



Snapdocs for Lenders User Guide

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

Snapdocs is a digital closing platform that allows you to process hybrid and wet closings for your borrowers easily and efficiently. This guide will help you navigate the platform and answer questions you might have during the closing process.

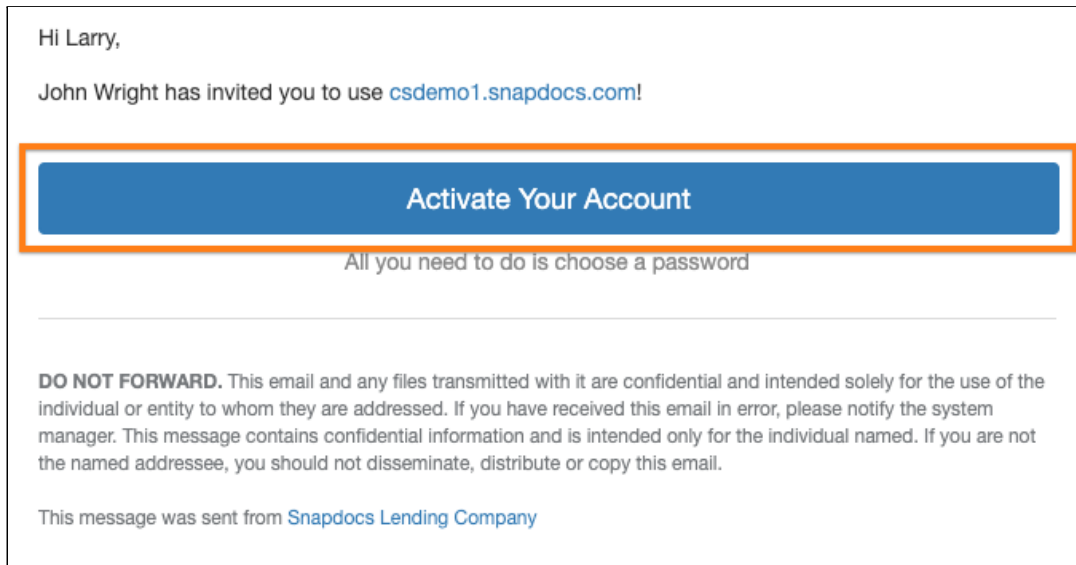
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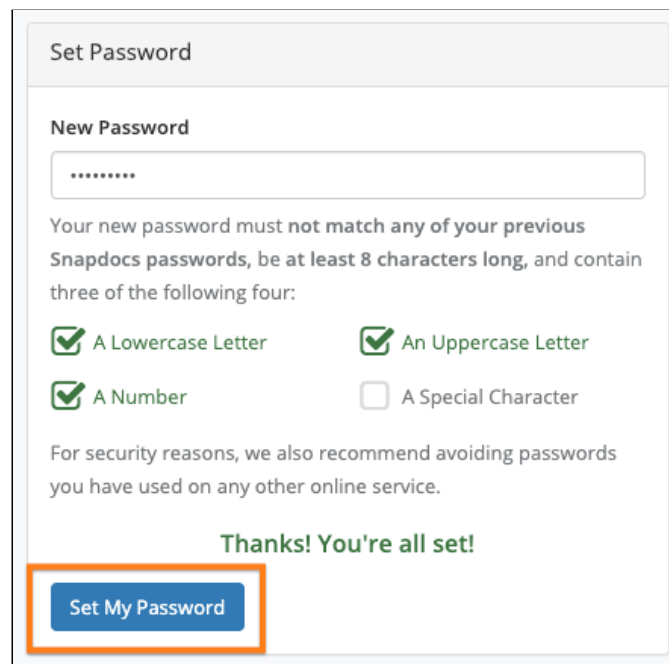
1. Logging into Snapdocs

New Snapdocs User

If you're new to Snapdocs, you will receive an email asking you to activate your account. First, click on the "Activate Your Account" button in the email to get started.



Simply set a unique password following the criteria outlined below in order to access Snapdocs:



Set Password

New Password

.....

Your new password must **not match any of your previous Snapdocs passwords**, be **at least 8 characters long**, and contain three of the following four:

- A Lowercase Letter
- An Uppercase Letter
- A Number
- A Special Character

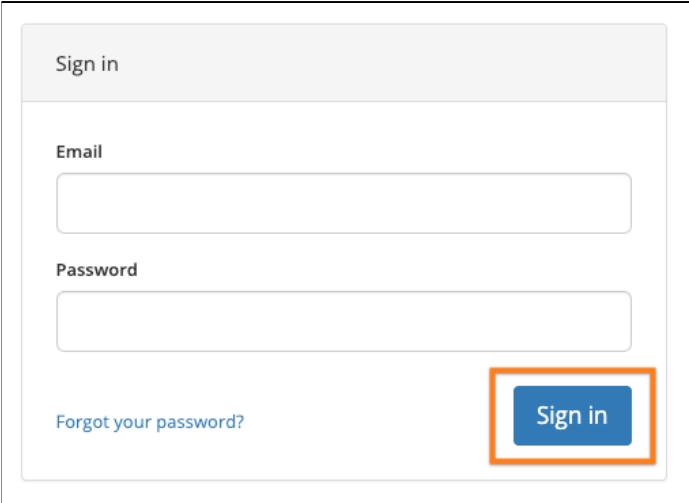
For security reasons, we also recommend avoiding passwords you have used on any other online service.

Thanks! You're all set!

Set My Password

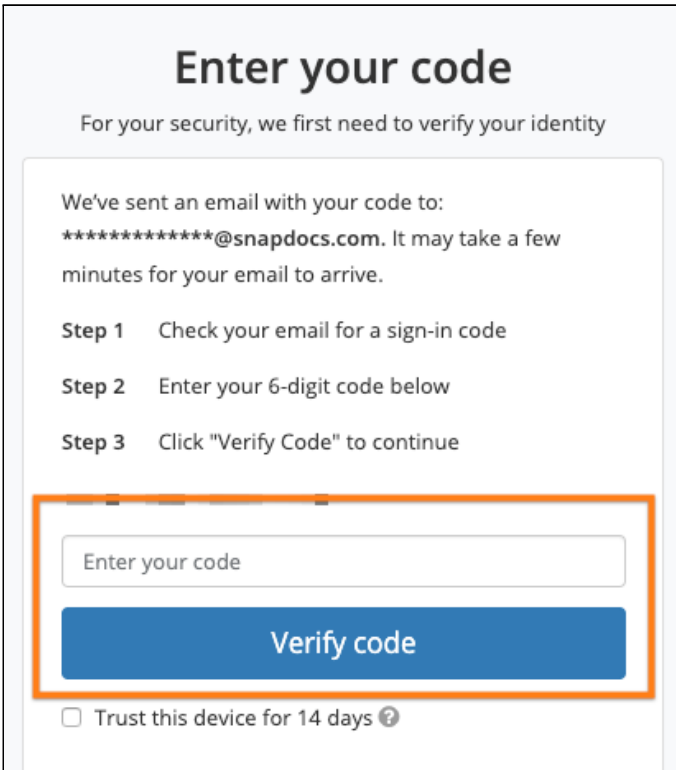
Existing Snapdocs User

If you've already set up a Snapdocs account, simply head to your Snapdocs instance URL, enter your credentials, and click the "Sign in" button.



The screenshot shows a sign-in form with a title bar that says "Sign in". Below the title bar are two input fields: "Email" and "Password". To the left of the "Sign in" button is a link that says "Forgot your password?". The "Sign in" button is highlighted with an orange border.

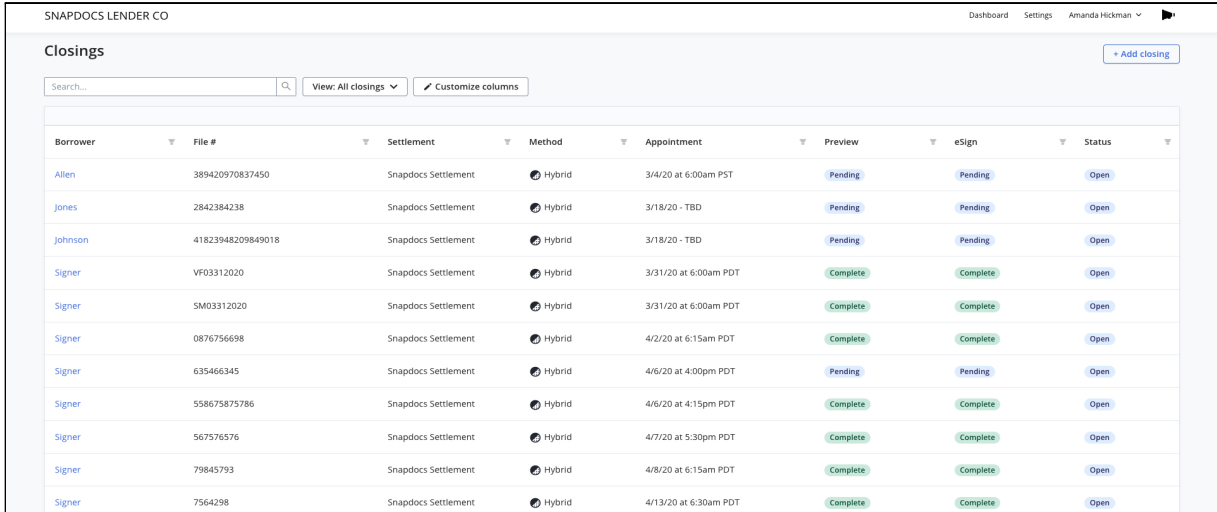
For security purposes, you may be asked to verify your account (via code sent to text message or email) if accessing on a new device or for the first time in a while. After entering the code, click the "Verify Code" button to proceed. You may also select "Trust this device for 14 days" to avoid entering this code again.



