



Snapdocs Email Notifications

Snapdocs Email Notifications

This document explains the email notifications that will be automatically sent by Snapdocs on your behalf. Recipients of the following emails can be customized by role depending on the notification. Your company's branding will replace any "Lending Company" or "Demo" branding present on the sample emails. Note if a recipient is selected, but not present on a closing there will be no error. Do not forward information will be included on every closing.

Category: Closing Documents are ready

Email Action: A closing has been created

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users
- **Subject:** [Last Name] [Loan Number], closing created

Greetings,

The Wr '4 closing has been created in Snapdocs. The settlement agent and borrower will be notified once docs are ready to view. You can log in and view details [here](#).

Best,

Snapdocs

DO NOT FORWARD. This email, and any files transmitted with it, are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you are not the intended recipient, do not use, rely on, disseminate, or copy the material in this email. If you received this email in error, please notify the system manager and delete this email.

This message was sent from [Snapdocs](#)

Email Action: A new settlement agent is invited to Snapdocs

- **Recipient Options:** Settlement Agent
- **Subject:** [Last Name] [Loan Number], You have a new closing! | [LenderName]



Hybrid Closing

Good news! You have a new closing to complete

Hi Emily Hanseler-Settlement,

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

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

Your easy steps to a 20-minute closing

Completing this checklist will ensure you meet The Lending Company'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

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.

3

Print the slimmed down closing package

These are the only lender documents you will need to get wet signed at the signing appointment.

4

Scan and upload signed documents

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

Simple, right? Let's get started.

Print lender documents

With Snapdocs, you can also:



Request a notary

If you need a notary to meet with the consumer for this closing, you can directly request that a notary be scheduled.



Communicate with all parties

You can add your colleagues and communicate directly with the lender, consumer, or signing service at any time.

Closing details



Emily Hanseler
emily.hanseler@snapdocs.com
(206) 817-5949



4/21/25 - TBD
Earliest signing date is 2025-04-21

Location not set yet

Why Snapdocs?

Closing with Snapdocs is a secure way to give borrowers the ability to preview and, in some cases, eSign some documents before the signing appointment. As a result, document errors can be caught in advance, there are fewer pages to print, and you and the borrower have a quicker, stress-free in-person appointment.

Print lender documents

[Or access closing here](#)

Email Action: Documents are ready for the settlement office to download

- **Recipient Options:** Settlement Agent
- **Subject:** [Last Name] [Loan Number], You have a new closing! | [LenderName]



Hybrid Closing

Good news! You have a new closing to complete

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Closing details



Emily Hanseler
emily.hanseler@snapdocs.com
(206) 817-5949



4/21/25 - TBD
Earliest signing date is 2025-04-21

Location not set yet

Why Snapdocs?

Closing with Snapdocs is a secure way to give borrowers the ability to preview and, in some cases, eSign some documents before the signing appointment. As a result, document errors can be caught in advance, there are fewer pages to print, and you and the borrower have a quicker, stress-free in-person appointment.

Print lender documents

Or access closing here

Email Action: Documents are available to preview

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Consumer
- **Subject:** Review and eSign your closing document | [Lender Name]



Hello Emily,

The Hanseler #Emailtest2 closing documents are ready for preview.

[View closing](#)

[Or access closing here](#)

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Closing type	Wet signing All documents will be wet signed
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Documents are available to eSign

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Consumer
- **Subject:** Review and eSign your closing documents | [Lender Name]



Hi Emily,

Please review and eSign your closing documents on your preferred device before your in-person signing appointment. If you have any questions about your closing, contact your lender or settlement agent in the signing platform.

If you are experiencing technical issues, please visit our [Help Center](#) or call Snapdocs at (833) 762-7362.

[Review & eSign documents](#)

[Or access closing here](#)

This link will expire in 14 days. By clicking on the Review and Sign button in this email, you acknowledge and agree to our [Terms of Service](#) and our [Privacy Policy](#).

