

How to Code Your Documents for Signature Page Generator

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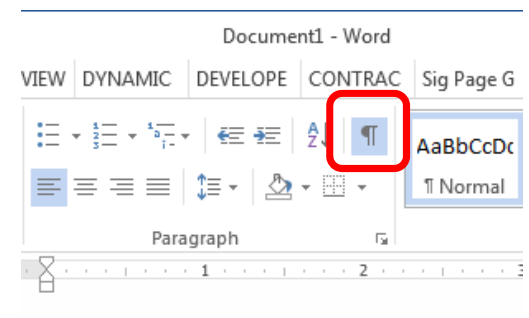
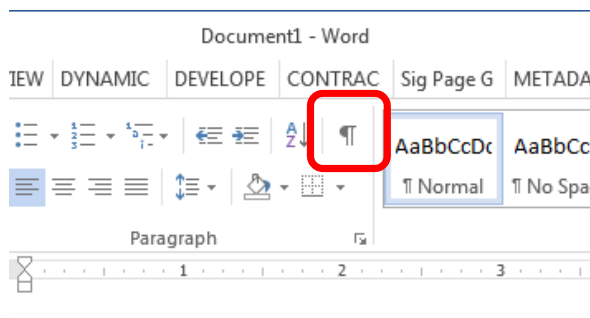
Background on How Sig Page Generator Works

- You add hidden text code on each signature page for each of your documents to indicate to the software that the current page is a signature page and who signs it.
 - The hidden text looks like this: “##Signature Page-Borrower##” with “Borrower” being replaced with whoever is signing the page.
 - Because this text is hidden, it typically doesn’t show up (unless you are viewing formatting in MS Word) and will not appear when printed or if a PDF is created.
- The software then opens each document and searches for that hidden text.
- When the hidden text is found, the software creates a PDF of that page, naming it for the appropriate signatory.
- When all of the documents have been processed, the software collates the individual PDF pages into separate packets for each signatory.

Working with Hidden Text:

Showing/Hiding Hidden Text

- To show/hide hidden text, click the ¶ icon in the Paragraph section of the Home ribbon.
- Note the examples below. Hidden text has a dotted line underneath.



This is not hidden text. |

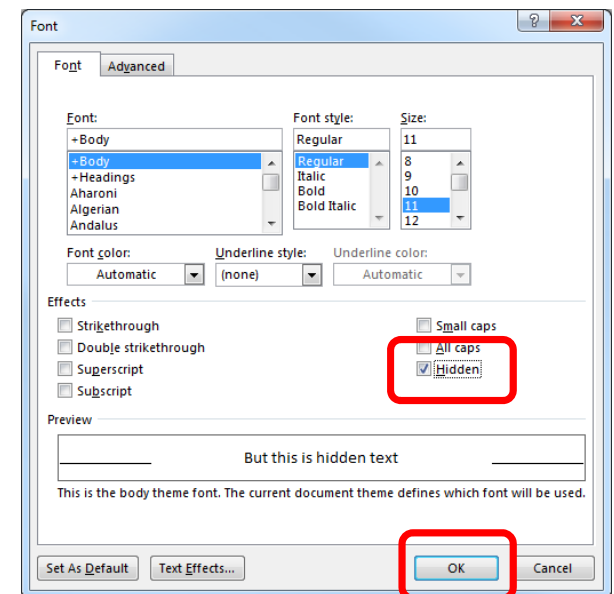
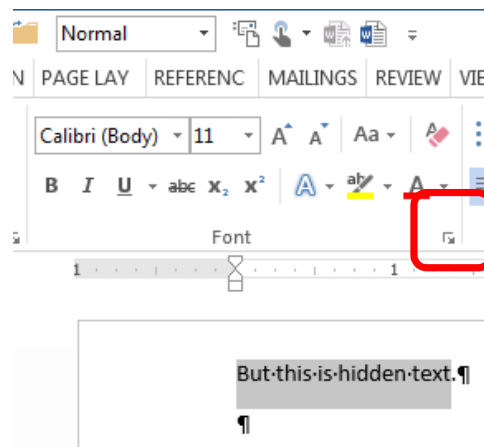
This is not hidden text. But this is hidden text. ¶

¶

Working with Hidden Text:

Creating Hidden Text

- Select the text you want to make hidden.
- Click the arrow in the bottom right corner of the Font section of the Home ribbon.
- Select the “Hidden” checkbox in the effects list.
- Then click “OK”.



Coding Your Documents

- On each signature page, add the following snippet as hidden text :
##Signature Page-[Signatory]##
- Replace “[Signatory]” with the party that is signing that page.
 - e.g. ##Signature Page-Borrower##
- If more than one party signs the same page, add a snippet for each party.
 - e.g. ##Signature Page-Borrower## ##Signature Page-Lender##

Example

(highlighting is only for reference purposes and not necessary.)

Signature Page to Bridge Loan Agreement

IN WITNESS WHEREOF, Borrower and Lender have executed this Agreement on the date first above written.

BORROWER: ##Signature Page-Borrower##

OAK GROVE LLC,
a Georgia limited liability company

By: → OAK GROVE MANAGER, LLC,
a Georgia limited liability company,
its managing member

By: → _____
Thomas Barnes
Vice President

LENDER: ##Signature Page-Lender##

STATE SOUTH BANK,
a Georgia banking corporation

By: → _____
Name: Jane Smith
Title: Senior Vice President

Section Break (Next Page)

Advanced Coding

- If you only want a certain number of copies of a specific signature page to be generated, even if multiple copies of other pages are being generated, add [Limit=#], where # is the maximum number of copies.
 - e.g. ##Signature Page-Borrower [Limit=1]##
 - This is helpful, for instance, when Borrower signs 3 copies of all of the loan documents, but only signs 1 copy of the promissory note.
 - See *SPG Example – Promissory Note.docx* for an example
- If a signature page encompasses more than one page, you can use [Pages=#], where # is the total number of consecutive pages this signatory signs
 - e.g. ##Signature Page-Borrower [Pages=2]##
 - This is useful where a party signs one signature page, and a notary acknowledges that party's signature on the next page. By including [Pages=#], those pages will always be kept together in the packet.
 - See *SPG Example – Deed of Trust.docx* for an example
- Separate packets can be made for the same party by naming the party differently in the snippet.
 - e.g. ##Signature Page-Borrower (Recordable) ## for signature pages to be sent to the title company, and ##Signature Page-Borrower (Non-Recordable) ## for signature pages that are to be sent to H&K.
 - This is useful when a party is sending signed packets to different destinations.
 - You can put any text (other than #, [,] and -) where [Signatory] is in ##Signature Page-[Signatory]##.
 - See *SPG Example – Deed of Trust.docx* for an example

Examples

(highlighting is only for reference purposes and not necessary.)

