



Salesforce App User Guide

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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.

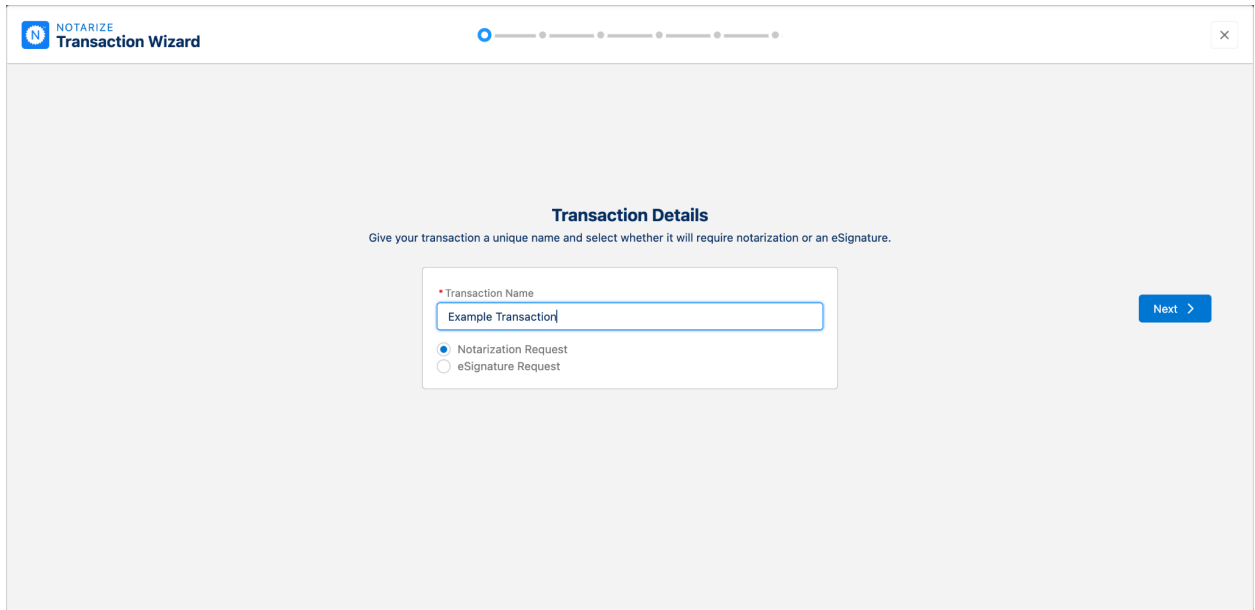
Creating a Transaction

The screenshot displays the Salesforce interface for an opportunity named "Example Widget Sale". The page includes a navigation bar with tabs for Sales, Home, Opportunities, Leads, Accounts, Contacts, Files, Tasks, Campaigns, Dashboards, Reports, and More. A search bar is located at the top right. The opportunity details section shows the Account Name as "Generic Hardware", the Close Date as "8/11/2022", the Amount, and the Opportunity Owner as "Kurt Huebner". A progress bar indicates the current stage is "Negotiation...", with previous stages marked as complete. Below the progress bar, there are tabs for Activity, Details, and Chatter. The Activity tab is selected, showing a list of activities with options to "Log a Call", "New Task", "New Event", and "Email". A text input field for "Recap your call..." is present, along with an "Add" button. Below this, there are filters for "All time", "All activities", and "All types", along with "Refresh", "Expand All", and "View All" options. A section titled "Upcoming & Overdue" shows "No activities to show." and a prompt to "Get started by sending an email, scheduling a task, and more." Below this, a section for "July - 2022" shows a "Transaction Reminder Email" activity from "Yesterday" with the text "You had a task with Jane Tester". On the right side, there is a "Notarize Transactions (4)" component with a "New" button. It lists four transactions: three "Test Transaction" entries dated "7/28/2022" with a "Sent" status, and one "Auto Purchase - John Doe" dated "7/28/2022" with a "Completed" status. Below this, there is a "Related" section with a "Contact Roles (0)" component.

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



The screenshot shows the 'Transaction Wizard' interface. At the top, there's a header with the Notarize logo and 'Transaction Wizard' text. Below this is a progress bar with five steps, the first of which is active. The main content area is titled 'Transaction Details' and includes the instruction: 'Give your transaction a unique name and select whether it will require notarization or an eSignature.' There is a text input field labeled 'Transaction Name' containing 'Example Transaction'. Below the input field are two radio button options: 'Notarization Request' (which is selected) and 'eSignature Request'. A blue 'Next >' button is located to the right of the input field.