Coming up: In-person signing appointment

Date: Apr 21, 2025
Time: 11:00 am PDT
Signing Location: TBD

Note: Your signed documents will become available up to a few weeks after your closing date. We will send you a notification when they are ready for download.

Snapdocs is a service provider to The Lending Company. The privacy policy and terms of use of The Lending Company, and contractual obligations between Snapdocs and The Lending Company, apply to the collection and use of your personal data. Links in the body of this email will direct you to a site maintained and hosted by Snapdocs. Use of Snapdocs is not required to complete your closing. By clicking on the links in this email, you acknowledge and agree to Snapdocs' Terms of Service and Privacy Policy.

DO NOT FORWARD. This email, and any files transmitted with it, are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you are not the intended recipient, do not use, rely on, disseminate, or copy the material in this email. If you received this email in error, please notify the system manager and delete this email.

For support, please visit the [Snapdocs Help Center](#) or call Snapdocs at (833) 762-7362.

Email Action: Remote notarization appointment link is available

- **Recipient Options:** Consumer
- **Subject:** [Borrower Name], you have documents to review



Hi Sally,

The documents for your online signing appointment are ready to review. Click the button below to read through your closing package on our remote online notary partner's platform ahead of your online signing appointment.

Signing Appointment: March 6 at 6:30 PM CST

[Review documents](#)

[Or access closing here](#)

What to expect

- Review your documents. Take as much time as you need to review your closing package
- You'll verify your identity by answering a few personalized questions and providing a [valid photo ID](#)
- Then join a live two way video call with a remote online notary and complete the closing package

Signer Checklist

Before joining your webcam signing appointment, make sure you are set up with these items:

- Your US Social Security Number
- Your government-issued photo ID (see the [list](#) of acceptable IDs)
- A computer with a microphone and webcam
- One of these up-to-date supported browsers: Mozilla Firefox, Google Chrome, or Safari
- A strong internet connection
- A quiet place to ensure an uninterrupted experience
- Multiple signers in the same location, please use the same device

Questions?

For technical issues, contact:

Notarize Support
notarize@support.com | +1 (888)-483-4330
Available 8am-8pm ET

For document or signing issues, contact:

Title Agent
PA Prod Demo Settlement
pa.prod.demos+sa@snapdocs.com

Email Action: Snapdocs Introductory Email

- **Recipient Options:** Consumer
- **Subject:** Welcome to your Snapdocs digital closing | [Lender Name]



Hello Emily,

The Lending Company provides a digital closing experience so you can have an easier closing process. This experience allows you to review your closing package and eSign most of your closing documents at your convenience, which shortens the in-person signing appointment.

Below is more information on when and how to complete your closing.

Your closing information

Review documents on: Apr 21, 2025

eSign documents on: Apr 21, 2025

Attend in-person signing appointment: Apr 21, 2025 at TBD

We will send you a notification for each of these milestones and if there are any updates to your closing.

What to expect

1. You will receive an email from Snapdocs with a secure link to your closing.
2. Authenticate with your phone number (no username or password required).
3. Once you're logged in, Snapdocs will walk you through how to preview and eSign.
4. After your digital closing is complete, you will attend the shorter in-person appointment to sign the remaining important documents.

Want to learn more?

[Check out our Borrower Resource Center](#)

Snapdocs is a service provider to The Lending Company. The privacy policy and terms of use of The Lending Company, and contractual obligations between Snapdocs and The Lending Company, apply to the collection and use of your personal data. Links in the body of this email will direct you to a site maintained and hosted by Snapdocs. Use of Snapdocs is not required to complete your closing. By clicking on the links in this email, you acknowledge and agree to Snapdocs' Terms of Service and Privacy Policy.

DO NOT FORWARD. This email, and any files transmitted with it, are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you are not the intended recipient, do not use, rely on, disseminate, or copy the material in this email. If you received this email in error, please notify the system manager and delete this email.

