# INSTALLATION & CONFIGURATION GUIDE

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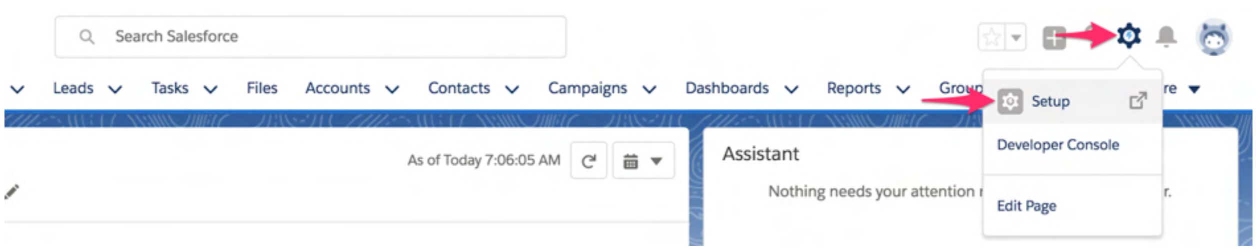
# Introduction

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](mailto: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.



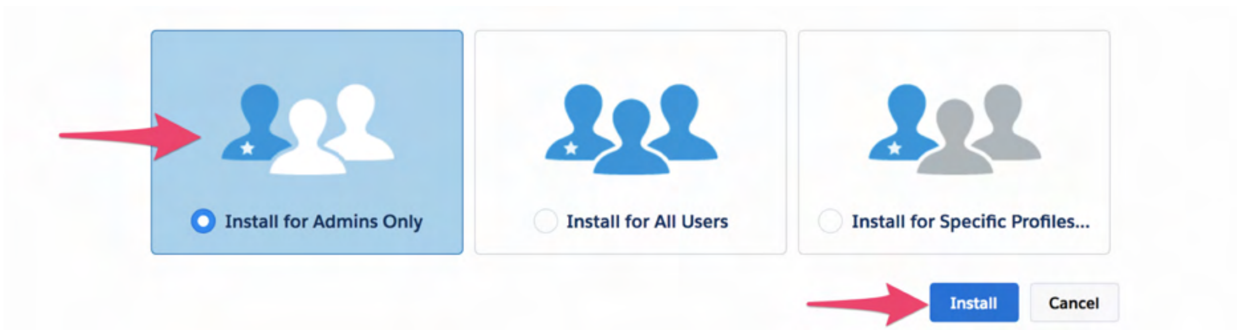
# Installation

## INSTALLING THE NOTARIZE PACKAGE

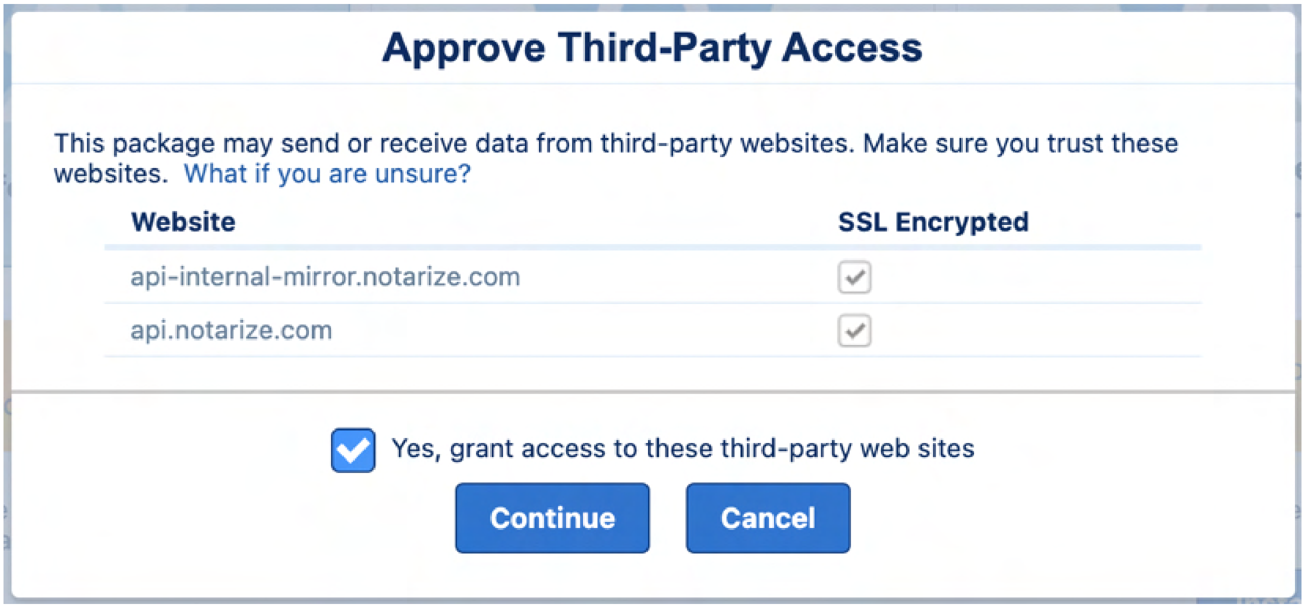
Navigate to the Notarize AppExchange listing and click **Get it Now.** Log in to your Salesforce account, and choose which set of users you would like to install the app for.

- **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.

