



NotarizeSM



INSTALLATION & CONFIGURATION GUIDE

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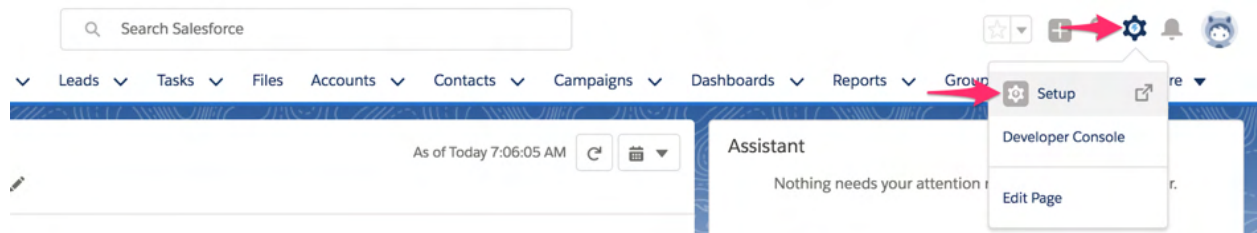
Introduction

This document serves as an installation guide for Salesforce admins who would like to configure the Notarize Salesforce app. Please ensure that you have a Notarize contract in place prior to beginning the configuration process - you will need a Notarize API key to proceed.

Key steps covered by this guide include installing the Notarize app from the Salesforce AppExchange, Salesforce environment configuration, creating a Notarize API key, and the Notarize Setup App.

If you have any questions after reading this guide, please contact salesforce@notarize.com.

Throughout this guide, you will be instructed to navigate through Setup. To do so, you will need to click on the gear to the upper right and select Setup. Once in Setup, you may use the Quick Find box to find and navigate to the appropriate section.



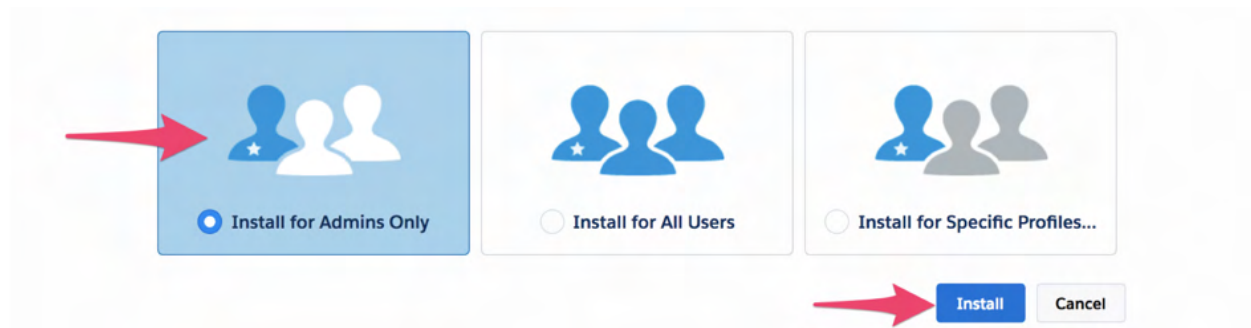
Installation

INSTALLING THE NOTARIZE PACKAGE

Navigate to the Notarize AppExchange listing and click **Get it Now**. Log in to your Salesforce account, and choose which set of users you would like to install the app for.

- **Install for Admins Only** is recommended - this option allows for controlling access and permissions after the package has been installed.

For further information, [please click here to refer to Salesforce documentation on Package Installations](#).



- **Approve Third-Party Access** - check off the box and click **Continue** to start the package installation when the modal appears. As it states, this is to allow data to be sent back and forth between your Salesforce org and Notarize.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api-internal-mirror.notarize.com	☒
api.notarize.com	☒

☒ Yes, grant access to these third-party web sites

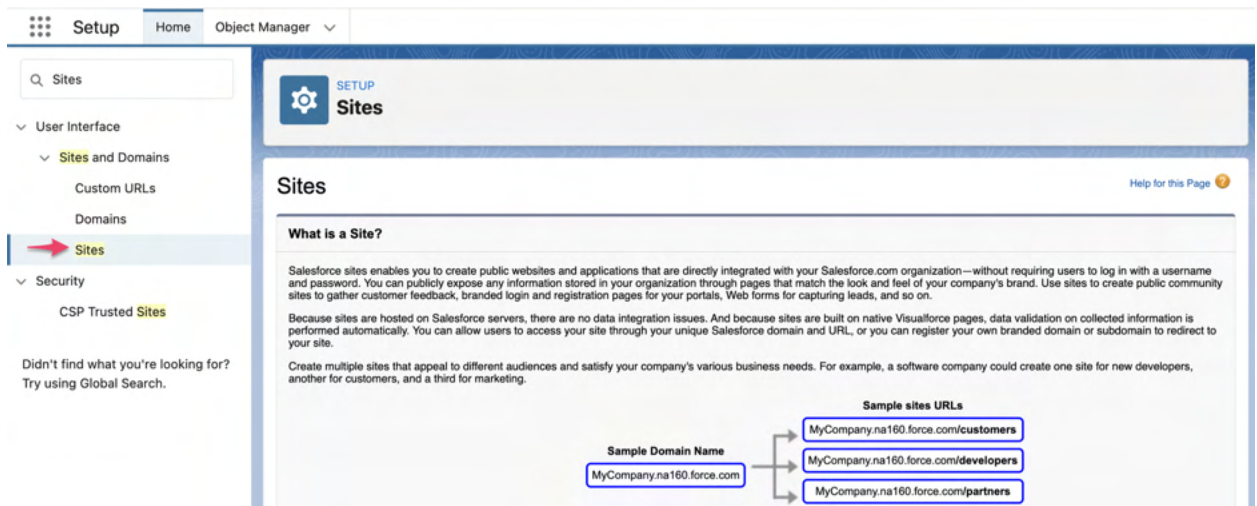
ContinueCancel

Post-Install Configuration

SET UP A SITE FOR WEBHOOK EVENTS

In order for Notarize to pass back Transaction updates to Salesforce, a webhook will need to be created in a public Site. The Guest User assigned to the Site will then need the **Notarize API User** Permission Set assigned.

- Navigate to **Setup > User Interface > Sites and Domains > Sites**



- If you have not yet set up a **Site Domain**, you will need to provide a unique domain name. Check the availability of the domain name (1), and if it is available (2), check the Terms of Use Agreement checkbox (3) and click the Register Button (4).

