



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.

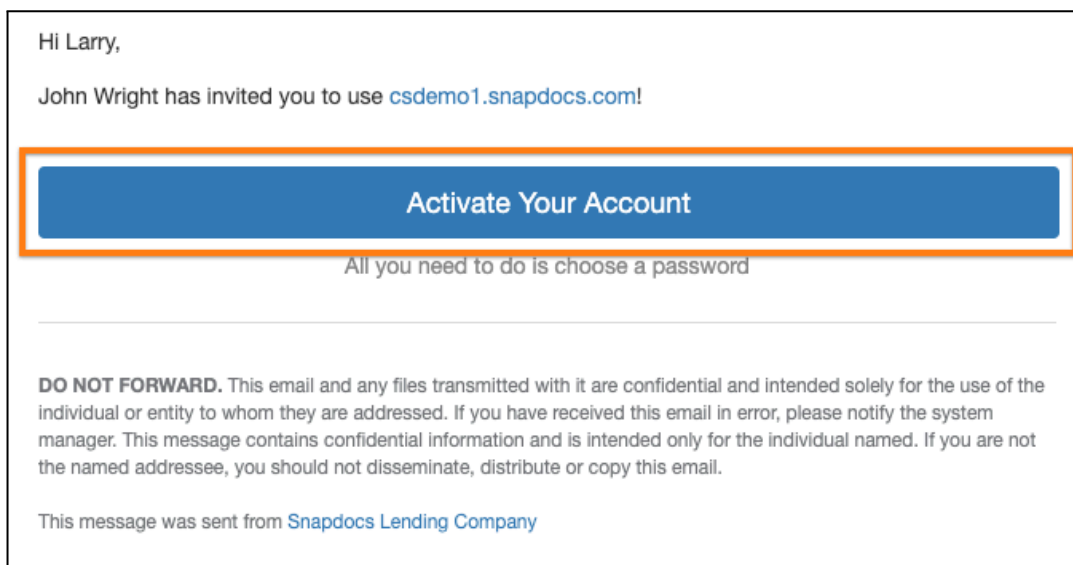
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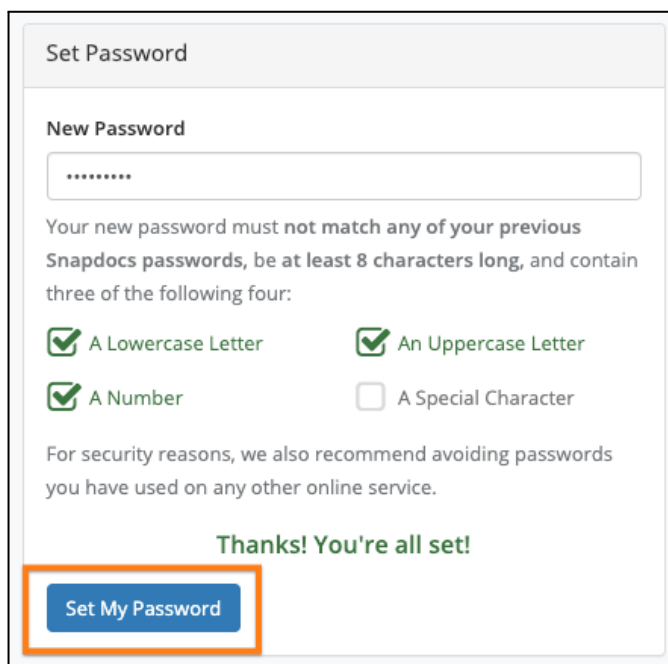
Logging into Snapdocs

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.

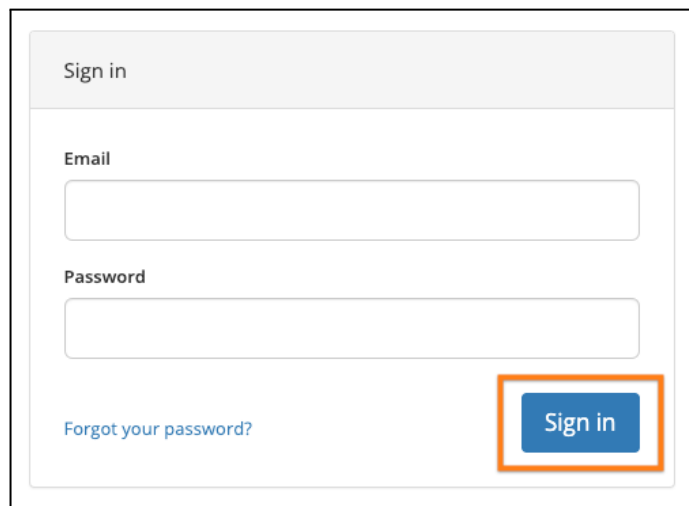


Simply set a unique password following the criteria outlined below in order to access Snapdocs:

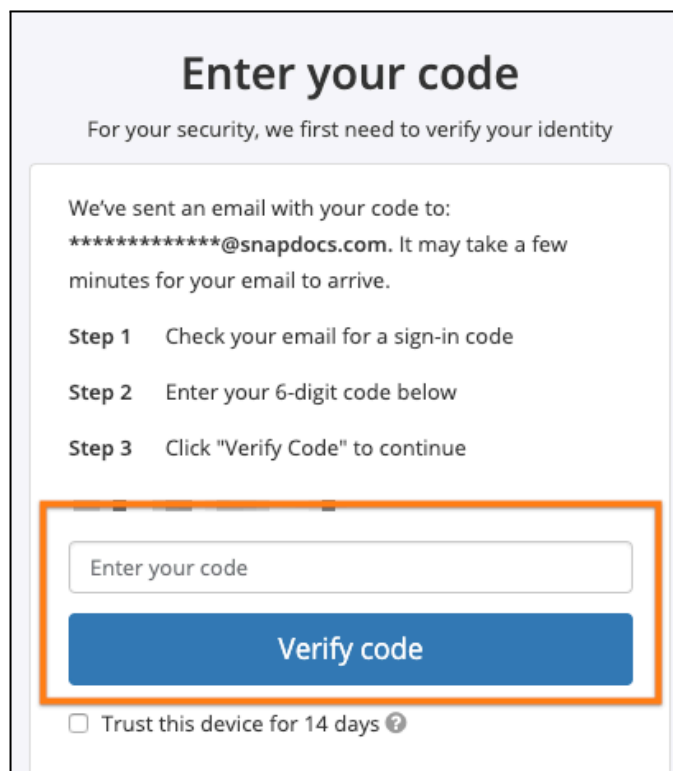
A screenshot of a "Set Password" form. The title "Set Password" is at the top. Below it is a section "New Password" with a password input field showing eight dots. Below the field, text states: "Your new password must not match any of your previous Snapdocs passwords, be at least 8 characters long, and contain three of the following four:". There are four checkboxes: "A Lowercase Letter" (checked), "An Uppercase Letter" (checked), "A Number" (checked), and "A Special Character" (unchecked). Below these is a note: "For security reasons, we also recommend avoiding passwords you have used on any other online service." At the bottom, it says "Thanks! You're all set!" in green. A blue button labeled "Set My Password" is at the bottom, highlighted with an orange rectangular border.