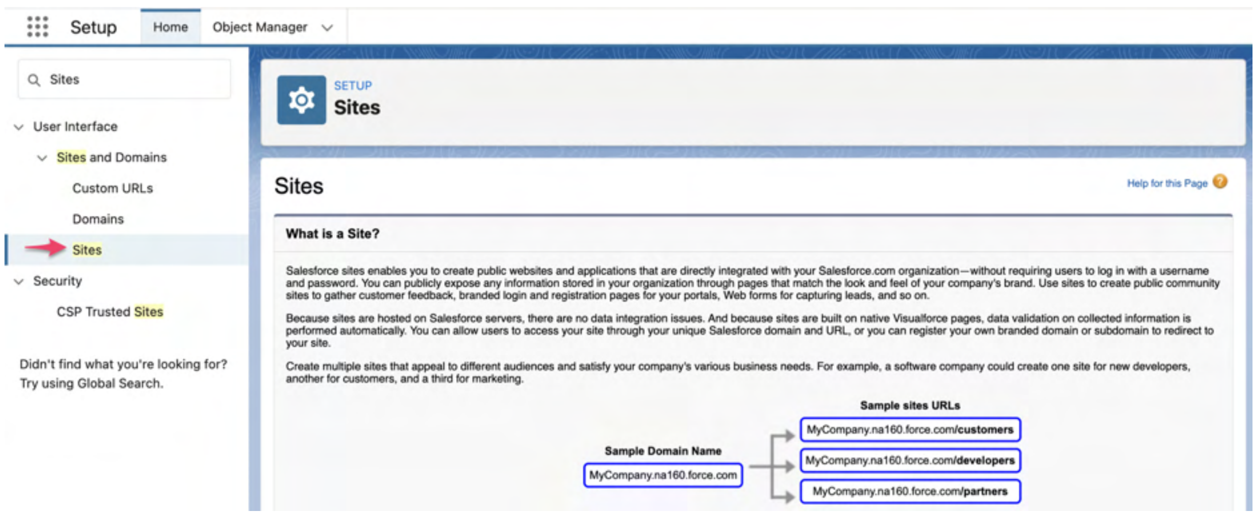


# Post-Install Configuration

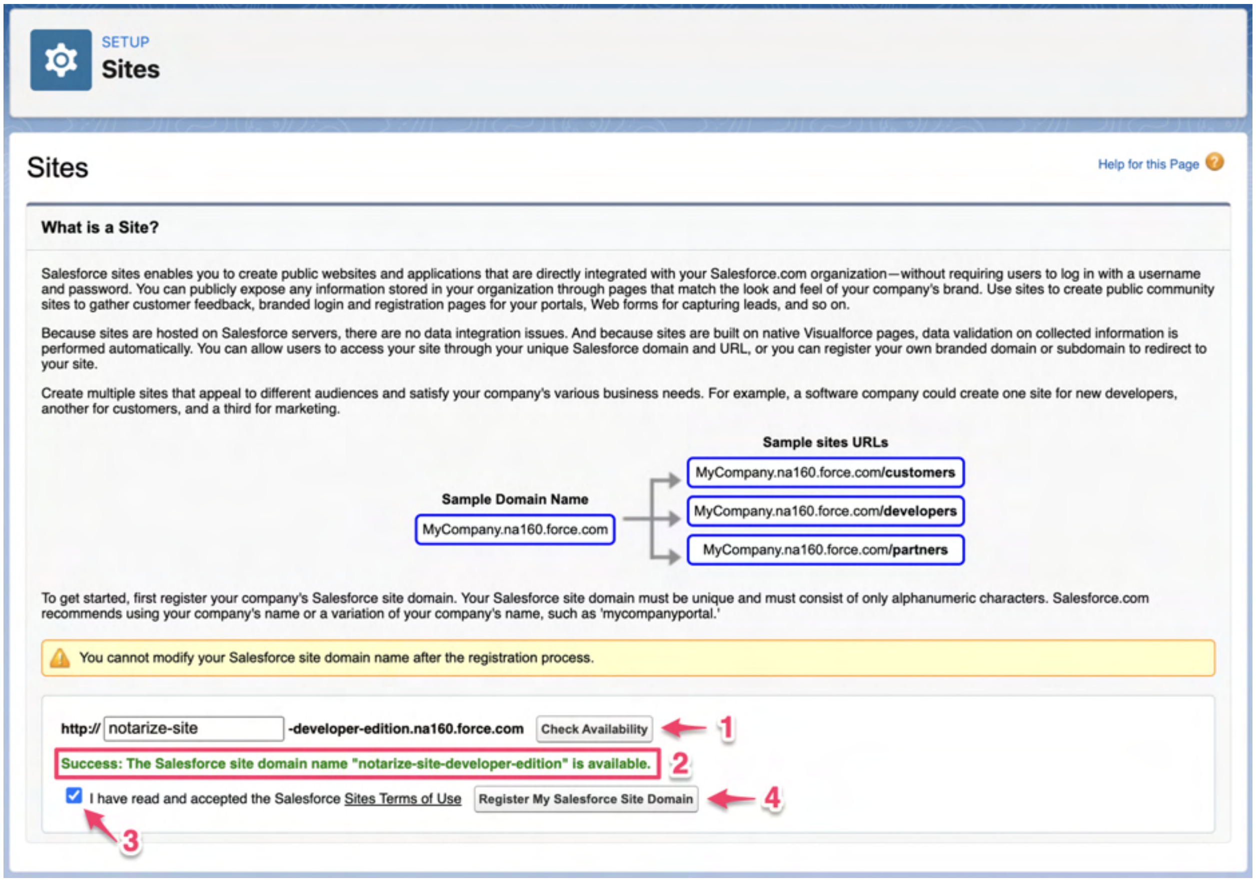
## SET UP A SITE FOR WEBHOOK EVENTS

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.

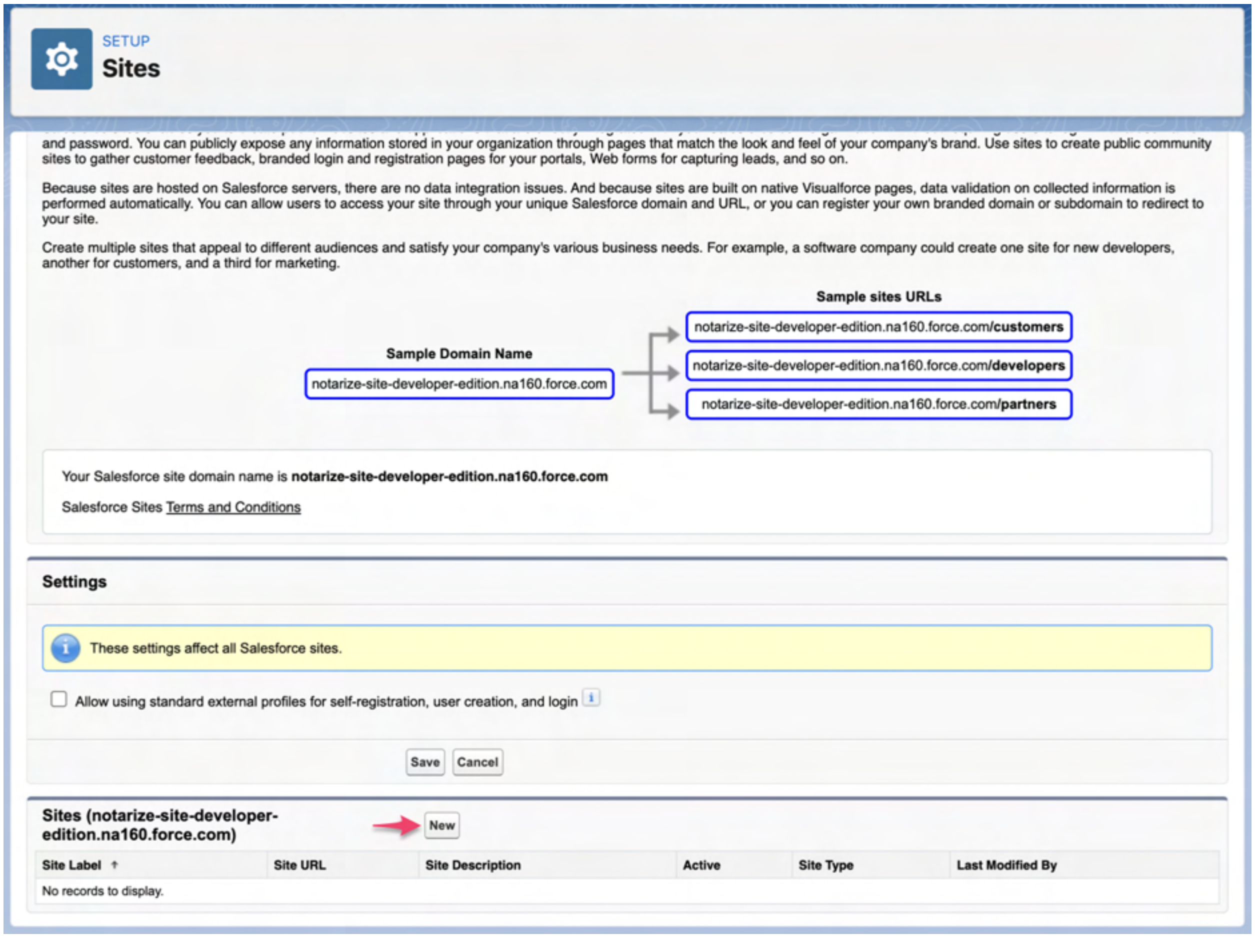
- Navigate to **Setup > User Interface > Sites and Domains > Sites**



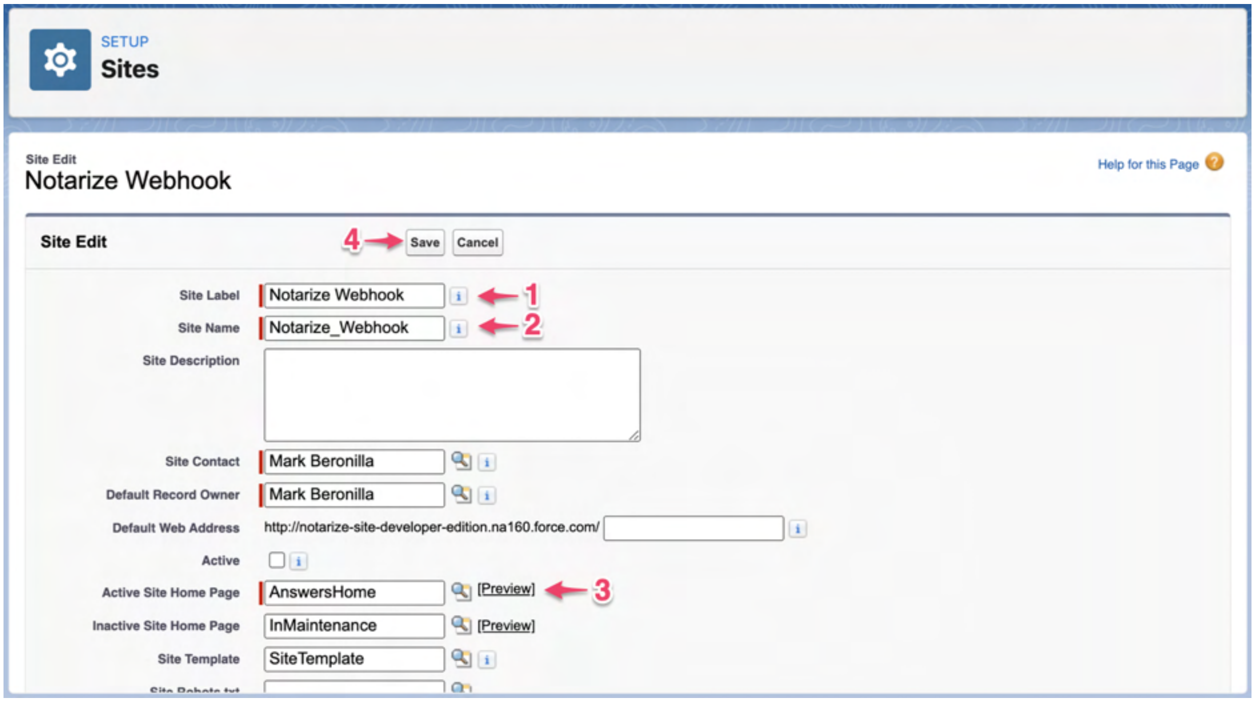
- If you have not yet set up a **Site Domain**, you will need to provide a unique domain name. Check the availability of the domain name **(1)**, and if it is available **(2)**, check the Terms of Use Agreement checkbox **(3)** and click the Register Button **(4)**.



