

CREATING AN ELECTRONIC CLOSING BINDER



Section of Real Property, Probate, and Trust Law

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Is your office overflowing with closing binders from transactions you have closed? Do you spend a lot of your time and your client's money making closing binders of transactional documents? You can save that time and money by instead creating electronic closing binders on CD for a fraction of the cost of paper binders. The CD can include an index which automatically opens when the CD is placed in the drive, and have hyperlinks to each of the documents. If documents on the CD are "image on text" PDF files created from your word processor, the documents will be searchable. You can even digitize your existing closing binders, and fit every deal you've ever done in a shoebox or two!

WHAT YOU WILL NEED

- Adobe Acrobat which is the full Adobe program capable of creating PDF files and managing the pages in them. Adobe Reader is the free program which enables you only to read a PDF file but not to create it.
- A scanner to scan either the signed documents after execution or the signature pages to insert in the original PDFs.
- An autorun program to create files for your CD which will cause it to automatically open the index page when the CD is placed in the drive.
- A CD-RW drive in which to burn the CDs, and CD software capable of creating labels.

WHAT YOU WILL DO

- Type the index in your word processor. Use bullets and colors to make it interesting and attractive. If your client has a logo you can use it at the top of the page and even hyperlink to the company's Web site in Acrobat.
- Pictures, graphics and logos can be inserted in either Word or Word Perfect:
 - In Word click on Insert/Picture/From File (or other source)
In WordPerfect click on Insert/Graphics/From file (or other source)
 - Right click on the image inserted to format its size and features
 - Click and drag the image to the desired position
- Print the index to PDF, open the Index in Acrobat, and create Internet links and/or links to the documents listed in the index.
- Create autoun files to cause the index to open when the CD is inserted in the drive.

- Print all of the documents to be executed to PDF from your word processor.
 - Using PDF documents has become much more important now that we e-mail documents to multiple parties for execution. Pagination is printer-dependent so that if a document is e-mailed to different parties with different printers, all will have different pagination when it is printed, and the counterpart signature pages will likely all be different. A document in PDF will maintain pagination regardless of the printer because it is image not text.
 - When the PDF documents are signed, the pagination of the signature pages will be identical in all copies, and the scanned signed pages can be substituted for the unsigned pages in the PDF files to be moved to CD.

CREATE AN INDEX

- Insert a picture or other graphics in the index
- Type the index in Word as you would any document
- Print the index to PDF and save it in the same folder as the documents to be moved to the CD

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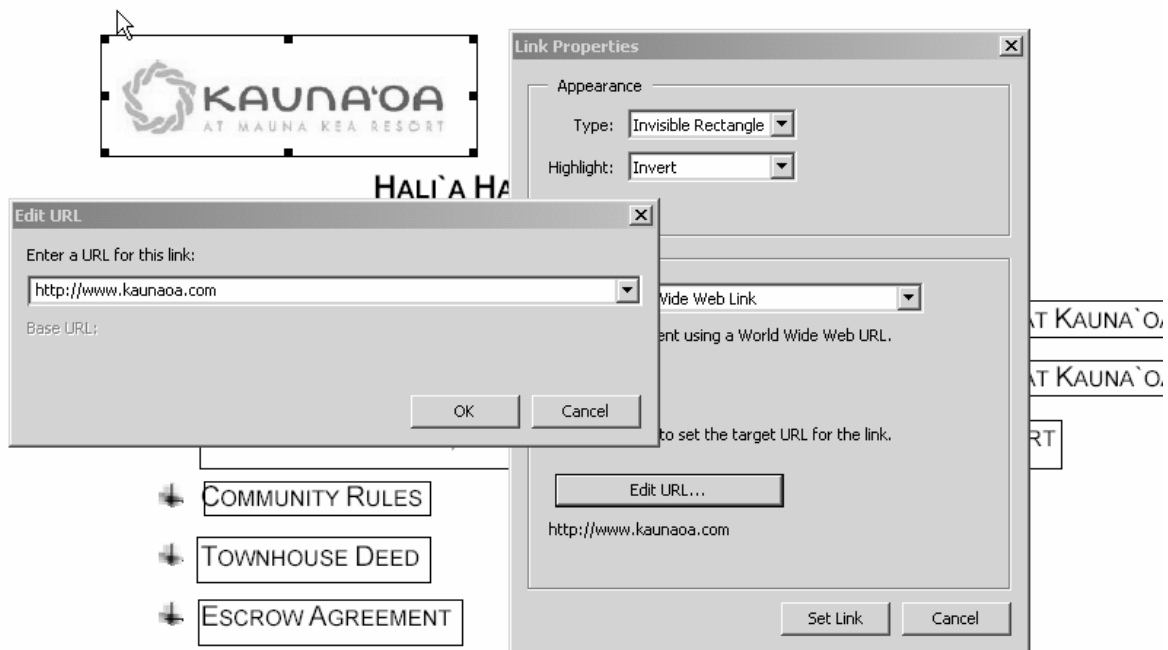
HALI'A HALE AT KAUNA'OA CONDOMINIUM