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.

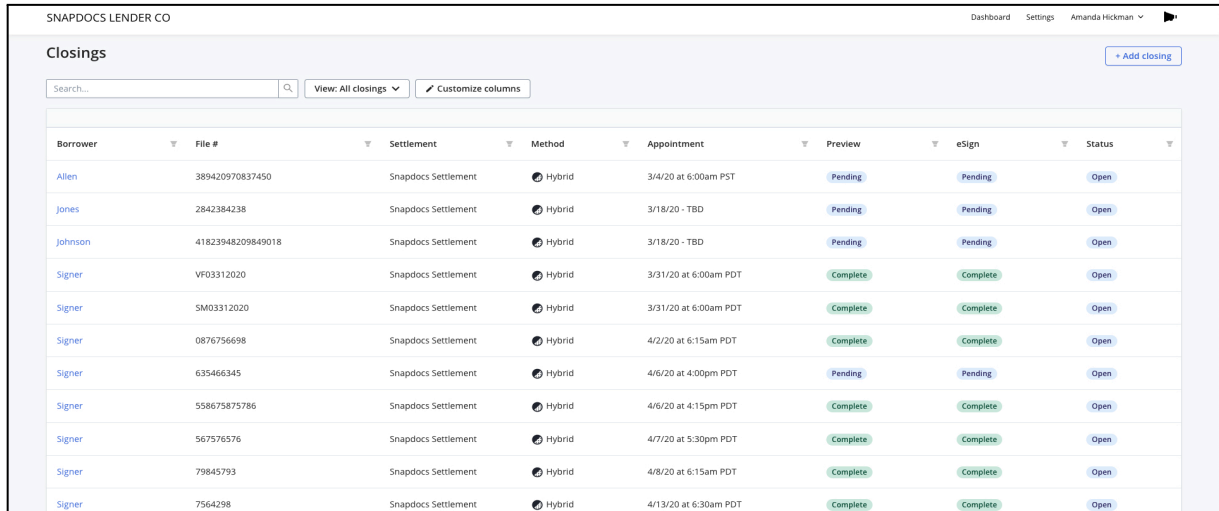
A screenshot of a web form titled "Sign in". It features two input fields: "Email" and "Password". Below the "Password" field is a link that says "Forgot your password?". To the right of the "Forgot your password?" link is a blue button with the text "Sign in". The button is highlighted with an orange rectangular 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.

A screenshot of a verification screen titled "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 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 a text input field labeled "Enter your code" and a large blue button labeled "Verify code". Both the input field and the button are highlighted with an orange rectangular border. Below the button is a checkbox labeled "Trust this device for 14 days" with a question mark icon.

Closings Dashboard

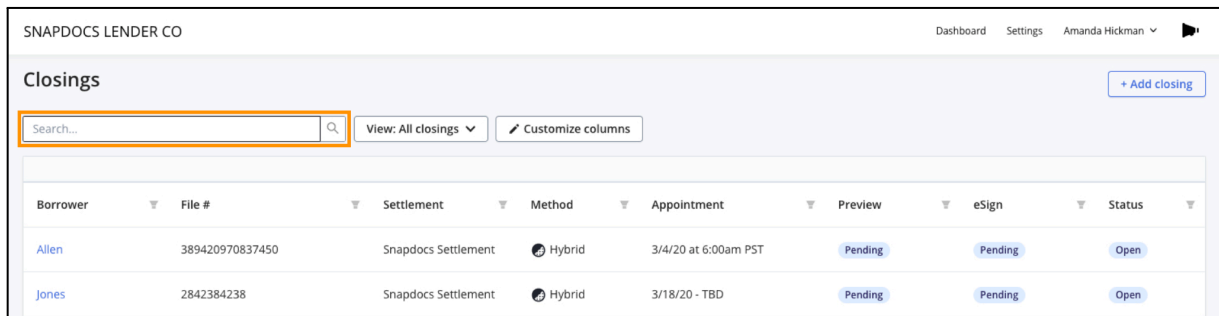
After logging in, the first thing you'll see is the Snapdocs Closings Dashboard. The Closings Dashboard serves as the central information hub for your pipeline.



The screenshot shows the Snapdocs Closings Dashboard for 'SNAPDOCS LENDER CO'. At the top, there's a header with 'Dashboard', 'Settings', and a user profile 'Amanda Hickman'. Below the header, the title 'Closings' is followed by a search bar, a 'View: All closings' dropdown, and a 'Customize columns' button. A '+ Add closing' button is in the top right. The main content is a table with the following columns: Borrower, File #, Settlement, Method, Appointment, Preview, eSign, and Status. The table lists 12 closings. The first three are 'Pending' and the rest are 'Complete'.

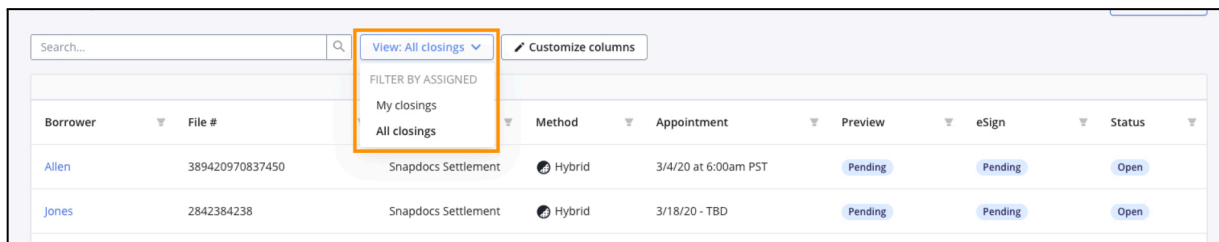
Borrower	File #	Settlement	Method	Appointment	Preview	eSign	Status
Allen	389420970837450	Snapdocs Settlement	Hybrid	3/4/20 at 6:00am PST	Pending	Pending	Open
Jones	2842384238	Snapdocs Settlement	Hybrid	3/18/20 - TBD	Pending	Pending	Open
Johnson	41823948209849018	Snapdocs Settlement	Hybrid	3/18/20 - TBD	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.