 **SETUP**
Sites

Sites

[Help for this Page](#)

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Sample Domain Name

MyCompany.na160.force.com

Sample sites URLs

- MyCompany.na160.force.com/customers
- MyCompany.na160.force.com/developers
- MyCompany.na160.force.com/partners

To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'

 You cannot modify your Salesforce site domain name after the registration process.

http:// -developer-edition.na160.force.com **1**

Success: The Salesforce site domain name "notarize-site-developer-edition" is available. **2**

☒ I have read and accepted the Salesforce [Sites Terms of Use](#) **3** **4**

- Once a domain is registered, create a new Site by clicking **New**



SETUP

Sites

and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

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Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Sample Domain Name

notarize-site-developer-edition.na160.force.com

Sample sites URLs

notarize-site-developer-edition.na160.force.com/customers

notarize-site-developer-edition.na160.force.com/developers

notarize-site-developer-edition.na160.force.com/partners

Your Salesforce site domain name is **notarize-site-developer-edition.na160.force.com**

[Salesforce Sites Terms and Conditions](#)

Settings



These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login
 

Save

Cancel

Sites (notarize-site-developer-edition.na160.force.com)



New

Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display.					

- Enter in a Site Label (1) (the Site Name (2) will be auto-filled) and Active Site Home Page (3), then click **Save** (4)

Site Edit

Site Label: (1)

Site Name: (2)

Site Description:

Site Contact:

Default Record Owner:

Default Web Address:

Active: ☐

Active Site Home Page: (Preview) (3)

Inactive Site Home Page: (Preview)

Site Template:

Save (4) **Cancel**

- Click **Activate**

Site Details

Notarize Webhook

Back to List: Sites

Site Detail

Site Label	Notarize Webhook	Site Name	Notarize_Webhook
Site Description		Site Contact	Mark Beronilla
Active	☐	Login	Not Allowed
Active Site Home Page	AnswersHome (Preview)	Site Favorite Icon	
Inactive Site Home Page	InMaintenance (Preview)	Site Robots.txt	
Site Template	SiteTemplate (Preview)	Enable Feeds	☐
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	☒
Enable Content Sniffing Protection	☒	Enable Browser Cross Site Scripting Protection	☒
Referrer URL Protection	☒	Allow only required cookies for this site	☐ More Details
Guest Access to the Payments API	☐	Guest Access to the Support API	☐
Default Record Owner	Security Review	Redirect to custom domain	☒
Cache public Visualforce pages	☒ More Info		

Activate

- Once the Site is Active, click **Public Access Settings**

Site Details
Notarize Webhook

« [Back to List: Sites](#)

Site Detail [Edit](#) [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

Site Label	Notarize Webhook	Site Name	Notarize_Webhook
Site Description		Site Contact	Mark Beronilla
Active	☒	Login	Not Allowed
Active Site Home Page	AnswersHome [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	☐
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	☒ i
Enable Content Sniffing Protection	☒ i	Enable Browser Cross Site Scripting Protection	☒ i
Referrer URL Protection	☒ i	Allow only required cookies for this site	☐ More Details
Guest Access to the Payments API	☐ i	Guest Access to the Support API	☐ i
Default Record Owner	Security Review i	Redirect to custom domain	☒ i
Cache public Visualforce pages	☒ More Info		

- Click **View Users**

Profile
Notarize Webhook Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[12\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

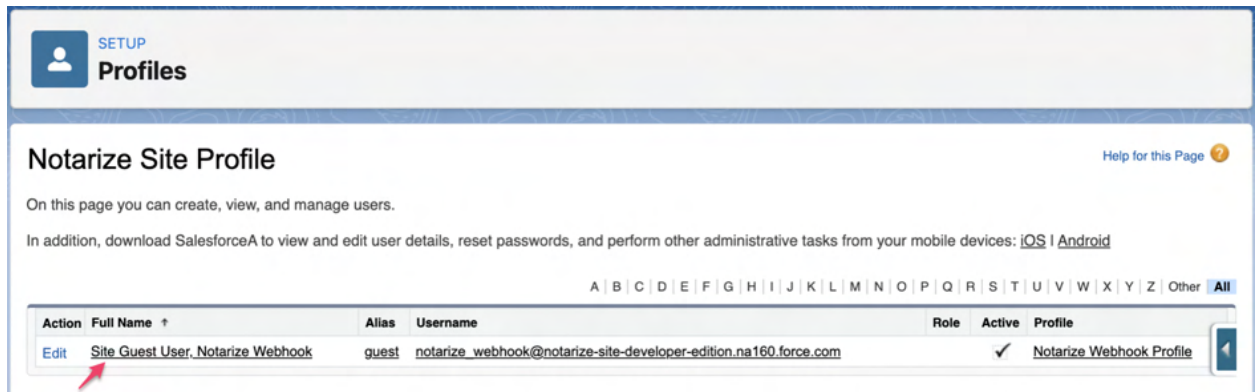
Profile Detail [Edit](#) [View Users](#)

Name	Notarize Webhook Profile		
User License	Guest User License	Custom Profile	☒
Description			
Created By	Mark Beronilla, 2/1/2022, 11:48 AM	Modified By	Mark Beronilla, 2/1/2022, 11:48 AM

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Employee	Employee Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Employee Crisis Assessment	Employee Crisis Assessment Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Employee User Provisioning Process	Employee User Provisioning Process Layout [View Assignment]