For support, please visit the [Snapdocs Help Center](#) or call Snapdocs at (833) 762-7362.

Category: Closing is completed

Email Action: A consumer completed eSigning

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement Office
- **Subject:** [Last Name] [Loan Number]. eSigning complete, signed documents are available



Hello,

The Hanseler #Farr1234 closing has successfully esigned all eligible documents.

View closing

[Or access closing here](#)

File #	Farr1234
Date and time	4/15/25 at 5:00pm PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Settlement office marks signing as complete

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement Office
- **Subject:** [Last Name] [Loan Number]. eSigning complete, signed documents are available

Signed documents are ready for review

Hi Emily,

The Settlement Company (SF Office) has successfully added documents to the Hanseler #Emailtest closing for your review.

The signed funding package is being securely transferred to your LOS for download. On rare occasions, documents can take up to 20 minutes to be delivered. If this happens and you need your documents sooner, you can download them directly from the closing in Snapdocs.

[View closing](#)

[Or access closing here](#)

Closing details



Emily Hanseler

emily.hanseler@snapdocs.com

(206) 817-5949



4/22/25 at 1:15pm PDT

Earliest signing date is 2025-04-21

Location not set yet

Why don't I see my documents in my LOS?

On a rare occasion, your signed funding package could experience delivery delays, here are some reasons why:

1 Your loan is open in the LOS

If your loan file is currently open, you will need to close it in order for the signed funding package to be successfully delivered to you.

2 Snapdocs is experiencing technical difficulties

There could be a delay in the queue that is sending your funding package to the LOS. If you do not receive your documents within 20 minutes, download them directly from the closing file in Snapdocs.

[Download Signed Documents in Snapdocs](#)

[Or access closing here](#)

DO NOT FORWARD. This email, and any files transmitted with it, are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you are not the intended recipient, do not use, rely on, disseminate, or copy the material in this email. If you received this email in error, please notify the system manager and delete this email.

For support, please visit our [Help Center](#) or call Snapdocs at (833) 762-7362.

Email Action: Settlement has finished QCing documents

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Quality Controller, Settlement office, Settlement agent
- **Subject:** [Last Name] [Loan Number], Snapdocs QC Report (*with errors*) is ready to review
- **Notes:** will only say “with errors” if errors are present. Only included if Funding QC is turned on



Hanseler #Emailtest2, Signed documents (with errors) are ready for review & download

Signed documents for the Hanseler #Emailtest2 closing have been uploaded into Snapdocs and we have analyzed and produced the report below. For more information on the closing documents, visit the closing in Snapdocs.

Quality Control Report



We've stopped LOS pushback because the borrower last name or loan number on the documents may not match the closing. Please view the closing to resolve:

- SallySigner_Signed__2_.pdf

4506 T		Error detected
Affidavit Of Occupancy		Error detected
Uniform Residential Loan Application		Error detected
Closing Disclosure		QC Passed
Unknown		68 Unknown pages

[View closing](#)

Email Action: Signed documents ready for download

- **Recipient Options:** Consumer
- **Subject:** Your signed closing documents are available | [Lender Name]

EPD DEMO

Hi David,

Your completed, signed closing documents are now available for you to download.

Note: It is normal for this email to arrive up to a few weeks after your closing date, although it may arrive faster

[View closing](#)

[Or access closing here](#)

This link will expire in 14 days. By clicking on the Review and Sign button in this email, you acknowledge and agree to our [Terms of Service](#) and our [Privacy Policy](#).

We hope you've enjoyed your closing experience with EPD demo. Please don't hesitate to reach out if you have any questions or feedback.

Snapdocs is a service provider to EPD demo. The privacy policy and terms of use of EPD demo, and contractual obligations between Snapdocs and EPD demo, apply to the collection and use of your personal data. Links in the body of this email will direct you to a site maintained and hosted by Snapdocs. Use of Snapdocs is not required to complete your closing. By clicking on the links in this email, you acknowledge and agree to Snapdocs' Terms of Service and Privacy Policy.

