

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

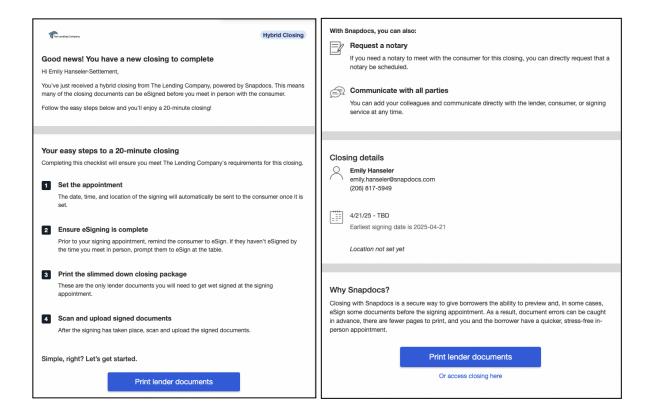
Greetings,	
The Wr will be notified once d	74 closing has been created in Snapdocs. The settlement agent and borrower locs are ready to view. You can log in and view details here.
Best,	
Snapdocs	
DO NOT FORWARD Thi	s email and any files transmitted with it are confidential and intended solely for the use of the

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

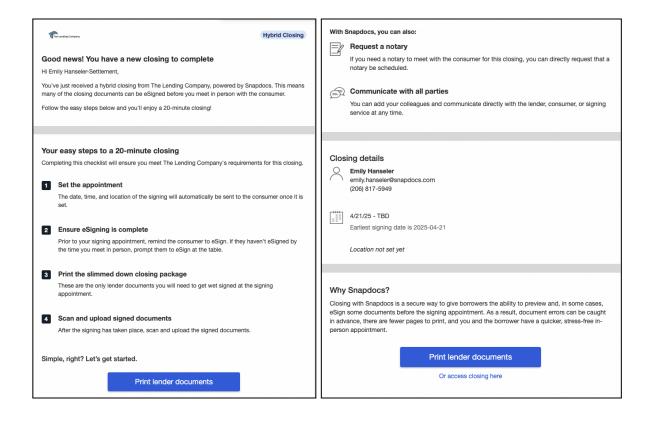
Email Action: A new settlement agent is invited to Snapdocs

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



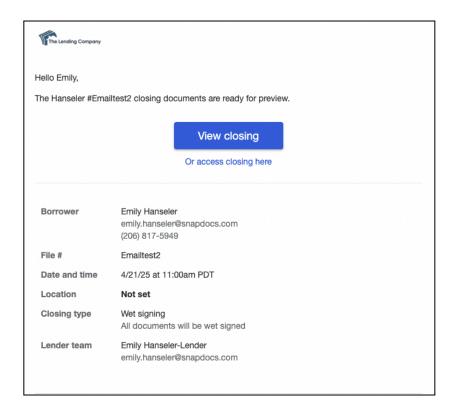
Email Action: Documents are ready for the settlement office to download

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



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]



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 Agen

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.
- 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.

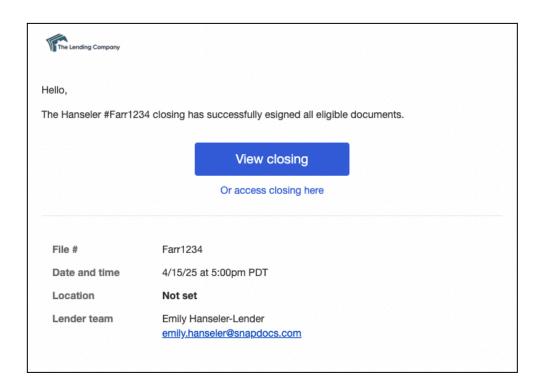
DO NOT FORWARD. This email, and any files transmitted with it, are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you are not the intended recipient, do not use, rely on, disseminate, or copy the material in this email. If you received this email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