- Select the **Site Guest User**



SETUP Profiles

Notarize Site Profile

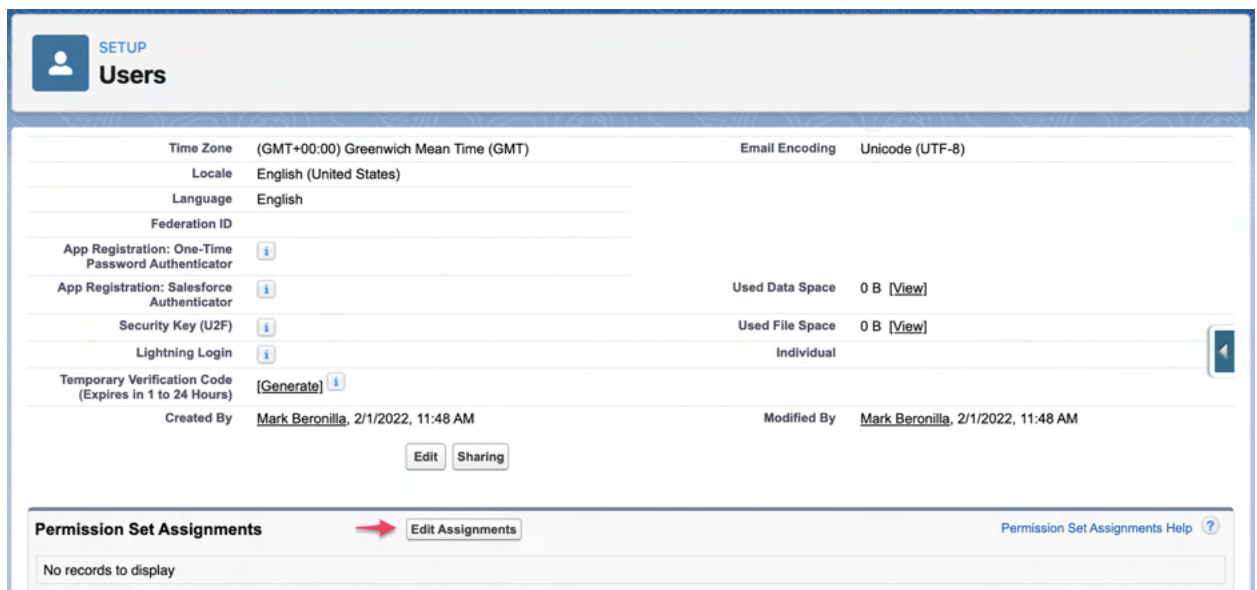
On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Site Guest User, Notarize Webhook	guest	notarize_webhook@notarize-site-developer-edition.na160.force.com		✓	Notarize Webhook Profile

- Scroll down to the Permission Set Assignments list and click **Edit Assignments**



SETUP Users

Time Zone (GMT+00:00) Greenwich Mean Time (GMT) Email Encoding Unicode (UTF-8)

Locale English (United States)

Language English

Federation ID

App Registration: One-Time Password Authenticator ⓘ

App Registration: Salesforce Authenticator ⓘ

Security Key (U2F) ⓘ

Lightning Login ⓘ

Temporary Verification Code (Expires in 1 to 24 Hours) [\[Generate\]](#) ⓘ

Created By [Mark Beronilla](#), 2/1/2022, 11:48 AM Modified By [Mark Beronilla](#), 2/1/2022, 11:48 AM

[Edit](#) [Sharing](#)

Permission Set Assignments [→ Edit Assignments](#) [Permission Set Assignments Help](#) ⓘ

No records to display

- Add the **Notarize API User** Permission Set to the right list (1), then click **Save** (2)

Permission Set Assignments

Notarize Webhook Site Guest User [Help for this Page](#)

Save Cancel

Available Permission Sets

- Manufacturing Sales Agreements
- Manufacturing Sales Agreements For Community
- Merchandiser
- Notarize Setup User
- Notarize Standard User
- Rebate Management Admin
- Rebate Management User
- Salesforce CMS Integration Admin
- Salesforce Console User
- Standard Einstein Activity Capture

