up to date supported browser (Mozilla Firefox, Google Chrome and Safari) OR Notarize app on Android or iOS. 5. A strong internet connection. At the bottom of the email is another blue button with the text 'Sign Documents Now' in white.

Notarize

Complete your online closing today

[Sign Documents Now](#)

Meeting scheduled for January 15 at 12:19 AM America/New_York

How it works

- **Electronically sign** the majority of your documents before meeting with a remote online notary.
- **Verify your identity** by answering a few personalized questions and providing a [valid photo ID](#).
- **Join a live two way video call** with a remote online notary and complete the closing package.
- **Access, download, and share** signed documents, as soon as all the required fields are completed.

Signer Checklist

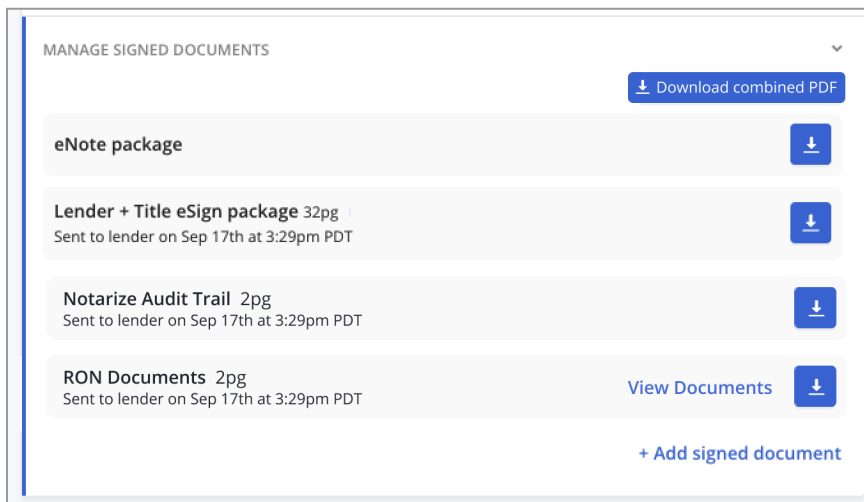
You will need the following for your meeting:

- US Social Security Number
- Government issued photo ID (see [list](#) of acceptable IDs)
- A device with audio and video capabilities.
- An up to date supported browser (Mozilla Firefox, Google Chrome and Safari) **OR** Notarize app on Android or iOS
- A strong internet connection

[Sign Documents Now](#)

Access Signed Documents

Signed documents from the eSign package and the RON signing appointment will be automatically uploaded and combined into a single file to the closing in Snapdocs once the signing appointment has been completed. You will have the ability to download the package and/or they will be automatically pushed back into Encompass, based on your respective configuration.



Support

If you have any questions or require support, please email support@snapdocs.com, or call us at (833) 762-7362.