DO NOT FORWARD. This email, and any files transmitted with it, are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you are not the intended recipient, do not use, rely on, disseminate, or copy the material in this email. If you received this email in error, please notify the system manager and delete this email.

For support, please visit the [Snapdocs Help Center](#) or call Snapdocs at (833) 762-7362.

Email Action: Remote notary appointment is complete

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users
- **Subject:** [Last Name] [Loan Number], Documents are ready for review

Signed documents are ready for review

Hi Testio,

Staging Settlement has successfully added documents to the Newton closing for your review.

Please sign in to Snapdocs to retrieve these signed documents.

[View closing](#)

Closing details



Jack Newton
jack_newton@gmail.com
(738) 657-3864



Date and time not set yet

DO NOT FORWARD. This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error, please notify the system manager. This message contains confidential information and is intended only for the individual named. If you are not the named addressee, you should not disseminate, distribute or copy this email.

For support, please visit our [Help Center](#) or call Snapdocs at (833) 762-7362.

Email Action: Settlement office uploads signed funding package

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other Lender Users
- **Subject:** [Last Name] [Loan Number], Documents are ready for review
- **Notes:** Will only include “eSigning has not yet been completed” if that is the case

Signed documents are ready for review

Hi Emily,

The Settlement Company (SF Office) has successfully added documents to the Hanseler #Emailtest2 closing for your review. **eSigning has not yet been completed.** The borrower and Settlement Agent have both been sent reminder emails directing them to complete the eSign portion of the closing.

The signed funding package is being securely transferred to your LOS for download. On rare occasions, documents can take up to 20 minutes to be delivered. If this happens and you need your documents sooner, you can download them directly from the closing in Snapdocs.

[View closing](#)

[Or access closing here](#)

Closing details



Emily Hanseler
emily.hanseler@snapdocs.com
(206) 817-5949



4/21/25 at 11:00am PDT

Earliest signing date is 2025-04-21

Location not set yet

Why don't I see my documents in my LOS?

On a rare occasion, your signed funding package could experience delivery delays, here are some reasons why:

- 1 Your loan is open in the LOS**

If your loan file is currently open, you will need to close it in order for the signed funding package to be successfully delivered to you.
- 2 Snapdocs is experiencing technical difficulties**

There could be a delay in the queue that is sending your funding package to the LOS. If you do not receive your documents within 20 minutes, download them directly from the closing file in Snapdocs.

[Download Signed Documents in Snapdocs](#)

[Or access closing here](#)

Email Action: Confirm QC report errors detected & dates

- **Recipient Options:** Settlement Office, Settlement Agent
- **Subject:** [Last Name] [Loan Number], Snapdocs QC Report *(with errors)* is ready to review
- **Notes:** will only say “with errors” if errors are present. Only included if Funding QC is turned on



Hanseler #Emailtest2, Signed documents (with errors) are ready for review & download

Signed documents for the Hanseler #Emailtest2 closing have been uploaded into Snapdocs and we have analyzed and produced the report below. For more information on the closing documents, visit the closing in Snapdocs.

Quality Control Report



We've stopped LOS pushback because the borrower last name or loan number on the documents may not match the closing. Please view the closing to resolve:

- SallySigner_Signed__2_.pdf

4506 T		Error detected
Affidavit Of Occupancy		Error detected
Uniform Residential Loan Application		Error detected
Closing Disclosure		QC Passed
Unknown		68 Unknown pages

[View closing](#)

Category: Messages

Email Action: Consumer adds a message

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement office, Participants
- **Subject:** [Last Name] [Loan Number], [User Name] has added a message | [Lender Name]



Hello,

Emily Hanseler-Lender has added a message to the [Hanseler closing](#):



Emily Hanseler-Lender

at The Lending Company

I'm confused what this means

View closing

[Or access closing here](#)