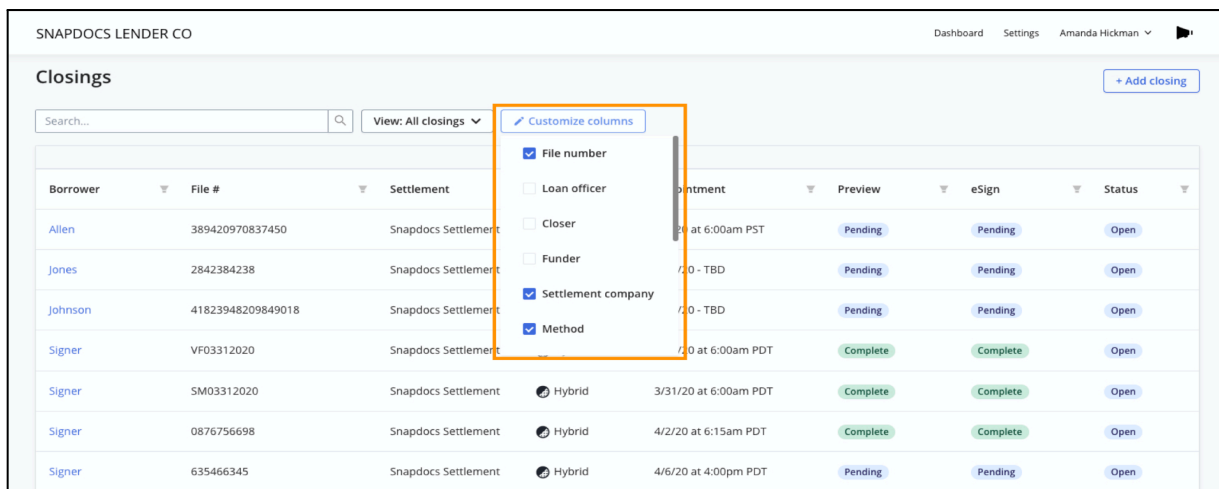


This screenshot is identical to the one above, but with an orange rectangular box highlighting the search bar in the 'Closings' section.

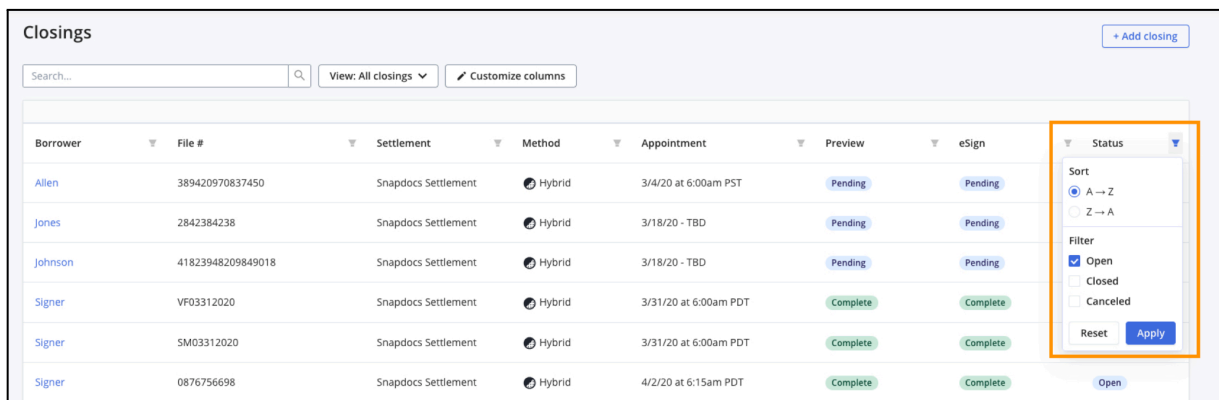
If you have admin privileges, which we will cover in “Snapdocs Instance Administration”, you have the ability to view all closings in your Snapdocs instance by clicking on the “View” button and selecting “All Closings”. If you are a non-admin user, you will only be able to view “My Closings”.



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.



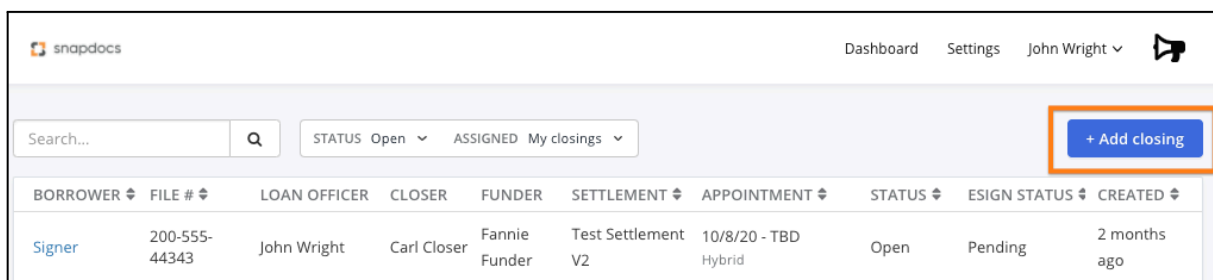
You can also choose to sort and filter each column by clicking on the respective column header and checking the options to sort or filter. In this example, we’re filtering the “Status” column to show only “open” closing in alphabetical order.