The screenshot shows a verification screen with the title "Enter your code". Below the title is a subtitle: "For your security, we first need to verify your identity". The main content area contains the following text: "We've sent an email with your code to: *****@snapdocs.com. It may take a few minutes for your email to arrive." Below this text are three steps: "Step 1 Check your email for a sign-in code", "Step 2 Enter your 6-digit code below", and "Step 3 Click 'Verify Code' to continue". At the bottom of the form is an input field labeled "Enter your code" and a blue button labeled "Verify code". Below the button is a checkbox labeled "Trust this device for 14 days" with a question mark icon. The input field and the "Verify code" button are highlighted with an orange border.

2. Closings Dashboard

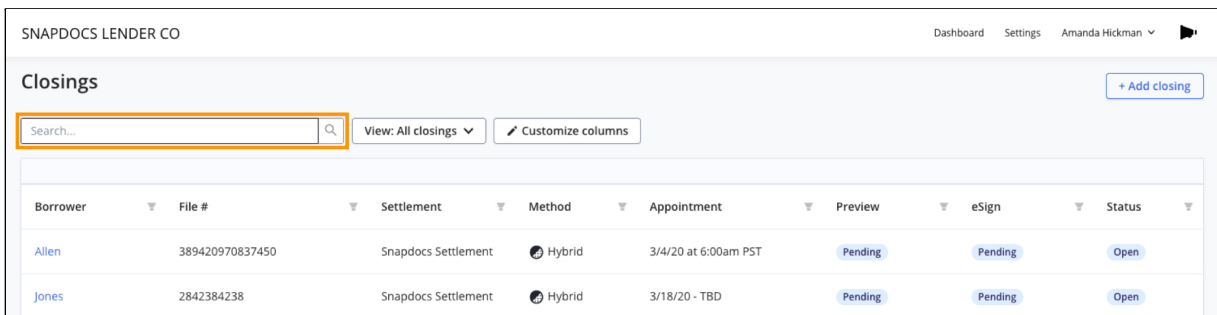
After logging in, the first thing you'll see is the Snapdocs Closings Dashboard. The Closings Dashboard serves as the central information hub for your pipeline.



The screenshot shows the Snapdocs Closings Dashboard for 'SNAPDOCS LENDER CO'. The dashboard includes a search bar, a 'View: All closings' dropdown, and a 'Customize columns' button. The main content is a table with the following columns: Borrower, File #, Settlement, Method, Appointment, Preview, eSign, and Status. The table contains 12 rows of data, with the first three rows for 'Allen', 'Jones', and 'Johnson' showing 'Pending' status, and the remaining nine rows for 'Signer' showing 'Complete' status.

Borrower	File #	Settlement	Method	Appointment	Preview	eSign	Status
Allen	389420970837450	Snapdocs Settlement	Hybrid	3/4/20 at 6:00am PST	Pending	Pending	Open
Jones	2842384238	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open
Johnson	41823948209849018	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open
Signer	VF03312020	Snapdocs Settlement	Hybrid	3/31/20 at 6:00am PDT	Complete	Complete	Open
Signer	SM03312020	Snapdocs Settlement	Hybrid	3/31/20 at 6:00am PDT	Complete	Complete	Open
Signer	0876756698	Snapdocs Settlement	Hybrid	4/2/20 at 6:15am PDT	Complete	Complete	Open
Signer	635466345	Snapdocs Settlement	Hybrid	4/6/20 at 4:00pm PDT	Pending	Pending	Open
Signer	558675875786	Snapdocs Settlement	Hybrid	4/6/20 at 4:15pm PDT	Complete	Complete	Open
Signer	567576576	Snapdocs Settlement	Hybrid	4/7/20 at 5:30pm PDT	Complete	Complete	Open
Signer	79845793	Snapdocs Settlement	Hybrid	4/8/20 at 6:15am PDT	Complete	Complete	Open
Signer	7564298	Snapdocs Settlement	Hybrid	4/13/20 at 6:30am PDT	Complete	Complete	Open

You may be working with hundreds of closings a day, and the search function allows you to quickly locate the desired closing. You are able to search by the Borrower or File #. Once you've entered the desired search criteria, click on the magnifying glass button to return your results.



This screenshot is identical to the one above, but the search bar is highlighted with an orange border. The search bar contains the text 'Search...' and a magnifying glass icon. The table below it shows the first two rows of data: 'Allen' and 'Jones', both with 'Pending' status.

Borrower	File #	Settlement	Method	Appointment	Preview	eSign	Status
Allen	389420970837450	Snapdocs Settlement	Hybrid	3/4/20 at 6:00am PST	Pending	Pending	Open
Jones	2842384238	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open

If you have admin privileges, which we will cover in “Snapdocs Instance Administration”, you have the ability to view all closings in your Snapdocs instance by clicking on the “View” button and selecting “All Closings”. If you are a non-admin user, you will only be able to view “My Closings”.

Borrower	File #	Method	Appointment	Preview	eSign	Status
Allen	389420970837450	Hybrid	3/4/20 at 6:00am PST	Pending	Pending	Open
Jones	2842384238	Hybrid	3/18/20 - TBD	Pending	Pending	Open

You also have the ability to customize your columns. To add or remove columns from the dashboard, select “Customize columns” then make your desired selection, to instantly update the dashboard.

Borrower	File #	Settlement	Method	Appointment	Preview	eSign	Status
Allen	389420970837450	Snapdocs Settlement	Hybrid	3/4/20 at 6:00am PST	Pending	Pending	Open
Jones	2842384238	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open
Johnson	41823948209849018	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open
Signer	VF03312020	Snapdocs Settlement	Hybrid	3/31/20 at 6:00am PDT	Complete	Complete	Open
Signer	SM03312020	Snapdocs Settlement	Hybrid	3/31/20 at 6:00am PDT	Complete	Complete	Open
Signer	0876756698	Snapdocs Settlement	Hybrid	4/2/20 at 6:15am PDT	Complete	Complete	Open
Signer	635466345	Snapdocs Settlement	Hybrid	4/6/20 at 4:00pm PDT	Pending	Pending	Open

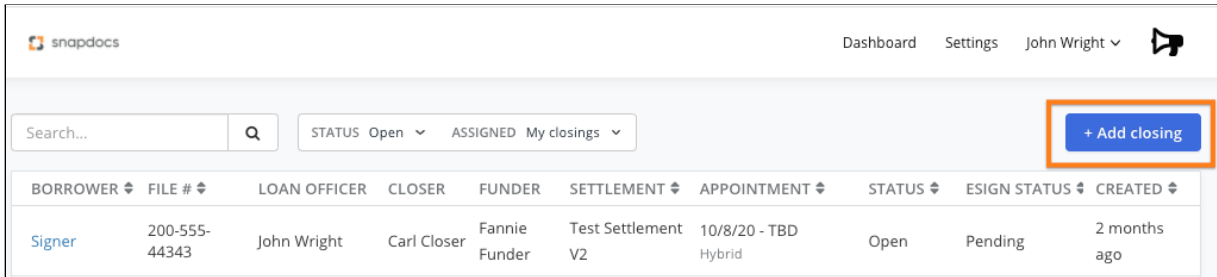
You can also choose to sort and filter each column by clicking on the respective column header and checking the options to sort or filter. In this example, we’re filtering the “Status” column to show only “open” closing in alphabetical order.

Borrower	File #	Settlement	Method	Appointment	Preview	eSign	Status
Allen	389420970837450	Snapdocs Settlement	Hybrid	3/4/20 at 6:00am PST	Pending	Pending	Open
Jones	2842384238	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open
Johnson	41823948209849018	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open
Signer	VF03312020	Snapdocs Settlement	Hybrid	3/31/20 at 6:00am PDT	Complete	Complete	Open
Signer	SM03312020	Snapdocs Settlement	Hybrid	3/31/20 at 6:00am PDT	Complete	Complete	Open
Signer	0876756698	Snapdocs Settlement	Hybrid	4/2/20 at 6:15am PDT	Complete	Complete	Open

To return to the unfiltered list of closings at any time, click the “reset” button at the bottom of the column drop down menu.