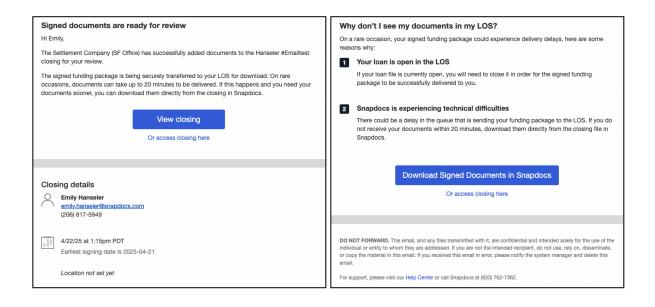
Email Action: A consumer completed eSigning

- 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



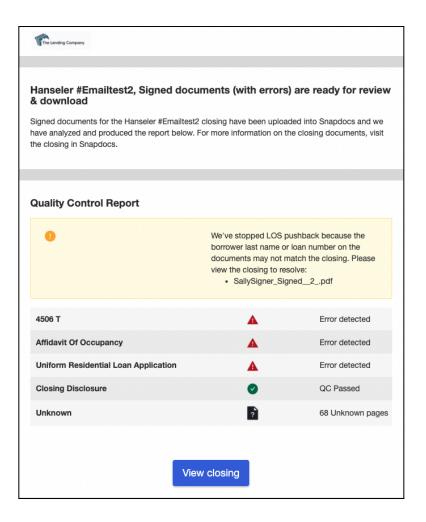
Email Action: Settlement office marks signing as complete

- 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



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



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

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.

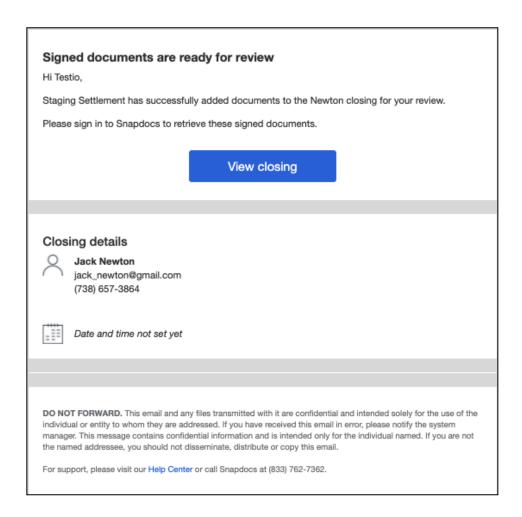
Snapdocs is a service provider to EPD demo. The privacy policy and terms of use of EPD demo, and contractual obligations between Snapdocs and EPD demo, apply to the collection and use of your personal data. Links in the body of this email will direct you to a site maintained and hosted by Snapdocs. Use 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 ${\bf Snapdocs\ Help\ Center}$ or call ${\bf Snapdocs\ at\ (833)\ 762-7362}.$

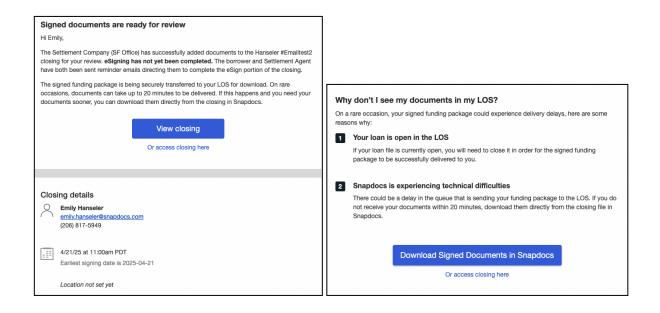
Email Action: Remote notary appointment is complete

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



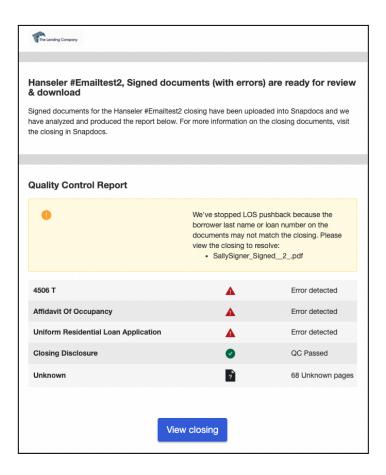
Email Action: Settlement office uploads signed funding package