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

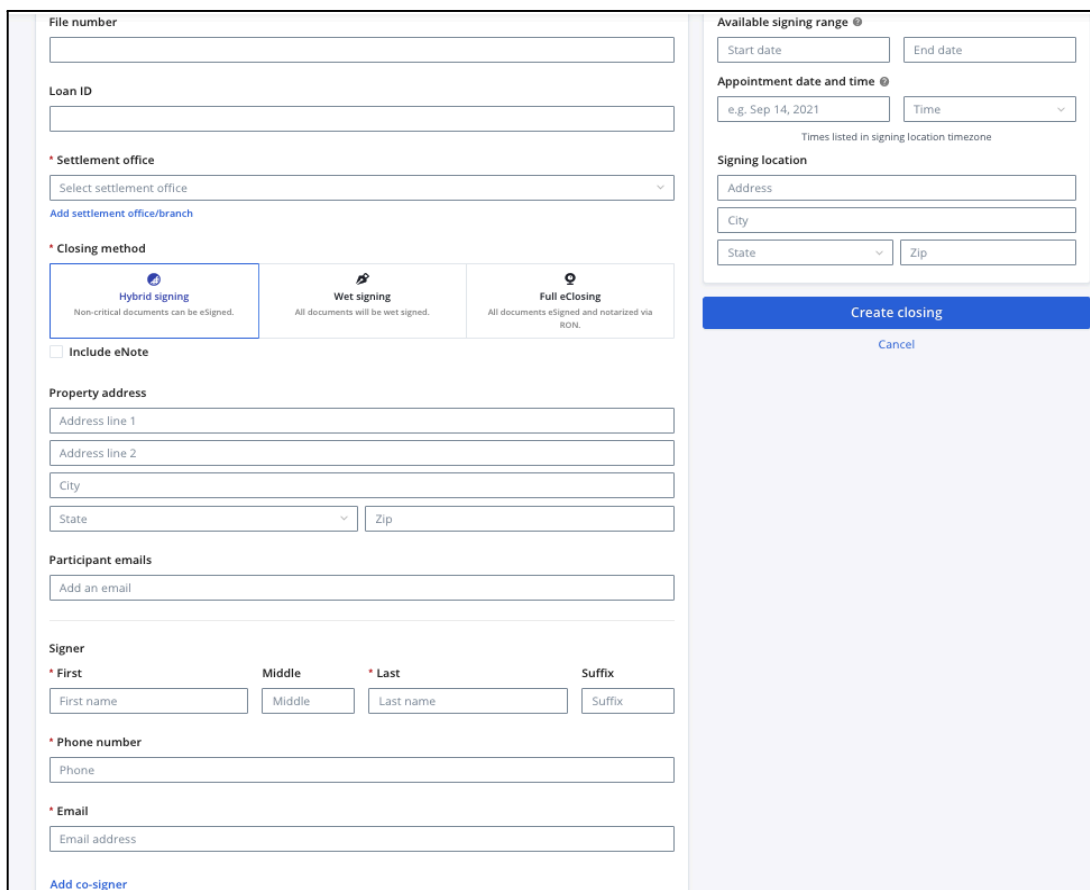
Manually Add a Closing

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, there's a navigation bar with 'Dashboard', 'Settings', and 'John Wright'. Below this is a search bar and a filter section with 'STATUS Open' and 'ASSIGNED My closings'. A blue button labeled '+ Add closing' is highlighted in the top right corner. Below the filter section is a table with the following columns: BORROWER, FILE #, LOAN OFFICER, CLOSER, FUNDER, SETTLEMENT, APPOINTMENT, STATUS, ESIGN STATUS, and CREATED. The table contains one row of data: Signer, 200-555-44343, John Wright, Carl Closer, Fannie Funder, Test Settlement V2, 10/8/20 - TBD Hybrid, Open, Pending, and 2 months ago.

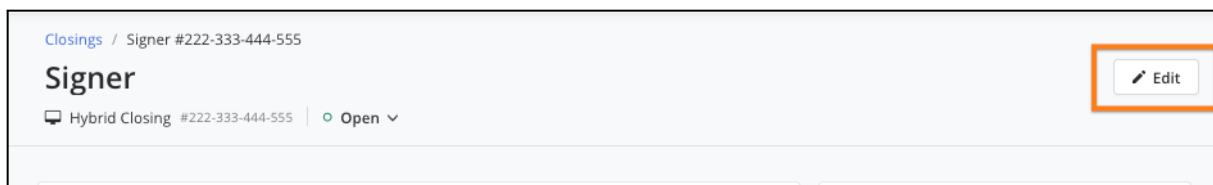
In the Create Closing form, populate the relevant fields. All required fields will have an * next to them. If you need to add additional cosigners, click on the “Add Cosigner” button on the bottom of the screen. Once you’ve populated your closing, click “Create Closing”.



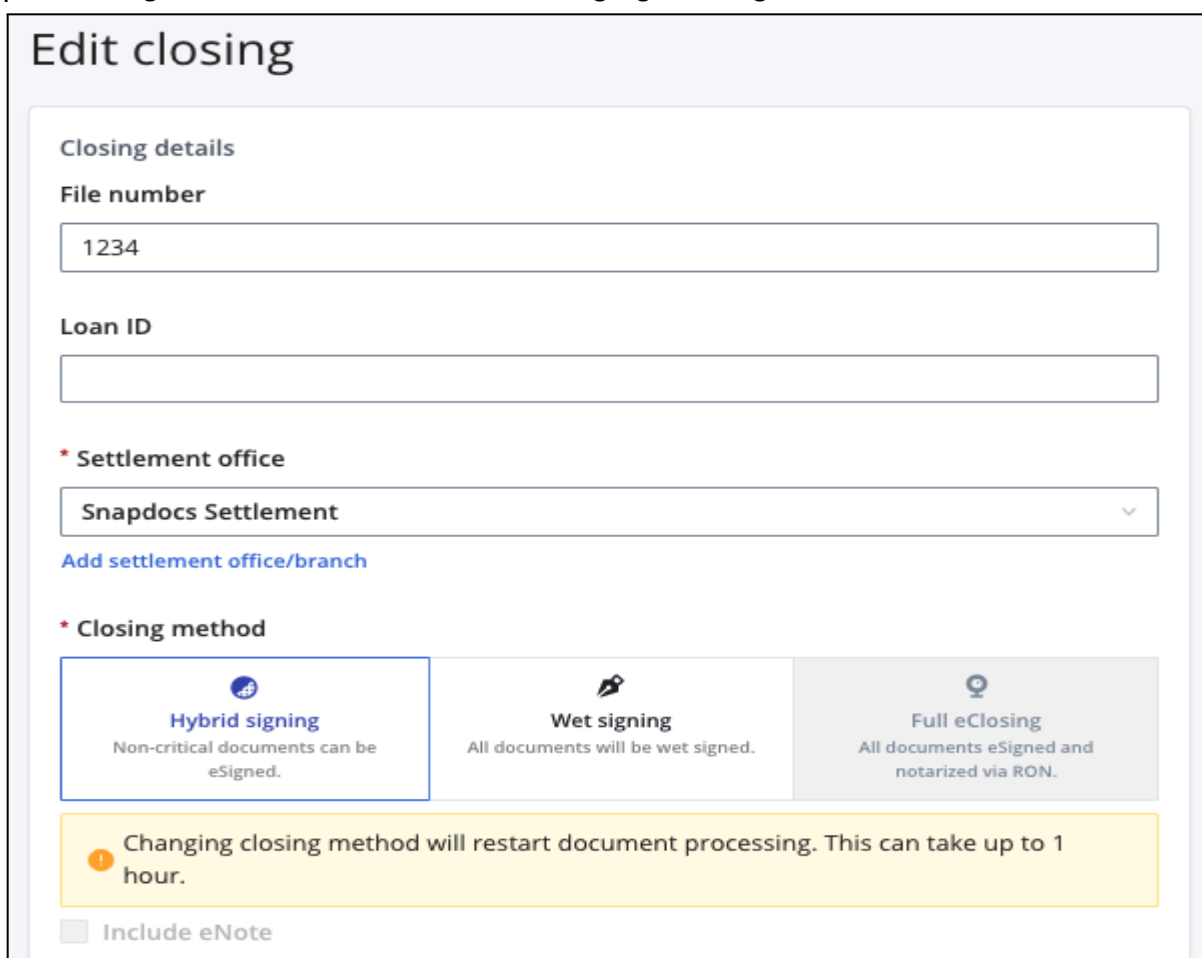
The screenshot shows the 'Create closing' form in Snapdocs. The form is divided into two main sections. The left section contains fields for: File number, Loan ID, Settlement office (with a dropdown and 'Add settlement office/branch' link), Closing method (with three options: Hybrid signing, Wet signing, and Full eClosing), Include eNote (checkbox), Property address (with fields for Address line 1, Address line 2, City, State, and Zip), Participant emails (with an 'Add an email' button), Signer (with fields for First, Middle, Last, and Suffix), Phone number, and Email. The right section contains fields for: Available signing range (with Start date and End date), Appointment date and time (with a date field and a Time dropdown), and Signing location (with fields for Address, City, State, and Zip). At the bottom right, there is a large blue button labeled 'Create closing' and a smaller blue link labeled 'Cancel'.

