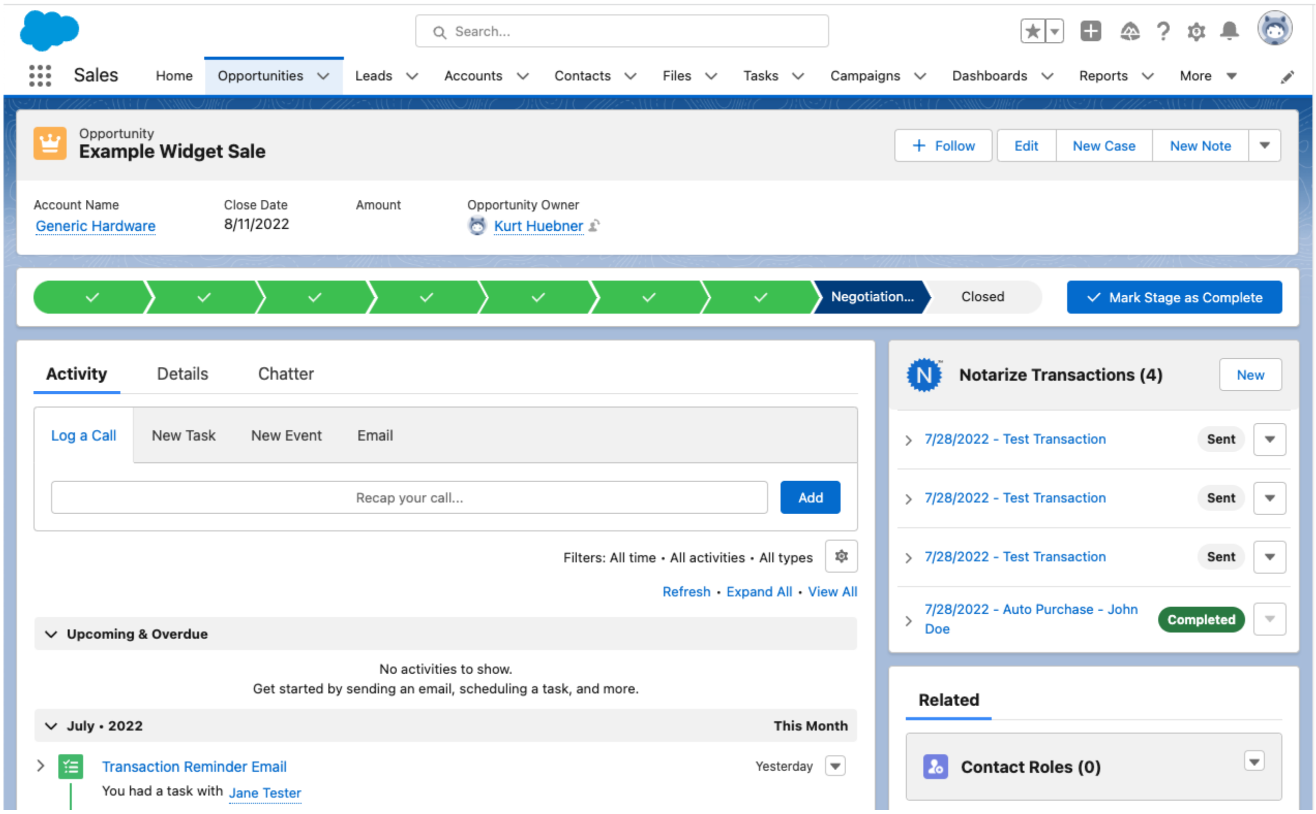
Salesforce App User Guide

Table of Contents

Introduction

This document serves as a user guide for the Notarize Salesforce app, aimed at all end users that will be sending transactions through the Notarize Salesforce app. This guide is meant to give you the tools you need to begin using the app and sending transactions. The guide begins with step-by-step instructions on transaction creation, and finishes with an overview of the various transaction management features. For detailed instructions on the installation of the app, please refer to the Installation and Configuration guide. If you have any questions after reading this guide, please reach out to salesforce@notarize.com.