1 →

Add
▶

Remove
◀

Enabled Permission Sets

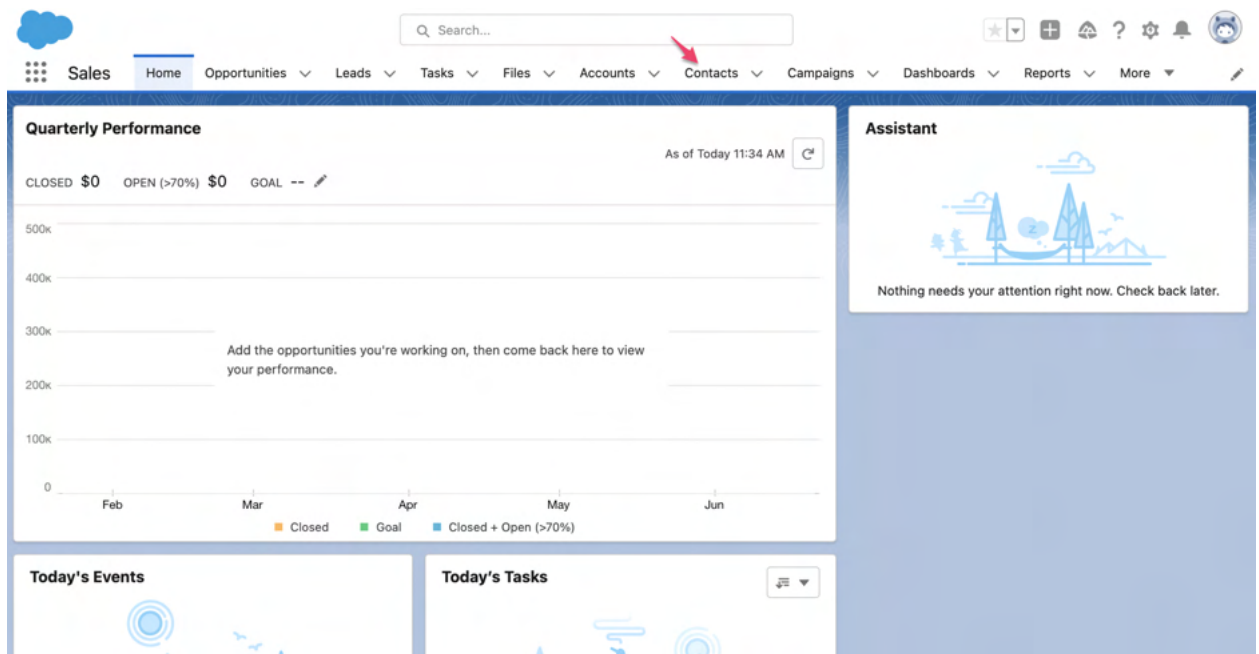
- Notarize API User

2 → Save Cancel

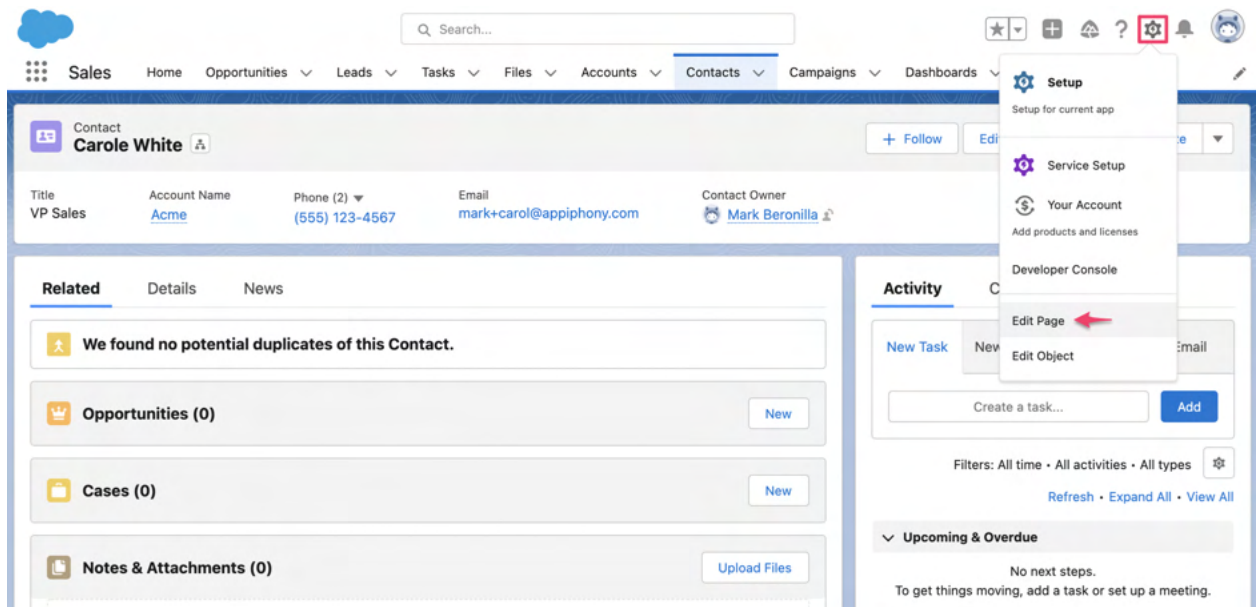
ADD THE NOTARIZE LIGHTNING COMPONENT TO RECORD PAGES

In order for your users to start using the Notarize app, the Notarize Lightning Component will first need to be added to the record pages of the supported objects. The following steps will guide you through adding the component to the **Contact** object, but you can also follow the same steps for the other supported objects (**Account**, **Opportunity**, and **Lead**)

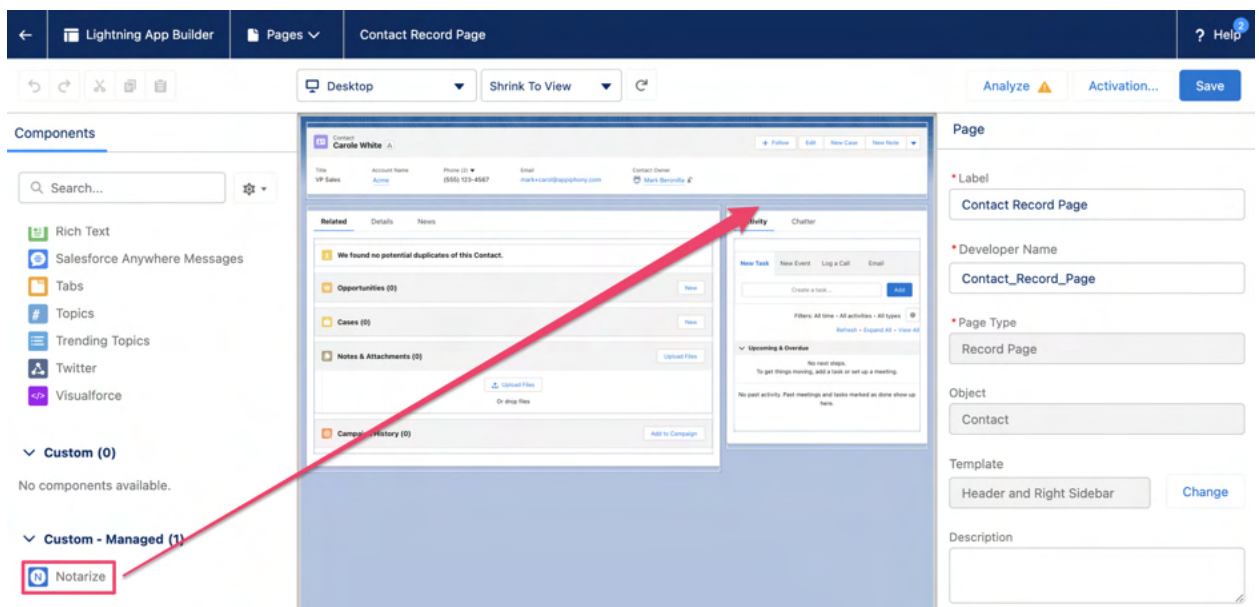
- In the **Sales** app, click on the **Contact** tab, then select an existing Contact record



- Click the **cog icon** on the top right of the page, then click **Edit Page**



- Drag the **Notarize Component** onto the record page layout



- Click **Save**

The screenshot shows the Lightning App Builder interface for configuring a 'Contact Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Contact Record Page'. The right side of the top bar contains 'Analyze', 'Activation...', and a highlighted 'Save' button with a red arrow pointing to it. The main area is divided into three sections: 'Components' on the left, a central preview of the 'Contact Record Page' for 'Carole White', and a 'Page' configuration panel on the right. The 'Page' panel includes fields for 'Label' (Contact Record Page), 'Developer Name' (Contact_Record_Page), 'Page Type' (Record Page), 'Object' (Contact), 'Template' (Header and Right Sidebar), and a 'Description' field. The 'Components' panel on the left shows a search bar and a list of components including 'Rich Text', 'Salesforce Anywhere Messages', 'Tabs', 'Topics', 'Trending Topics', 'Twitter', 'Visualforce', and 'Notarize' under the 'Custom - Managed (1)' category.

- Once the page is saved, click **Activation**

This screenshot is identical to the one above, showing the 'Contact Record Page' configuration in the Lightning App Builder. The 'Save' button was highlighted in the previous image. In this image, the 'Activation...' button in the top right corner is highlighted with a red arrow, indicating the next step in the process. The interface elements, including the 'Components' panel, the central preview, and the 'Page' configuration panel, remain the same.

- Set up activation based on which users will need to see this component. **Note:** This app is supported on **Mobile devices**, so make sure to set the form factor to **Desktop and phone** when activating the page.

Assign form factor

Select the form factors that you want your org default page to be available for.