- ✚ DECLARATION OF CONDOMINIUM PROPERTY REGIME
- ✚ ARTICLES OF INCORPORATION OF APARTMENT OWNERS OF HALI'A HALE AT KAUNA'OA
- ✚ BYLAWS OF THE ASSOCIATION OF APARTMENT OWNERS OF HALI'A HALE AT KAUNA'OA
- ✚ NOTICE OF INTENTION, QUESTIONNAIRE AND PRELIMINARY PUBLIC REPORT
- ✚ COMMUNITY RULES
- ✚ TOWNHOUSE DEED
- ✚ ESCROW AGREEMENT

FORMAT THE INDEX IN ADOBE ACROBAT WITH HYPERLINKS TO THE DOCUMENTS

- **CREATE AN INTERNET LINK**

- Open the index in Acrobat.
- Click on the Link Tool 
- A crosshair "+" will appear. Drag it around the area you want to be a link. When you release the mouse, the Link Properties dialog box will appear.
- Select "Invisible Rectangle" for type and "Wide Web Link" as the "Action."
- The "Enter a URL for this link" dialog will appear. Enter the URL and click on "Set Link" then OK



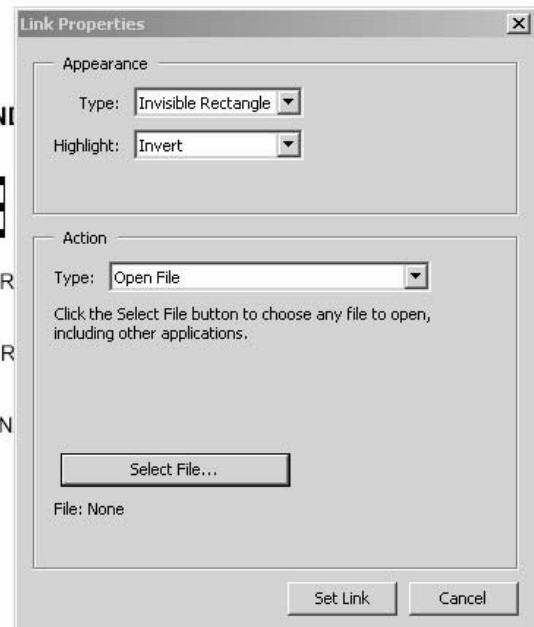
- **CREATE DOCUMENT LINKS.**

- All documents to be linked from the index should be in the same folder.
- Click on the "Link" tool. A crosshair "+" will appear. Drag it around the words you want to be the link and release the mouse.
- The Link Properties dialog box will open. Select "Invisible Rectangle" for Type and "Open File" for Action.
- Click on "Select File" and a file open dialog will open. Scroll to the file you want to open and click "Set Link" and OK.