[LIMIT=#]

Executed as of the date first above written. ##Signature Page-Borrower [LIMIT=1]##

BORROWER:

OAK GROVE LLC, a Georgia limited liability company

By: → OAK GROVE MANAGER, LLC, a Georgia limited liability company, its managing member

By: → Thomas Barnes Vice President

[PAGES=#] and Separate packets for same signatory (note notary block after Page Break)

IN-WITNESS-WHEREOF, Grantor, intending to be legally bound, has duly executed and delivered this Security Instrument under seal as of the day and year first above written. ##Signature Page-Borrower (Recordable) [PAGES=2]##

GRANTOR:

OAK GROVE LLC, a Georgia limited liability company

By: → OAK GROVE MANAGER, LLC, a Georgia limited liability company, its managing member

By: → Thomas Barnes Vice President

Page Break

ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA

COUNTY OF: _____

On _____ before me, _____, personally appeared _____ who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to

Things to Keep in Mind...

- I try and insert the hidden text snippets in the signature page lead-in sentence or another location that is unlikely to be edited (as opposed to inserting it within the signature block). If the signature block is updated at a later date by copying and pasting a new block over the old block, the snippet may be deleted inadvertently.
- If the same party signs the same page more than once, and you only want that party to sign a single page (as opposed to signing separate pages for each party), you will want to only include a single snippet for all of the related parties.
 - For example, if the same individual signs for both the Guarantor and Borrower, and the Guarantor and Borrower both sign the same signature page, you would only insert ##Signature Page-Borrower## and not include ##Signature Page-Guarantor##, because you ultimately only want 1 signature page for both Borrower and Guarantor.
 - See *SPG Example – Guaranty.docx* for an example
- If your signature page breaks across 2 pages when hidden text and formatting is visible, that signature page may not output correctly.
 - It is important to make sure your signature page is entirely on one page.
 - This occurs most often when there is a signature block and notary block on the same page.

How to Generate Signature Pages

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Open the “Sig Page Generator.docm” document

**SIGNATURE PAGE
GENERATOR**
v.1

Click the below button to run the signature page generator:

Click the below button to run the signature page snippet inserter app:

Developed by:
Drew Gandy
Holland & Knight LLP
Atlanta Office
404-817-8518
Drew.Gandy@hklaw.com

Always double check the generated signature packets for completeness and accuracy.

This software collects the total number of documents processed and total number of signature pages generated by the user for basic analytical purposes. Filenames, document contents and other file data are NOT collected.

Click “Run Signature Page Generator”

**SIGNATURE PAGE
GENERATOR**
v.1

Click the below button to run the signature page generator:

Click the below button to run the signature page snippet inserter app:

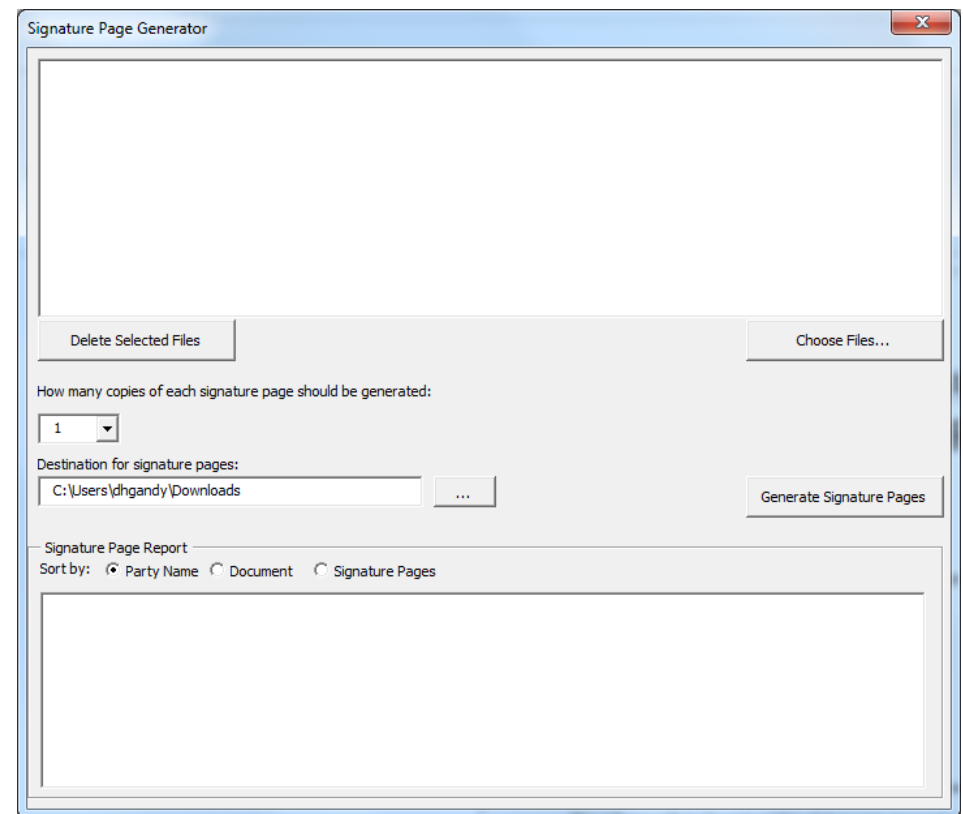
Developed by:
Drew Gandy
Holland & Knight LLP
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Always double check the generated signature packets for completeness and accuracy.