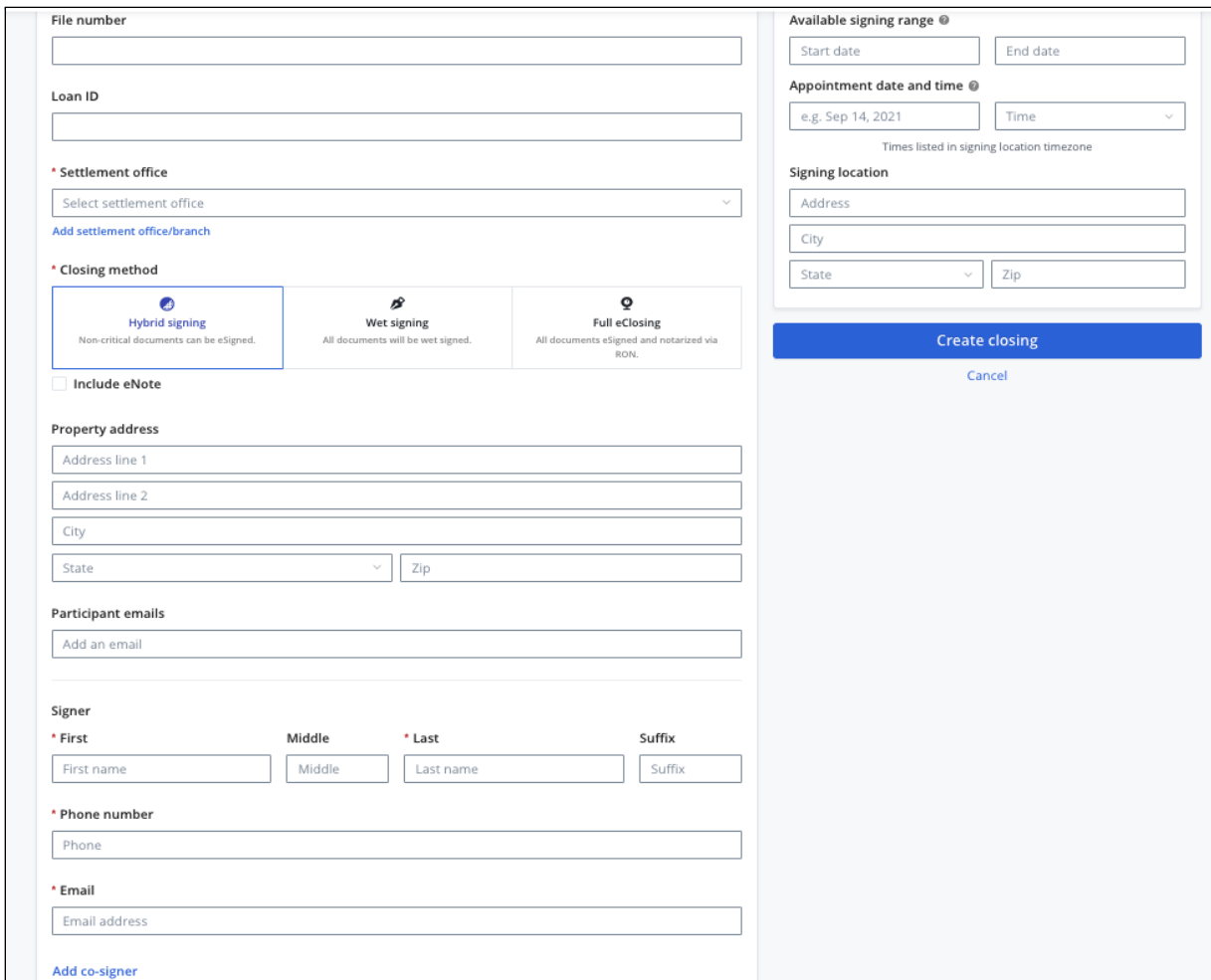
3. Manually Add a Closing

In addition to supporting automatic closing creation via the integration setup between your LOS and Snapdocs, you also have the option of manually creating closings in Snapdocs. Click on the “+ Add Closing” button on the top right of the Closings Dashboard.



The screenshot shows the Snapdocs interface. At the top right, there are links for 'Dashboard', 'Settings', and a user profile 'John Wright'. Below this is a search bar and a filter menu with 'STATUS Open' and 'ASSIGNED My closings'. A blue button labeled '+ Add closing' is highlighted with a red box. Below the filter menu is a table with columns: BORROWER, FILE #, LOAN OFFICER, CLOSER, FUNDER, SETTLEMENT, APPOINTMENT, STATUS, ESIGN STATUS, and CREATED. The first row of data is: Signer, 200-555-44343, John Wright, Carl Closer, Fannie Funder, Test Settlement V2, 10/8/20 - TBD Hybrid, Open, Pending, 2 months ago.

In the Create Closing form, populate the relevant fields. All required fields will have an * next to them. If you need to add additional cosigners, click on the “Add Cosigner” button on the bottom of the screen. Once you’ve populated your closing, click “Create Closing”.



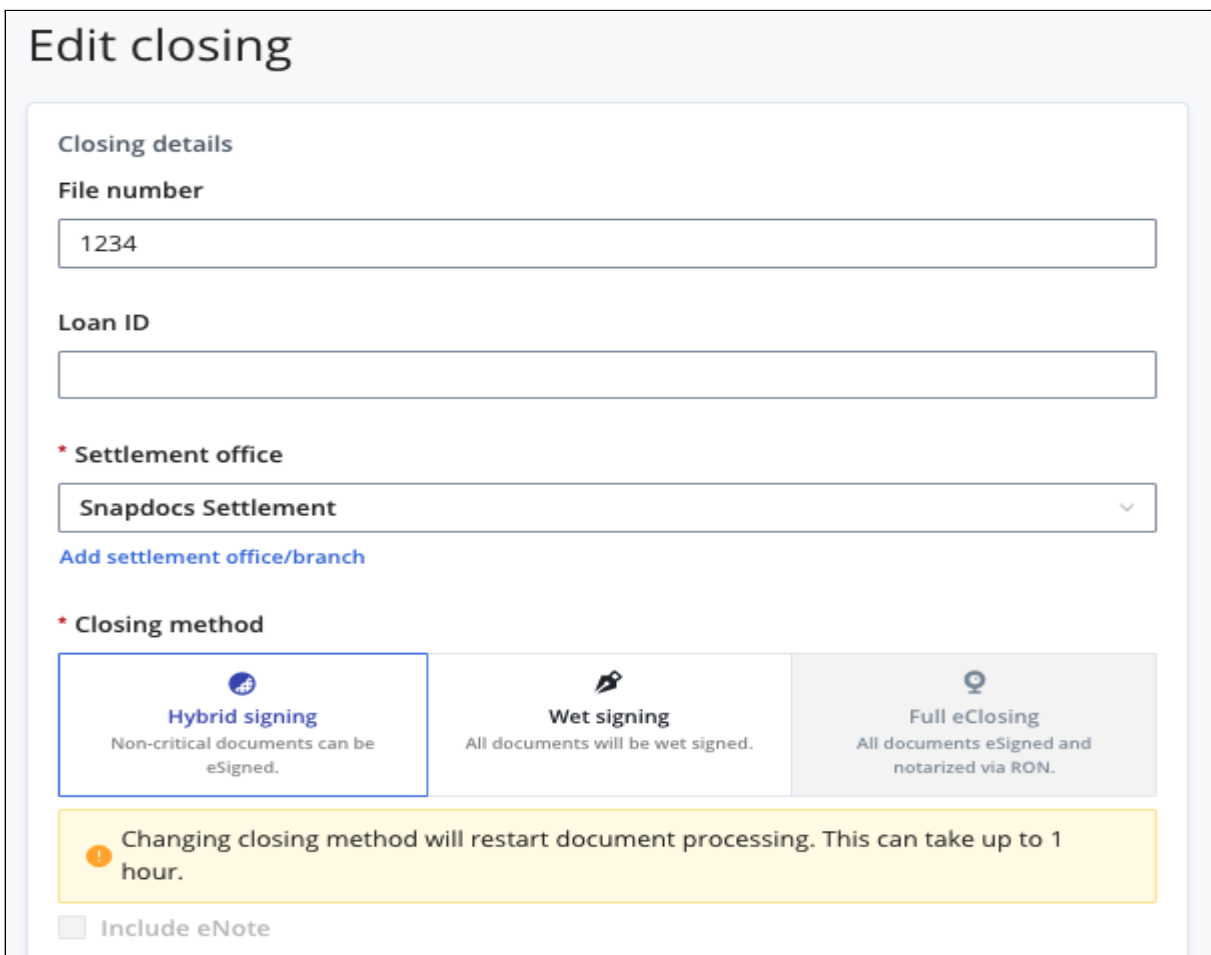
The 'Create Closing' form is divided into two main sections. The left section contains the following fields: 'File number', 'Loan ID', '* Settlement office' (a dropdown menu with 'Add settlement office/branch' below it), '* Closing method' (three buttons: 'Hybrid signing' (selected), 'Wet signing', and 'Full eClosing'), 'Include eNote' (checkbox), 'Property address' (Address line 1, Address line 2, City, State, Zip), 'Participant emails' (Add an email), 'Signer' (First, Middle, * Last, Suffix), '* Phone number', and '* Email'. The right section contains: 'Available signing range' (Start date, End date), 'Appointment date and time' (e.g. Sep 14, 2021, Time), 'Signing location' (Address, City, State, Zip), and a large blue 'Create closing' button with a 'Cancel' link below it.

4. Editing a Closing

If you need to adjust the signer’s contact information, closing type, Settlement office, or the closing date & time, click on the “Edit” button on the top right of a closing to enter the Edit Closing form.



Changes to the closing method and Borrower name or email will restart document processing, which we will cover in [“Managing Closing Documents”](#).

A screenshot of the 'Edit closing' form. The title 'Edit closing' is at the top left. Below it is a section titled 'Closing details'. The first field is 'File number' with the value '1234'. The second field is 'Loan ID' which is empty. Below that is a dropdown menu for 'Settlement office' with the selected value 'Snapdocs Settlement'. There is a link 'Add settlement office/branch' below the dropdown. The next section is 'Closing method' with three options: 'Hybrid signing' (selected, with a blue border), 'Wet signing', and 'Full eClosing'. Each option has a description: 'Hybrid signing' says 'Non-critical documents can be eSigned.', 'Wet signing' says 'All documents will be wet signed.', and 'Full eClosing' says 'All documents eSigned and notarized via RON.'. Below the options is a yellow warning box with an exclamation mark icon and the text: 'Changing closing method will restart document processing. This can take up to 1 hour.'. At the bottom, there is a checkbox labeled 'Include eNote' which is currently unchecked.

Signer

* First	Middle	* Last	Suffix
<input type="text" value="Sally"/>	<input type="text" value="Middle"/>	<input type="text" value="Signer"/>	<input type="text" value="Suffix"/>

* Phone number

* Email

! Changing consumer's name or email will restart document processing. This can take up to 1 hour.

[Add co-signer](#)

After making the necessary changes, click the “Save Changes” button to exit the Edit Closing view and return to the closing.