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 screenshot shows a web interface titled "NOTARIZE Transaction Wizard". At the top, there is a progress bar with five steps, the second of which is active. The main heading is "Select a Notary". Below this, a sub-heading reads: "Select On Demand Notary to be paired with one of Notarize's team of notaries, or choose In House Notary to select a specific notary." There are two radio button options: "On Demand Notary" (which is selected) and "In House Notary". Navigation buttons labeled "Back" and "Next" are located on the left and right sides of the form area, respectively.

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

The screenshot shows the 'Notarize Transaction Wizard' interface. At the top, there's a progress bar with four steps. The current step is 'Select a Notary'. Below the title, a subtitle reads: 'Select On Demand Notary to be paired with one of Notarize's team of notaries, or choose In House Notary to select a specific notary.' The main content area has a 'Notary Service' section with two radio buttons: 'On Demand Notary' (selected) and 'In House Notary'. Below this is a section titled 'Available Notaries' with a dropdown menu labeled 'Select an option'. A search bar is visible below the dropdown. At the bottom of the search bar, the email address 'jma.notary@notarize.com' is displayed. Navigation buttons 'Back' and 'Next' are located on the left and right sides of the form respectively.

- **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

The screenshot shows the 'Signer Information' page within the 'NOTARIZE Transaction Wizard'. At the top, there is a progress bar with five steps, where the third step is currently active. The page title is 'Signer Information' with a subtitle: 'Add one or more signers to this transaction, who will be notified via email. Add a phone number to signers' contact information to send a link to this transaction via SMS as well.' The main form area contains a 'Primary Signer' dropdown menu with 'Howard Jones' selected. Below this is a 'CONTACT INFORMATION' section with a pencil icon for editing. It includes an 'Email Address' field with 'info@salesforce.com' and a 'Phone Number' field with '(212) 555-5555'. At the bottom right of the form is a '+ Add Additional Signer' button. Navigation buttons include '< Back' on the left and 'Next >' on the right.

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

The screenshot shows the Notarize Transaction Wizard interface. At the top, there's a progress bar with four steps. The first step is active. Below the progress bar, the title "Signer Information" is centered. Underneath the title, a small note states: "Add one or more signers to this transaction. All signers must be associated with an email address in order for Notarize to send notifications and reminders about this transaction. Optionally, you can also add an SMS-enabled phone number to each signer in order to send reminders via SMS." Below this note is a modal form for "Primary Signer" with the name "Edward Stamos". The form has a "CONTACT INFORMATION" section with the following fields: "Email Address" (with the value "info@salesforce.com"), "SMS-Enabled Phone Number Field" (a dropdown menu), "Business Phone" (a dropdown menu), and "SMS Number (Business Phone)" (with the value "(212) 656-6566"). At the bottom of the form, there is a checkbox labeled "Update contact information in Salesforce?" which is checked. There are "Cancel" and "Save" buttons at the bottom right of the modal. On the left side of the wizard, there is a "Back" button, and on the right side, there is a "Next" button.

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

NOTARIZE Transaction Wizard

Signer Information

Add one or more signers to this transaction. All signers must be associated with an email address in order for Notarize to send notifications and reminders about this transaction. Optionally, you can also add an SMS-enabled phone number to each signer in order to send reminders via SMS.

Primary Signer

Edward Stamos

CONTACT INFORMATION

*Email Address
info@salesforce.com

SMS Number (Mobile Phone)
None listed

☒ Update contact information in Salesforce?