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

File #	Emailtest
Date and time	4/22/25 at 1:15pm PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: A Settlement Agent adds a message

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement office, Participants, Consumer
- **Subject:** [Last Name] [Loan Number], [User Name] has added a message | [Lender Name]



Hello,

Emily Hanseler-Lender has added a message to the [Hanseler closing](#):



Emily Hanseler-Lender at The Lending Company

I'm confused what this means

View closing

[Or access closing here](#)

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

File #	Emailtest
Date and time	4/22/25 at 1:15pm PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: A company team member adds a message

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement office, Participants, Consumer
- **Subject:** [Last Name] [Loan Number], [User Name] has added a message | [Lender Name]



Hello,

Emily Hanseler-Lender has added a message to the [Hanseler closing](#):



Emily Hanseler-Lender at The Lending Company

I'm confused what this means

View closing

[Or access closing here](#)

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

File #	Emailtest
Date and time	4/22/25 at 1:15pm PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: A participant adds a message

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement office, Participants, Consumer
- **Subject:** [Last Name] [Loan Number], [User Name] has added a message | [Lender Name]



Hello,

Emily Hanseler-Lender has added a message to the [Hanseler closing](#):



Emily Hanseler-Lender

at The Lending Company
I'm confused what this means

View closing

[Or access closing here](#)

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

File #	Emailtest
Date and time	4/22/25 at 1:15pm PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: A signing service member adds a message

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement office
- **Subject:** [Last Name] [Loan Number], [User Name] has added a message | [Lender Name]



Hello,

Emily Hanseler-Lender has added a message to the [Hanseler closing](#):



Emily Hanseler-Lender at The Lending Company

I'm confused what this means

View closing

[Or access closing here](#)

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

File #	Emailtest
Date and time	4/22/25 at 1:15pm PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Category: Reminders: eSign & wet Sign

Email Action: Settlement office hasn't set an appointment, and it's 24 hours before the earliest possible close date OR full eclosing and it's 48 hours or less before the latest possible close date

- **Recipient Options:** Settlement Office
- **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 Hanseler #emailtest3 closing.

The earliest signing date is 2025-04-21.

Set appointment details

[Or access closing here](#)

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	emailtest3
Date and time	4/21/25 - TBD
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: It's the day of the signing

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office
- **Subject:** [Last Name] [Loan Numer], Signing appointment is today | [Lender Name]
- **Note:** Copy depends on if borrower has eSigned or not

Hello,

The Br 5 closing is scheduled for 11:00am EDT 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

Or access closing [here](#)

Borrower

File

Date and time 4/18/25 at 11:00am EDT

Location

Closing type	Hybrid signing
	Some documents are eligible to be eSigned

Lender team

Email Action: Remote notarization appointment is about to start

- **Recipient Options:** Consumer
- **Subject:** [Borrower Name], your online signing begins in 30 minutes



Hi Jeffrey,

Your online signing appointment is coming up soon. Click the button below 15 minutes prior to your appointment to begin your login process. Make sure you are on a webcam-enabled computer. Please review the signer checklist before you login and ensure you have everything you need ready before your appointment.

 February 21 at 8:00 PM MST

Join the signing appointment

[Or access closing here](#)

Signing appointment will last up to 1 hour

Signer Checklist

Before joining your webcam signing appointment, make sure you are set up with these items:

- Your US Social Security Number
- Your government-issued photo ID (see the [list](#) of acceptable IDs)
- A computer with a microphone and webcam
- One of these up-to-date supported browsers: Mozilla Firefox, Google Chrome, or Safari
- A strong internet connection
- A quiet place to ensure an uninterrupted experience
- Multiple signers in the same location, please use the same device

Email Action: Reminder to eSign unsigned documents before appointment

- **Recipient Options:** Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** Reminder to eSign your closing documents | [Lender Name]



Hi Emily,

Please review and eSign your closing documents on your preferred device before your in-person signing appointment. If you have any questions about your closing, contact your lender or settlement agent in the signing platform.