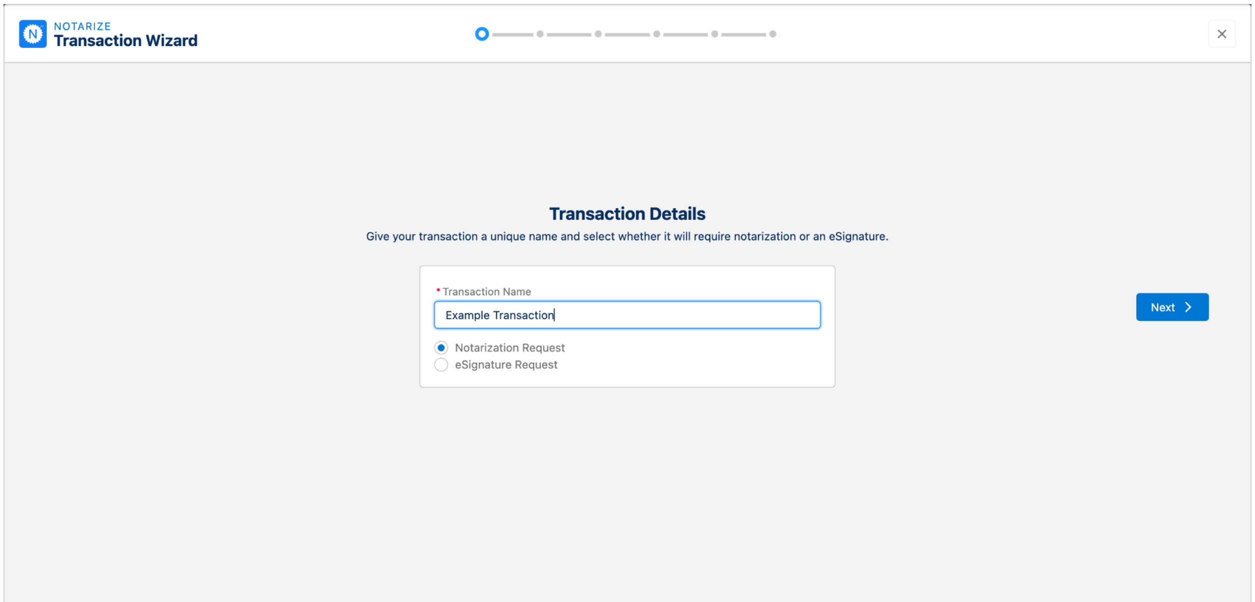
Creating a Transaction



To begin creating transactions, navigate to one of the supported objects (Accounts, Opportunities, Contacts, or Leads). Locate the Notarize Transactions lightning component. Click **New** to begin the transaction creation process.

- Note: if the transaction creation workflow is abandoned, you will need to start over at this step.

SELECTING A TRANSACTION TYPE



Each transaction must be assigned a transaction type. The transaction type value will default to a notarization, but you can also choose to send an eSignature only transaction.

Notarization Transactions

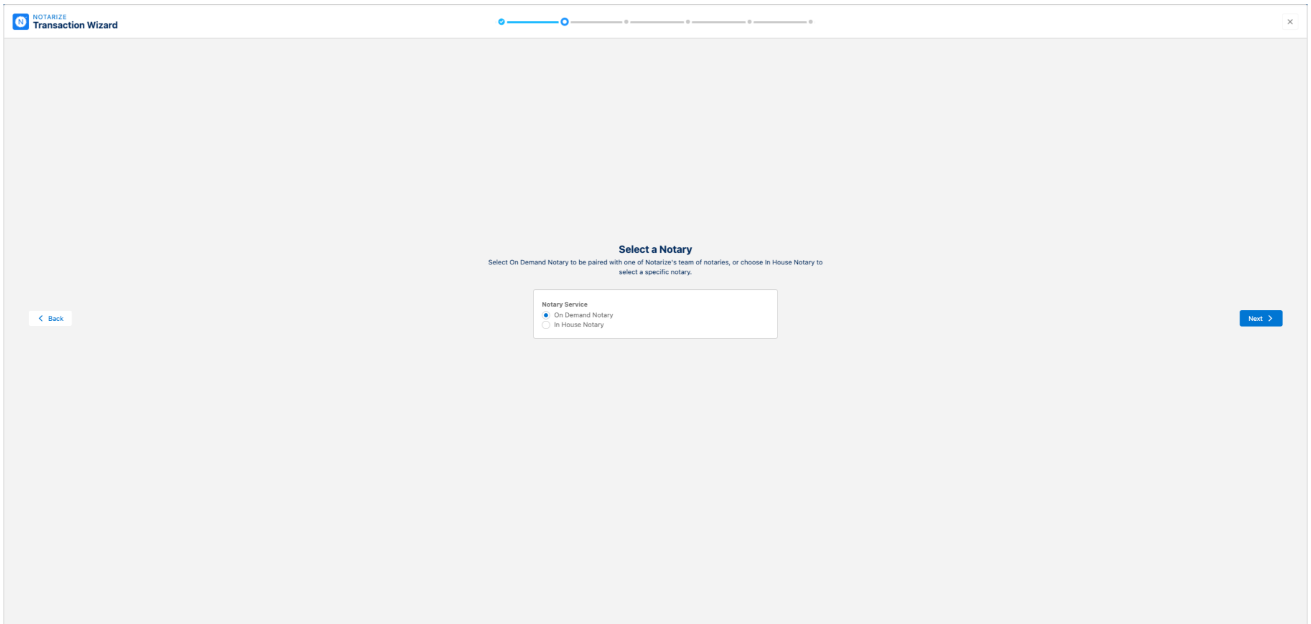
- Select this transaction type if you have one or more documents that require a notarization
  - You can include eSignature documents in the transaction, but you will not be able to finish creating the transaction without marking at least one document as requiring notarization

eSignature Transactions

- Select this transaction type if you only need signers to eSign documents and do not need them to meet with a notary