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](#)".



Signer

* First

Middle

* Last

Suffix

Sally

Middle

Signer

Suffix

* Phone number

(999) 999-9999

* Email

testing@gmail.com

!

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 ?

Sep 14, 2021

Sep 16, 2021

Appointment date and time ?

Sep 14, 2021

Time

Times listed in signing location timezone

Signing location

Address

City

State

Zip

Save changes

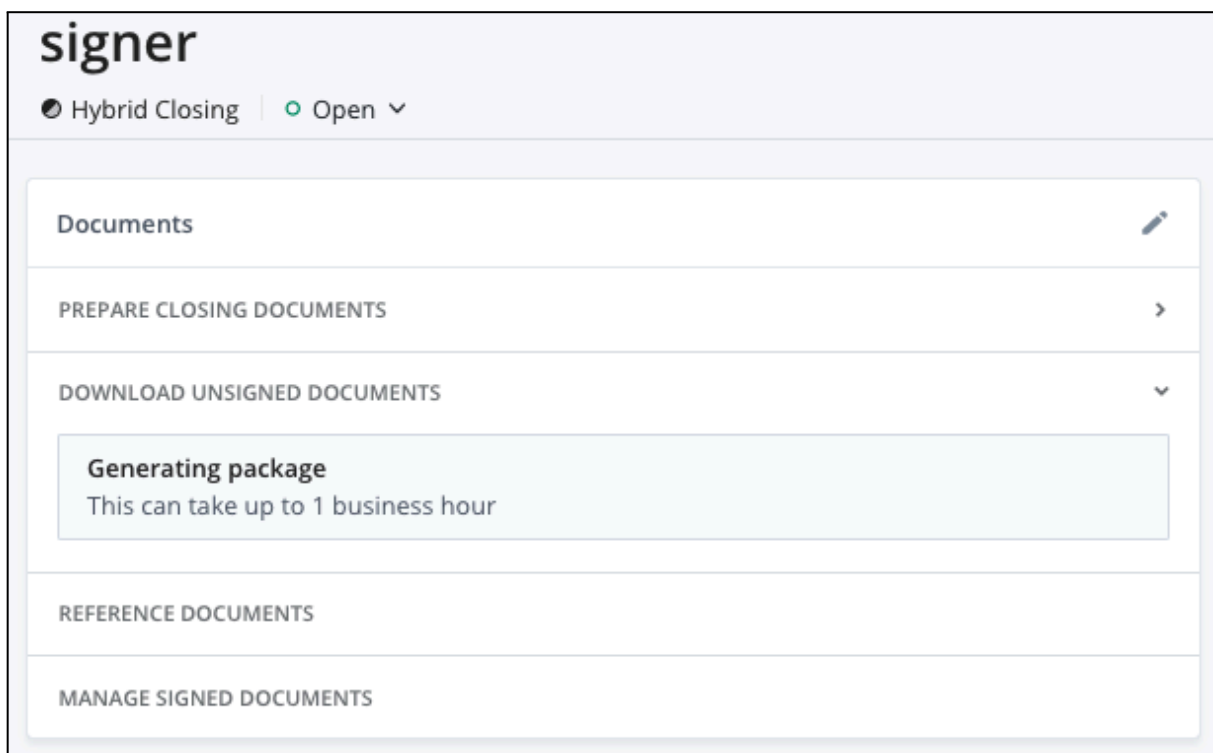
Cancel changes

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).

Documents
Update documents ▾

PREPARE CLOSING DOCUMENTS >

DOWNLOAD UNSIGNED DOCUMENTS ▾

Wet Sign Package 11pg
Not downloaded by Settlement.

Download

eSign Package 7pg
Consumer notified to sign on Tue, June 7th 2022 at 4:18am PDT

More
Download

REFERENCE DOCUMENTS ▾

These documents are here for you to view.

Original Package
This document was added on Jun 3rd at 2:32pm PDT

Consumer Preview
The consumer will preview these documents before eSigning

Add Redraw Documents

You may find that you need to replace or add additional documents to the original closing package. By adding redraw documents, you trigger a new round of document processing which will attempt to remove the original documents of that type and replace them with the new version you have uploaded here. We will update the eSign and wet sign packages accordingly and alert Settlement and Borrowers accordingly.

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.

The screenshot shows the Snapdocs interface for a closing package. At the top, the title "Green" is displayed. Below it, the status is "Hybrid Closing" with a globe icon, the ID "#VR06030245", and a status of "Open" with a dropdown arrow. The main section is titled "Documents" and contains a list of documents. A pop-up menu is open over the "Wet Sign Package" document, showing three options: "Add redraw documents" (with a description: "Start process to replace docs or add new docs to existing package."), "Add rush documents" (with a description: "Share newly added docs immediately for wet signing."), and "Remove original closing package" (with a description: "Also remove any split docs so you can add a new package."). The "Wet Sign Package" document is listed as "11pg" and "Not downloaded by Settlement". Below it, the "eSign Package" is listed as "7pg" with a note: "Consumer notified to sign on Tue, June 7th 2022 at 4:18am PDT". A "Download" button is visible next to the eSign Package.