Additional Signer

Carole White

CONTACT INFORMATION

*Email Address
info@salesforce.com

SMS Number (Mobile Phone)
None listed

[Add Additional Signer](#)

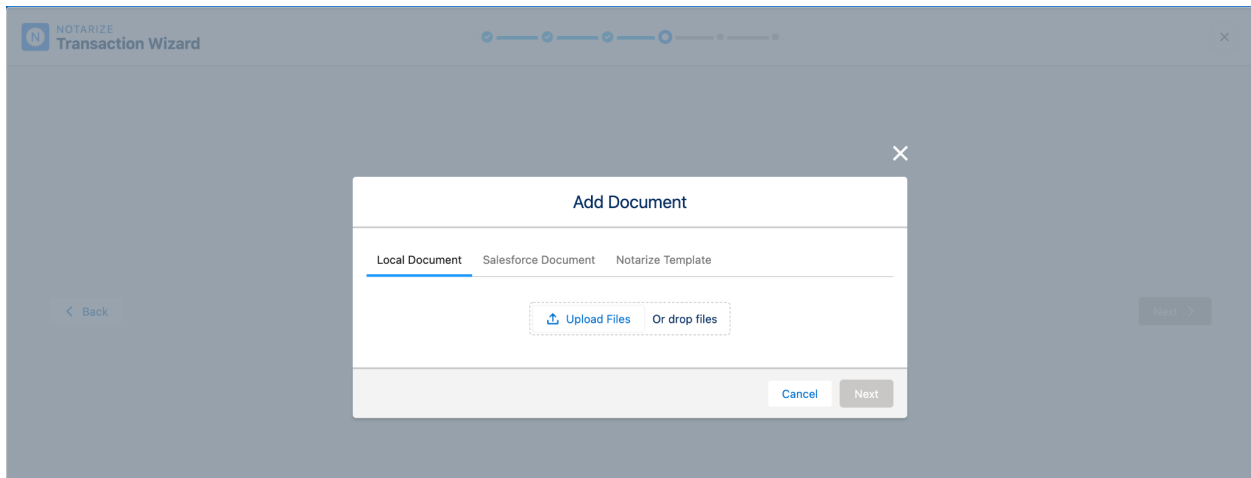
[Back](#) [Next](#)

- 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**.