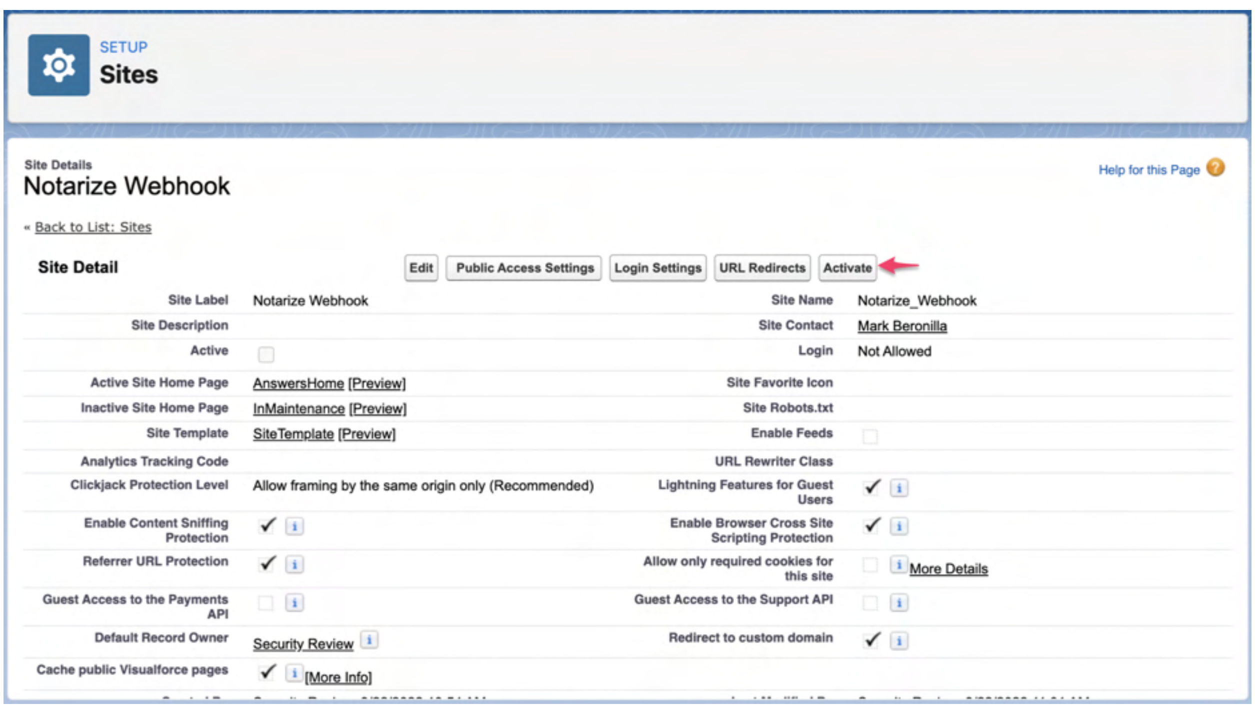
- Once a domain is registered, create a new Site by clicking **New**



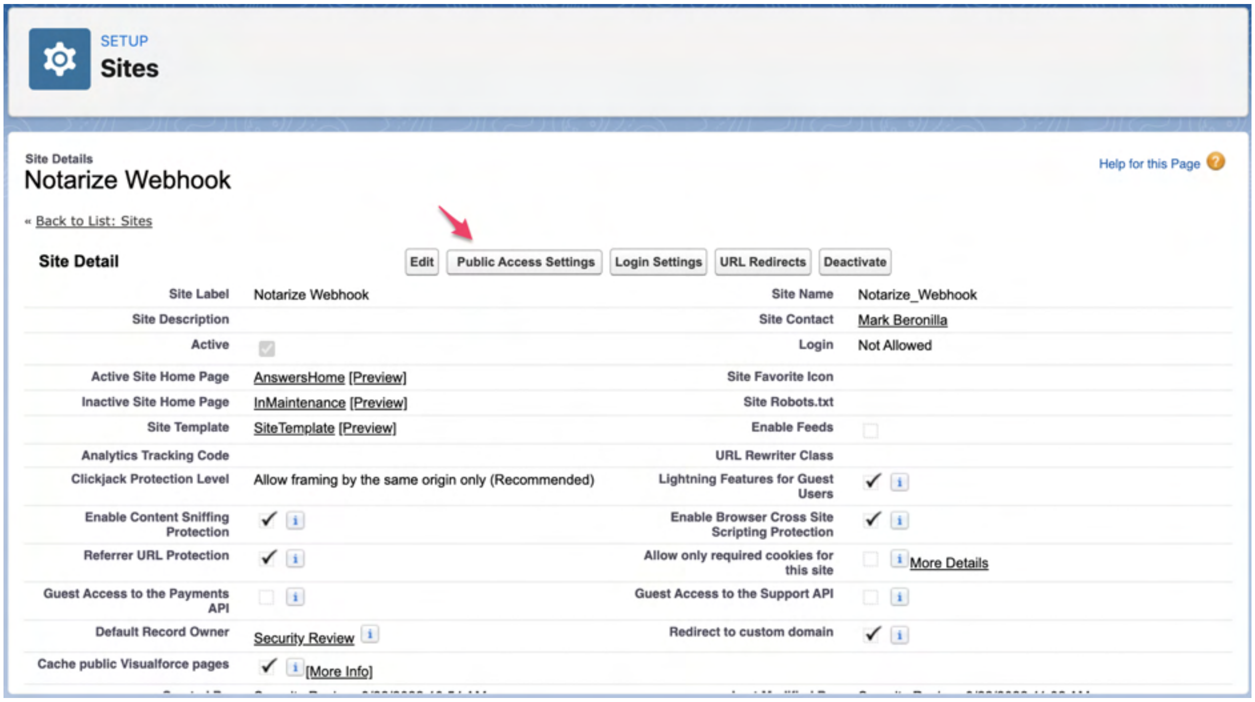
- Enter in a Site Label **(1)** (the Site Name **(2)** will be auto-filled) and Active Site Home Page **(3)**, then click **Save (4)**



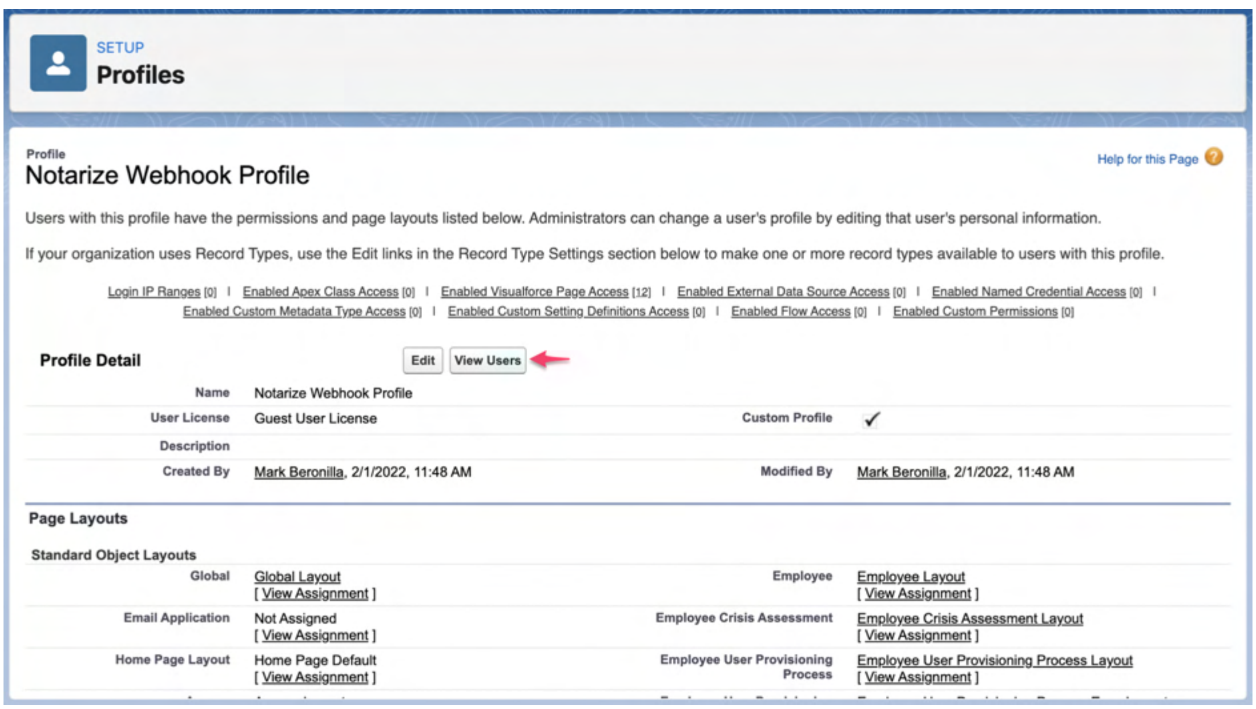

- Click **Activate**



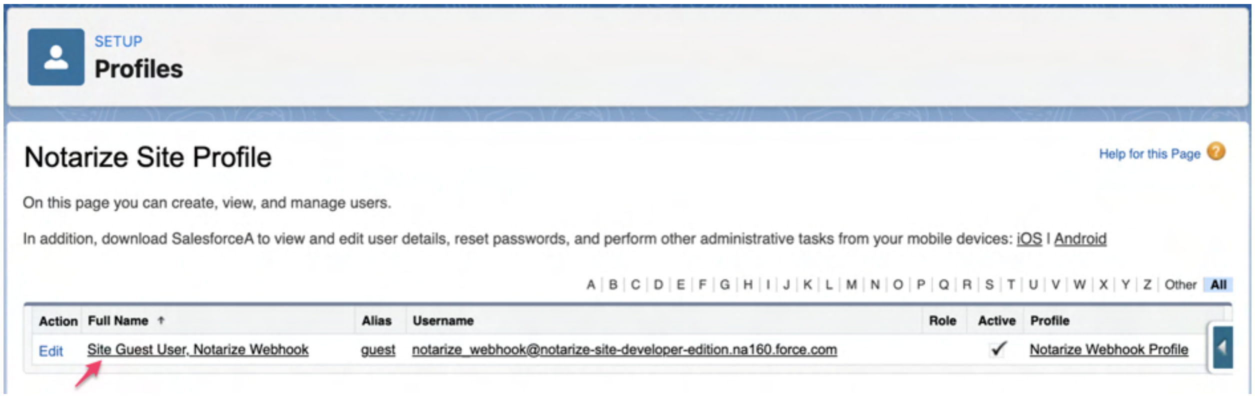
- Once the Site is Active, click **Public Access Settings**