☐ Desktop

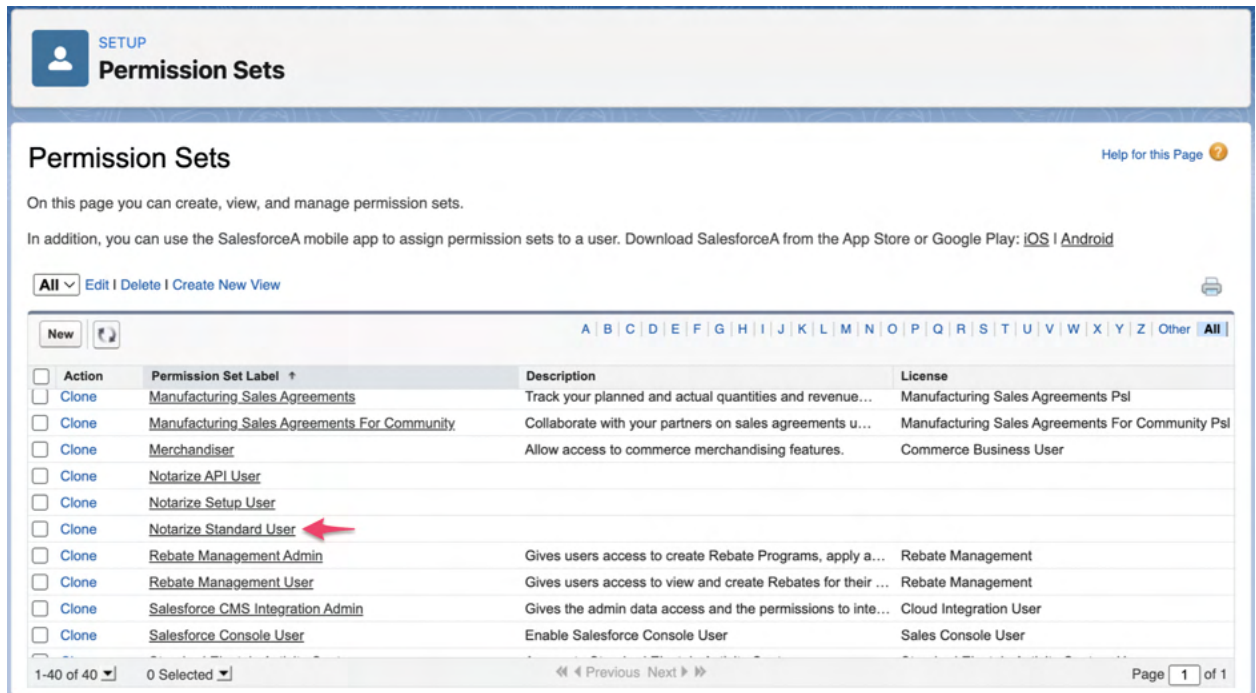
☐ Phone

☒ Desktop and phone

PERMISSION SETS

The package includes the **Notarize Standard User** permission set that must be assigned to any standard user that will use the Notarize lightning component. To assign the permission set to users, navigate to **Setup > User > Permission Sets**

- Select the **Notarize Standard User** permission set



SETUP
Permission Sets

Permission Sets [Help for this Page](#)

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All | [Edit](#) | [Delete](#) | [Create New View](#)

[New](#) | [Refresh](#) | [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [Other](#) | [All](#)

☐	Action	Permission Set Label ↑	Description	License
☐	Clone	Manufacturing Sales Agreements	Track your planned and actual quantities and revenue...	Manufacturing Sales Agreements Psi
☐	Clone	Manufacturing Sales Agreements For Community	Collaborate with your partners on sales agreements u...	Manufacturing Sales Agreements For Community Psi
☐	Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Business User
☐	Clone	Notarize API User		
☐	Clone	Notarize Setup User		
☐	Clone	Notarize Standard User		
☐	Clone	Rebate Management Admin	Gives users access to create Rebate Programs, apply a...	Rebate Management
☐	Clone	Rebate Management User	Gives users access to view and create Rebates for their ...	Rebate Management
☐	Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to inte...	Cloud Integration User
☐	Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User

1-40 of 40 | 0 Selected | [Previous](#) [Next](#) | Page **1** of 1

- From the Permission Set Overview page, click **Manage Assignments**

Permission Sets

Permission Set: **Notarize Standard User** [Video Tutorial](#) | [Help for this Page](#)

Find Settings... | **Clone** | **Manage Assignments**

Permission Set Overview

Description	API Name	Notarize_Standard_User
License	Namespace Prefix	Notarize_SF
Session Activation Required ☐	Created By	Mark Beronilla, 3/22/2022, 9:03 AM
Last Modified By	Mark Beronilla, 3/22/2022, 9:03 AM	

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

- Click **Add Assignments**

Permission Sets

Assigned Users: **Notarize Standard User** [Help for this Page](#)

[Back to: Permission Set](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Add Assignments | **Remove Assignments**

Full Name ↑	Alias	Username	Role	Active	Profile	Expires On
No records to display.						

Add Assignments | **Remove Assignments**

- Check the box next to the user(s) that you would like to assign the permission set to and click **Assign**

SETUP
Permission Sets

Assign Users
All Users [Help for this Page](#)

View: All Users [Edit](#) | [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

☐ Action Full Name ↑ Alias Username Last Login Role Active Profile

☐	Edit	Beronilla, Mark	MBero	mark+notarizeqa1@appiphony.com	3/29/2022, 1:43 PM		✓	System Administrator
☐	Edit	Chatter Expert	Chatter	chatty.00d8c000002ht0teaa.nybvhydubd@chatter.salesforce.com			✓	Chatter Free User
☒	Edit	Standard, Mark	mstan	mark+notarizeqa1s@appiphony.com	3/29/2022, 1:20 PM		✓	Standard User