This software collects the total number of documents processed and total number of signature pages generated by the user for basic analytical purposes. Filenames, document contents and other file data are NOT collected.

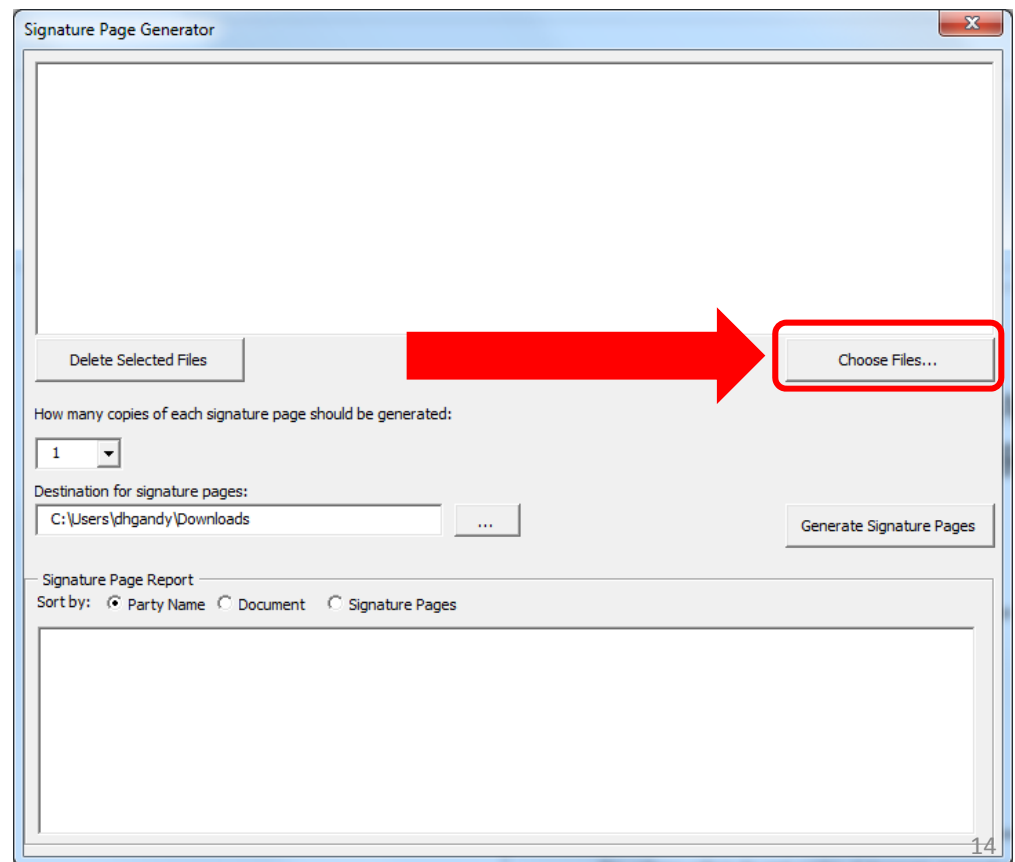
This is the Signature Page Generator interface

- From here you can:
 - Add and remove your documents from the list of documents to process
 - Select how many copies of each signature page you want
 - Select the destination for the signature packets
 - Review the report of all signature pages generated



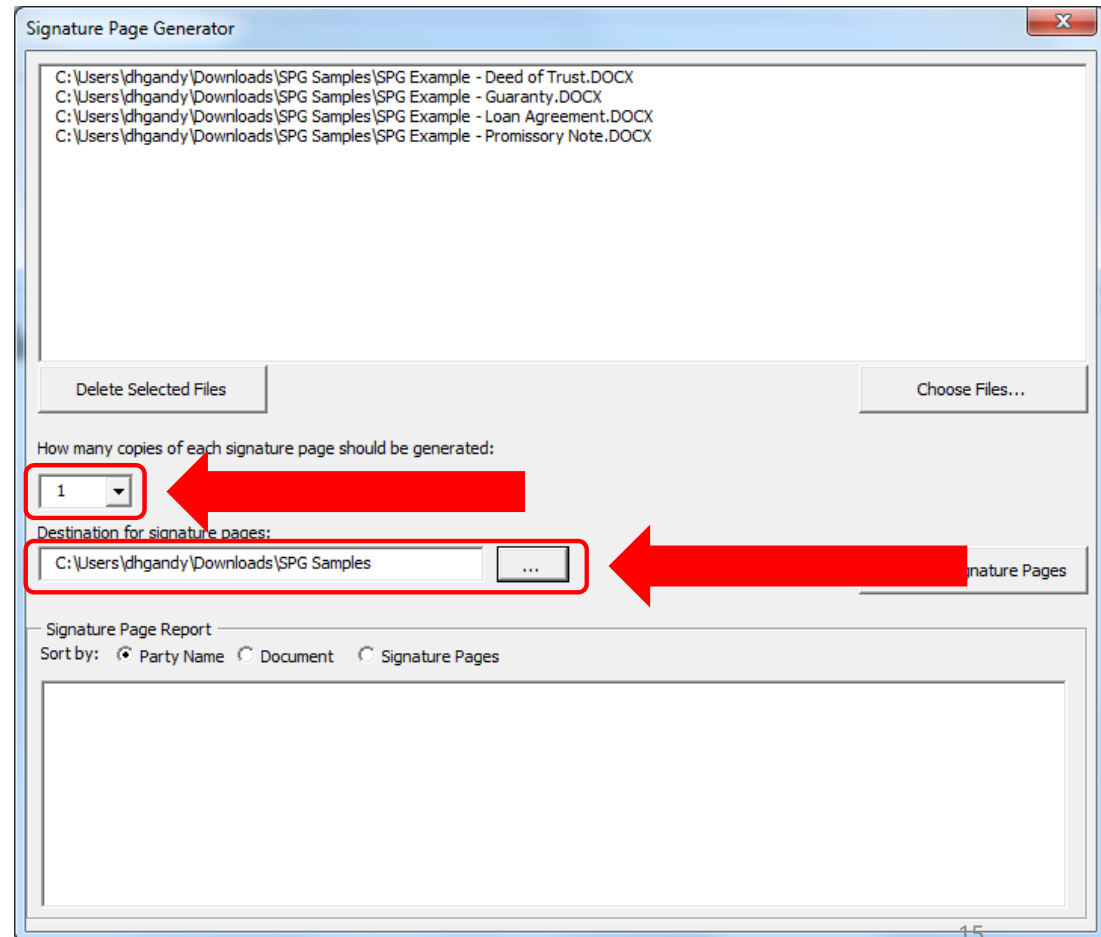
Click “Choose Files...” to select documents to pull signature pages from.