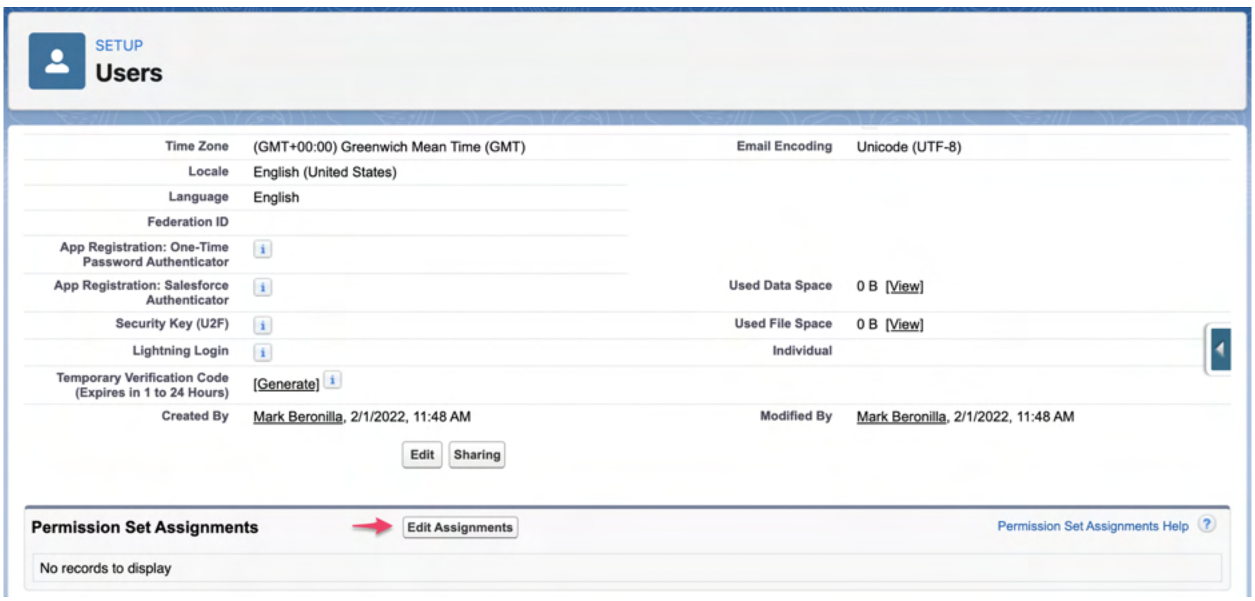

- Click **View Users**



- Select the **Site Guest User**




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

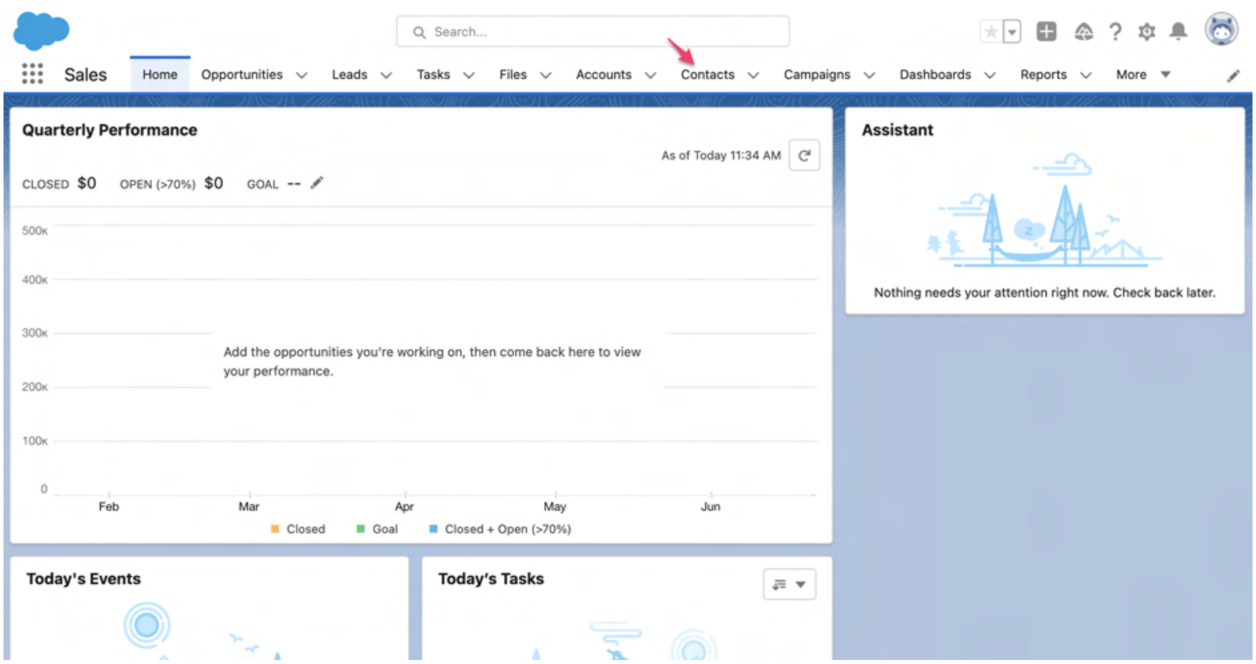


- Add the **Notarize API User** Permission Set to the right list **(1)**, then click **Save (2)**

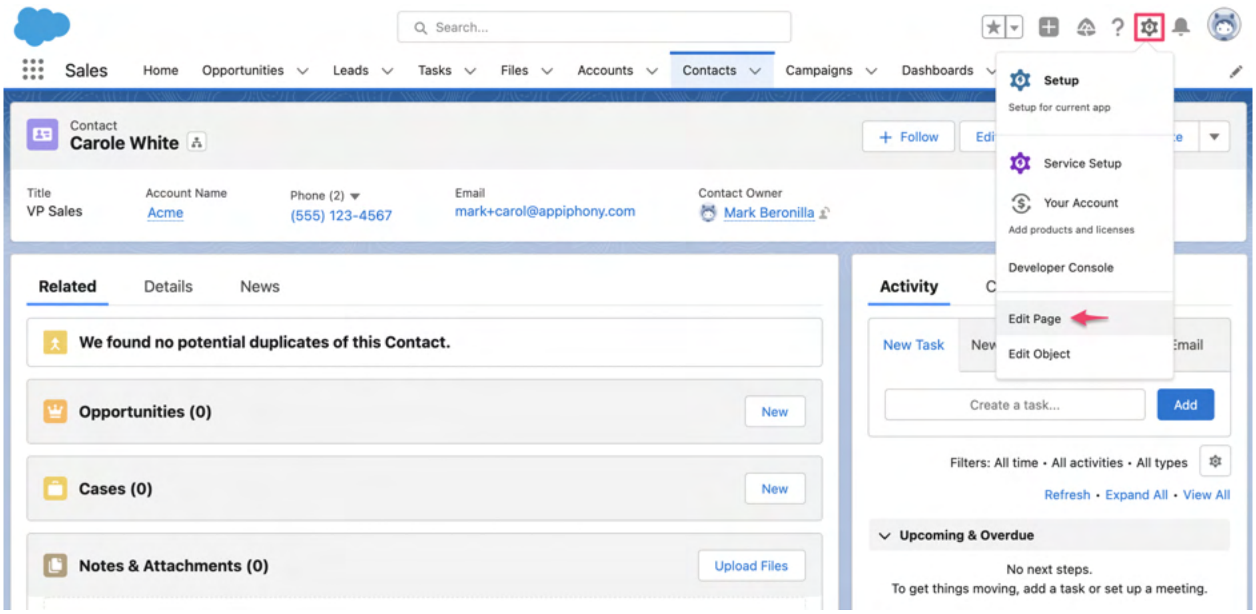
## ADD THE NOTARIZE LIGHTNING COMPONENT TO RECORD PAGES

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**)