Enable Flow Template for Document Return

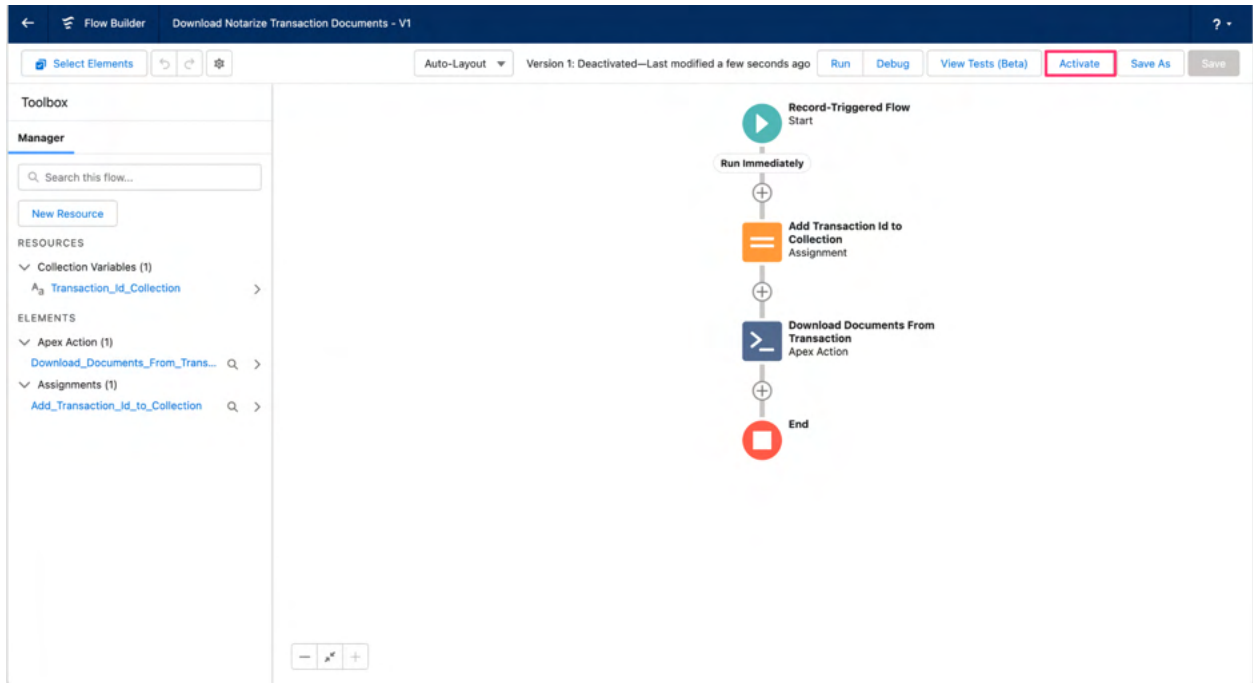
One flow template will be packaged (Download Notarize Transaction Documents) for automated document return into Salesforce. This is a record triggered flow that activates when a Transaction is completed. This flow will not be activated by default and must be enabled.

- In the Quick Find, search for **Flows**
- Click **Download Notarize Transaction Documents**

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Flows' link is highlighted. The main content area displays a list of flow definitions. The flow 'Download Notarize Transaction Documents' is highlighted with a red box. The table below shows the details of the flows.

Flow Label	Process Type	Active	Temp...	Package State	Packa...	Last Modifi...	Last Modified Date
Change Case Owner to Incident Owner	Screen Flow	☐	☒	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	☐	☒	Managed-Installed			
Create a Case	Screen Flow	☒	☒	Managed-Installed			
Create Visit	Screen Flow	☒	☐	Managed-Installed			
Download Notarize Transaction Documents	Autolaunched Flow	☒	☒	Managed-Installed	Notarize	Matt Kurnyta	7/22/2022, 2:22 PM
Orchestration flow for Recurrence Scheduler	Autolaunched Flow	☒	☒	Managed-Installed			
Recurrence Schedule Flow	Autolaunched Flow	☒	☐	Managed-Installed			
Reset Password	Screen Flow	☒	☒	Managed-Installed			
Verify Identity	Screen Flow	☒	☒	Managed-Installed			

- Click **Activate**



Set up a Notarize API Key

You will need to configure a Notarize API key to use the Notarize Salesforce app. To begin, log into your Notarize account.

Get Started

Send + Manage

Sign

Scheduled Meetings

Resources ^

Team

Notarize Academy

Templates

API Keys

EasyLink

Marketing Resources

DATE COMPLETED
07/11/2022
06/27/2022

API Keys

Generate Full Access Key

Generate Client Only Key

A 'Full Access' key lets you use all Business API endpoints, whereas 'Client Only' key only lets you create transactions, and is meant for public use.

Learn about these settings in our [API documentation](#).

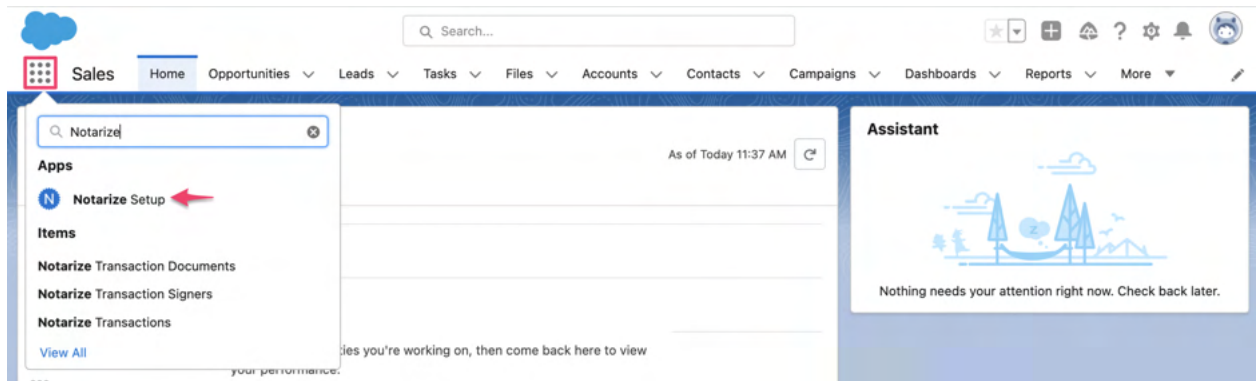
NAME	VALUE	ACCESS LEVEL	CREATED
------	-------	--------------	---------

- Click Resources and API Keys
- Click Generate Full Access API Key
- Save this key for reference in the [Notarize Setup App](#)

