



New Document Best Practices

Support@e-closing.com | (603) 485-7951

A new document qualifies as any document that is currently not available within your E-Closing document library. New documents must be sent to us in Word format, so that we may insert **tags** which are strings of code that automatically pulls data from your file, onto the form. We ask that submissions follow the best practices below, so that load times are quicker, information pulled is accurate, and it minimizes the overall time spent reviewing.

NOTE: Revision documents that have substantial differences from the version pre-existing in E-Closing should be submitted following these instructions below.

What we look for in **New Document** requests:

1) **FORMAT** - Ensure that the format type is in a **WORD format, NOT PDF** as we cannot upload this type and we may reject it. The file extension types would include .doc, .docx, .dot, .dotx, .dotm, and .rtf. If it is not in one of these formats you can double check with us to see if we can work with it.

2) **NAMING CONVENTION** - Please name the form as you would like it to appear within the system.

- Example: **DO: Affidavit of Non-Homestead FL.doc** **NOT: affnonhmstdfl.doc**

We will include your company name or shortened version within the document title. This will allow you to distinguish your custom forms from E-Closing's pre-existing forms.

- Example: **EC - Affidavit of Non-Homestead FL**

3) **HIGHLIGHTS/INSERTS/EDITS** - If you would like information to pull on a file by file basis, please use **RED** font or **yellow highlight** to indicate the information you want to automatically pull from the file. Label them how you want them to appear. PLEASE do not send these with pre-filled info.

- **Correct** - Note that the inserts are simple and descriptive.

Today's date

Borrower names

Borrower address

RE: Purchase of property located at: **Property address**

Dear **Borrower first names**:

Our company is pleased to be representing **Lender** with regard to your purchase

- **Incorrect** - Information is pre-filled and requires educated guessing.

January 28, 2019 → Which date? Current, close, contract date? Which?

James W. Harden → Whose names are these? Borrowers? Sellers? Real Estate Agents? Who?

Sarah R. Harden

852 Abbie Dr.

Hooksett, NH 03106 → If seller's address, which one is it? Current, forwarding? Specify, please.

RE: Purchase of property located at: **123 Hehehe Lane, Adger, AL 35006**

Dear **James W. Harden and Sarah R. Harden**:

E-Closing Lite is pleased to be representing **1st Bank of New England** with regard to your purchase



4) **LETTERHEADS/FOOTERS** - You can send us your letterhead and footer in either Word or PDF format. If you would like us to load custom forms with these letterheads and footers, please indicate on the requested forms with **Letterhead** at the top, and **Footer** at the bottom.

5) **REVIEW BEFORE SUBMITTING** - PLEASE review the forms and try to ensure all documents follow these best practices before submitting them to support@e-closing.com.

6) **QUESTIONS ON DOCUMENTS?** - If you have questions or concerns regarding these instructions... we want to help! Please feel free to give us a call at (603) 485-7951. We understand this may take time for you, but relaying your intentions on these forms will help save you time by ensuring the changes you intend are made.