- 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



Email Action: Confirm QC report errors detected & dates

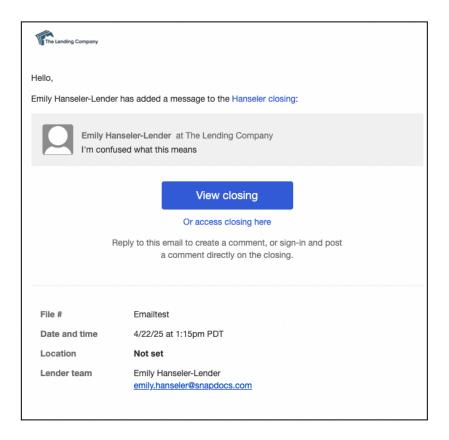
- Recipient Options: Settlement Office, Settlement Agent
- **Subject:** [Last Name] [Loan Number], Snapdocs QC Report (with errors) is ready to review
- **Notes:** will only say "with errors" if errors are present. Only included if Funding QC is turned on



Category: Messages

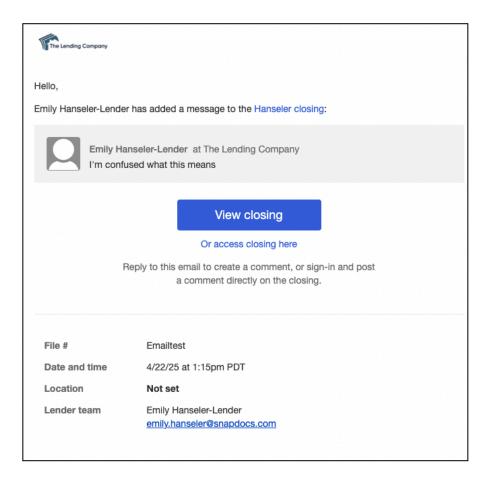
Email Action: Consumer adds a message

- 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]



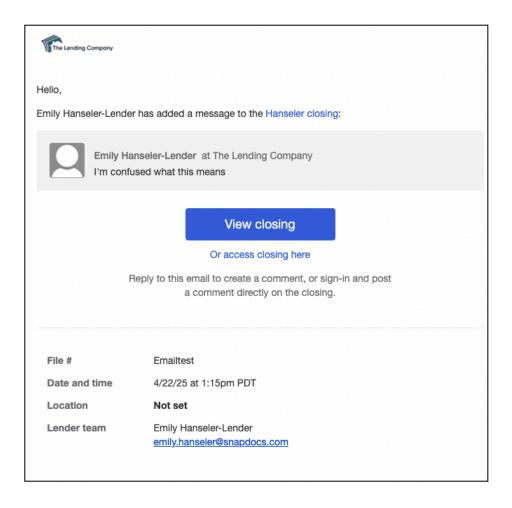
Email Action: A Settlement Agent adds a message

- 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]



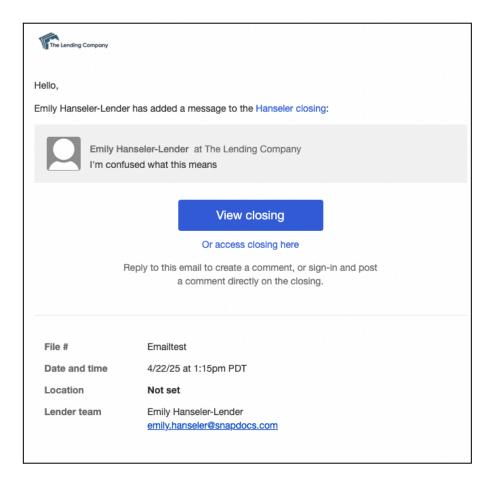
Email Action: A company team member adds a message

- 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]