Once you have finalized the transaction name and type, click **Next**

SELECTING A NOTARY ROUTING OPTION

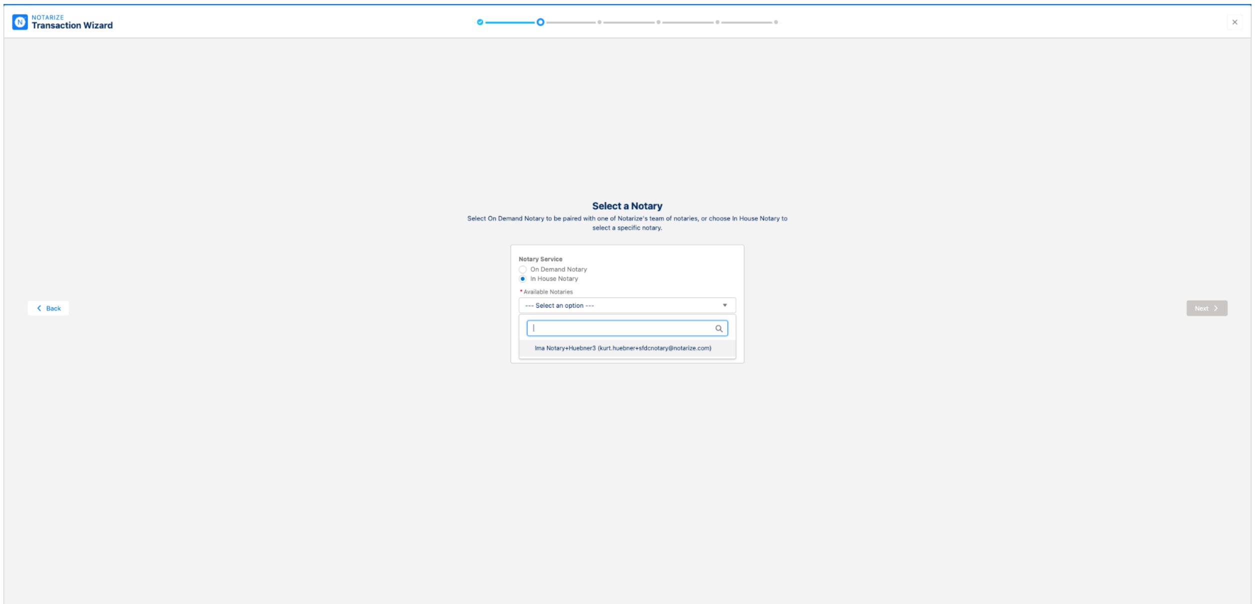


The “Select a Notary” page allows you to schedule a specific member of your organization to serve this transaction (if applicable).

Notary on Demand

- **Notary on Demand/On Demand Notary (ODN)** is the default choice. Select this option to be served by a member of our On Demand Notary network, allowing signers to complete their notarization 24/7
  - Note: account level transaction routing rules will still apply. If you are an organization with In House Notaries configured with an overflow value set, customers will still be required to wait for the set overflow time until a transaction is sent to our On Demand Notary queue

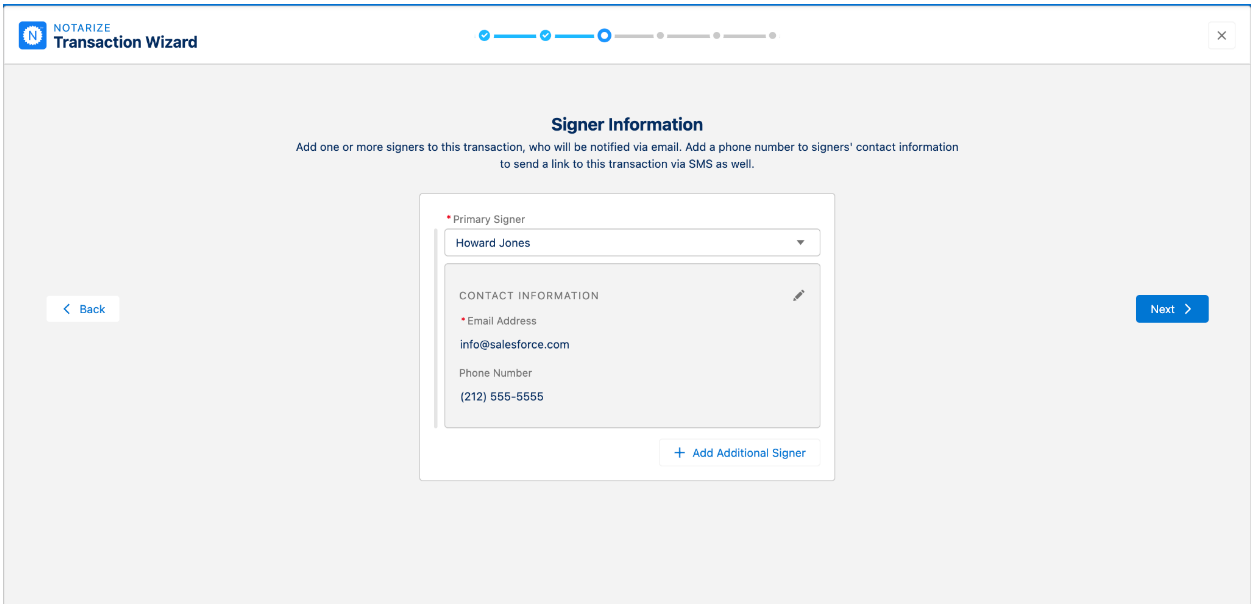
Bring Your Own Notary



- **Bring Your Own Notary/In House Notary (IHN)** is an option for customers who have onboarded their own notaries to serve transactions.
- If you choose this option, you are required to specify which notary will be assigned
  - Notary users will not appear in the “Available Notaries” dropdown menu until they have been invited to an account, have completed notary onboarding and review by our team, and have been enabled to accept calls by an Admin in your Notarize account.
  - Assigned notaries will receive a SMS notification when the signer is entering Knowledge Based Authentication, prompting them to log into the Notary Portal.
  - A meeting time can be optionally specified, making the scheduled meeting appear in the notary’s dashboard.