If you are experiencing technical issues, please visit our [Help Center](#) or call Snapdocs at (833) 762-7362.

[Review & eSign documents](#)

[Or access closing here](#)

This link will expire in 14 days. By clicking on the Review and Sign button in this email, you acknowledge and agree to our [Terms of Service](#) and our [Privacy Policy](#).

Coming up: In-person signing appointment

Email Action: Reminder to consumers that eSign is incomplete but signing was completed

- **Recipient Options:** Consumer
- **Subject:** Reminder to eSign your closing documents | [Lender Name]



Hi Emily,

Your signing appointment has occurred, and you have not yet eSigned your documents. You are required to log in and eSign a portion of your documents to complete your closing.

If you do not eSign, you will need to sign the full package with your mobile notary.

[Review & eSign](#)

[Or access closing here](#)

This link will expire in 14 days. By clicking on the Review and Sign button in this email, you acknowledge and agree to our [Terms of Service](#) and our [Privacy Policy](#).

Thank you,
The Lending Company

Email Action: Settlement office marks signing complete but eSign is incomplete

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users
- **Subject:** [Last Name] [Loan Number], Esign Incomplete | [Lender Name]



Hello Emily,

The wet sign appointment was recently marked as complete on the Hanseler #Emailtest2 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

[Or access closing here](#)

File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Title documents have not been uploaded by settlement

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users
- **Subject:** [lastname] [File #] Title documents not uploaded



Hello [Lenderuser],

Title documents have not been uploaded for the below closing. Please reach out to the settlement agent if title documents are required.

Borrower name	Firtname Lastname
File number	lastname-123456789
Settlement Company	The Settlement Company

If title documents are not required on this closing, log in and click the "title documents not required" button in the 'Update documents' dropdown.

[View Closing](#)

For support, please visit our [Help Center](#) or call Snapdocs at (833) 762-7362.

Category: Reminders: signing status & scanbacks

Email Action: Settlement office hasn't added a signing status yet after the appointment (2 hours and 4 hours after appointment)

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office
- **Subject:** [Last Name] [Loan Number], Upload signed funding package or mark signing appointment complete | [Lender Name]



Hello,

Please upload all documents in the signed funding package if the signing appointment has happened. If all documents have been uploaded, mark the signing appointment as complete.

If you are unable to upload signed documents because the appointment time or date has changed, please update the date/time in Snapdocs. If the user uploading the docs is not on the closing, please add them to the closing and have them upload.

View closing, add status

[Or access closing here](#)

File #	Test redirect params
Date and time	TBD
Location	Not set
Lender team	Robert McCoveys isaac+closings@snapdocs.com

Email Action: Settlement office hasn't added a signing status yet after the appointment (9AM and 2PM one day after appointment)

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office
- **Subject:** [Last Name] [Loan Number], Upload signed funding package or mark signing appointment complete | [Lender Name]



Hello,

Please upload all documents in the signed funding package if the signing appointment has happened. If all documents have been uploaded, mark the signing appointment as complete.

If you are unable to upload signed documents because the appointment time or date has changed, please update the date/time in Snapdocs. If the user uploading the docs is not on the closing, please add them to the closing and have them upload.

[View closing, add status](#)

[Or access closing here](#)

File #	Test redirect params
Date and time	TBD
Location	Not set
Lender team	Robert McCoveys isaac+closings@snapdocs.com

Email Action: Settlement office hasn't added a signing status yet after the appointment (AM and 2PM two days after appointment)

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office
- **Subject:** [Last Name] [Loan Number], Upload signed funding package or mark signing appointment complete | [Lender Name]



Hello,

Please upload all documents in the signed funding package if the signing appointment has happened. If all documents have been uploaded, mark the signing appointment as complete.