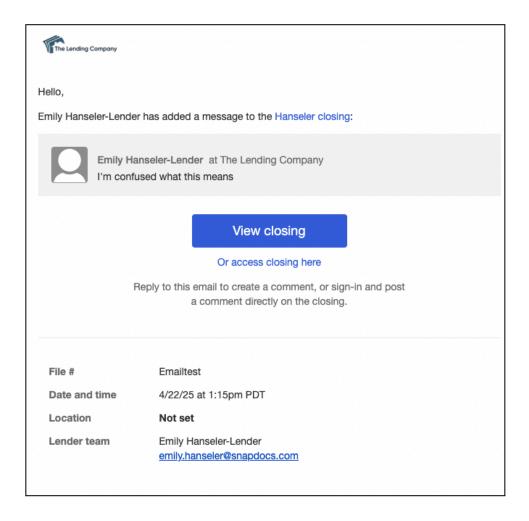
Email Action: A participant adds a message

- 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]



Email Action: A signing service member adds a message

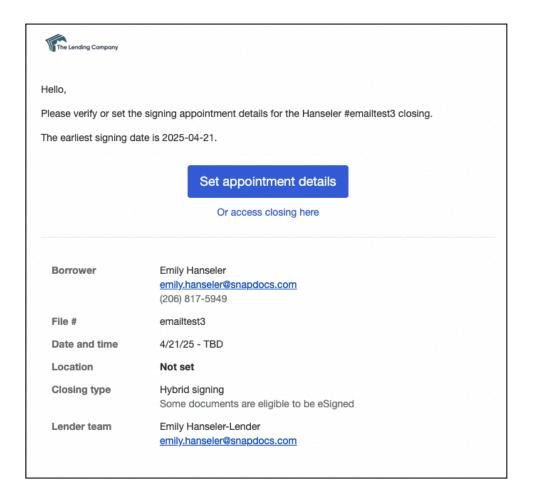
- Recipient Options: Loan officer, Broker, Loan Coordinator, Closer, Funder, Other lender users, Settlement office
- **Subject:** [Last Name] [Loan Number], [User Name] has added a message | [Lender Name]



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]



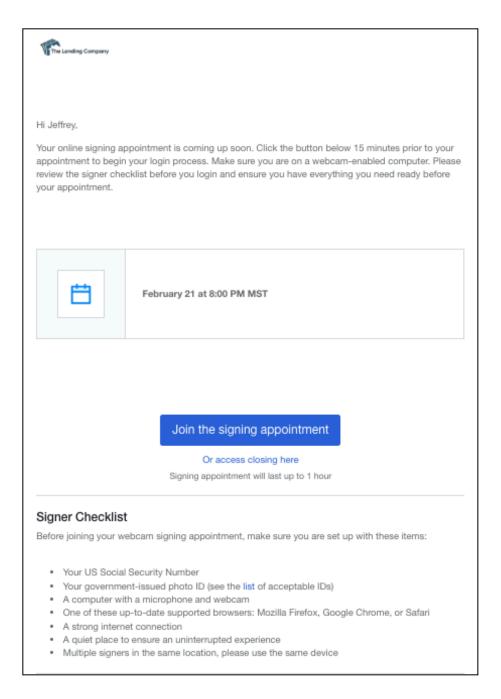
Email Action: It's the day of the signing

- 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



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.

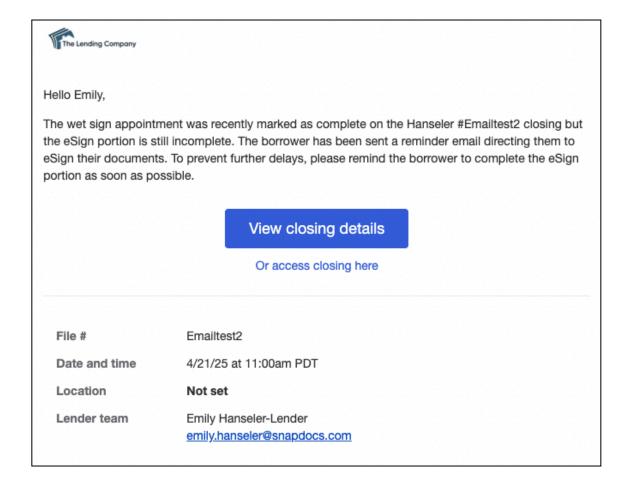
Review & eSign

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]