Signing appointment

Available signing range ⓘ

<input type="text" value="Sep 14, 2021"/>	<input type="text" value="Sep 16, 2021"/>
---	---

Appointment date and time ⓘ

<input type="text" value="Sep 14, 2021"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Time"/>
---	--

Times listed in signing location timezone

Signing location

<input type="text" value="Address"/>	
<input type="text" value="City"/>	
<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="State"/>	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Zip"/>

Save changes

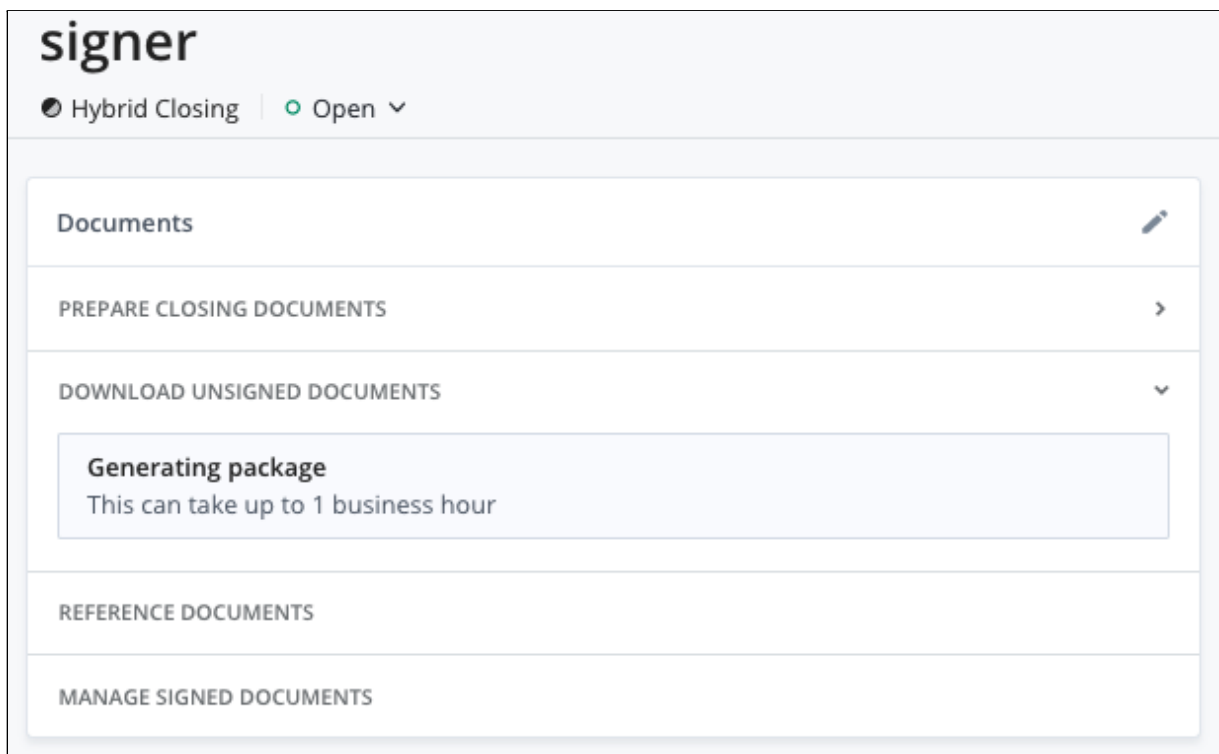
[Cancel changes](#)

5. Managing Closing Documents

Document Processing

Snapdocs can receive closing documents directly from your LOS and automatically upload them to the closing with our lightweight integration.

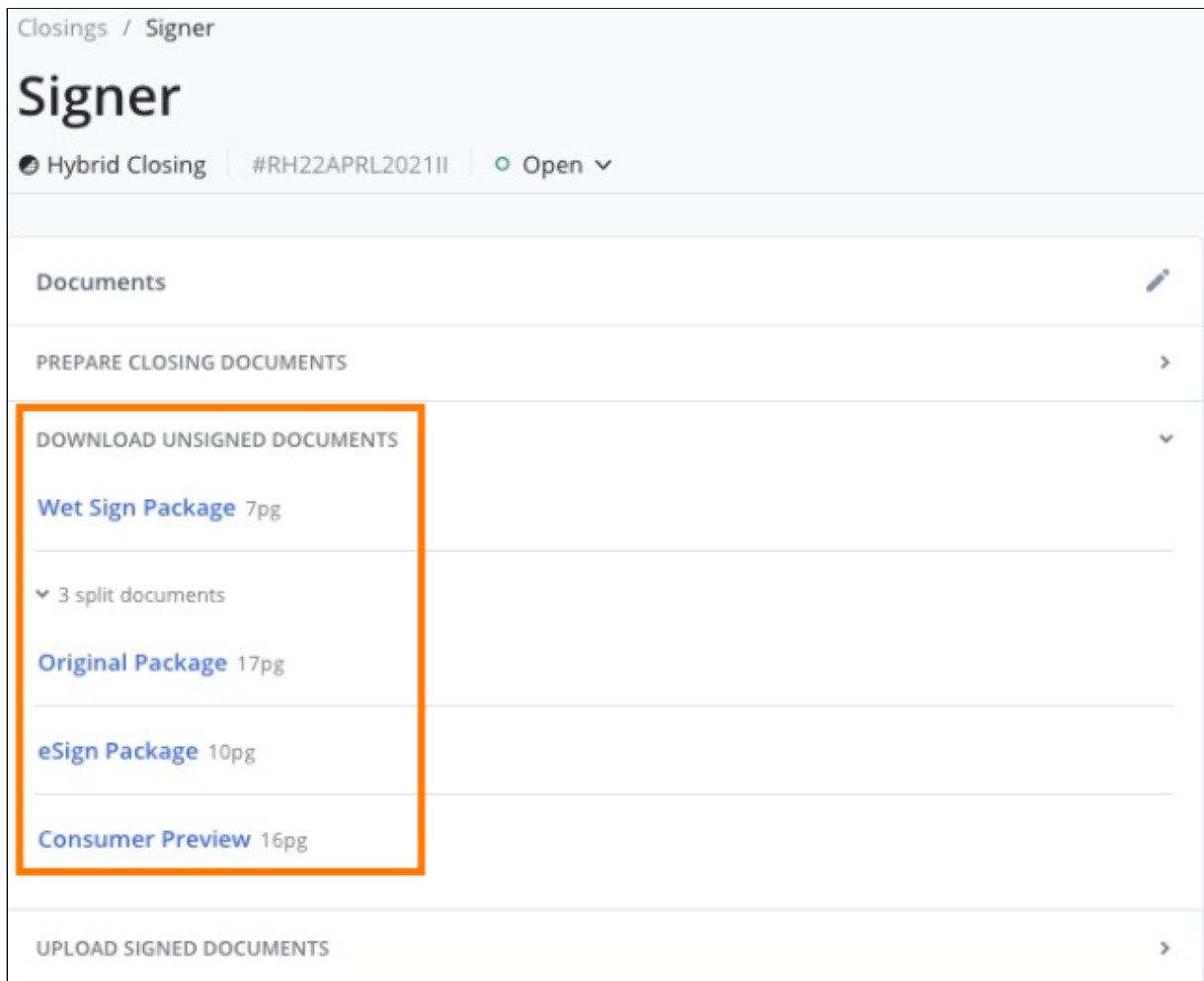
Once documents have been submitted, they will enter our Doc Processing Queue to be split and tagged by our AI, followed by a QC check driven by our support team. While the documents are still in that process, you will see the “Generating Package - this can take up to 1 business hour” flag shown below.



Once documents are available, the relevant email notifications will go out to Settlement & Borrower(s), and optionally your team (depending on configuration of email notifications as covered in [“Snapdocs Instance Administration”](#)). The flag shown above will also be replaced by the respective classified and split document packages:

- The Original Package is the full closing package you uploaded to the closing.
- The eSign Package contains all of the documents that you’ve set as eSignable and is sent to the borrower to eSign. (Note, if you are doing a wet closing, this package will be omitted but the others will be available.)
- The Wet Sign Package is all documents Settlement will print for the wet sign appointment.

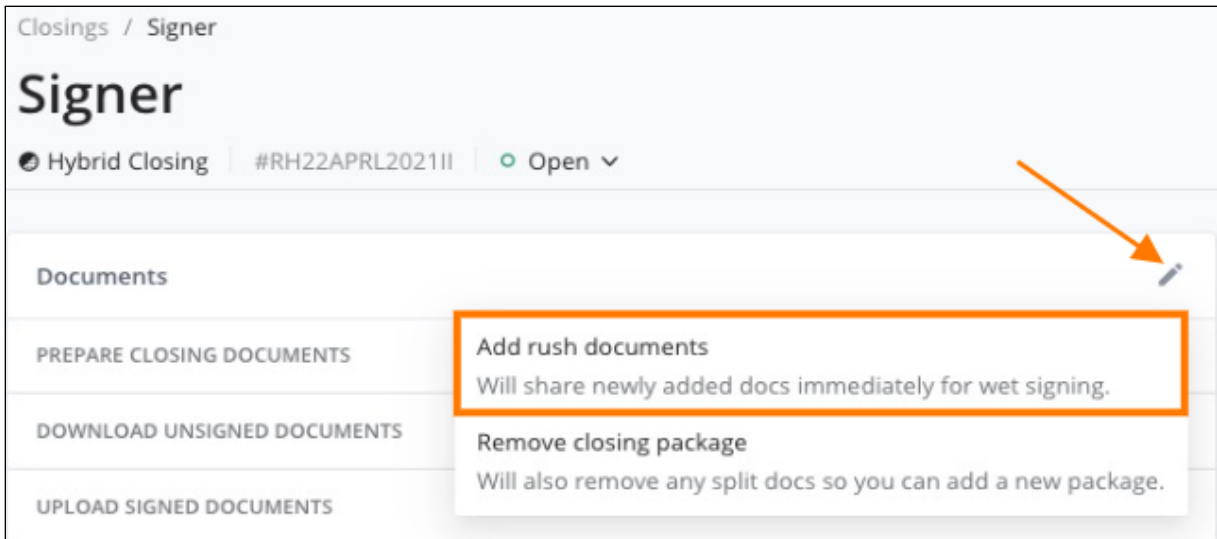
- The Consumer Preview contains both the eSign and Wet Sign Package documents, but excludes any documents you've marked as non-consumer previewable (e.g. notary or settlement instructions).