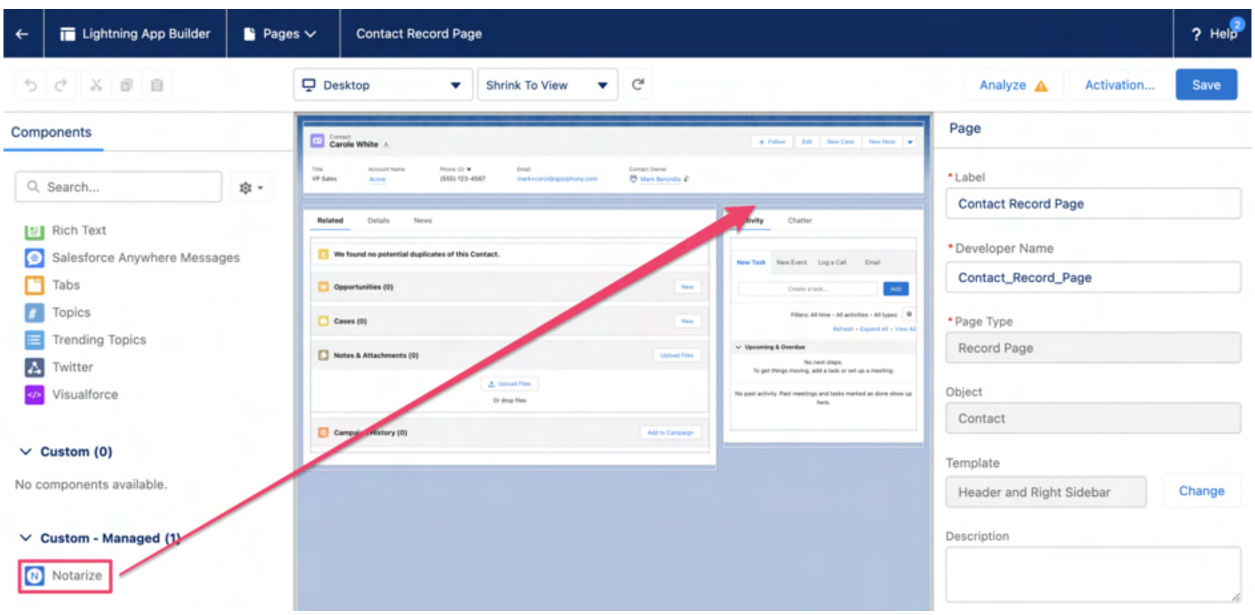
- In the **Sales** app, click on the **Contact** tab, then select an existing Contact record



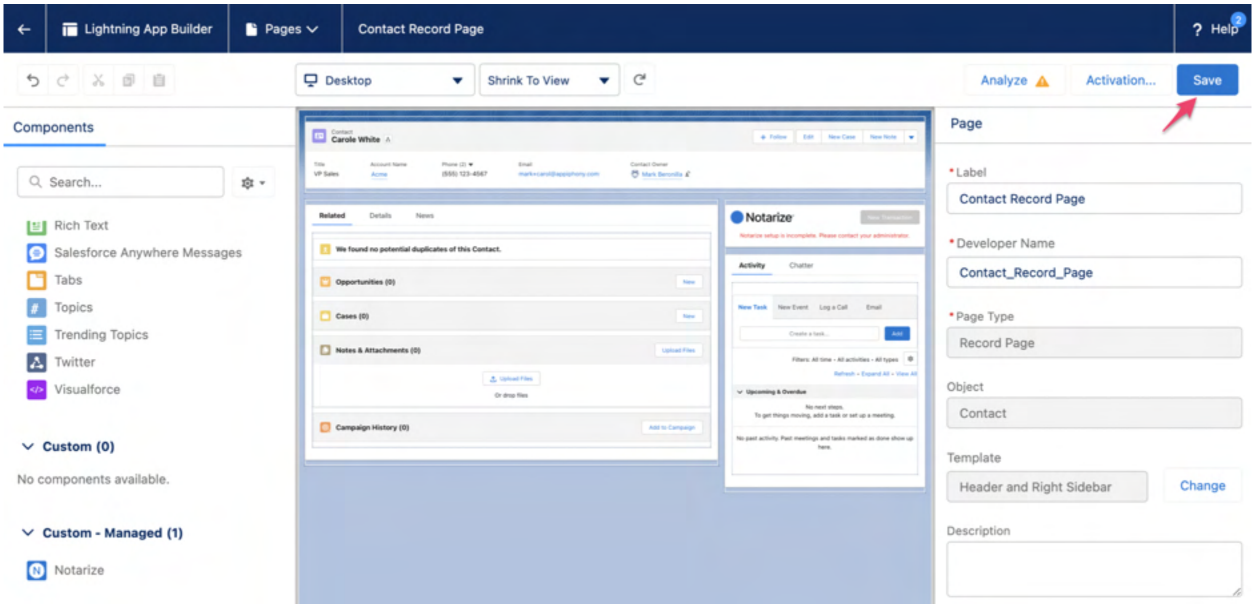
- Click the **cog icon** on the top right of the page, then click **Edit Page**