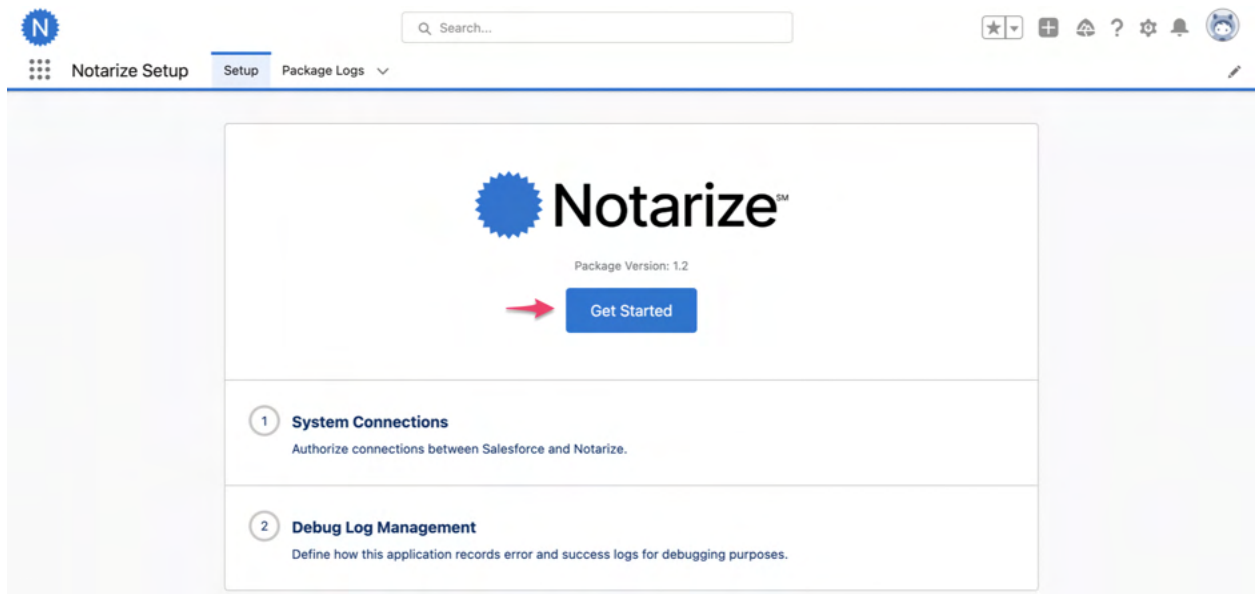
GO THROUGH THE NOTARIZE SETUP APP

The last step in setting up the Notarize app is to go through the packaged **Notarize Setup** app. This app is used for establishing a secure connection between Salesforce and Notarize. You will need to run through these steps to ensure you are connected to your Notarize instance.

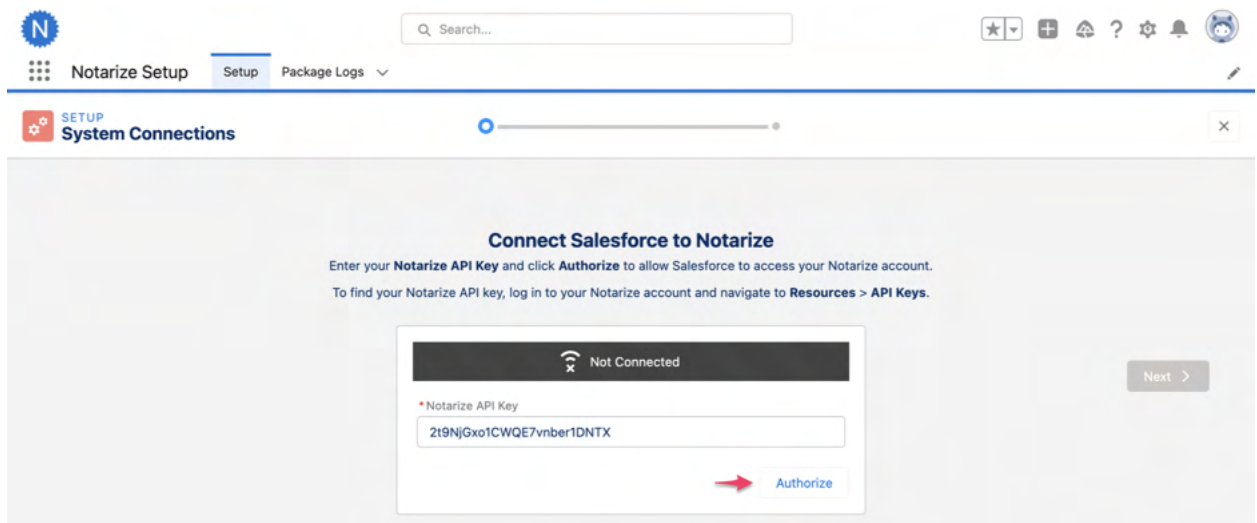
- Click on the **App Launcher** icon, then click on **Notarize Setup**



- On the Notarize Setup app, click **Get Started**



- Enter the **API Key** that you set up in your Notarize instance, then click **Authorize**



- Once you've successfully connected, click **Next**

The screenshot shows the Notarize Setup interface. At the top, there's a navigation bar with the Notarize logo, a search bar, and several utility icons. Below this is a sub-header with 'Notarize Setup', 'Setup', and 'Package Logs'. The main content area is titled 'System Connections' and features a progress bar. The primary instruction is 'Connect Salesforce to Notarize', followed by a brief explanation of the API key process. A central box displays a green 'Connected' status with a checkmark, the API key '2t9NjGxo1CWQE7vnber1DNTX', and a 'Reauthorize' button. A red arrow points to a blue 'Next >' button on the right side of the interface.

- The next step will guide you through creating a Site for Webhook events. You've already created and set up a Site from a [previous section](#) on this guide, so all you need to do is select the correct Site from the picklist, then click **Activate Webhook**.

Notarize Setup | **Setup** | Package Logs

Search...

System Connections

Enable Data Sync with Webhooks

Use the instructions below to create a public Salesforce site that Notarize will use to send data to Salesforce.

Creating a Public Salesforce Site

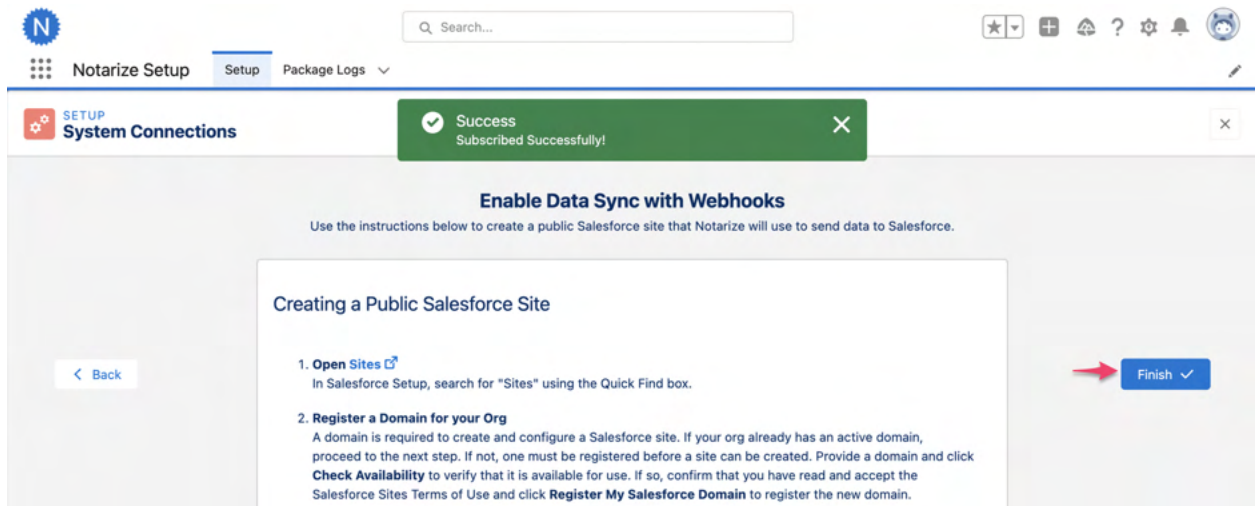
- 1. Open Sites**
In Salesforce Setup, search for "Sites" using the Quick Find box.
- 2. Register a Domain for your Org**
A domain is required to create and configure a Salesforce site. If your org already has an active domain, proceed to the next step. If not, one must be registered before a site can be created. Provide a domain and click **Check Availability** to verify that it is available for use. If so, confirm that you have read and accept the Salesforce Sites Terms of Use and click **Register My Salesforce Domain** to register the new domain.
- 3. Create a Site**
Once a domain has been registered for your org, you can create a site. At the bottom of the page, find the **Sites** section and click **New** to create a new site. Make sure the following information is present:
 - A **Site Name** and **Site Label** of your choosing.
 - An **Active Site Home Page** set to a page of your choosing. This can be done by clicking the Search icon next to the provided input.Once all required fields are complete, click **Save** to create your site. If the new site is not already active, click **Activate** next to the site label to activate it.
- 4. Configure Public Access Settings**
Above the Site Details section, click **Public Access Settings**. At the top of the next page, click **View Users** and select the **Guest User** full name from the list of users. Under the user's Permission Set Assignments, ensure that the **"Notarize API User"** permission set is assigned. If not, click **Edit Assignments** and move it into the Enabled Permission Sets column. Click **Save**.
Once Public Access has been configured, return to the Sites section of Salesforce Setup. Open the details for the newly created site by clicking its **Site Label**. Take note of the secure domain and path (if applicable) of the newly created site and return to the Notarize Setup Assistant.
- 5. Complete the Activate Webhook step in the Notarize Setup Assistant**
Select your new domain from the **Public Site URL** picklist below. If you don't see it in the list of options, **refresh this page**. Click **Activate Webhook** to create the webhook using the provided public site URL. Once the webhook is active, click **Finish** to proceed.