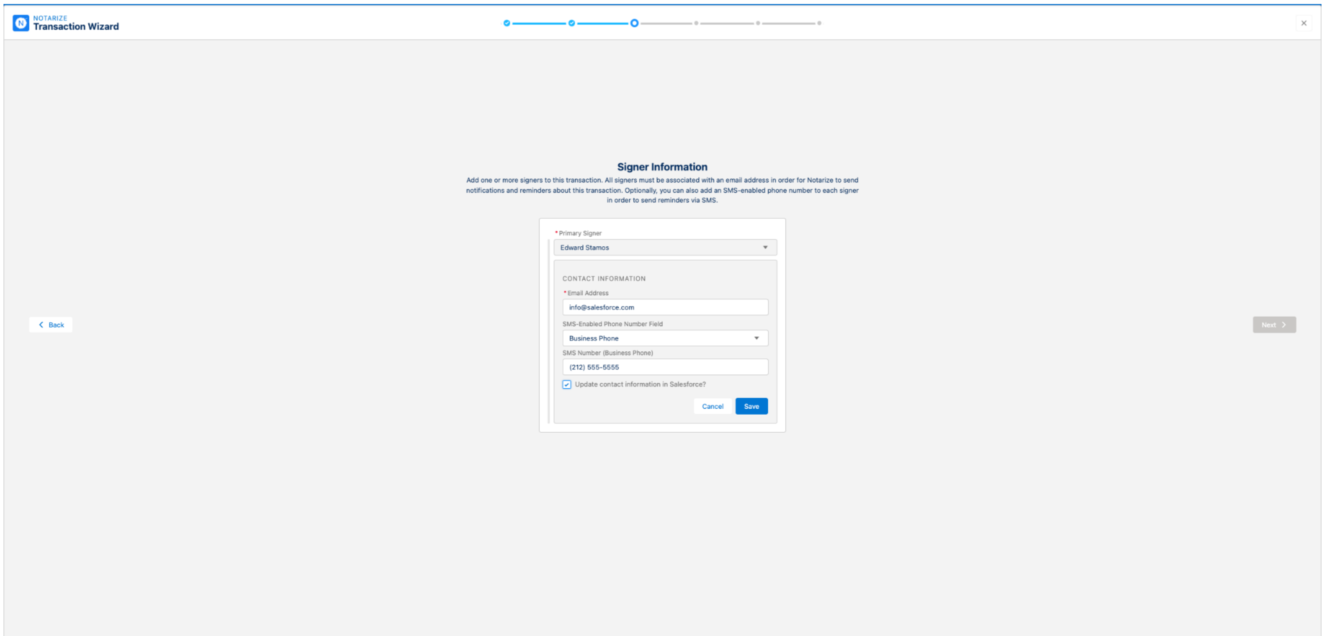
Once you have chosen a notary routing option, click **Next.**

SELECTING SIGNERS



Upon entering the Signer Information page, you can select a primary signer from a picklist. This picklist is generated using contacts that are associated with any objects related to the one the transaction was initiated from. For example, if initiating a transaction from an opportunity, you will see a list of contacts associated with that opportunity and the account that the opportunity is attached to.

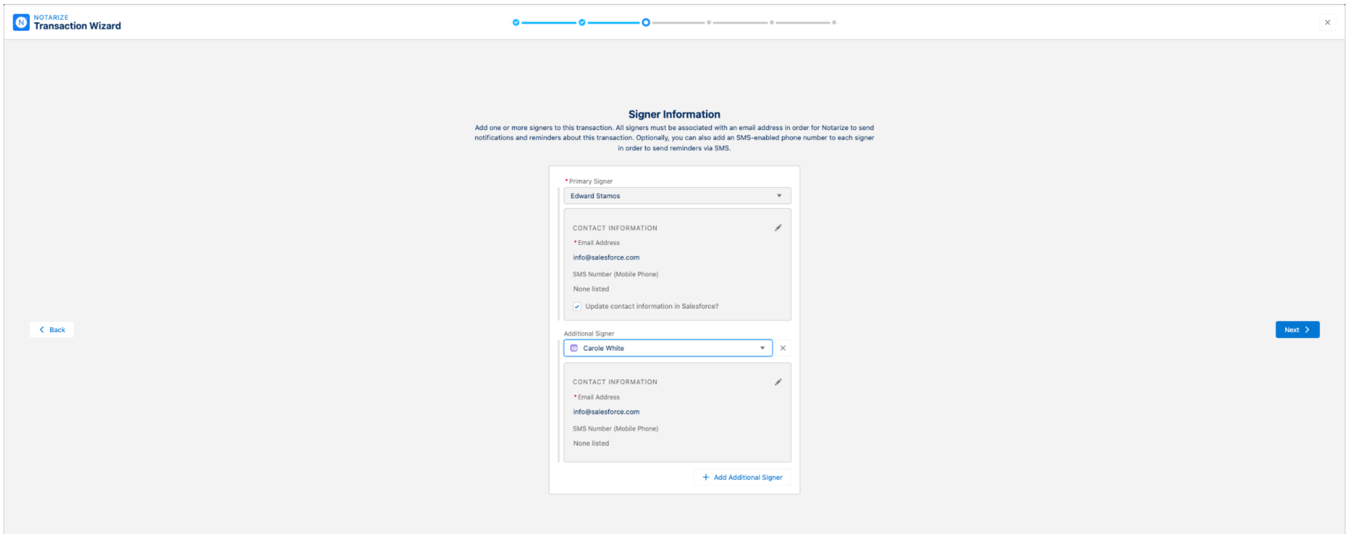
Updating Signer Information



Click on the pencil icon to update a signer's contact information.

- An email is always required in order to notify the signer of the transaction
- A SMS-enabled phone number can also be included to send a transaction notification message
  - You can customize which field is used for the phone number - click on the **SMS Enabled Phone Number Field** dropdown to select any phone number field from the contact/lead. The value will appear in the SMS Number field below.
- Check the **Update contact information in Salesforce** option if you wish to save any changes to the email address/phone number in the original contact/lead record