If you are unable to upload signed documents because the appointment time or date has changed, please update the date/time in Snapdocs. If the user uploading the docs is not on the closing, please add them to the closing and have them upload.

[View closing, add status](#)

[Or access closing here](#)

File #	Test redirect params
Date and time	TBD
Location	Not set
Lender team	Robert McCoveys isaac+closings@snapdocs.com

Category: Updates: closing Type

Email Action: Consumer opts into eSigning

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** [Last Name] [Loan Number], Signing type update | [Lender Name]



Hello Emily,

Emily Hanseler-Lender on the Hanseler #Emailtest2 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](#)

[Or access closing here](#)

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Consumer opts into eSigning

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** [Last Name] [Loan Number], Borrower has opted out of esigning



Hello,

The Hanseler #Emailtest2 closing has opted out of esigning. The settlement agent has been notified to print the full closing document package for a wet signing.

[View closing](#)

[Or access closing here](#)

File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: The signing type has changed on a closing

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** [Last Name] [Loan Number], Signing type update | [Lender Name]
- **Note:** Email will contain specific information on how the closing has changed



Hello Emily,

Emily Hanseler-Lender on the Hanseler #Emailtest2 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

[Or access closing here](#)

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Category: Updates: Closing Documents

Email Action: Original closing package is updated

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** Documents Updated - File [Loan Number]
- **Note:** Will only prompt the Settlement Office to print the docs



Hello Emily Hanseler-Settlement,

Emily Hanseler-Lender uploaded documents for file #Emailtest2.

Download the updated documents and use at the signing appointment.

Print updated documents

[Or access closing here](#)

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Redraw documents are added

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** Documents Updated - File [Loan Number]
- **Note:** Will only prompt the Settlement Office to print the docs



Hello Emily Hanseler-Settlement,

Emily Hanseler-Lender uploaded documents for file #Emailtest2.

Download the updated documents and use at the signing appointment.

Print updated documents

Or access closing here

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Signed documents are updated

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** A new version of signed closing documents is available | [Lender Name]

Hi David,

We've made some changes to your signed closing package. Please be sure to download the latest version.

[View closing](#)

[Or access closing here](#)

This link will expire in 14 days. By clicking on the Review and Sign button in this email, you acknowledge and agree to our [Terms of Service](#) and our [Privacy Policy](#).

We hope you've enjoyed your closing experience with EPD demo. Please don't hesitate to reach out if you have any questions or feedback.

Email Action: Rush documents are added

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** Documents Updated - File [Loan Number]
- **Note:** Will only prompt the Settlement Office to print the docs



Hello Emily Hanseler-Settlement,

Emily Hanseler-Lender uploaded documents for file #Emailtest2.

Download the updated documents and use at the signing appointment.

[Print updated documents](#)

[Or access closing here](#)

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Signed documents are changed post download

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement office, Consumer
- **Subject:** A new version of your signed closing documents is available | [Lender Name]

Hi David,

We've made some changes to your signed closing package. Please be sure to download the latest version.

[View closing](#)

[Or access closing here](#)

This link will expire in 14 days. By clicking on the Review and Sign button in this email, you acknowledge and agree to our [Terms of Service](#) and our [Privacy Policy](#).

We hope you've enjoyed your closing experience with EPD demo. Please don't hesitate to reach out if you have any questions or feedback.

Category: Updates: Closing Appointment

Email Action: Appointment details are changed

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Consumer
- **Subject:** [Last Name] [Loan Number], Signing appointment is set for [Date and Time]



Hello,

The signing appointment for the Hanseler #Emailtest2 closing is set for 4/21/25 at 11:00am PDT:

View closing

Or access closing here

Borrower	Emily Hanseler emily.hanseler@snapdocs.com (206) 817-5949
File #	Emailtest2
Date and time	4/21/25 at 11:00am PDT
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Lender team	Emily Hanseler-Lender emily.hanseler@snapdocs.com

Email Action: Notary order canceled

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement Office, Consumer
- **Subject:** Borrower #98765433, Signing appointment has been canceled | [Lender Name]



Powered by Connected Closings

Hello Consuelo,

The signing appointment for the George order has been canceled.