- Note that this software cannot (yet) interface with iManage. Thus, you will need to save any iManage documents locally before running them through the software.
- To export several files from iManage at once, I select all of the files I want, right click them, click “Send” then “Send Document.” This will create an Outlook email. You can now drag the files from the Outlook email to a local folder.
- “Delete Selected Files” will remove the selected items from the list.

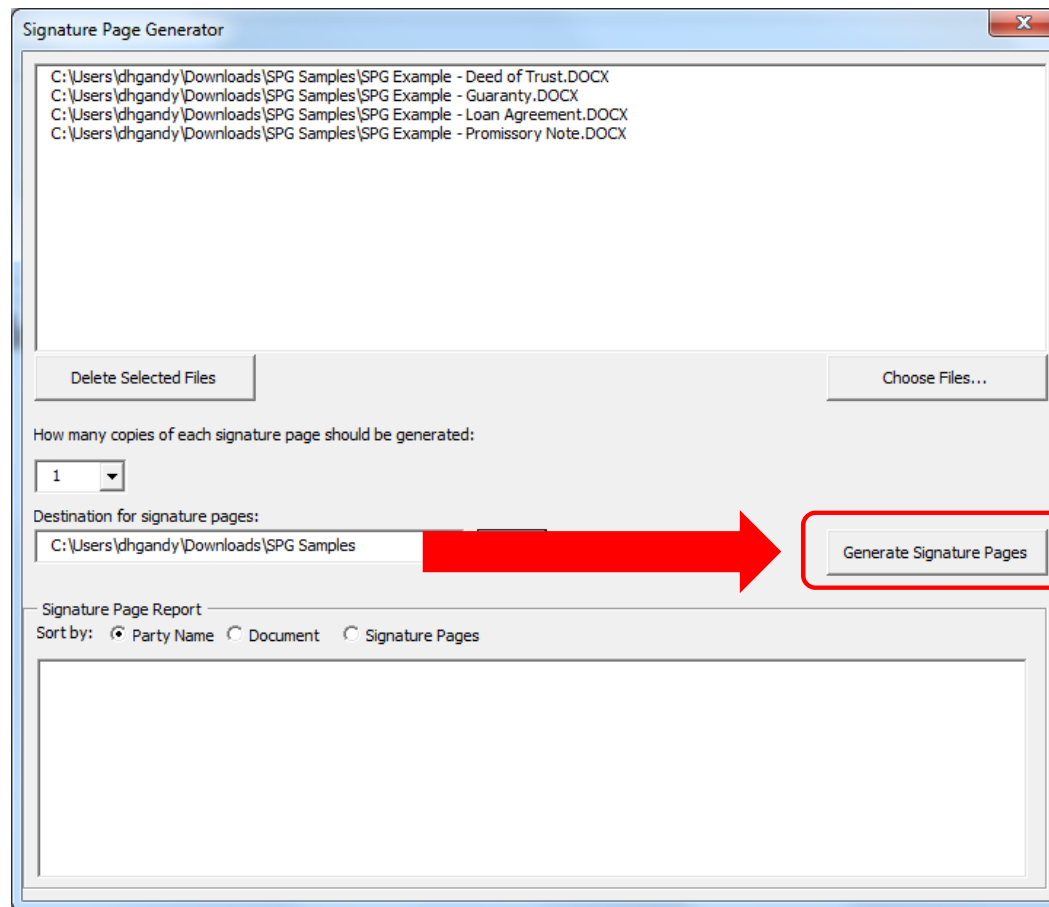


Choose options...

- Select the number of copies of each signature page to be generated.
- Select the location where the signature packets should be saved.