Green

Hybrid Closing | #VR06030245 | Open ▾

Documents Update documents ▾

PREPARE CLOSING DOCUMENTS

DOWNLOAD UNSIGNED DOCUMENTS

Wet Sign Package 11pg
Not downloaded by Settlement

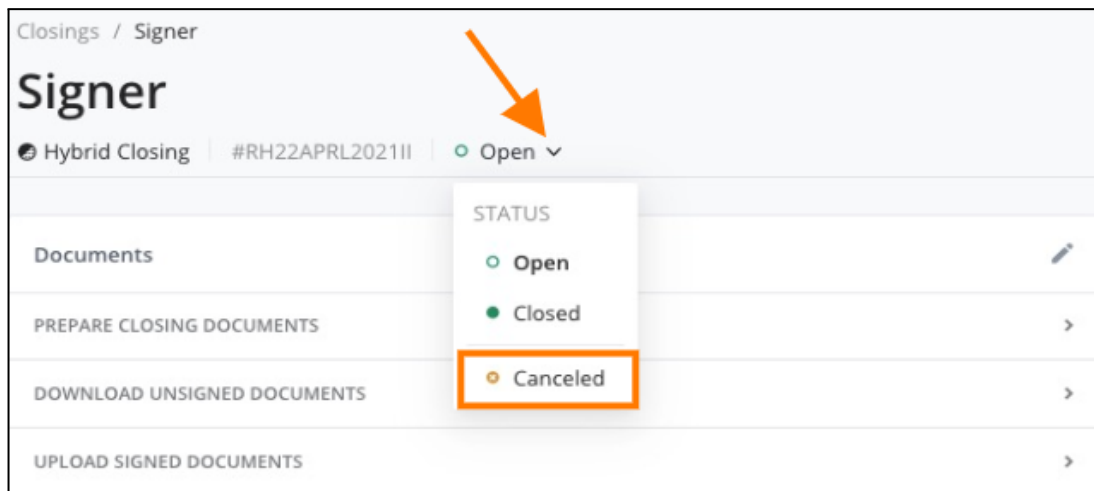
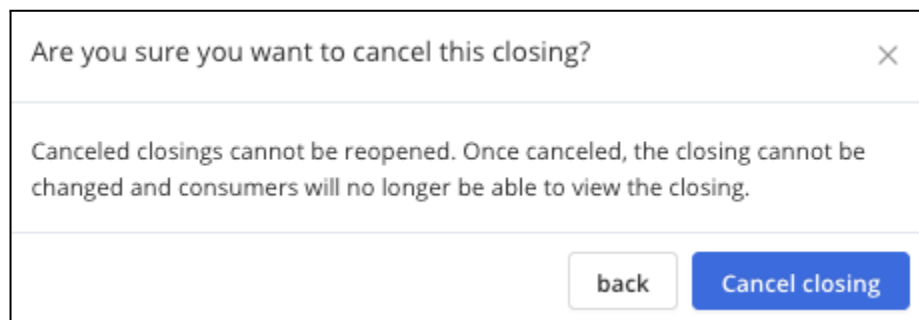
eSign Package 7pg
Consumer notified to sign on Tue, June 7th 2022 at 4:18am PDT

...

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 canceling the closing. The Borrower will get an email notification that the closing has been canceled 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.

Green

Hybrid Closing | #VR06030245 | Open ▾

Documents

Update documents ▾

PREPARE CLOSING DOCUMENTS

Add redraw documents
Start process to replace docs or add new docs to existing package.

DOWNLOAD UNSIGNED DOCUMENTS

Add rush documents
Share newly added docs immediately for wet signing.

Wet Sign Package 11pg
Not downloaded by Settlement Office

Remove original closing package
Also remove any split docs so you can add a new package.

eSign Package 7pg
Consumer notified to sign on Tue, June 7th 2022 at 4:18am PDT



Are you sure you want to remove closing documents? X

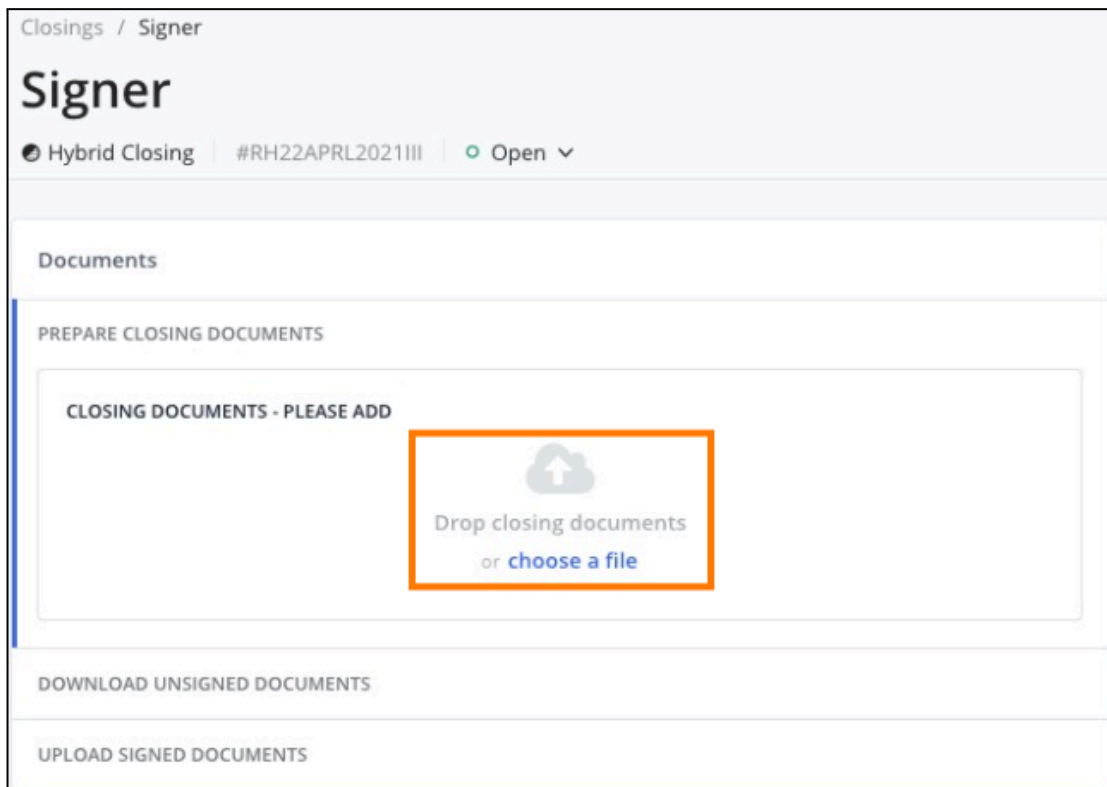
Any open esignings will be canceled. The consumer and settlement office will be notified when replacement documents are available.