The screenshot shows the 'Signer' interface for a 'Hybrid Closing' with ID '#RH22APRL2021II'. The status is 'Open'. The 'Documents' panel is active, showing a list of document packages under the heading 'PREPARE CLOSING DOCUMENTS'. The packages listed are: 'Wet Sign Package' (7pg), '3 split documents', 'Original Package' (17pg), 'eSign Package' (10pg), and 'Consumer Preview' (16pg). The 'Wet Sign Package' and 'Consumer Preview' items are highlighted with an orange border. Below the list is an 'UPLOAD SIGNED DOCUMENTS' button.

Add Additional Rush Documents to Wet Sign Package

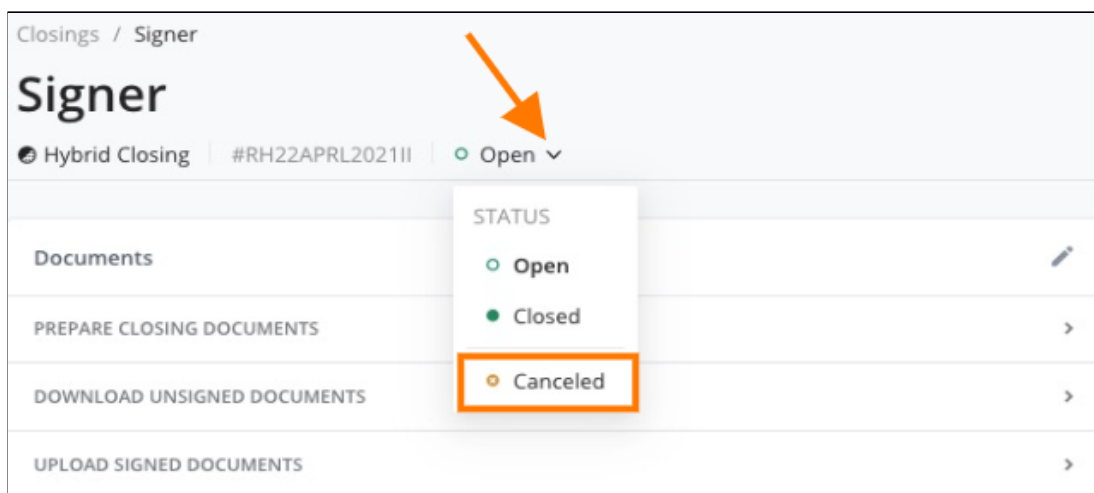
You may find that you need to add an additional document after the doc processing is complete. To add in additional documents, click on the Pencil icon in the top right corner of the Documents panel and click on "Add rush documents". Rush documents are considered any updated documents that you want added directly to the wet sign package. These will be made immediately available to Settlement to print for the wet sign appointment and the relevant email notifications will go out as the documents are added.

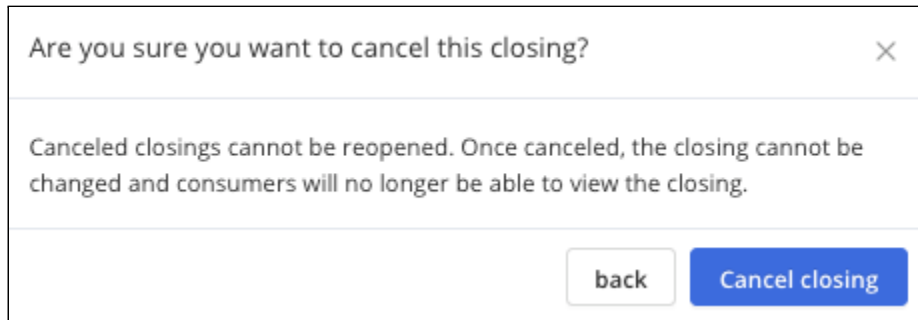


Remove and Add New Full Closing Package

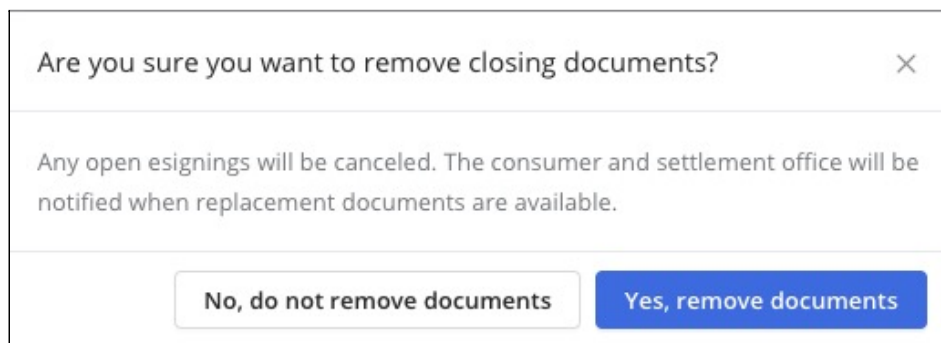
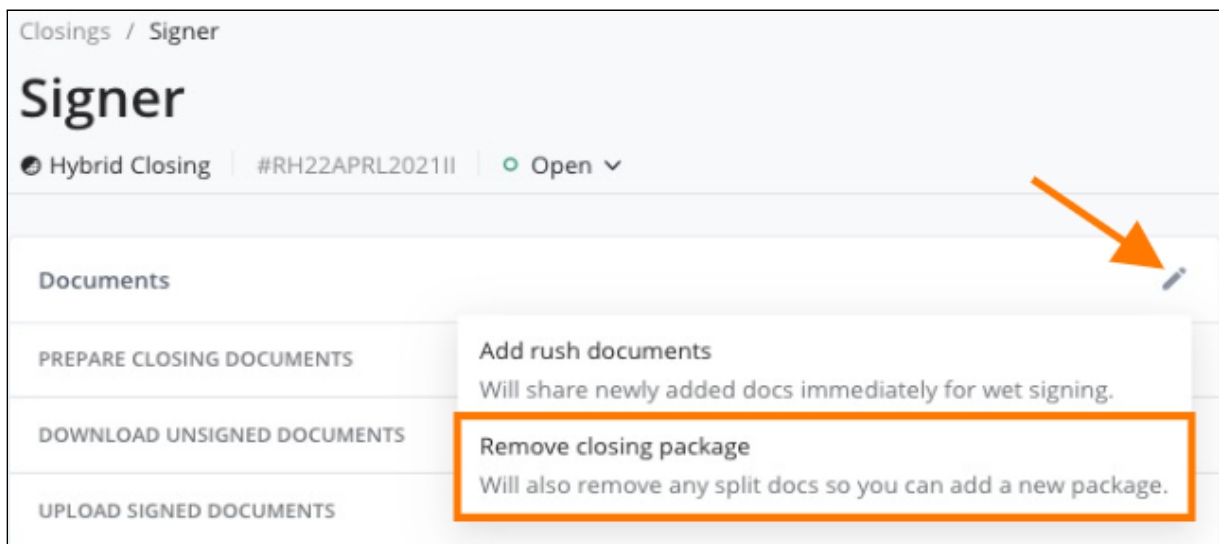
If you are using our direct integration with your LOS, Snapdocs recommends that you cancel the closing in Snapdocs and resend the closing from your LOS if you need to redraw the entire closing package. This requires less manual work for you and your teams, and ensures that all data such as date changes are reflected in the closing.

To cancel a closing, click on the “Open” status symbol at the top of the closing. In the drop down, click on “Canceled”. A pop-up will appear asking you to confirm before cancelling the closing. The Borrower will get an email notification that the closing has been cancelled and they will receive updated links when documents finish reprocessing.