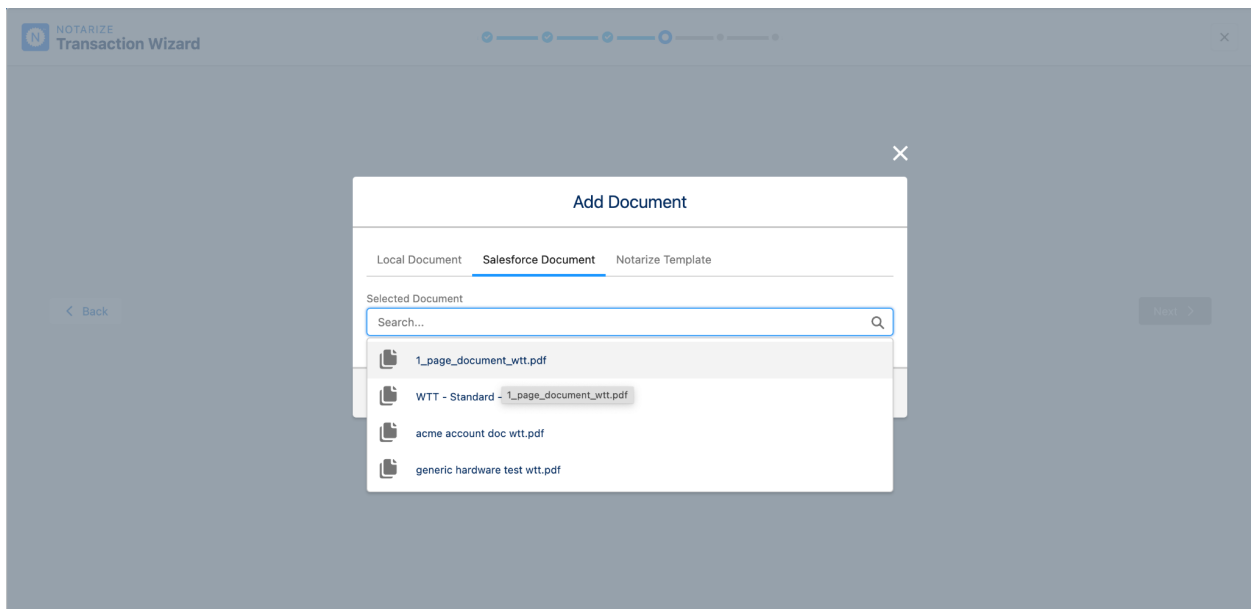
SELECTING DOCUMENTS

Uploading a local document



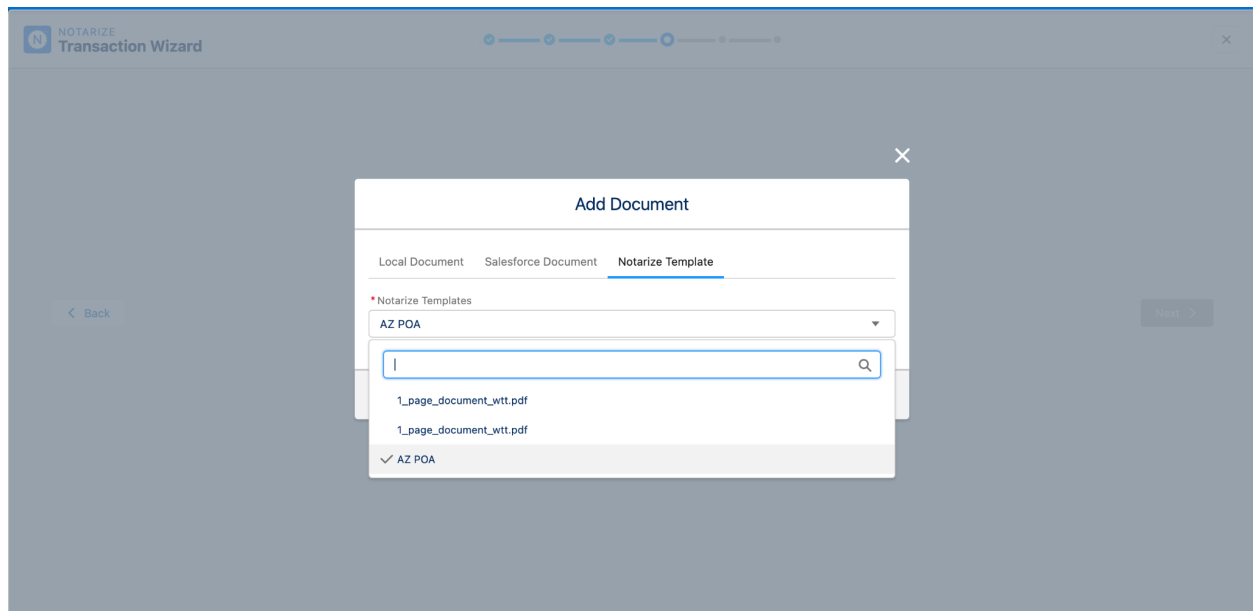
- Local documents are any PDF stored on your machine.
- You can select **Upload Files** to open a file browser, or you can drag and drop files from your desktop.

Selecting a Salesforce document



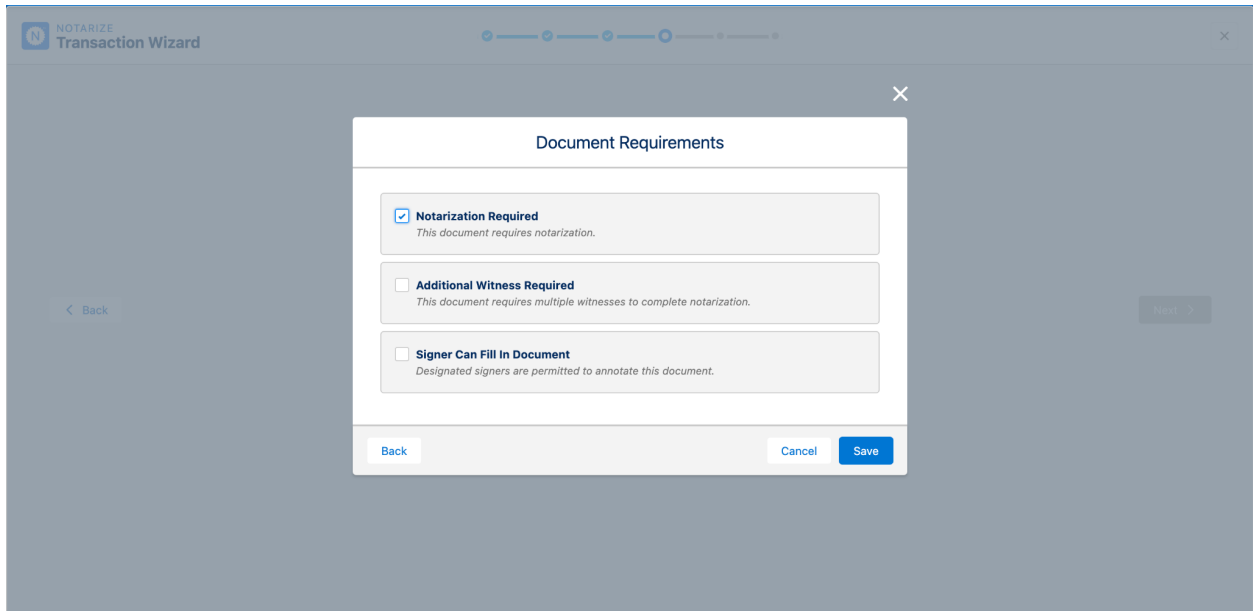
- Salesforce documents are any documents that are stored as PDF files within Salesforce.
- The **Selected Document** dropdown can be used to search for any document across your Salesforce instance.