05/14/25 at 12:00 pm *(canceled)*

TBD, Denver, CO 80218

View This Order

[Or access closing here](#)

Email Action: Notary order details are available

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement Office, Consumer
- **Subject:** Notary order details available



 **Powered by Connected Closings**

Greetings,

The Letterman #329d933 closing has been linked to Snapdocs notary order 3023403.

The appointment is scheduled for **5/15/25 at 1:30pm PDT** at 100 Montgomery St, San Francisco, CA 94104.

[View closing](#)

[Or access closing here](#)

Borrower	David Letterman davidl@gmail.com (412) 818-1818
File #	329d933
Appointment status	Appointment scheduled; waiting for signer confirmation
Date and time	5/15/25 at 1:30pm PDT
Location	100 Montgomery St, San Francisco, CA 94104
Closing type	Hybrid signing Some documents are eligible to be eSigned
Notary status	Scheduler has started notary search
Scheduler	Mobile Notary - Staging mobilenotarystaging@company26.com
Lender team	Patrick Vasseurnegohi patrick_vasseurnegohi@snapdocs.com

Email Action: Mobile notary is assigned

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement Office, Consumer
- **Subject:** Notary assigned | [Lender Name]

snapdocs 

Powered by Connected Closings

A notary has been assigned to the George #88888 closing. The appointment is scheduled for **5/14/25 at 12:00pm MDT** at TBD, Denver, CO 80218.

Consuelo Mora
consuelo@notary14134.com
(912) 898-7118

View closing

[Or access closing here](#)

Borrower	Jenny George jgeorge9995@gmail.com (234) 343-2532
File #	88888
Appointment status	Appointment scheduled; waiting for signer confirmation
Date and time	5/14/25 at 12:00pm MDT
Location	TBD, Denver, CO 80218
Closing type	Hybrid signing Some documents are eligible to be eSigned
Notary status	Notary assigned
Notary	Consuelo Mora consuelo@notary14134.com (912) 898-7118
Scheduler	Staging Demo Company general@address.com
Lender team	Ryan Hutnick ryan.hutnick@snapdocs.com

Email Action: Remote notary is assigned

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Consumer
- **Subject:** [Borrower Last Name], Notary assigned

snapdocs 

Powered by Connected Closings

A notary has been assigned to the Jones closing. The appointment is scheduled for **5/12/25 at 6:00pm PDT**.

Consuelo Mora
consuelo@notary14134.com
(912) 898-7118

View closing

[Or access closing here](#)

Borrower	Jenny Jones jjones555@gmail.com (983) 759-2837
Appointment status	Appointment scheduled; waiting for signer confirmation
Date and time	5/12/25 at 6:00pm PDT
Location	Not set
Closing type	Hybrid signing Some documents are eligible to be eSigned
Notary status	Notary assigned
Notary	Consuelo Mora consuelo@notary14134.com (912) 898-7118
Scheduler	Staging Demo Company general@address.com
Lender team	John Adams john@adams-lending.com

Category: Other

Email Action: Fresh secure access link

- **Recipient Options:** Consumer
- **Subject:**
- **Note:** Snapdocs team working through compliance on this notification. This is not an automatic email currently in use. Snapdocs support can manually resend link if needed

Email Action: Notify when a closing is canceled

- **Recipient Options:** Loan officer, Broker, Loan coordinator, Closer, Funder, Other lender users, Settlement Office
- **Subject:** [Last Name] [Loan Number], Closing canceled | [Lender Name]



Hi The Settlement Company (SF Office),

The Hanseler closing has been canceled. Please reach out to the lender if you have any questions.

[View closing](#)

[Or access closing here](#)

Borrower name	Emily Hanseler
File #	Emailtest2
Lender	The Lending Company