Adding additional signers

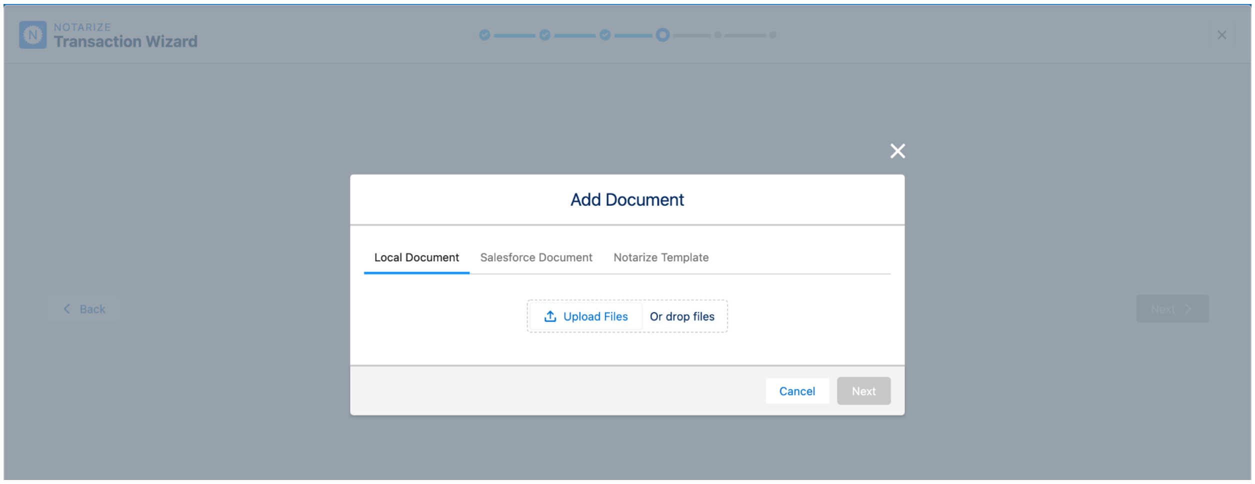


- Click **Add Additional Signer** to search for an additional signer
- Up to 9 additional signers may be added - Notarize currently supports a maximum of 10 signers in a single notary session

Once you have finalized the signers on the transaction, click **Next.**

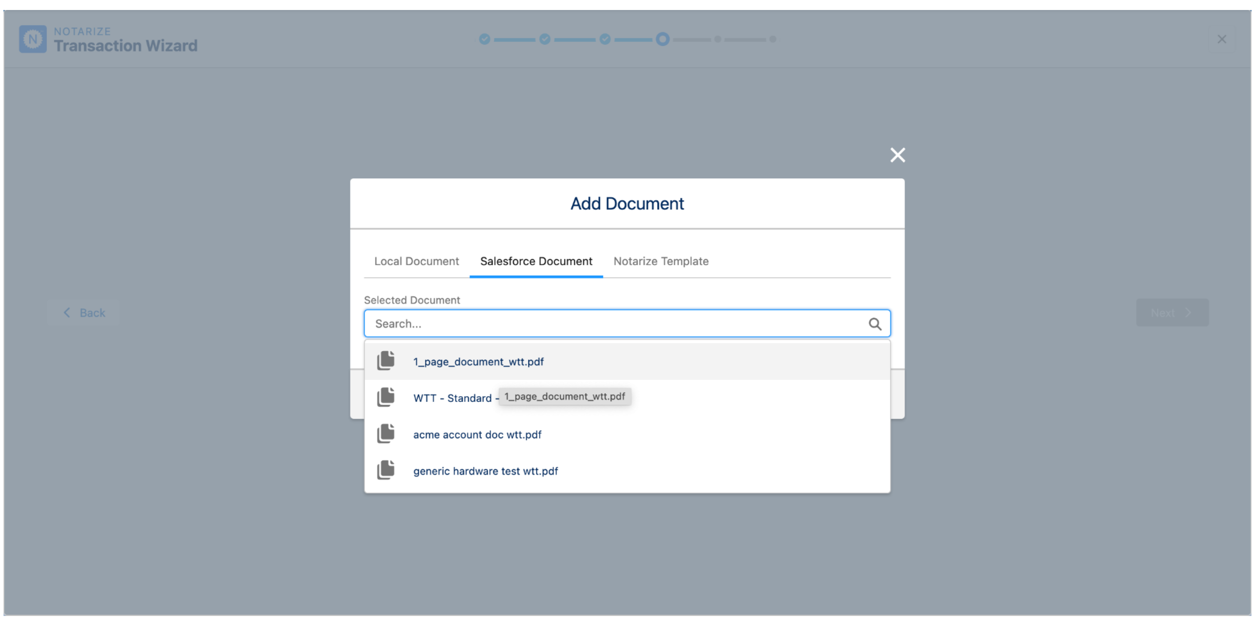
SELECTING DOCUMENTS

Uploading a local document



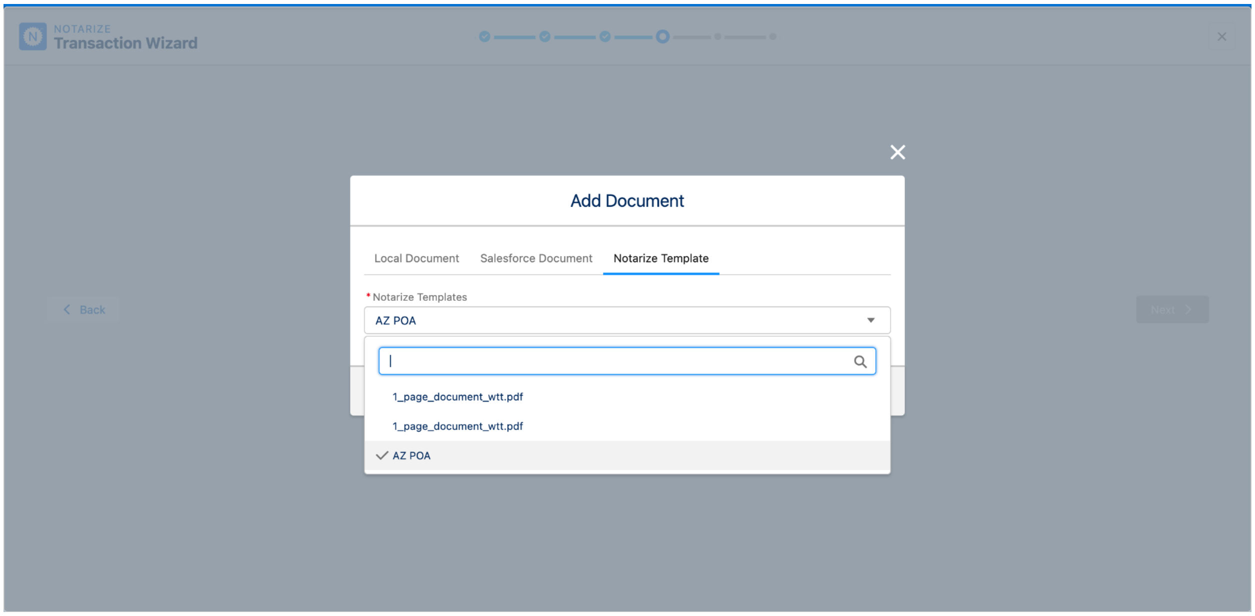
- Local documents are any PDF stored on your machine.
- You can select **Upload Files** to open a file browser, or you can drag and drop files from your desktop.