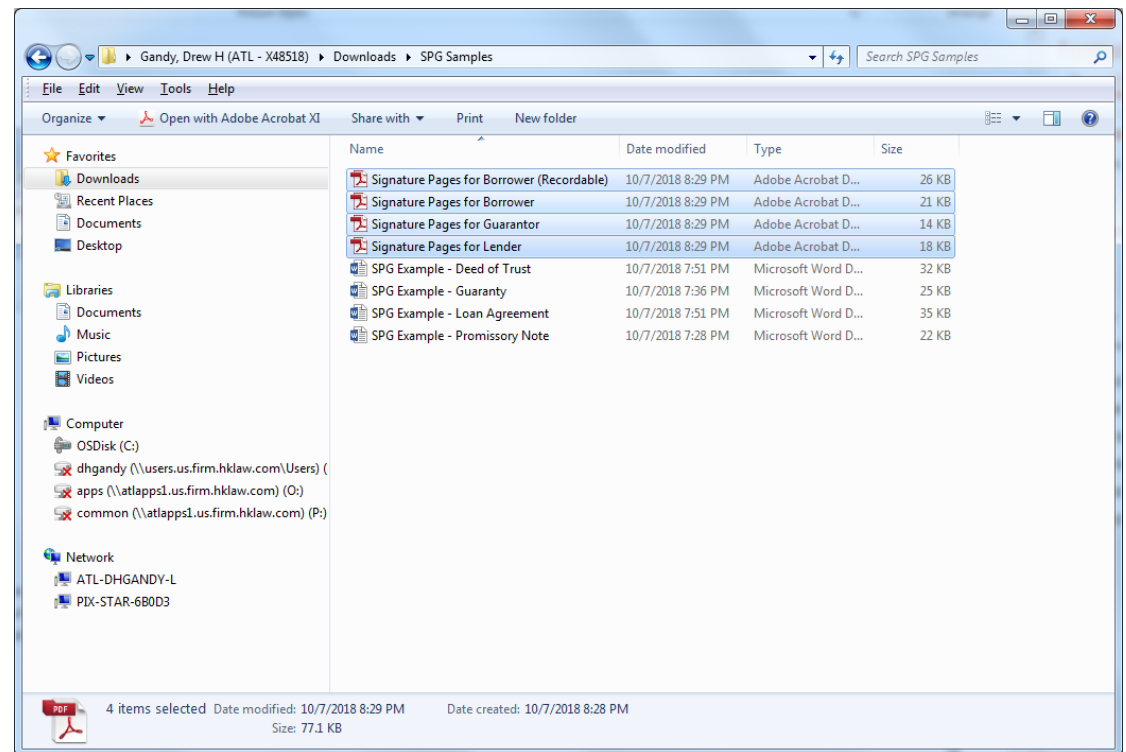


Click “Generate Signature Pages” to generate packets



That's it...

- The packets will be created in the destination folder.
- Once done, you can review the Signature Page Report to confirm the appropriate signature pages were created.
 - This list can be copied and pasted in the email distributing the packets if you want to identify which parties sign which documents.



What's on the roadmap

- iManage integration
- Custom cover pages included in packets for mailing instructions, etc.
- Update signature blocks and other info in documents on the fly
- Draft tag management
 - When a new version is created, draft tag is blanked out (e.g. "10/__/18")
 - When ready to circulate documents to working group, draft tags are filled in

Don't hesitate to let me know if you have any questions or comments.

- Email: drew.gandy@hklaw.com
- Phone: 404-817-8518 or x48518

Setting Up Signature Page Generator Software

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Download “Sig Page Generator.docm” document

- The software is built into a Word document.
- The latest version may be obtained here:

<https://github.com/drewgandy/Sig-Page-Generator/raw/master/Sig%20Page%20Generator.docm>

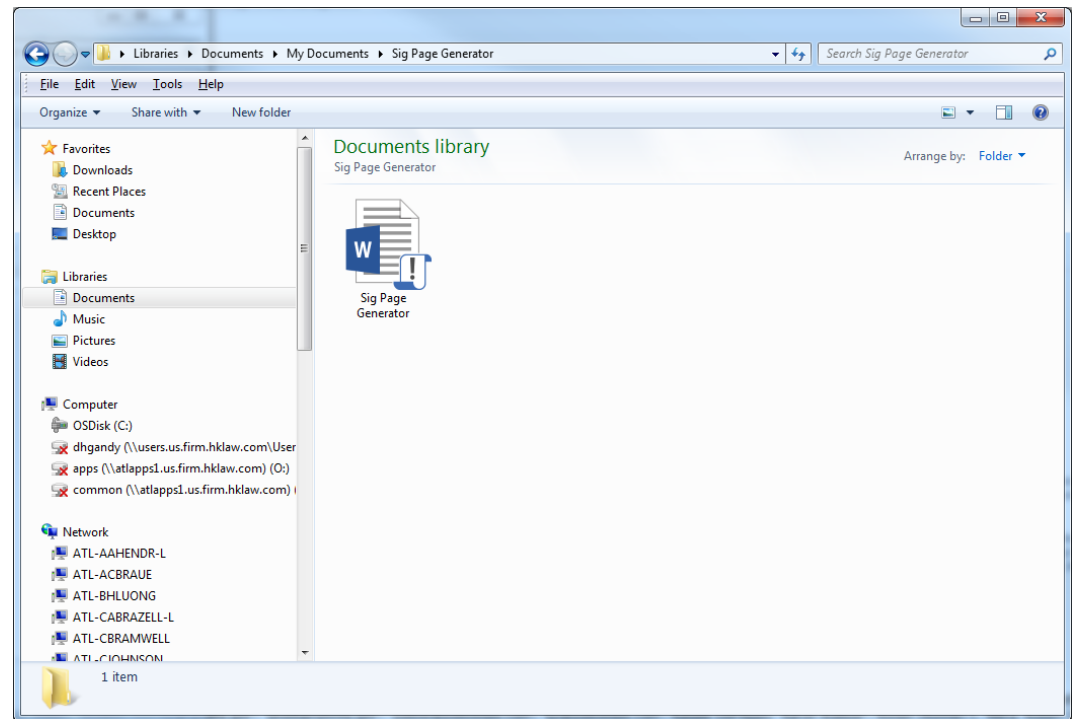
- The latest version of this user guide may be obtained here:

<https://github.com/drewgandy/Sig-Page-Generator/raw/master/Sig%20Page%20Generator%20User%20Guide.pdf>