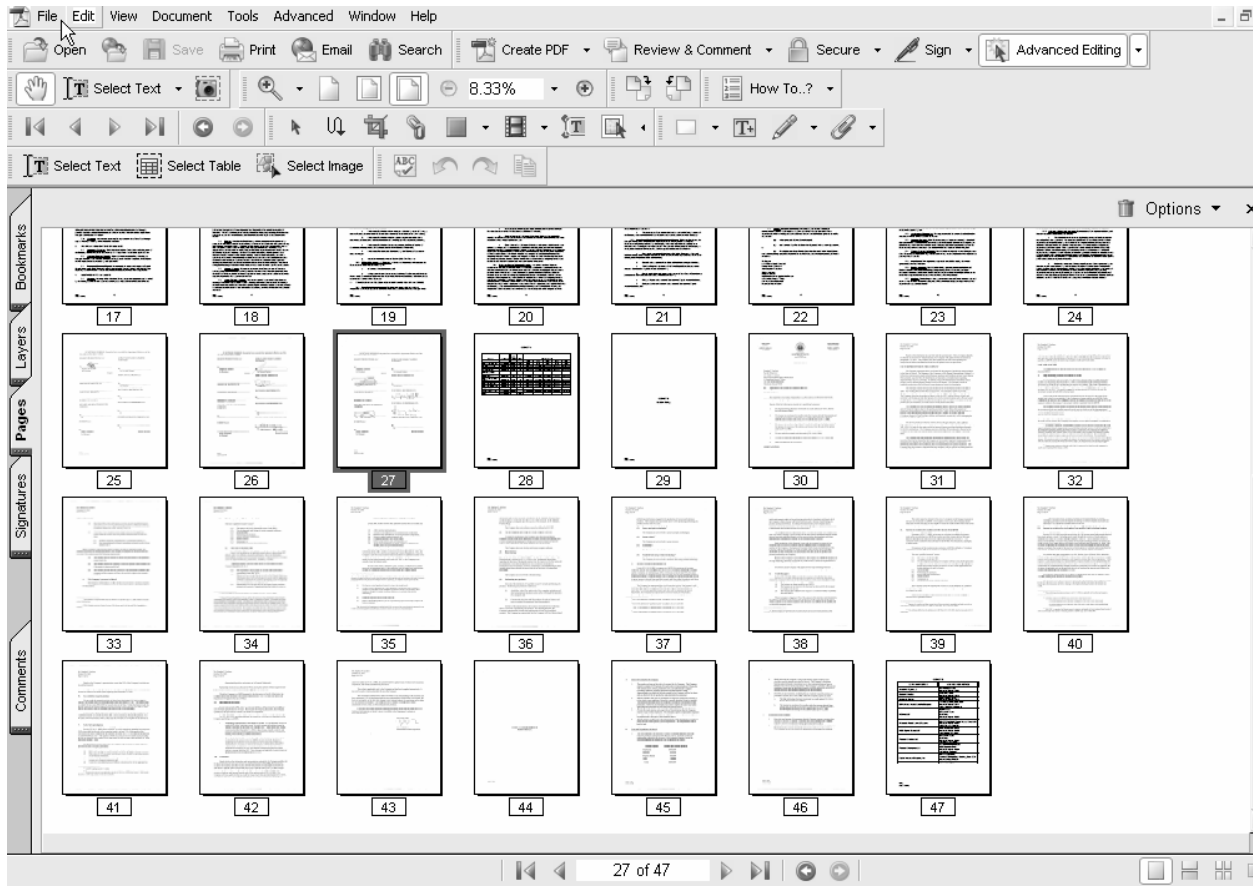
HALI`A HALE AT KAUNA`OA CONDO

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- ✚ COMMUNITY RULES
- ✚ TOWNHOUSE DEED
- ✚ ESCROW AGREEMENT



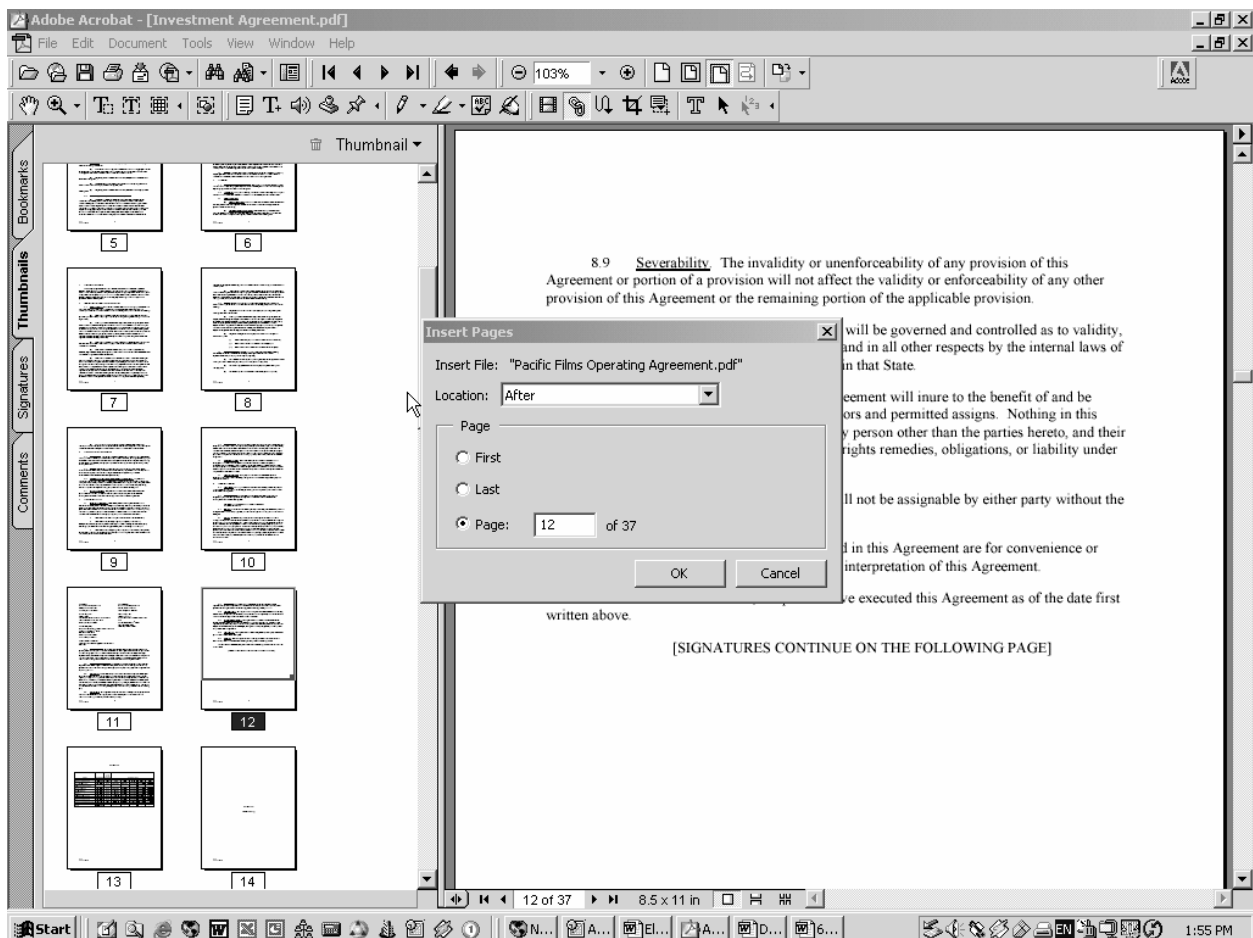
INSERT SCANNED SIGNED PAGES IN THE DOCUMENTS

- Print all documents to go to the CD to PDF before execution.
- Delete the unsigned signature pages from the original PDF document by selecting "Pages" on the left of your Adobe Acrobat screen, and right clicking on the page to be deleted.
- The page will be outlined in blue. Now right click in the page, and in the right click menu, select "Delete pages" and hit enter. The page will be deleted.



INSERT THE SIGNED PAGES IN THE DOCUMENT.

- Scan the signed pages and save them as a PDF file.
- Open the document in which you want to insert the signed pages in Acrobat and click on "Pages" on the left side of your screen.
- Right click on the thumbnail of the page after which you want to insert the pages and click on "Insert Pages."
- A file open dialog box will appear. Scroll to the PDF file of the signature pages you want to insert and click OK. A dialog box will appear asking if you want to insert the pages before or after. Select "After" and OK.



CREATE THE CD

- Create the Autorun Files using Autorun Wizard or a similar product.
- You can find autorun wizards on the Internet by typing "autorun wizard" in your search engine. Most are free shareware or inexpensive.