Selecting a Salesforce document



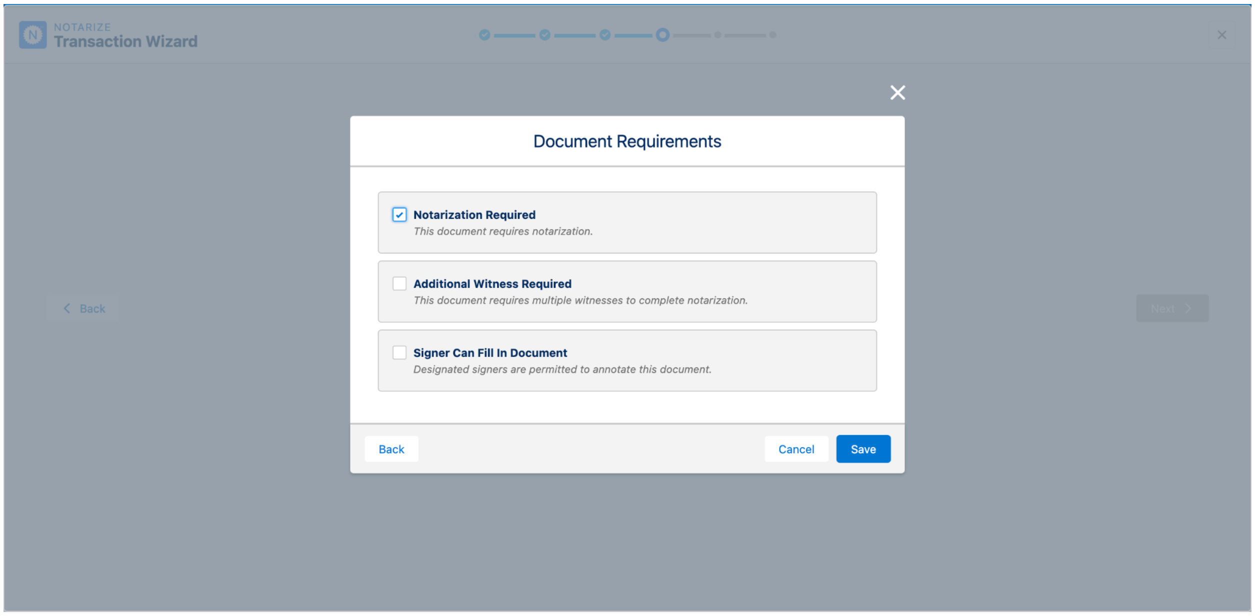
- Salesforce documents are any documents that are stored as PDF files within Salesforce.
- The **Selected Document** dropdown can be used to search for any document across your Salesforce instance.

Selecting a Notarize template



- If you have [configured a Notarize template]() in your account, you can select that here
- **Please ensure that a value is set for the template permalink in the template setup page.**
    - Templates cannot be retrieved from Notarize without a unique value set for the permalink

CUSTOMIZING THE DOCUMENT REQUIREMENTS



Please see [Set Document Requirements]() on the Notarize Help Center for more information about document requirement options.

Notarization Required

Check this option if your document requires notarization. Leave this unchecked if the document only requires eSignature.

- Note: If you have selected a Notarize-type transaction, at least one of the documents you include must have this option checked.

Additional Witness Required

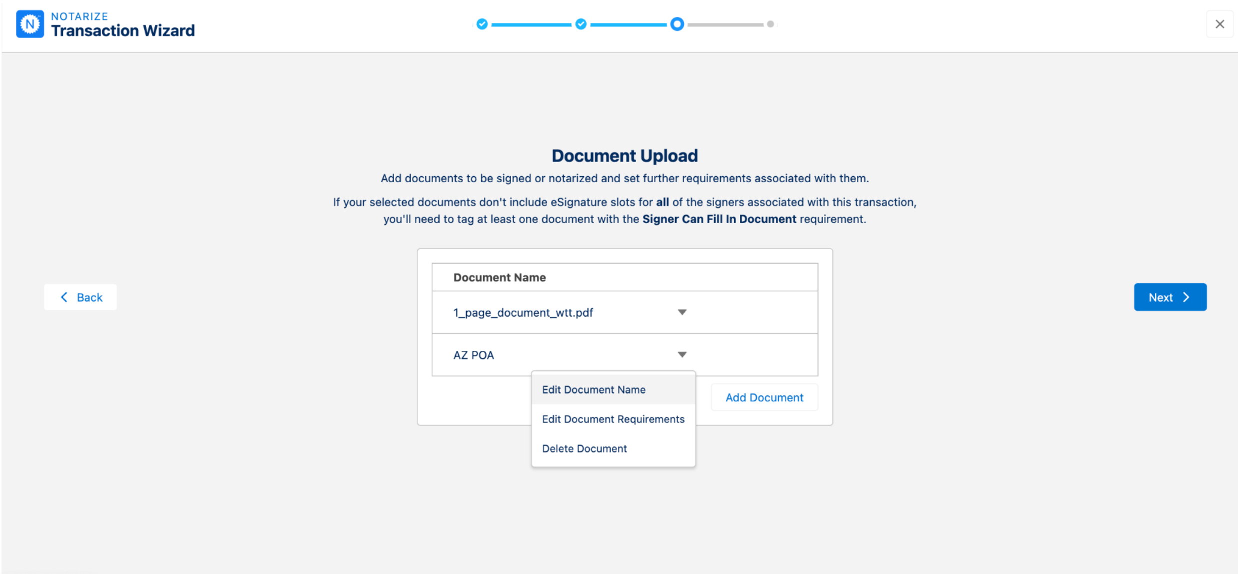
Check this option if your document requires a third-party witness. Please see [Requiring a Witness]() on the Notarize Help Center for more information.