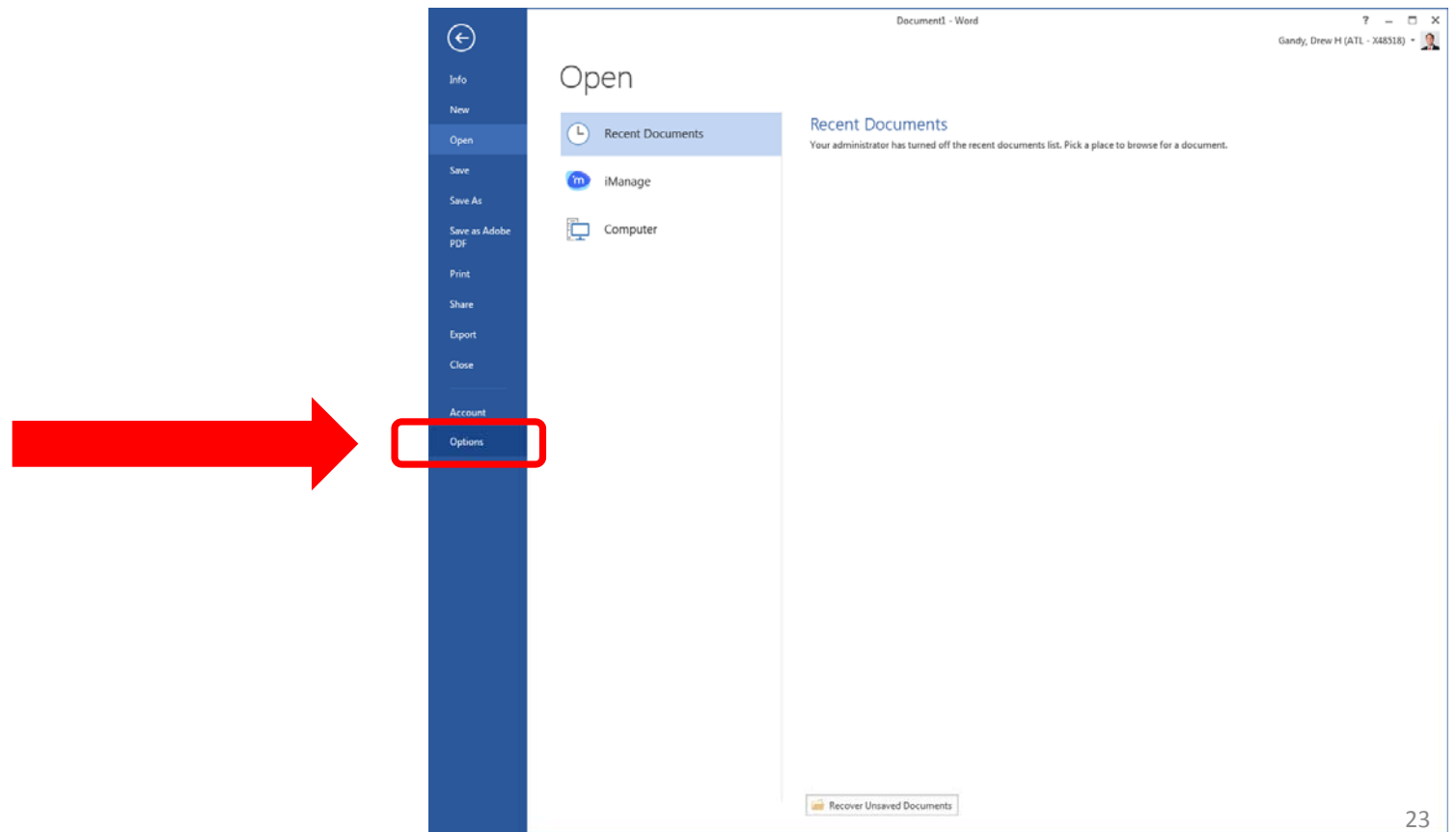
Save the Word Document somewhere convenient. Remember where you saved it...

- You will be using this document to run the Signature Page Generator interface.
- The document should be saved in a folder where you will not save any other files.
- The suggested location is a sub-folder in the My Documents folder:

“C:\Users\[Username]\Documents\Sig Page Generator\”

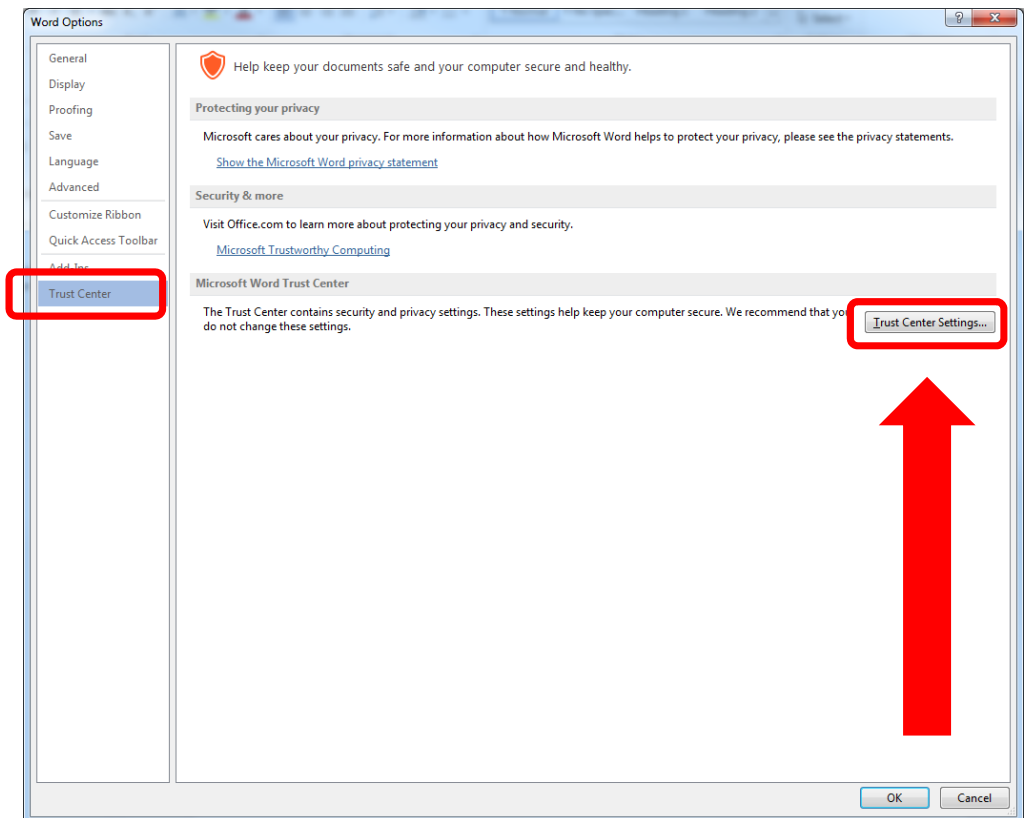


Open MS Word, click the “File” tab and select “Options”