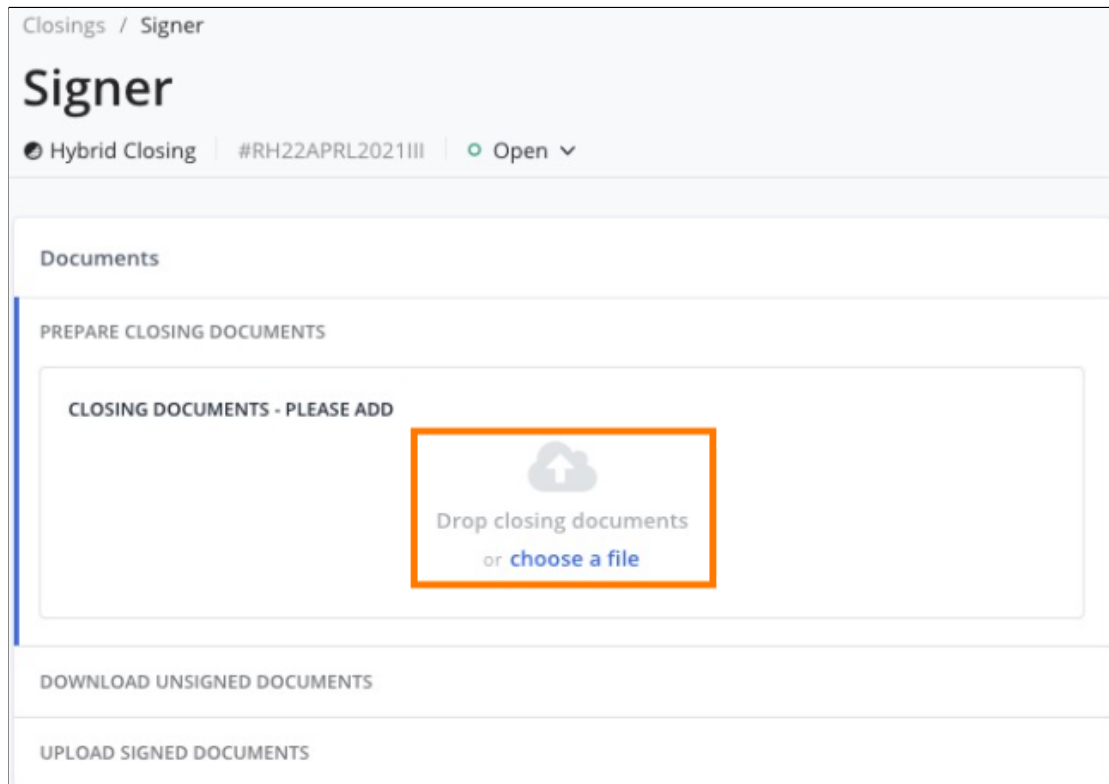


If you would like to keep the original closing, you can remove the closing package manually by clicking on the same pencil icon and click on “Remove closing package”. A pop-up will appear asking you to re-confirm, and at that point you’ll be able to add a net-new closing package to the entire closing using the instructions for [“Add New Closing Package Manually”](#) in the next section.

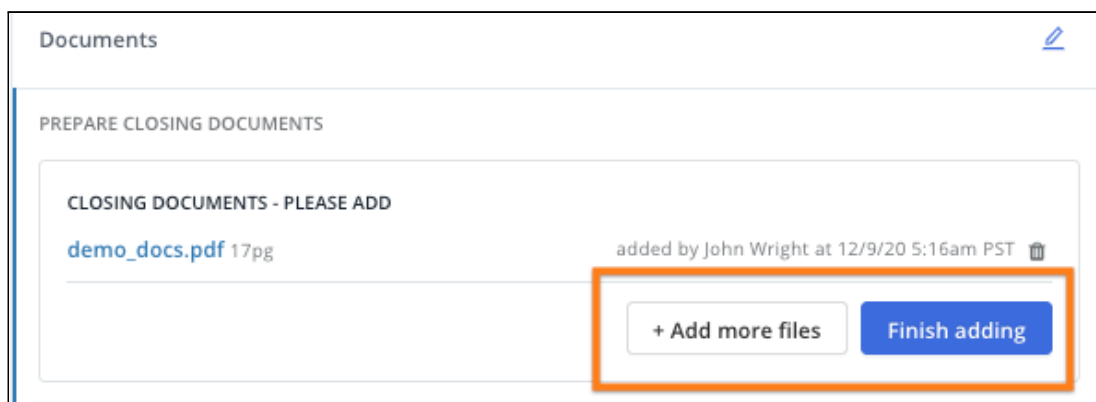


Add New Closing Package Manually

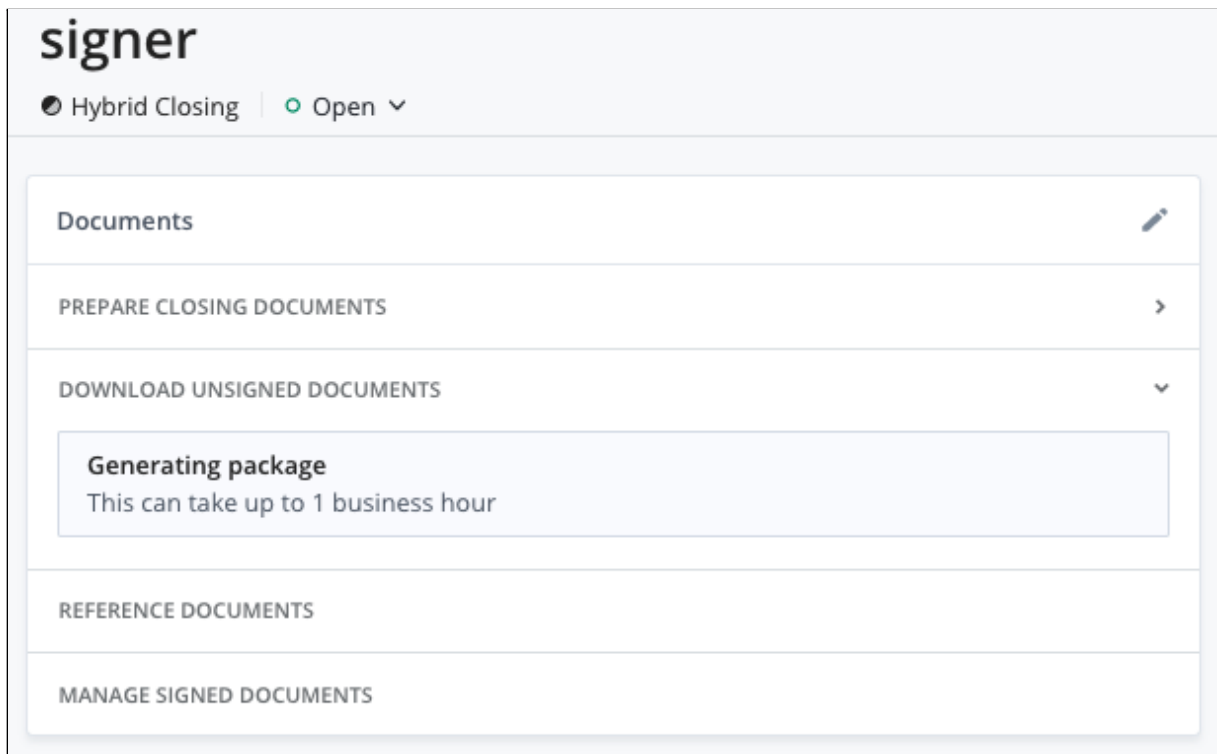
If you are not using our LOS integration, you may need to manually add documents to the closing. Proceed to the “Documents” panel in the closing and either drag & drop your documents or click the “choose a file” button.



Once you’ve added your additional documents by clicking the “+ Add more files” button (if applicable), click “Finish adding” to start document processing by our AI and QC by our support team.



You will know if your documents have entered the Document Processing Queue once the “Generating Package - this can take up to 1 business hour” flag shown below appears.



6. Adding and Removing Users on a Closing

Snapdocs can receive the list of users needed on a closing directly from your LOS with our lightweight integration, but you can also manually add & remove Lender, Settlement, and Borrower users to Snapdocs closings.

Borrowers

To add or remove a Borrower, click on the “Edit” button on the top right of the closing to load the Edit Closing view.

- Proceed to the Signer section at the bottom of the panel and click on the “add cosigner” button to add another section for you to fill in.
- To remove a Borrower, click on the “remove” button.
- Please note, changing their name or email address will restart document processing as the eSign package will need to be regenerated with the new information.
- Click “Save Changes” before exiting the tab.

Signer

First* Last*

Phone number*

Email*

i Changing consumer's name or email will restart document processing. This can take up to 2 hours.

Co-Signer [remove](#)

First* Last*

Phone number*

Email*

i Changing consumer's name or email will restart document processing. This can take up to 2 hours.

[add cosigner](#)

Settlement

If you need to adjust the Settlement Office on a closing, click on the “Edit” button on the top right of the closing and proceed to the Edit Closing view.

- If we’ve processed a closing with a Settlement Office previously, they will appear in the drop down for selection.
- If they do not appear on the list, click on the “Add settlement office/branch” button and populate the relevant details. Click “Save Changes” before exiting the tab.

Edit closing

Closing details

File number

222-333-444-555

Closing method

Hybrid signing
Non-critical documents can be esigned

Wet sign everything
All documents will be wet signed

! Changing closing method will restart document processing. This can take up to 2 hours.

Include eNote

Settlement office*

Snapdocs Settlement

[Add settlement office/branch](#)

To add a Settlement Agent to a closing, select the “+” in the Settlement Office panel.

Closings / Signer

Signer

● Hybrid Closing | #RH26ARPL2021 | ○ Open

Documents

PREPARE ADDITIONAL DOCUMENTS

All additional documents will be wet signed only and available to download for anyone who has access to the closing.

[Add additional documents](#)

DOWNLOAD UNSIGNED DOCUMENTS

Download the wet sign package for the appointment. If you request a notary, you can upload an unsigned document to share with the notary.

Wet Sign Package 7pg
Excludes all eSignable documents. Print for wet sign. [Download](#)

eSign Package 10pg
Includes documents that the consumer will eSign. [More](#)

REFERENCE DOCUMENTS

UPLOAD SIGNED DOCUMENTS

Signing Details

Consumers


Sally Signer
(555) 555-1212
sally.signer25042021@gmail.com

- Notified to review**
2 hours ago
- Reviewed closing documents**
Not yet
- Completed eSigning**
Not yet
- Completed signing appointment**
Not yet

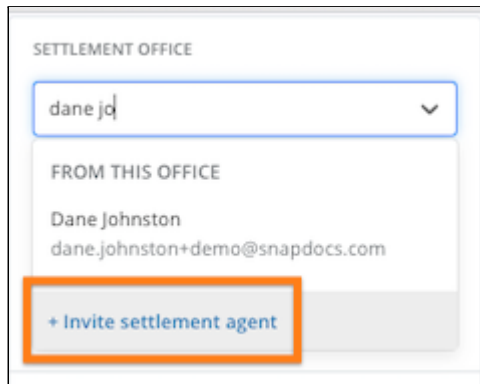
Closing Team

SETTLEMENT

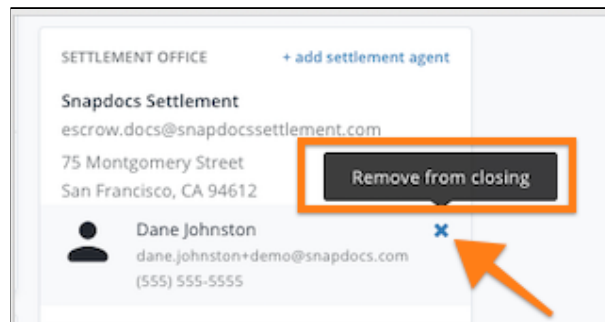
Settlements Are US
settlement.sam@snapdocsettlement.com
123 N Maple St
Burbank, CA 91503



Select the specific Settlement Agent from the drop down and click the “Add” button. If they are not on the list, click “Invite settlement agent” and populate the relevant information to invite them to this Settlement Office on Snapdocs and add them to the closing.