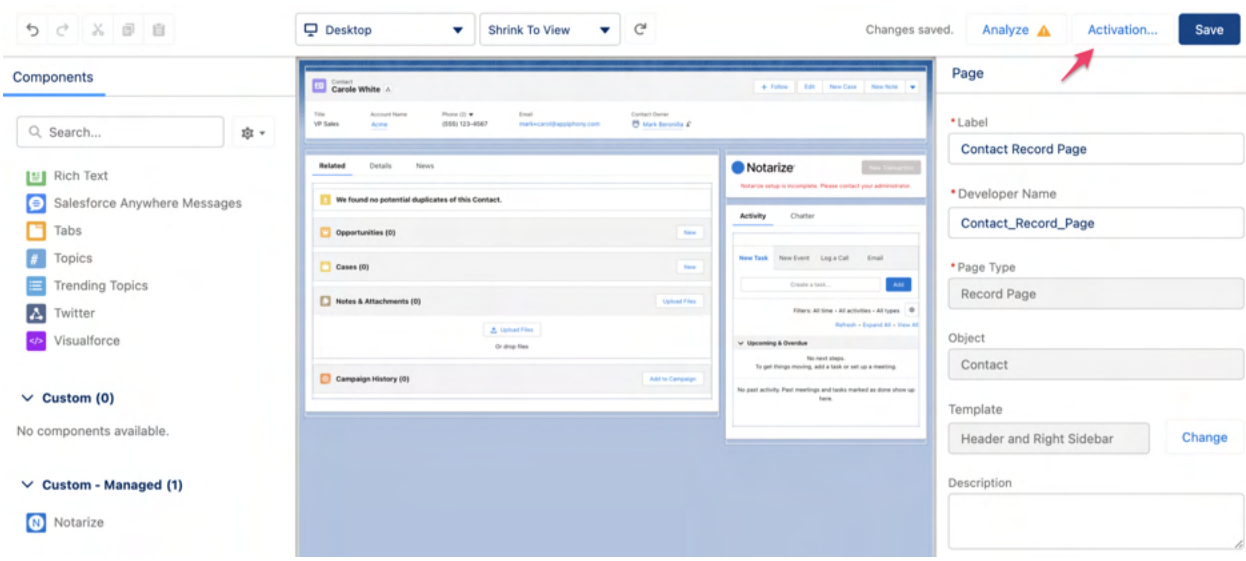

- Drag the **Notarize Component** onto the record page layout



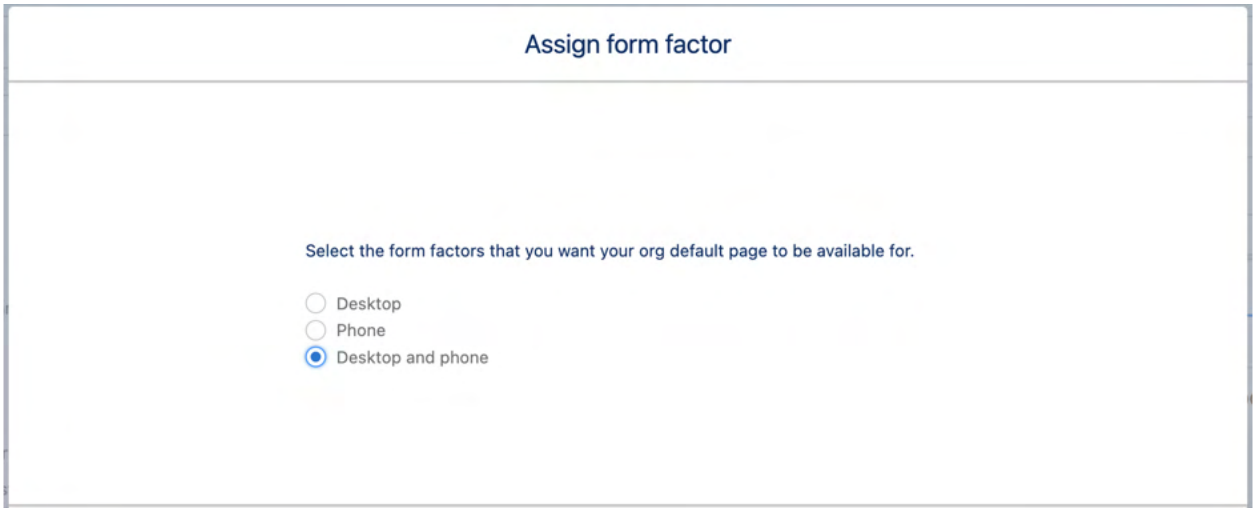
- Click **Save**




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



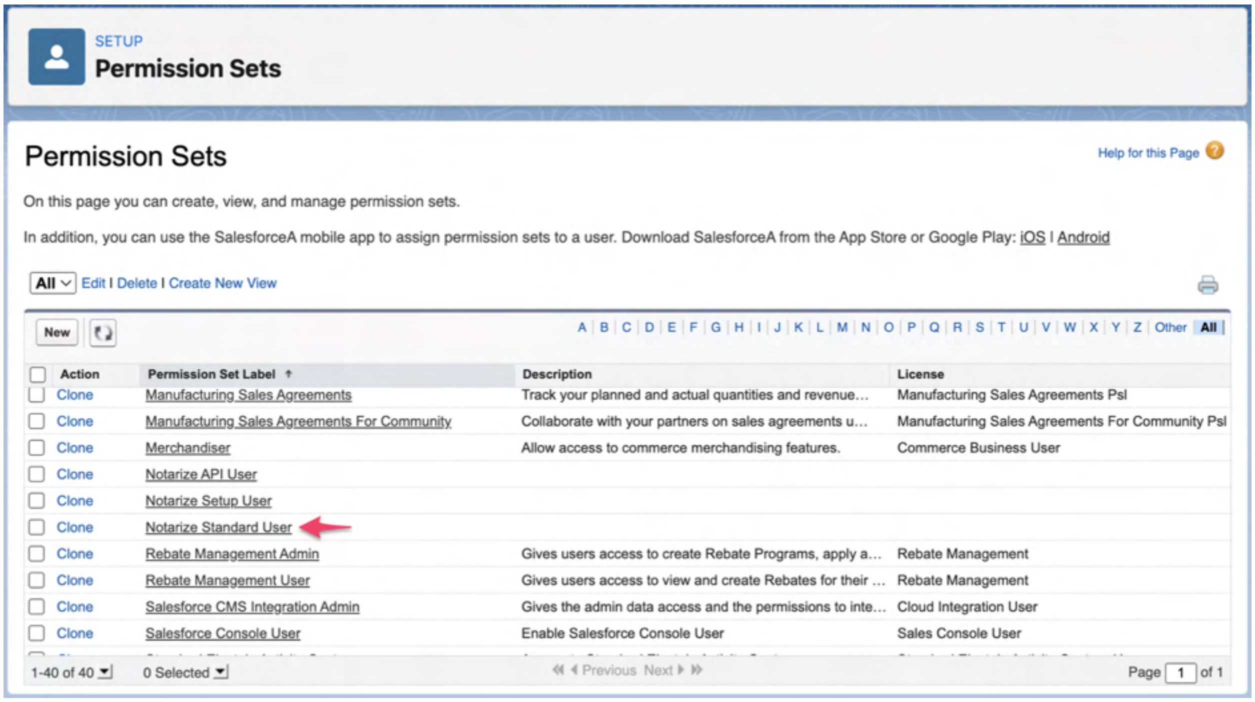
- Set up activation based on which users will need to see this component.  **Note:** This app is supported on **Mobile devices**, so make sure to set the form factor to **Desktop and phone** when activating the page.



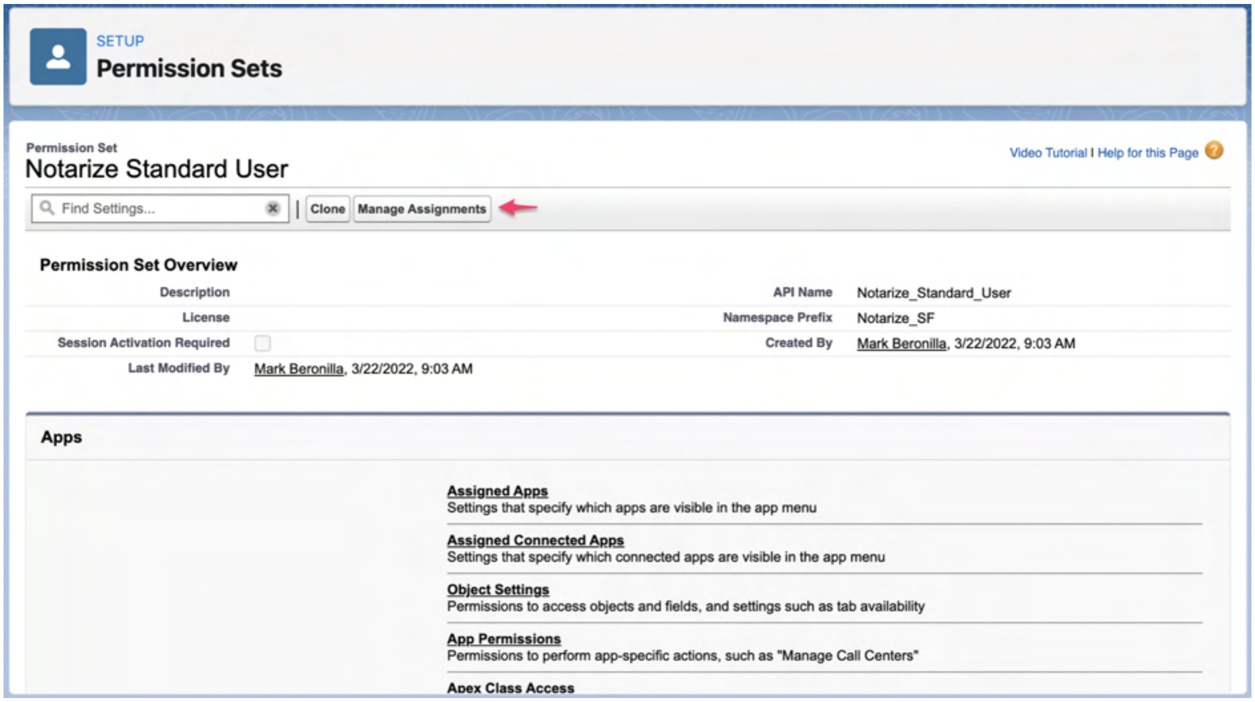
## PERMISSION SETS

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**

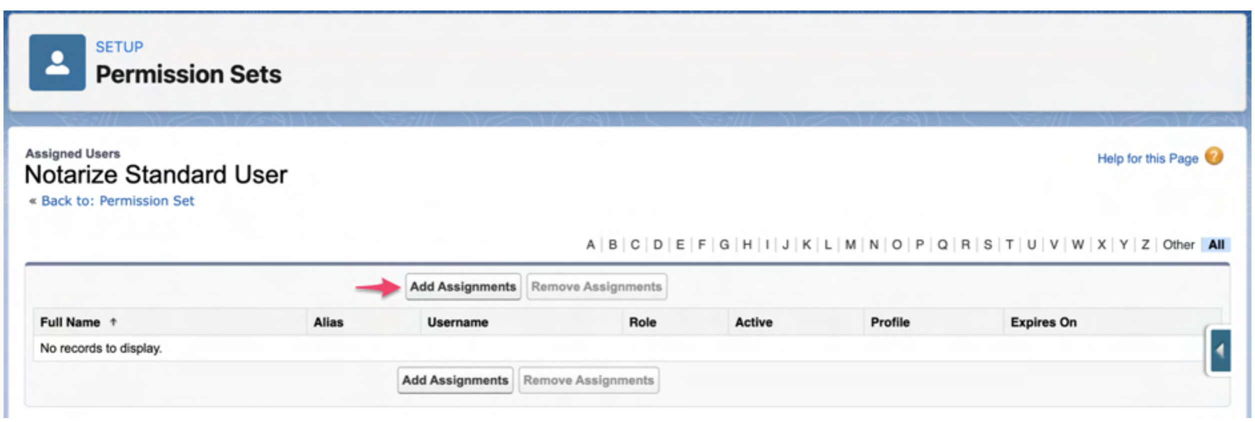
- Select the **Notarize Standard User** permission set