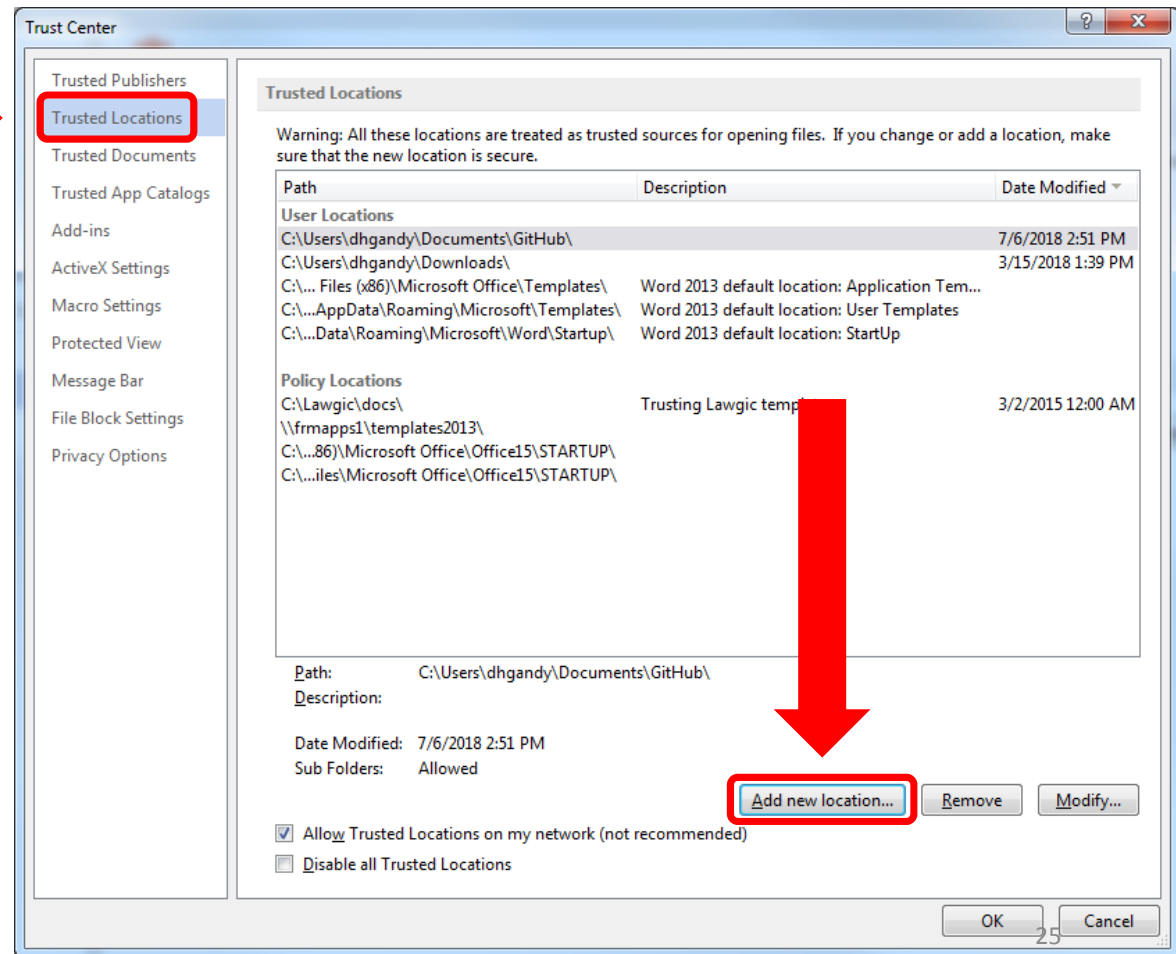
Click “Trust Center” from the list on the right...

- Then click “Trust Center Settings...”



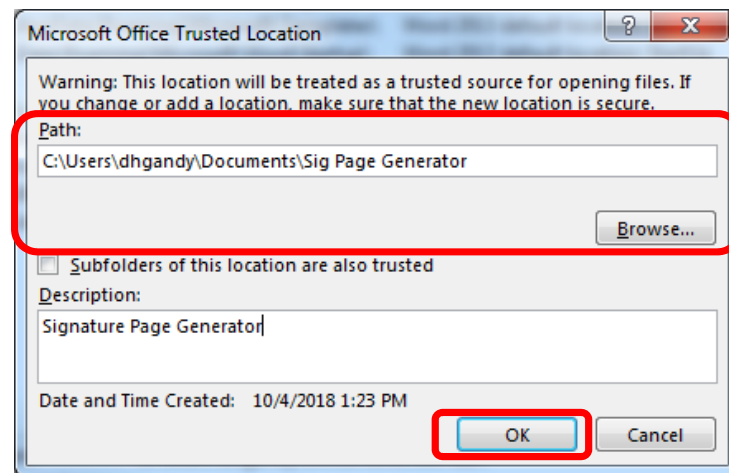
Click “Trusted Locations” from the list on the right...

- Then click “Add new location...”