To remove from the closing, hover over the X icon to the right of their name and click “Remove from closing”. Confirm in the next tab that going forward, they will not receive notifications regarding this closing. They will still remain a member of the Settlement Office and have access to the Closing from their homepage.



Lender

To add a Lender user such as a Loan Office or Closer to a closing, select the “+” in the Lender panel. Select a user from the drop-down and add them to the closing. Non-admin Lender users are not able to view a closing unless they are added to it and unlike Settlement Agents, we do not allow you to direct-add Lender users here due to broader roles and permissions of Lender users. *Please review [Snapdocs permissions levels and adding Lender users in the “Snapdocs Instance Administration”](#) section of this document.*

Closings / Signer

Signer

Hybrid Closing #RH26ARPL2021 Open

ENSURE CONSUMER ESIGNS

Make sure the consumer eSigns documents before the appointment. Have the consumer eSign at the closing appointment if the eSigning is still incomplete.

Sally Signer
Consumer can't eSign until appointment is set **Hasn't eSigned**

Send an eSign reminder ▾

SET SIGNING APPOINTMENT [Edit appointment](#)

Please set the appointment

Available signing range April 26th to April 29th

Appointment date Settlement has not set a date yet


Signing location Settlement has not set a location yet

Closing Team

SETTLEMENT +

Settlements Are US
settlement.sam@snapdocssettlement.com
123 N Maple St
Burbank, CA 91503

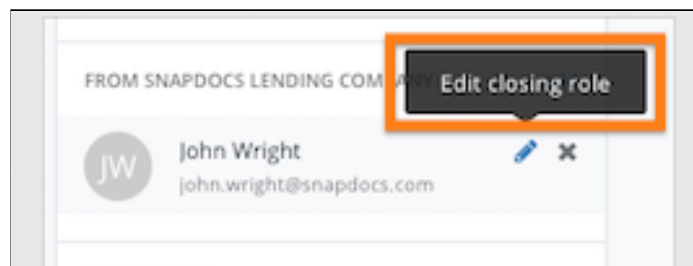
SNAPDOCS LENDER CO +

 Rachel Hagensen
rachel.hagensen@snapdocs.com
(555) 555-1212

PARTICIPANTS

None

You are able to adjust a Lender user's role on the closing to control the email notifications that go out to them. In the Lender user panel, click on the pencil icon to the right of the name and click on "Edit closing role". From the drop-down, select the appropriate user type and click "Update closing role". *To review email settings, please refer to "[Snapdocs Instance Administration](#)" to understand if/what emails are going out to individual roles at your company. You will need admin permissions to view these email settings.*



Edit closing role ✕

Assign yourself a role for this closing. This may impact which closing emails you receive.

Loan Coordinator
 Loan Officer
 Closer
 Funder

7. Managing Activities and Messages

You can review the activity to date on each closing in the Activity Feed, located at the bottom of the page on the closing. This feed documents all activities taken on the closing, by whom, and when the activity was completed.

Activity [audit trail](#)

To ✕ ▾

Enter a message...

Activity Feed:

- Snapdocs Settlement notified of new closing
12/10/20 5:15pm CST
- Documents sent to Sally Signer for preview
12/10/20 5:15pm CST
- Documents marked as finished uploading (by Jenna Schofield)
12/10/20 5:14pm CST
- Closing created (by Jenna Schofield)
12/10/20 5:13pm CST

Additionally, you can utilize the activity feed to send messages to other parties involved in the closing. You can adjust the recipients by clicking in the “To” box. Note, the message will always be sent to the participants from the lender who have been added to the closing (see [“Adding and Removing Users on a Closing”](#).)

Activity audit trail

To: Snapdocs Lending Company All consumers (1) X ▾

Hi Sally,
This is my message to you,
Thanks!

Send

All messages will be recorded in the activity feed, with the sender, recipient(s), and body of the message, and will be visible to anyone who has access to the closing. Note, the lender participants are assumed recipients and are not called out specifically.

JS Jenna Schofield | Snapdocs Lending Company **Sender**
12/10/20 5:28pm CST

Hi Sally,
This is my message to you. **Message**
Thanks!

↶ Shared with: Sally Signer **Recipients**

○ Snapdocs Settlement notified of new closing
12/10/20 5:15pm CST

For more detailed activity data, you can click on “Audit Trail” to review actions, IP addresses, and timestamps. This is largely utilized by Snapdocs support for troubleshooting.

Activity audit trail

To: Snapdocs Lending Company Snapdocs Settlement X ▾

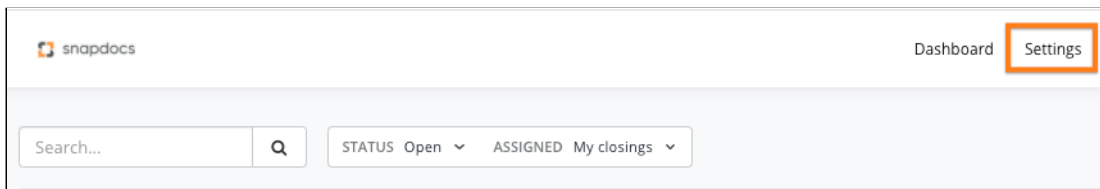
Enter a message...

Audit trail for Signer closing #JS-123456 ✕

User	Action	Notes	IP	Browser	Timestamp
Jenna Schofield	closing.show		13.56.156.98	Chrome	12/10/20 at 5:15pm CST
Jenna Schofield	closing.finished_uploading_docs			Chrome	12/10/20 at 5:14pm CST
Jenna Schofield	documents.original_combined_documents.upload	demo_docs.pdf uploaded		Chrome	12/10/20 at 5:14pm CST
Jenna Schofield	closing.show		13.56.156.98	Chrome	12/10/20 at 5:14pm CST
Jenna Schofield	documents.original_documents.upload	demo_docs.pdf uploaded	13.56.156.98	Chrome	12/10/20 at 5:14pm CST
Jenna Schofield	closing.show		13.56.156.98	Chrome	12/10/20 at 5:13pm CST
Jenna Schofield	closing.create		13.56.156.98	Chrome	12/10/20 at 5:13pm CST

8. Snapdocs Instance Administration

If you have admin privileges, you'll be able to review and adjust the settings specific to your Snapdocs instance. First, click on the "Settings" button on the top right of your screen.



Company Info

Under "Company Info", you'll be able to adjust some basic information about your company's location. Snapdocs will have set this for you before launch but you can always adjust and click "Save" to lock-in your preferences.

General

Company Info

Team

Branding

Document Intelligence

Emails

Company Name

Snapdocs Lending Company

Street Address

100 Montgomery Street

City

San Francisco

State

CA - California

Zip

94104

Phone

When a user logs out, redirect to

https://csdemo1.snapdocs.com

Save

Team

Under “Team”, you are able to manage the Lender users that have access to your Snapdocs instance. To add a new user, click “add team member”.

General

Company Info

Team

Branding

Document Intelligence

Emails

My Team [add team member](#)


LC	Leslie Chen leslie@snapdocs.com Admin	
	Carrie Closer carrie.closer@snapdocs.com Non-admin	
	Max Closer closings-demo@snapdocs.com Owner	
DC	Dave Coen davidacoen@snapdocs.com Admin	
	Carlos Coordinator carlos.coordinator@snapdocs.com Admin	

Select the permissions level for the user, either as a Non-admin or Admin:

- Non-admins can only see closings they’ve been assigned to and are not able to view the Settings tab.
- Admins can see all closings and change your Snapdocs settings in the Settings tab.

Enter the relevant information for the team member and select if you'd like to send out the login details via now. If you uncheck that box, you can always resend the credentials at a later date. Click the "Add team member" button when finished.

Adding team member ×

Non-admin 
Non-admins can only access closings they've been assigned to


Admin
Admins can change your company's settings and access any closing

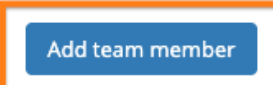
First name **Last name**

Title

Email

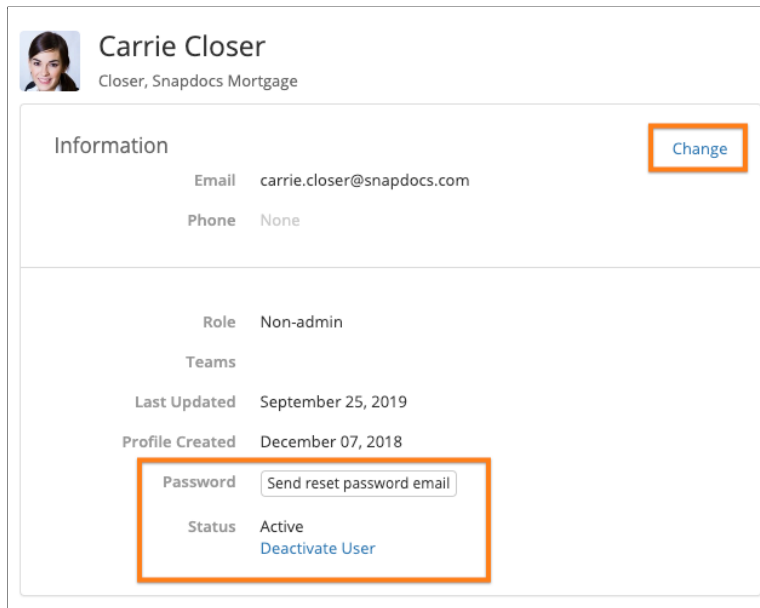
Phone

Email login information to this user 

[Cancel](#) 

To edit or remove a user, click on the pencil icon for the user you'd like to adjust:

- To adjust the information such as an email or phone change, click on "Change".
- To send a password reset email or deactivate the user, click on the respective actions shown below.
- Reactivating a user is as simple as clicking "Activate user" on a deactivated user.