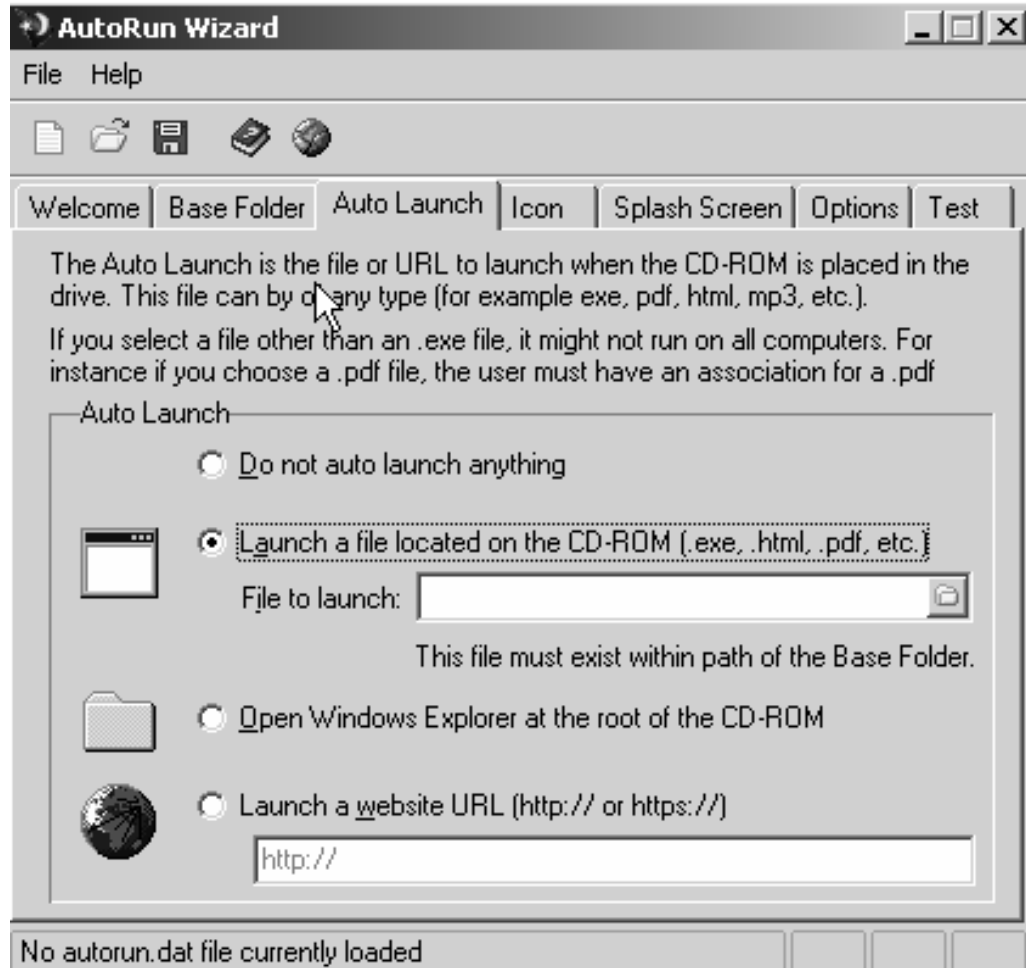


- **SPECIFY THE BASE FOLDER.**

- Put all of your documents to go on the CD in this folder including the autorun executable and related files which will be created by the autorun wizard.
- Click on the yellow folder to the right of the window and a file open dialog box will open. Scroll to the directory where the documents are located and click OK.



- **SELECT THE FILE TO LAUNCH.** Click Autolaunch and “Launch a File Located on the CD-ROM” and specify the name of the file to launch when the CD is inserted the drive. This should be your index file.



- **SAVE** the autorun files to the same directory as the documents to go to the CD
- **COPY** all of the files in the directory including the 3 autorun files you created to your CD
- **YOUR** CD will automatically open the index
- **CREATE** CD labels for the CDs
- **YOU'RE DONE!** You now have a CD which automatically runs the index, with hyperlinks to the documents, and if you used the image on text PDF files, is searchable.