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

The screenshot shows a 'Document Requirements' dialog box within the 'NOTARIZE Transaction Wizard' interface. The dialog has a title bar with a close button (X). It contains three sections, each with a checkbox and a description: 1. 'Notarization Required' (checked) with the description 'This document requires notarization.' 2. 'Additional Witness Required' (unchecked) with the description 'This document requires multiple witnesses to complete notarization.' 3. 'Signer Can Fill In Document' (unchecked) with the description 'Designated signers are permitted to annotate this document.' At the bottom of the dialog are three buttons: 'Back', 'Cancel', and 'Save'. The background of the wizard shows a progress bar and 'Back' and 'Next' buttons.

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

The screenshot shows the 'Document Upload' step in the Notarize Transaction Wizard. At the top, the Notarize logo and 'Transaction Wizard' are visible, along with a progress bar showing three steps, with the current step being the third. Below the header, the title 'Document Upload' is centered, followed by instructions: 'Add documents to be signed or notarized and set further requirements associated with them.' and a note: 'If your selected documents don't include eSignature slots for all of the signers associated with this transaction, you'll need to tag at least one document with the **Signer Can Fill In Document** requirement.' The main area contains a table with two rows of document information. The first row has '1_page_document_wtt.pdf' and the second row has 'AZ POA'. To the right of the table is an 'Add Document' button. A dropdown menu is open next to the 'AZ POA' document, showing three options: 'Edit Document Name', 'Edit Document Requirements', and 'Delete Document'. To the left of the table is a '< Back' button, and to the right is a 'Next >' button.

Document Upload

Add documents to be signed or notarized and set further requirements associated with them.

If your selected documents don't include eSignature slots for **all** of the signers associated with this transaction, you'll need to tag at least one document with the **Signer Can Fill In Document** requirement.

< Back

Document Name

1_page_document_wtt.pdf

AZ POA

Edit Document Name

Edit Document Requirements

Delete Document

Add Document

Next >

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

The screenshot shows the 'Customize Email' step in the Notarize Transaction Wizard. At the top, the Notarize logo and 'Transaction Wizard' are visible. A progress bar indicates the current step. The main heading is 'Customize Email' with a subtext: 'Customize and preview the email your signers will receive linking them to this transaction in Notarize.' The form contains three sections: 'Email Subject' with the text 'Notarize Solutions - Demo Env has shared a document with you'; 'Email Message' with the text 'This is a test email - please use this link to get your limited POA notarized.'; and 'Email Signature' with the text 'Test User'. Navigation buttons 'Back' and 'Next' are located on the left and right sides of the form respectively.