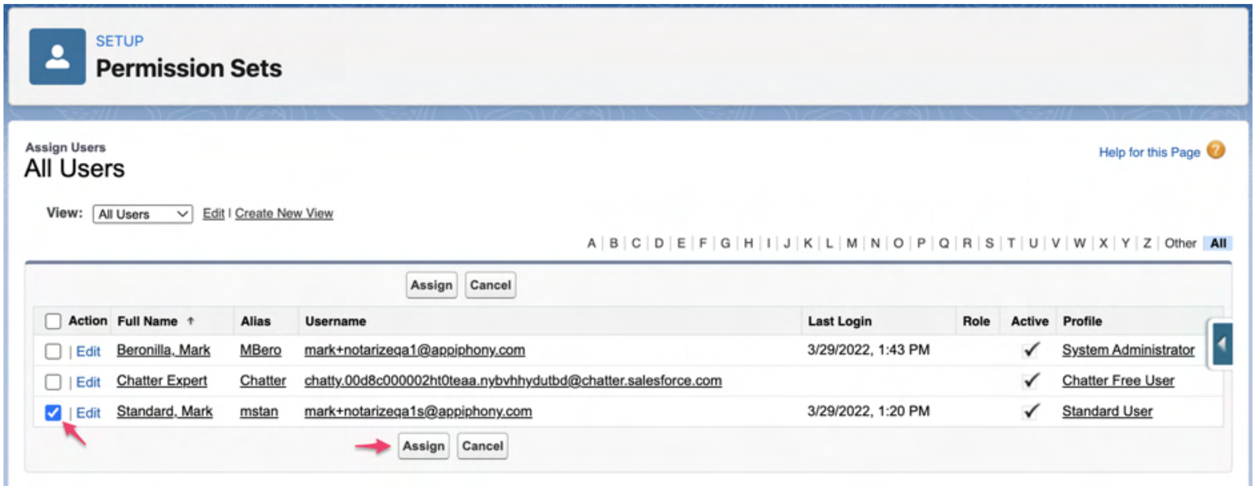
- From the Permission Set Overview page, click **Manage Assignments**




- Click **Add Assignments**



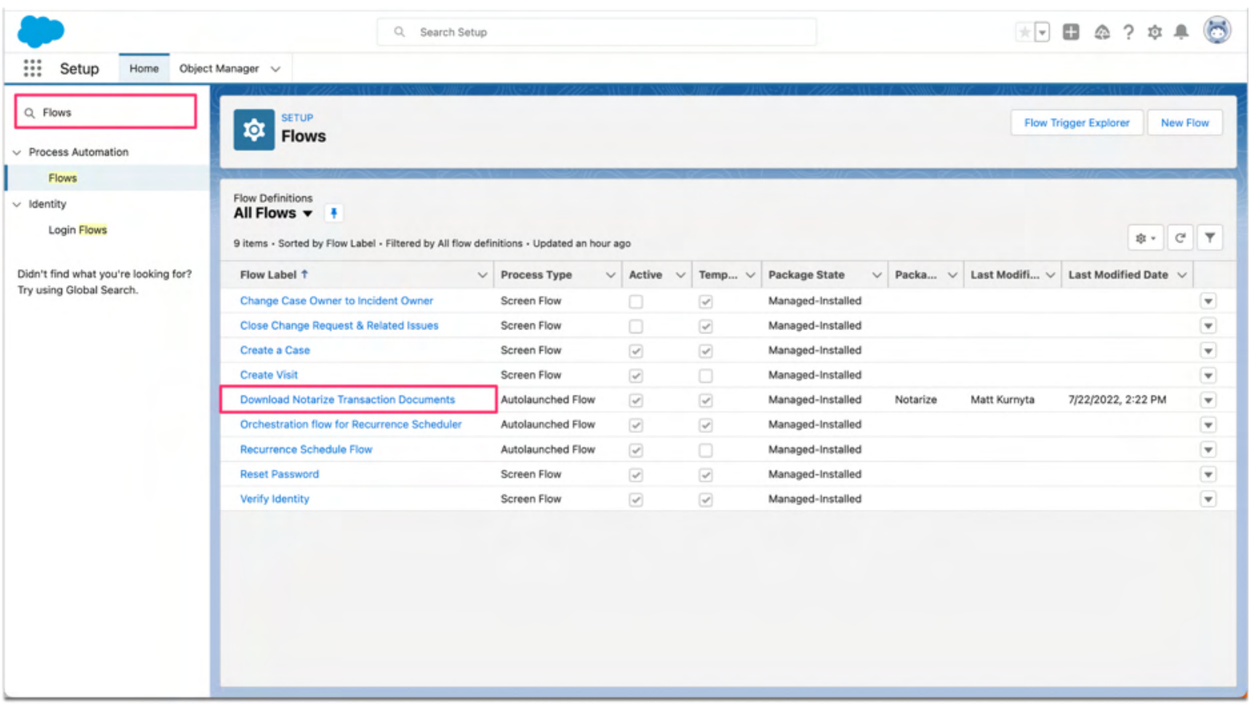
- Check the box next to the user(s) that you would like to assign the permission set to and click **Assign**



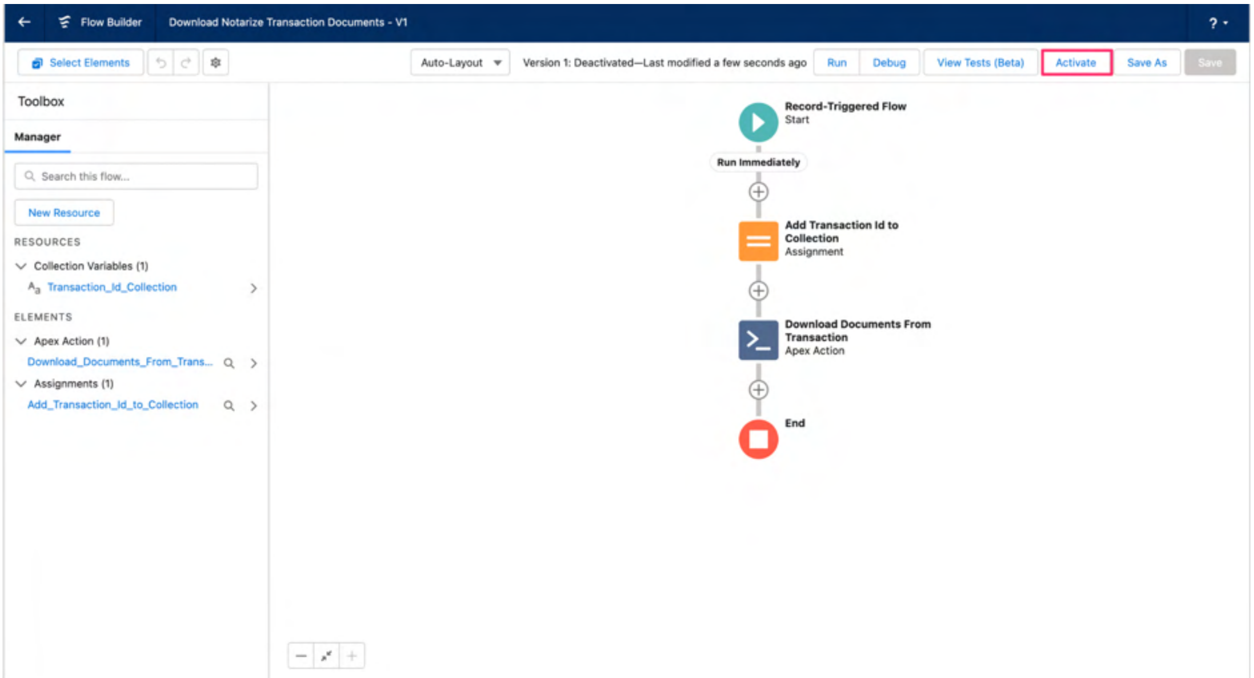
# Enable Flow Template for Document Return