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

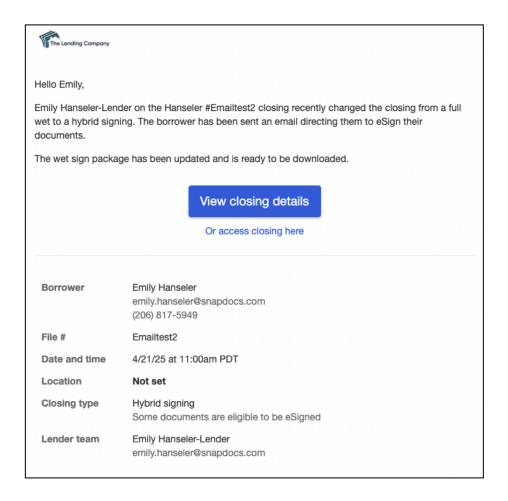
Lender team Robert McCoveys

isaac+closings@snapdocs.com

Category: Updates: closing Type

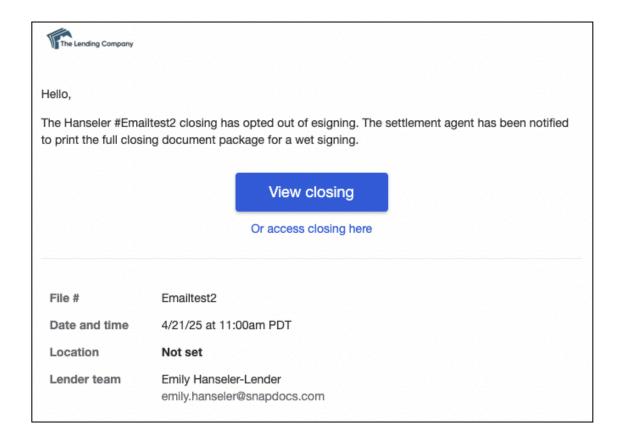
Email Action: Consumer opts into eSigning

- 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]



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



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

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

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

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

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

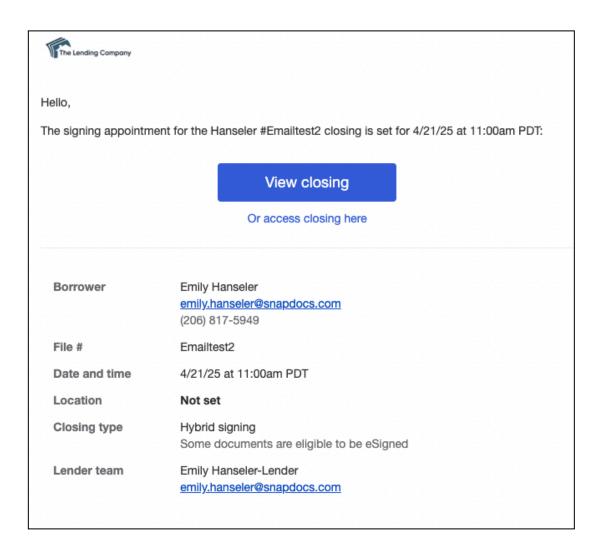
This link will expire in 14 days. By clicking on the Review and Sign button in this email, you acknowledge and agree to our Terms of Service and our Privacy Policy.