Carrie Closer
Closer, Snapdocs Mortgage

Information [Change](#)

Email: carrie.closer@snapdocs.com
Phone: None

Role: Non-admin

Teams

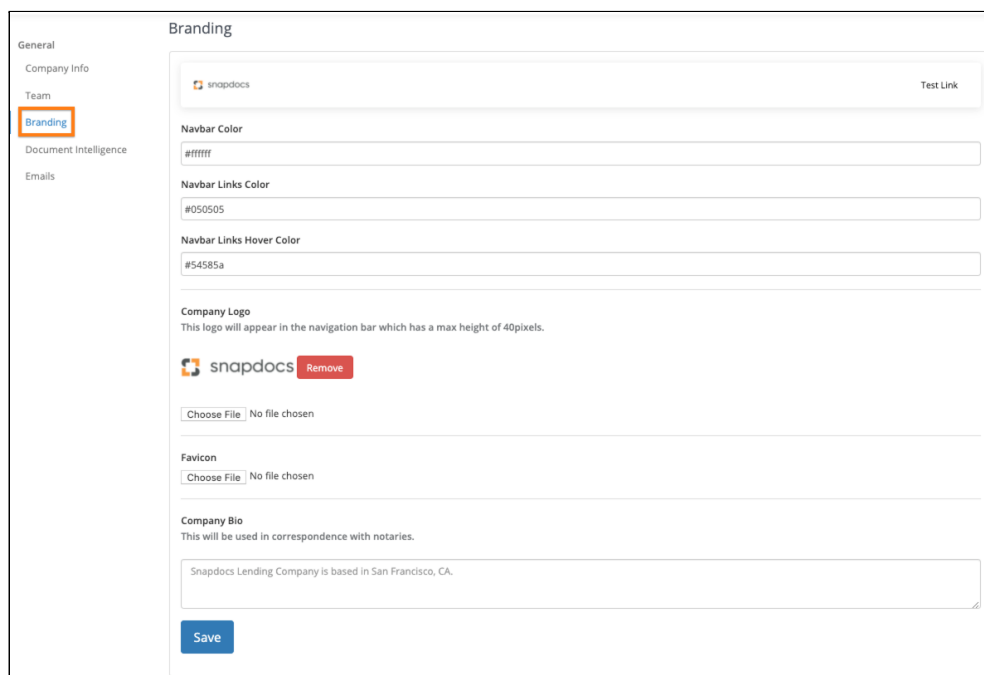
Last Updated: September 25, 2019
Profile Created: December 07, 2018

Password
 Status: Active [Deactivate User](#)

Branding

Your Customer Success Manager will pre-populate your logo, favicon, and color scheme for you, but you also have the ability to adjust these settings at any time:

- To adjust the color, use hex code colors.
- To add a logo, click “Choose File” and select from your desktop. The logo can have a max height of 40pixels.
- To remove a logo, click the “Remove” button and re-add a new logo.



Branding


Company Info: snapdocs [Test Link](#)

Navbar Color: #ffffff

Navbar Links Color: #050505

Navbar Links Hover Color: #54585a

Company Logo
This logo will appear in the navigation bar which has a max height of 40pixels.

 [Remove](#)
 No file chosen

Favicon
 No file chosen

Company Bio
This will be used in correspondence with notaries.

Snapdocs Lending Company is based in San Francisco, CA.

Document Intelligence

Your Document Intelligence preferences are stored here for review. If you ever need one of these documents moved from one setting to another, you can reach out to your Customer Success Manager who can open the support ticket.

General	Package Splitting Preferences		
Company Info	To change these preferences please contact support@snapdocs.com		
Team			
Branding			
Document Intelligence			
Emails			
	Consumer preview	Esign	Wet sign package
	1065	4506 T	1065
	4506 T	Acknowledgment Of Receipt Of Appraisal Report	Affidavit Of Occupancy
	Acknowledgment Of Receipt Of Appraisal Report	Amortization Schedule	Ca Finance Lenders Law Disclosure
	Affidavit Of Occupancy	Borrower Authorization For Counseling	Compliance Agreement
	Amortization Schedule	Borrowers Certification And Authorization	Cover Sheet
	Borrower Authorization For Counseling	Closing Disclosure	Data Entry Proof Sheet
	Borrowers Certification And Authorization	Closing Instructions For Notary	Evidence Of Insurance
	Ca Finance Lenders Law Disclosure	Credit Score Disclosure	Future Income Disclosure
	Closing Disclosure	Equal Credit Opportunity Act Notice	Insect Report
	Closing Instructions For Notary	Escrow Waiver	Instruction To Escrow Title Closing Agent
	Compliance Agreement	First Payment Letter	Irs Account Transcript
	Credit Score Disclosure	Flood Hazard Determination	Lead Based Paint Certification
	Equal Credit Opportunity Act Notice	Hazard Insurance Endorsement Letter	Loan Disbursement Instructions
	Escrow Waiver	Initial Escrow Account Disclosure Statement	Mers Rider
	Evidence Of Insurance	Mailing Address Certification	Mortgage or Deed of Trust
	First Payment Letter	Ssa 89	Note
	Flood Hazard Determination	Tangible Net Benefit Worksheet	Notice Of Right To Cancel
	Future Income Disclosure	Tax Record Information Sheet	Patriot Act
	Hazard Insurance Endorsement Letter	Uniform Residential Loan Application	Planned Unit Development Rider

Emails

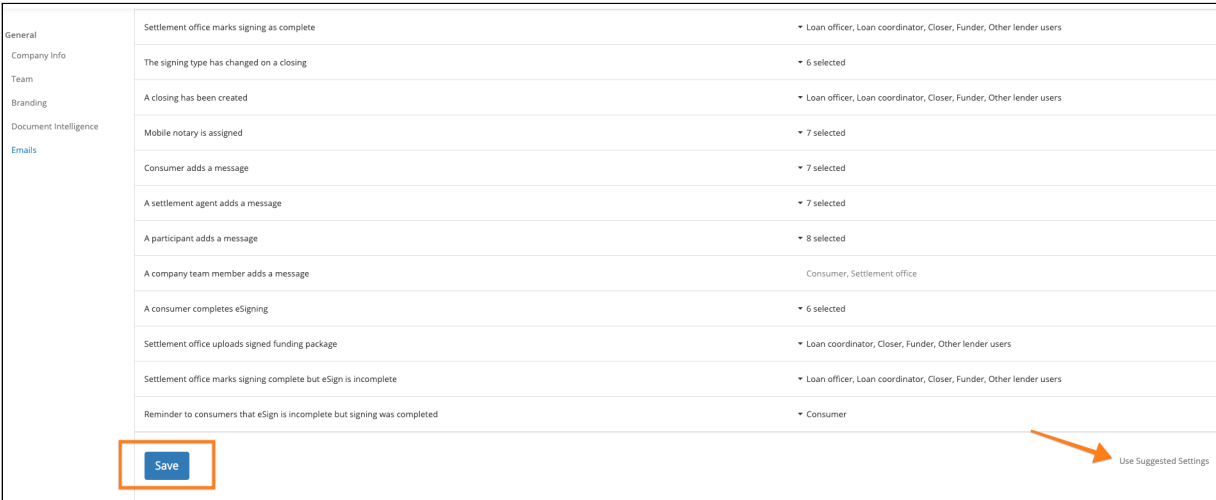
If you would like to adjust the emails that are going out to Lender, Settlement, and Borrower users, you can do so in the settings here.

General	Emails	
Company Info		
Team		
Branding		
Document Intelligence		
Emails		
	When...	Email...
	Documents are ready for the settlement office to download	Settlement office
	Documents are available to preview	▼ 6 selected
	Original closing package is updated	Consumer, Settlement office
	Rush documents are added	▼ Loan officer, Loan coordinator, Closer, Funder, Other lender users
	Signed documents are updated	▼ 7 selected
	Settlement office hasn't set an appointment, and it's 24 hours before the earliest possible close date	Settlement office
	Settlement office sets an appointment	▼ 6 selected
	It's the day of the signing	▼ 6 selected
	Documents are available to eSign	▼ 6 selected
	Reminder to eSign unsigned documents 3 hours before the appointment	▼ Consumer
	Consumer opts out of eSigning	▼ 7 selected
	Settlement office hasn't added a signing status yet and it's 2 hours after the appointment	Settlement office
	Settlement office marks signing as complete	▼ Loan officer, Loan coordinator, Closer, Funder, Other lender users

To make a change, click on a specific email and update the selected items from the drop down. Other lender users are any Lender user with no role type (e.g. Loan Officer) assigned to them.



Make sure you save your changes before leaving this tab. You can also always return back to the Snapdocs suggested preferences by clicking the "Used Suggested Settings" button on the bottom right of the screen.



Support

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