No, do not remove documents

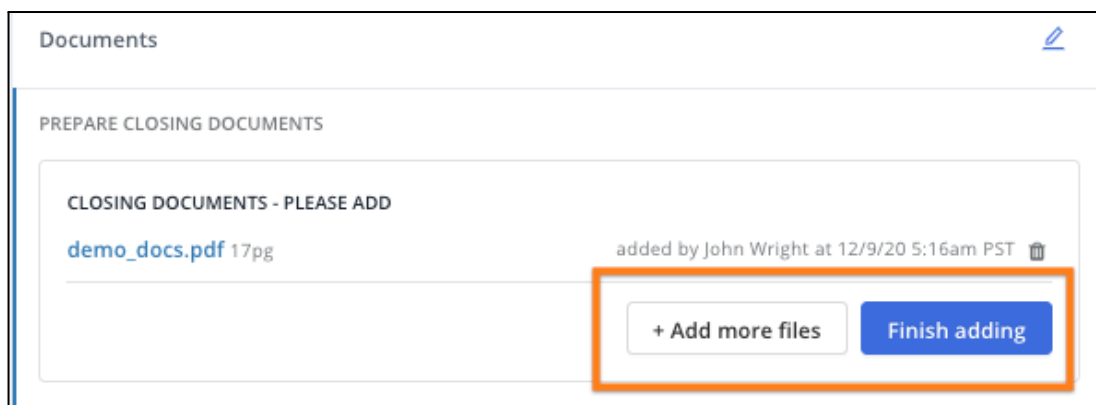
Yes, remove documents

Add New Closing Package Manually

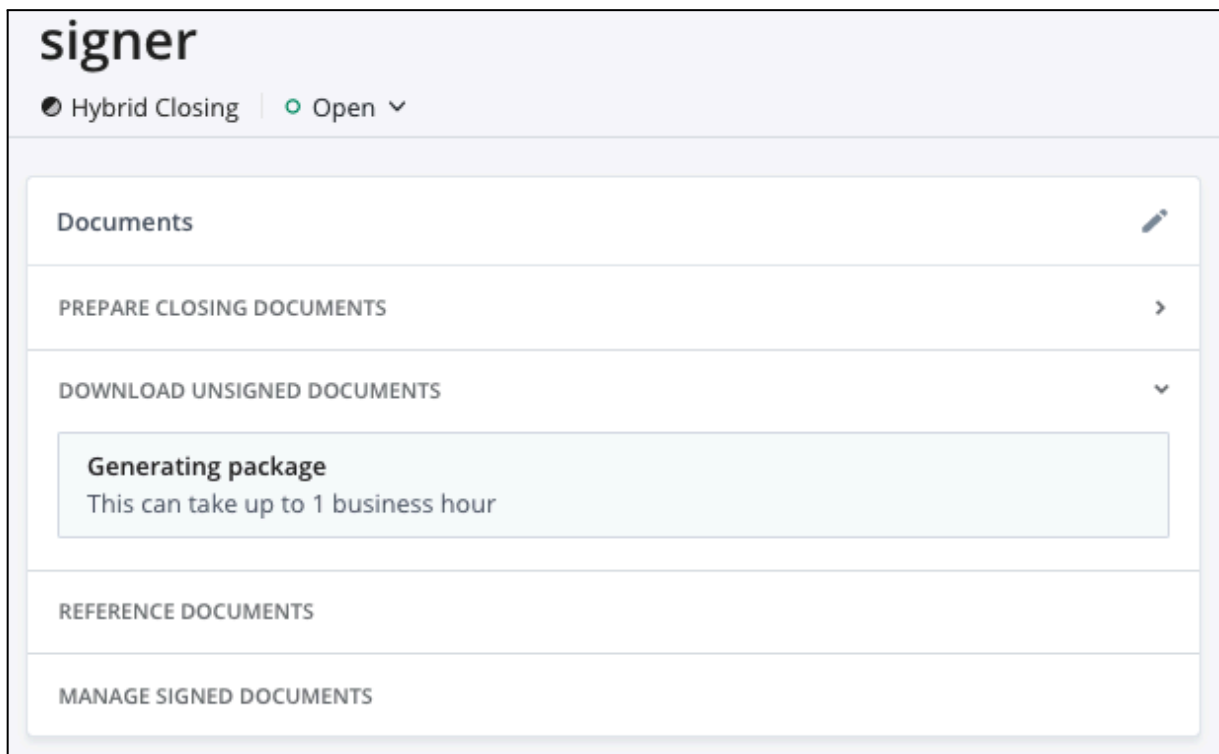
If you are not using our LOS integration, you may need to manually add documents to the closing. Proceed to the “Documents” panel in the closing and either drag & drop your documents or click the “choose a file” button.



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.



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*

Sally

Last*

Signer

Phone number*

(555) 555-5555

Email*

sally.signer@aol.com

ⓘ

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

Co-Signer

First*

First name

Last*

Last name

Phone number*

Phone

Email*

Email address

ⓘ

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

remove

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

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*

[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

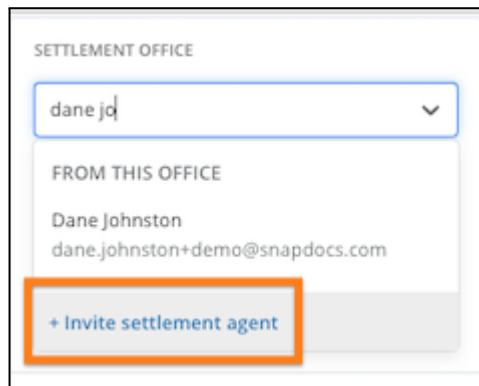
Settlements Are US

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

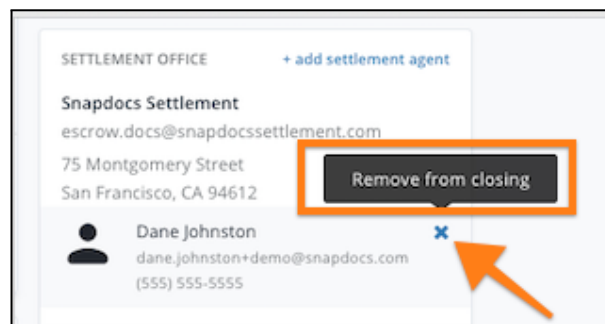
+

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 add 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

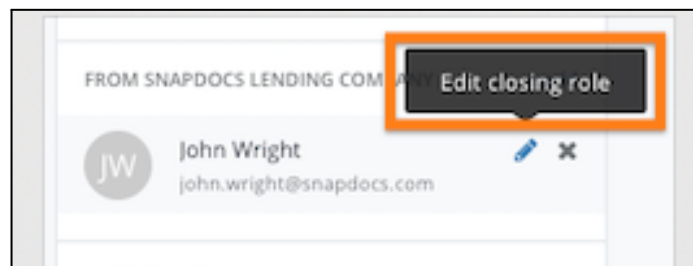
rachel.hagensen@snapdocs.com

(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

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

Snapdocs Lending Company Snapdocs Settlement X

X

▼

Enter a message...