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

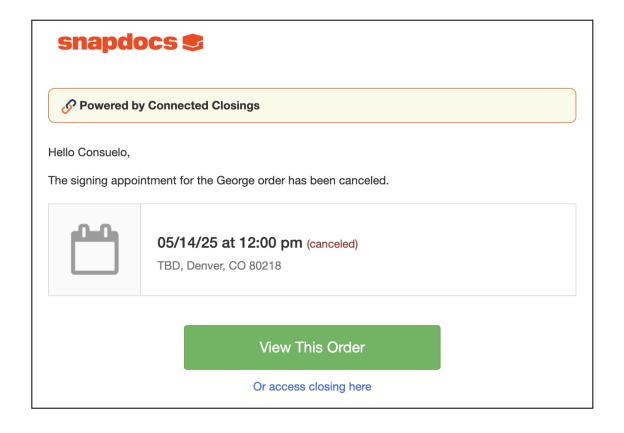
Email Action: Appointment details are changed

- 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]



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]



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

snapdocs!



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

Hybrid signing Closing type

Some documents are eligible to be eSigned

Scheduler has started notary search **Notary status**

Scheduler Mobile Notary - Staging

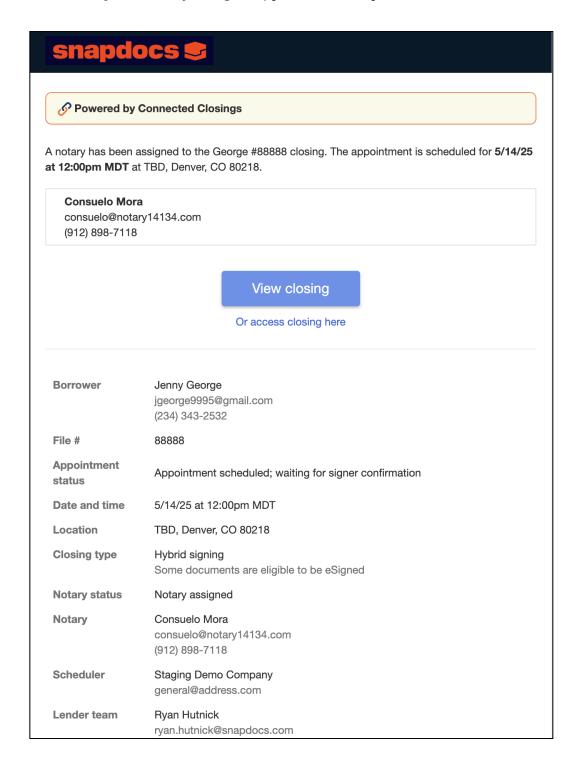
mobilenotarystaging@company26.com

Lender team Patrick Vasseurnegohi

patrick_vasseurnegohi@snapdocs.com

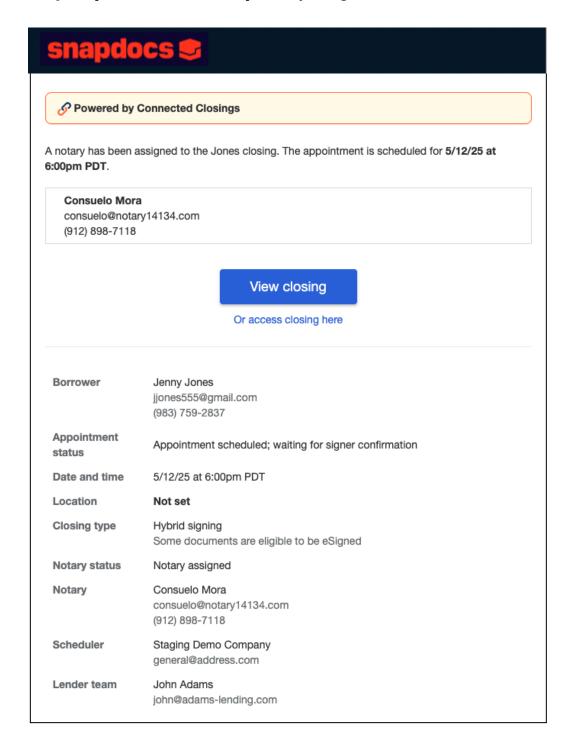
Email Action: Mobile notary is assigned

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



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



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]