Signer Can Fill In Document

Check this option if signers should be able to add annotations to their documents outside of the notary meeting.

For eSignature transactions with multiple signers, please ensure that at least one document has this option checked if you are not using a Notarize template with the appropriate number of signer designations.

UPDATING DOCUMENTS AND ADDING ADDITIONAL DOCUMENTS



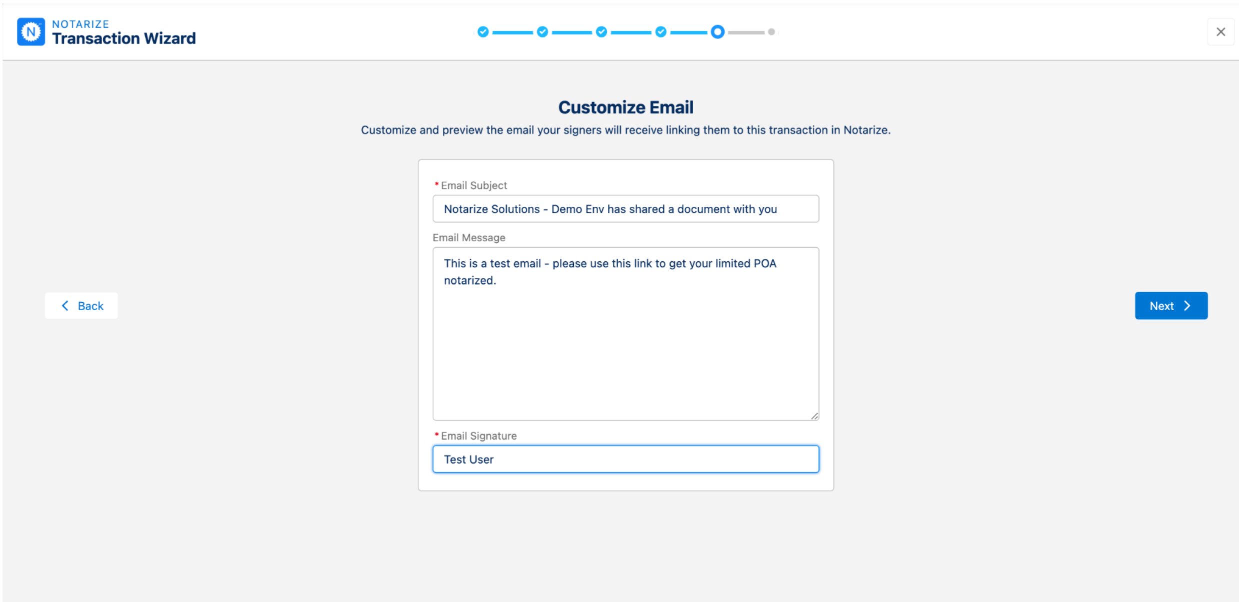
If you need to make changes to a document, click the dropdown next to the document name. This will allow you to:

- Edit the document name
- Edit the document requirements
- Delete the document

You can also add additional documents by pressing **Add Document**.

Once you are finished adding documents, click **Next**.

CUSTOMIZING THE SIGNER INVITATION EMAIL



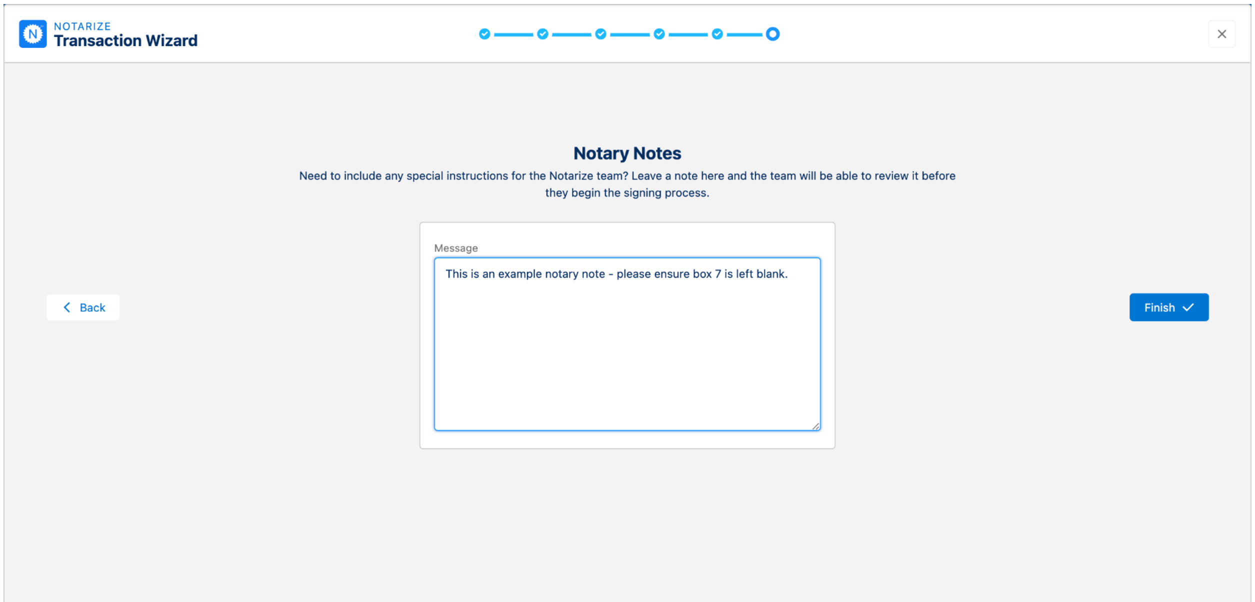
You can customize the transaction invitation email that is sent to the signer. The form shown will pre-populate with default copy, but you can make any changes necessary here.