Send

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](#)

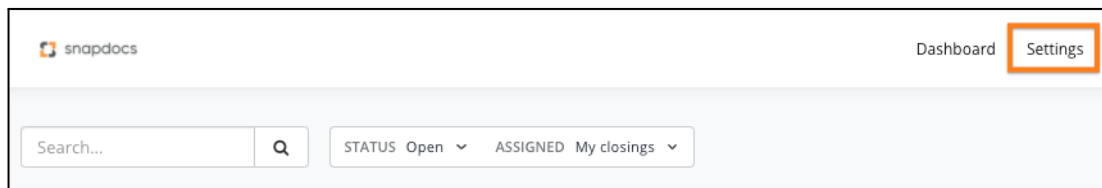
To Snapdocs Lending Company Snapdocs Settlement x

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_documents			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

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 Info

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

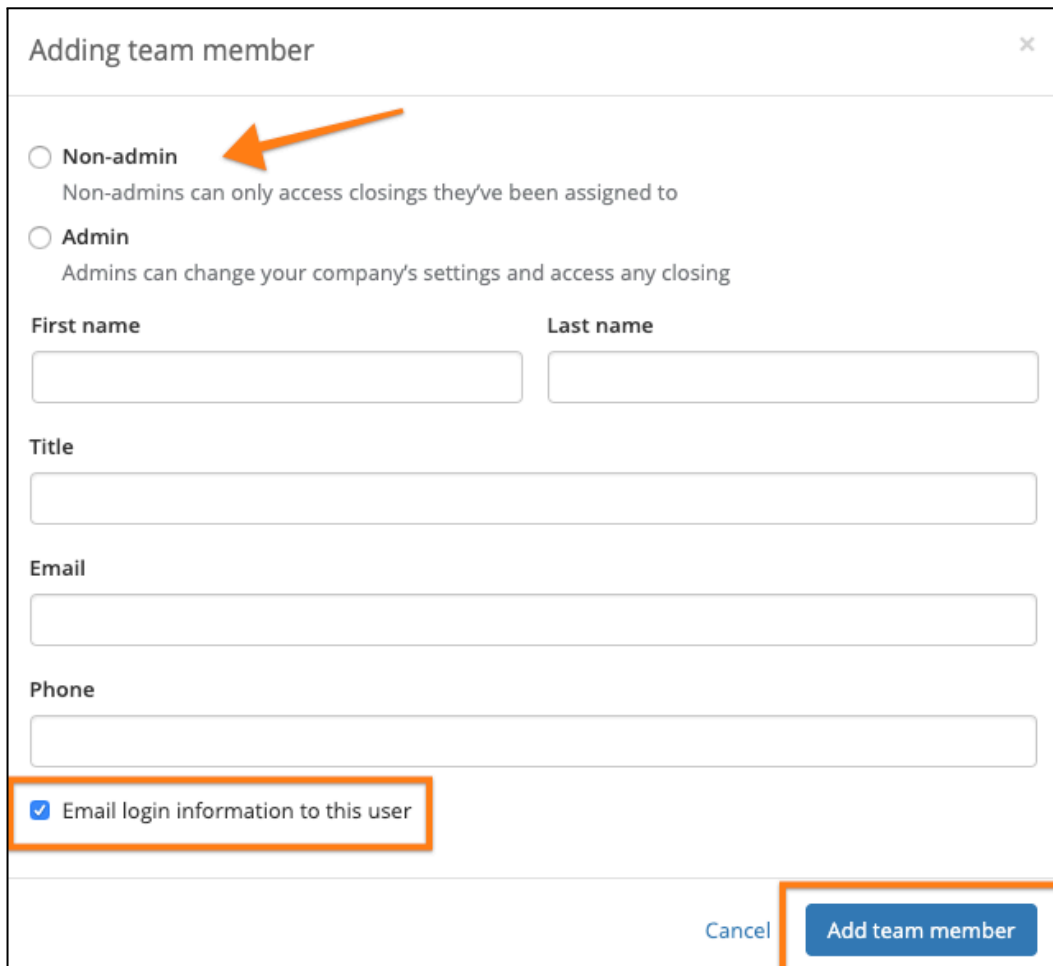
Carrie Closer
carrie.closer@snapdocs.com
Non-admin

Max Closer
closings-demo@snapdocs.com
Owner

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.



The screenshot shows a form titled "Adding team member" with a close button (X) in the top right corner. The form contains two radio button options: "Non-admin" (selected, indicated by an orange arrow) and "Admin". Below these are text input fields for "First name", "Last name", "Title", "Email", and "Phone". At the bottom, there is a checkbox labeled "Email login information to this user" which is checked and highlighted with an orange box. In the bottom right corner, there are two buttons: "Cancel" and "Add team member", with the latter also highlighted by an orange box.

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: Send reset password email

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.

General

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Branding


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

Choose File No file chosen

Favicon

Choose File No file chosen

Company Bio
This will be used in correspondence with notaries.

Snapdocs Lending Company is based in San Francisco, CA.

Save

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

Company Info

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Branding

Document Intelligence

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Package Splitting Preferences

To change these preferences please contact support@snapdocs.com

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

Company Info

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Branding

Document Intelligence

Emails

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.

Documents are available to preview	▼ 6 selected
Original closing package is updated	☒ Loan officer
Rush documents are added	☒ Loan coordinator
Signed documents are updated	☒ Closer
Settlement office hasn't set an appointment, and it's 24 hours before the earliest possible close date	☒ Funder
	☒ Other lender users
	Consumer

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.

General	Settlement office marks signing as complete	▼ Loan officer, Loan coordinator, Closer, Funder, Other lender users
Company Info	The signing type has changed on a closing	▼ 6 selected
Team	A closing has been created	▼ Loan officer, Loan coordinator, Closer, Funder, Other lender users
Branding	Mobile notary is assigned	▼ 7 selected
Document Intelligence	Consumer adds a message	▼ 7 selected
▼ Emails	A settlement agent adds a message	▼ 7 selected
	A participant adds a message	▼ 8 selected
	A company team member adds a message	Consumer, Settlement office
	A consumer completes eSigning	▼ 6 selected
	Settlement office uploads signed funding package	▼ Loan coordinator, Closer, Funder, Other lender users
	Settlement office marks signing complete but eSign is incomplete	▼ Loan officer, Loan coordinator, Closer, Funder, Other lender users
	Reminder to consumers that eSign is incomplete but signing was completed	▼ Consumer
	<div>Save</div>	<div>Use Suggested Settings</div>

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.