* Public Site URL

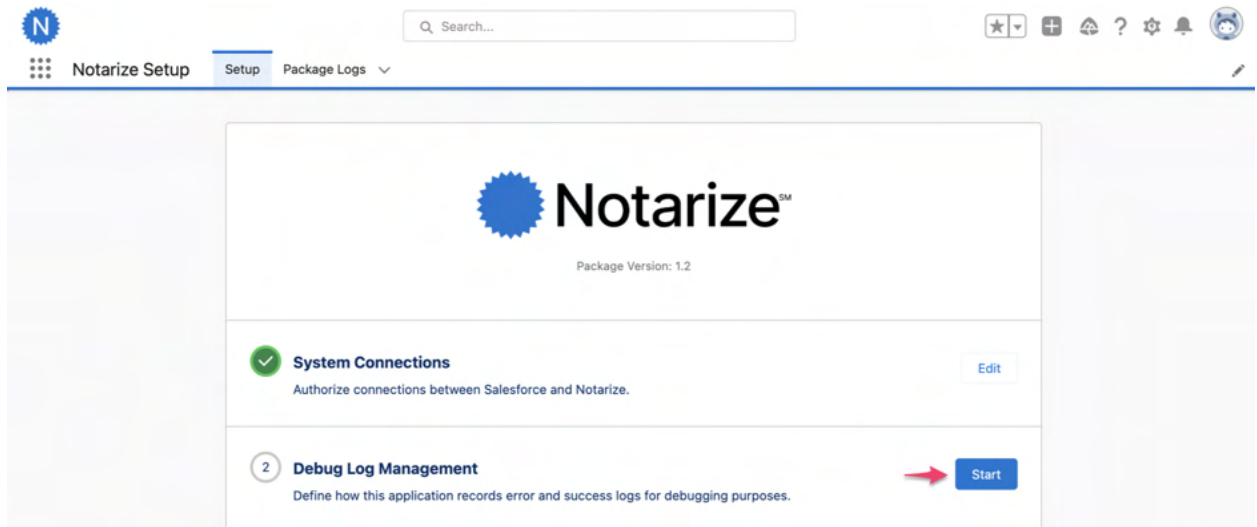
Notarize Site (https://[domain].my.salesforce.com/...)

Activate Subscription

- Once the webhook is successfully activated, click **Finish**



- Back in the Setup Home Page, click **Start** next to **Debug Log Management**



- This section controls which debug record types to create in the app, as well as how many records you want stored in Salesforce. Once you are done selecting your options, click **Finish**.

The screenshot shows the Salesforce Notarize Setup interface. At the top, there is a navigation bar with a search bar and several icons. Below the navigation bar, the 'Setup' tab is selected, and the 'Debug Log Management' section is visible. The main content area is titled 'Debug Log Management' and contains the following information:

- Debug Log Management**
- This app automatically creates activity logs for use in the debugging process.
- You can choose to log both success and error activity, or error activity alone.

The configuration options are as follows:

- Logged Activity:** Two buttons are present: 'All Activity' (selected) and 'Errors Only'.
- Max Log Records Retained:** A text input field containing the value '10,000'.
- Log Record Count:** A text input field containing the value '0'.
- Delete All:** A button with a trash icon and the text 'Delete All'.

A red arrow points to the 'Finish' button, which is located at the bottom right of the configuration area.

Appendix

SET THE NOTARIZE APP TO USE THE TESTING API (OPTIONAL)

The Notarize Salesforce app can use Notarize's testing API for user acceptance testing (UAT). If you plan on using the app with Notarize's production API, you can skip this section. If you are configuring the Notarize Salesforce App in a sandbox/developer environment, please complete these steps.

- Navigate to **Setup > Custom Code > Custom Settings** and click **Manage** next to **Notarize Package Settings**

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'custom settings' and a list of items under 'Custom Code', with 'Custom Settings' highlighted and a red arrow pointing to it. The main content area is titled 'Custom Settings' and includes a 'Get Usage' button. Below this is a table with columns: Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size. The table contains one row for 'Notarize Package Settings' with a 'Manage' link highlighted by a red arrow.

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Notarize Package Settings	Public	Hierarchy	Notarize_SF		110	0	0

- Click **New**

Custom Settings

Custom Setting
Notarize Package Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

New

▼ **Default Organization Level Value**

View: **All** Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

New

Setup Owner	Location
No records to display.	

- Click the checkbox next to **Package Testing Mode**, then click **Save**

Custom Settings

Notarize Package Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit Notarize Package Settings **Save** **Cancel**

Notarize Package Settings Information **! = Required Information**

Location

Package Testing Mode ☒

Note: If you want to switch back to the Notarize Production API, navigate back to this Custom Setting, uncheck the checkbox, and click Save.