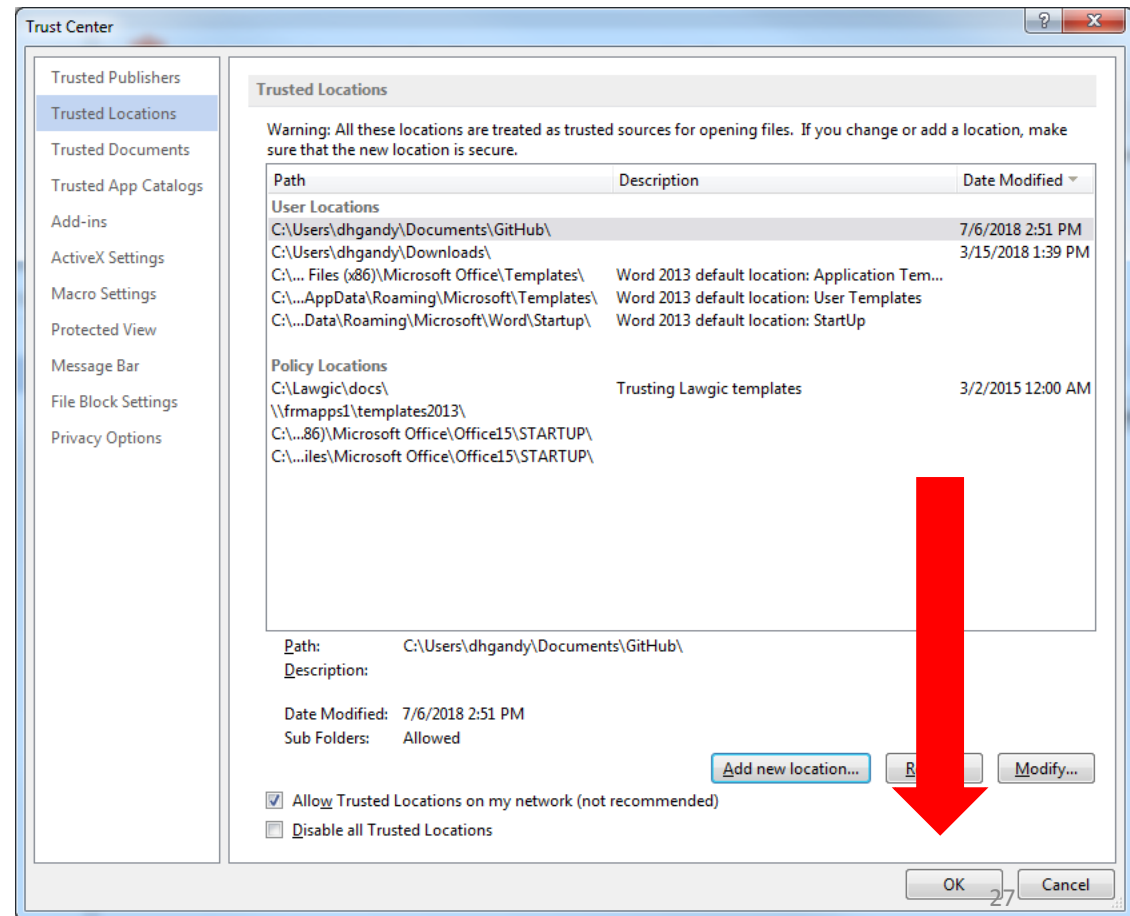


Enter the folder location in the “Path:” textbox where you saved the Word document...

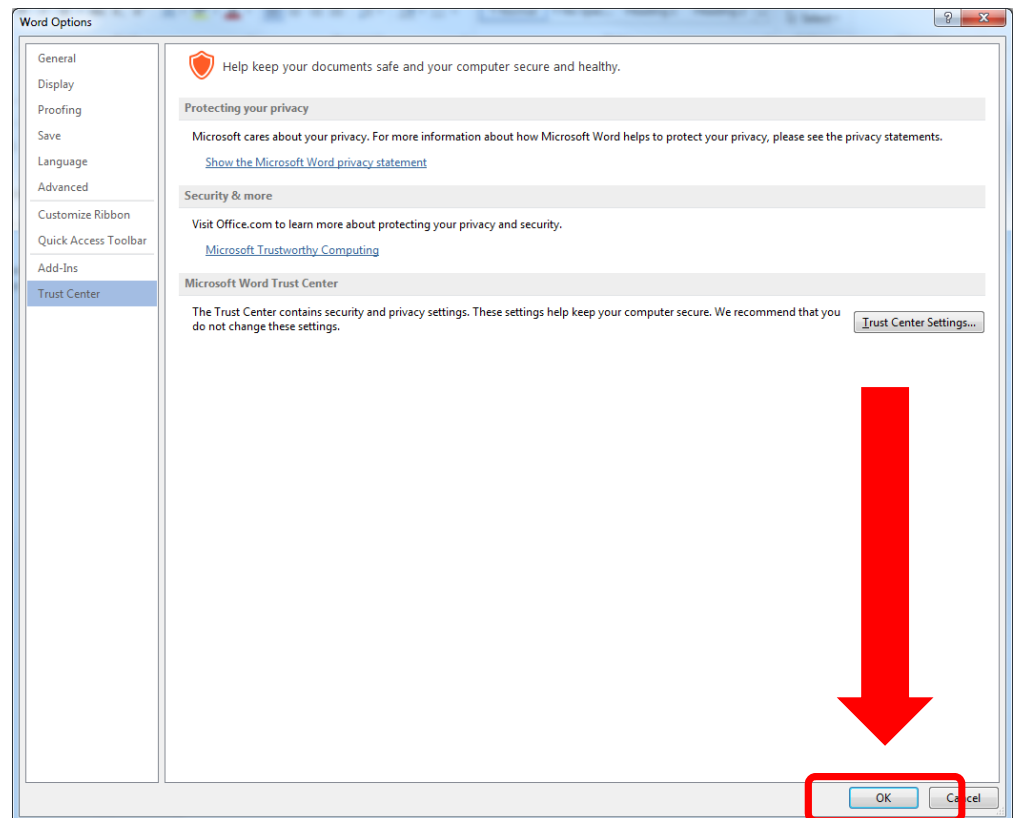
- Then click “OK”
- You can fill in a description, but this is not necessary.
- If you move the “Sig Page Generator.docm” file to another folder, you will need to update the location in this path.



Click “OK” in the Trust Center window



Click “OK” in the Word Options window



That's it! You're done.

Let's test that the setup worked...

- Open “Sig Page Generator.docm” from where you saved it.
- Click the “Run Signature Page Generator” button embedded in the Word document.
- If the following screen appears, the software was setup correctly.
- You can now close MS Word if you'd like.

Click the below button to run the signature page generator:

Run Signature Page Generator