Defaulting email copy

Please reach out to your customer success manager or customersuccess@notarize.com if you need assistance defaulting signer email copy. This feature is set at the Notarize account level.

Once you are finished making any edits, click **Next**.

ADDING NOTARY NOTES



Upon entering the Notary Notes page, you can type any message that you would like the notary to review. Notary notes must be read and acknowledged by the notary, so this is the ideal place to give guidance for complex documents.

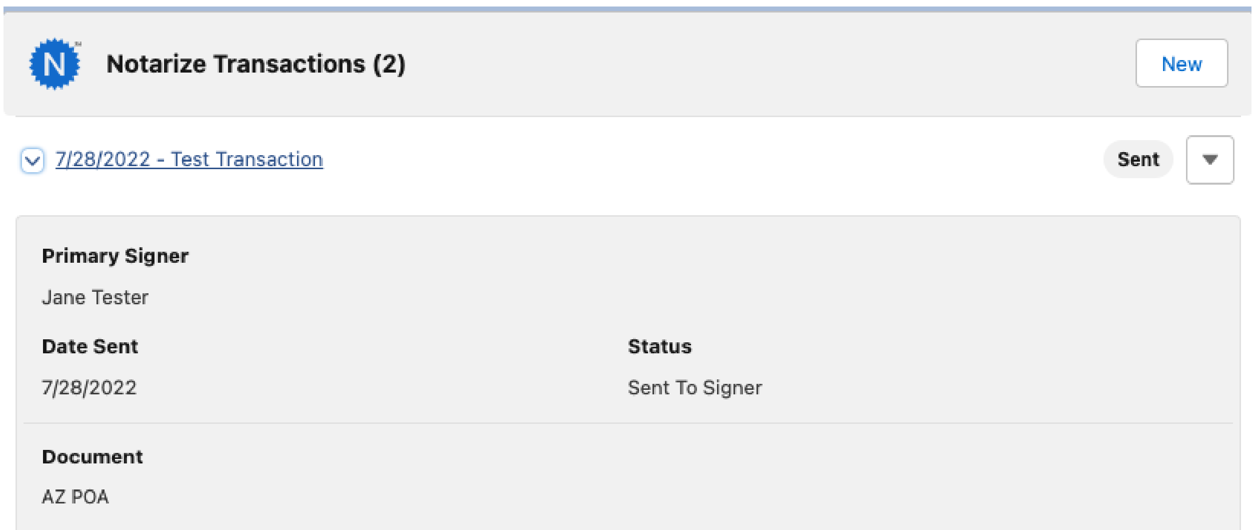
Defaulting notary notes

Please refer to Creating Notary Notes on the Notarize Help Center for more information on how to set account-level notary notes.

Once you have finished adding any notary notes, click **Finish** to send the transaction to the signer.

Managing transactions

Viewing transaction information



After sending a transaction you can click on the dropdown next to the transaction name to view more information, including:

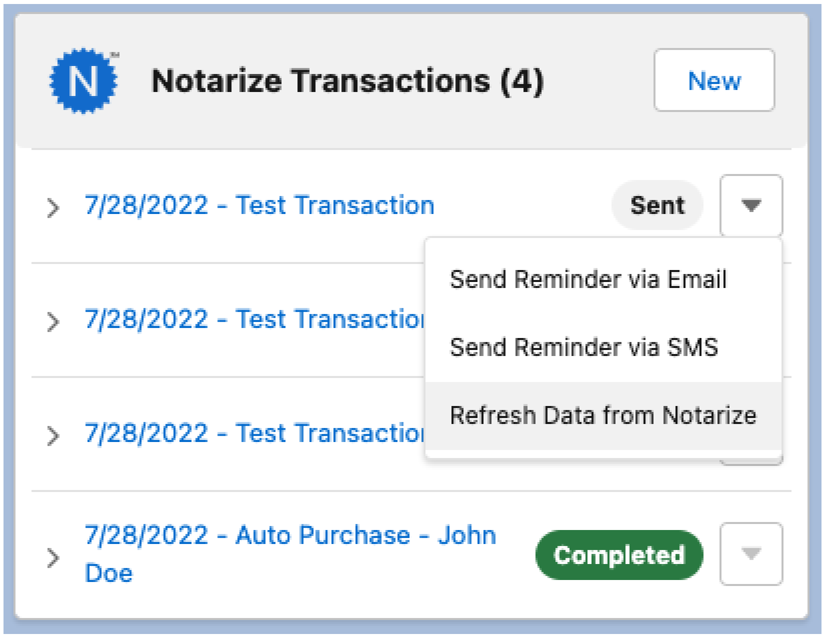
- The primary signer
- The date the transaction was sent
- The list of documents included in the transaction
- The detailed transaction status

Sending reminders to signers

If a signer does not complete the transaction within 24 hours Notarize will send an automated email reminding the signer to complete their transaction. If you wish to send a manual reminder:

- Click on the **alarm clock icon** next to the transaction status
- Select one of **Send Reminder via Email** or **Send Reminder via SMS** (if you included a SMS-capable phone number with the signer's email)
    - If you selected **Send Reminder via Email**, you will be prompted to add a customized message before sending the email.

Manually Refreshing Transaction Information



If you would like to manually refresh a transaction's status, click on the dropdown next to any sent/received transaction and click **Refresh Data from Notarize.**

- Note: If you are utilizing the automatic document retrieval flow included with the integration, you will need to fully reload the page using your browser's refresh button to see completed documents appear in the Notes and Attachments