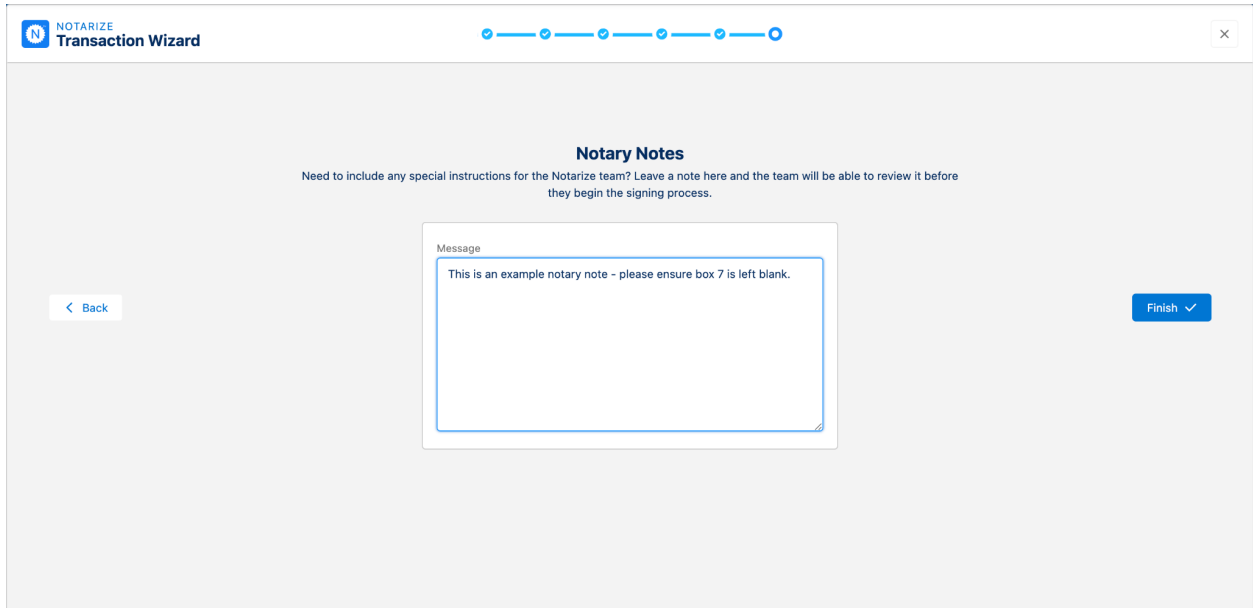
You can customize the transaction invitation email that is sent to the signer. The form shown will pre-populate with default copy, but you can make any changes necessary here.

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



The screenshot shows the 'Notary Notes' step in the Notarize Transaction Wizard. At the top, the 'NOTARIZE Transaction Wizard' header is visible with a progress bar showing six steps, with the current step highlighted. Below the header, the title 'Notary Notes' is centered, followed by a sub-header: 'Need to include any special instructions for the Notarize team? Leave a note here and the team will be able to review it before they begin the signing process.' In the center, there is a text input area with a placeholder message: 'This is an example notary note - please ensure box 7 is left blank.' To the left of the input area is a '< Back' button, and to the right is a 'Finish ✓' button.

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

 **Notarize Transactions (2)** New

☒ [7/28/2022 - Test Transaction](#) Sent ▼

Primary Signer Jane Tester	
Date Sent 7/28/2022	Status Sent To Signer
Document AZ POA	

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

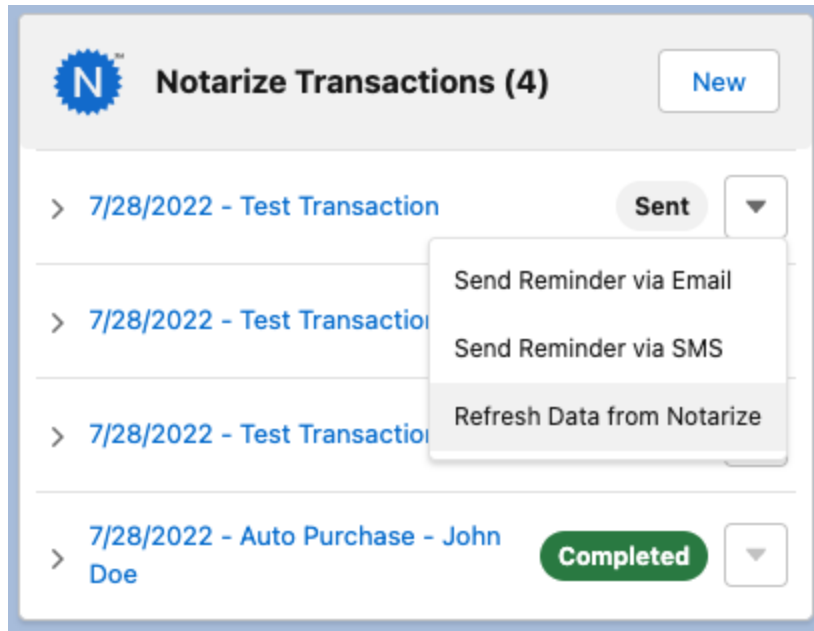
- The primary signer
- The date the transaction was sent
- The list of documents included in the transaction
- The detailed transaction status

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