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**

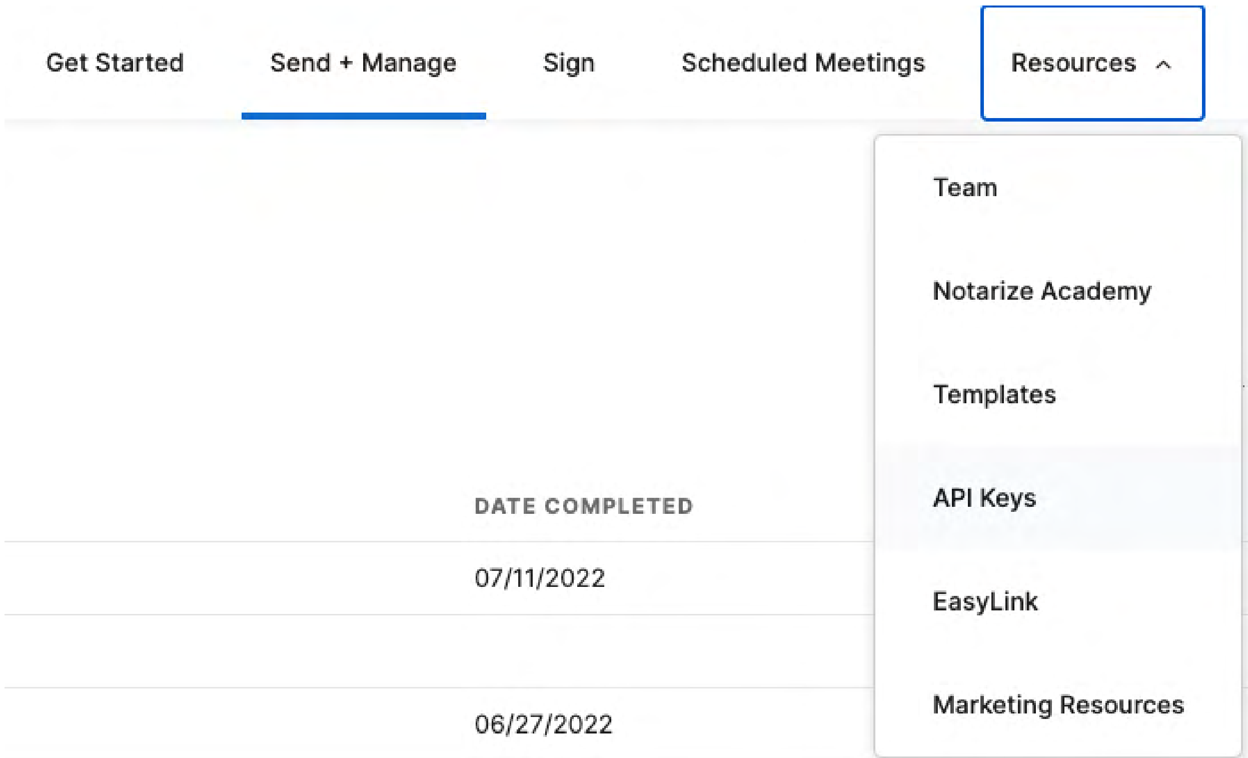


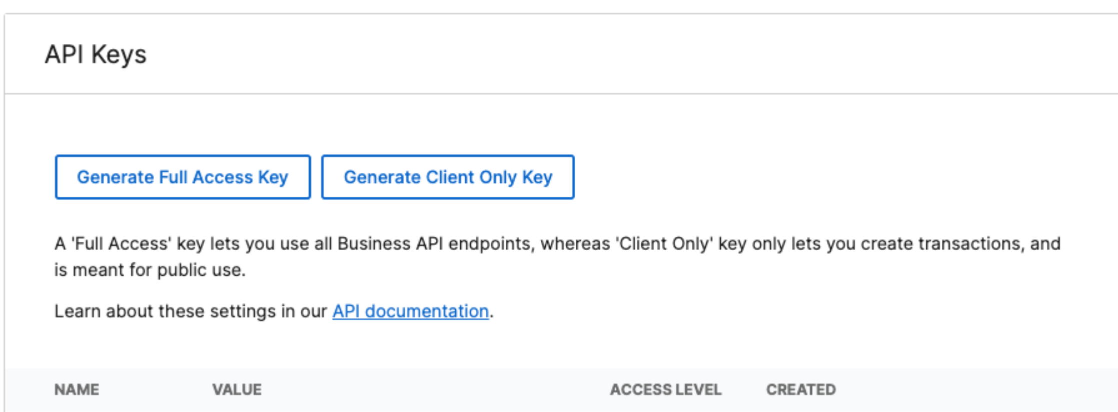
- Click **Activate**



# 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.



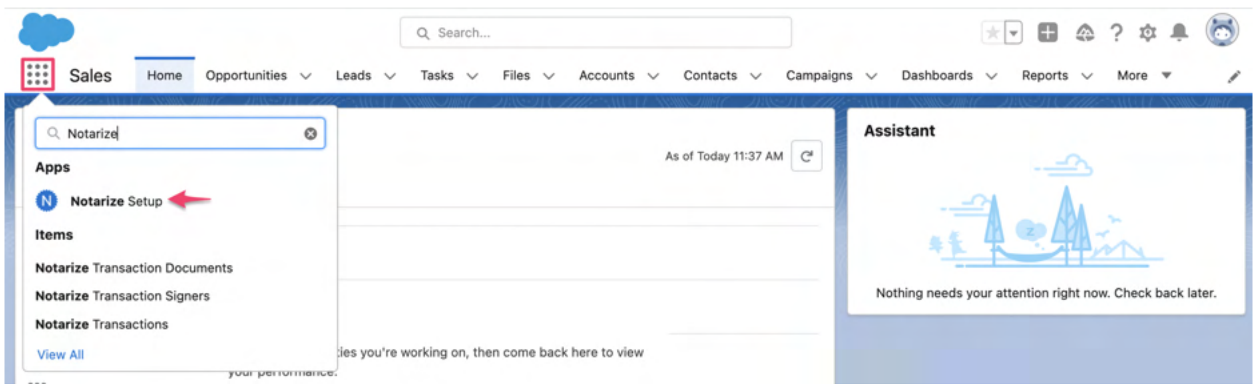



- Click Resources and API Keys
- Click Generate Full Access API Key
- Save this key for reference in the Notarize Setup App

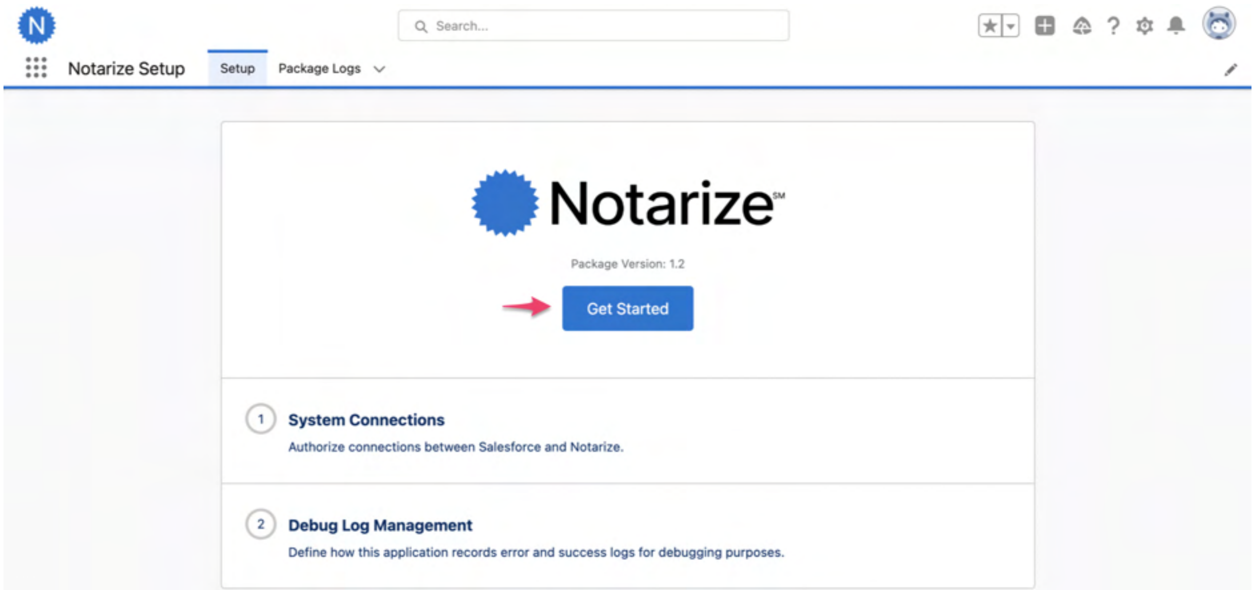
## GO THROUGH THE NOTARIZE SETUP APP

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.

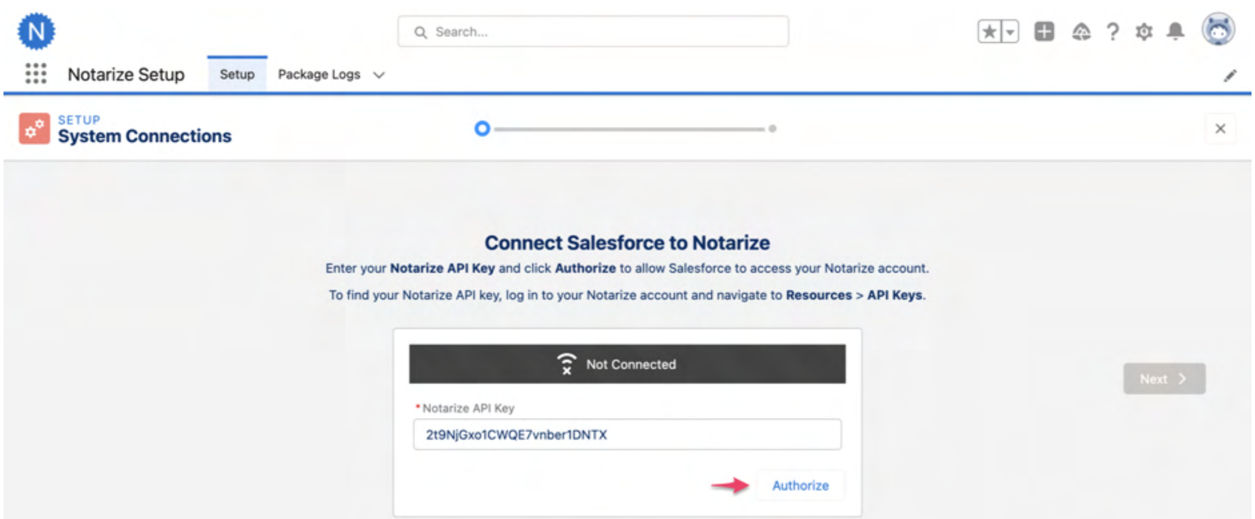
- Click on the **App Launcher** icon, then click on **Notarize Setup**



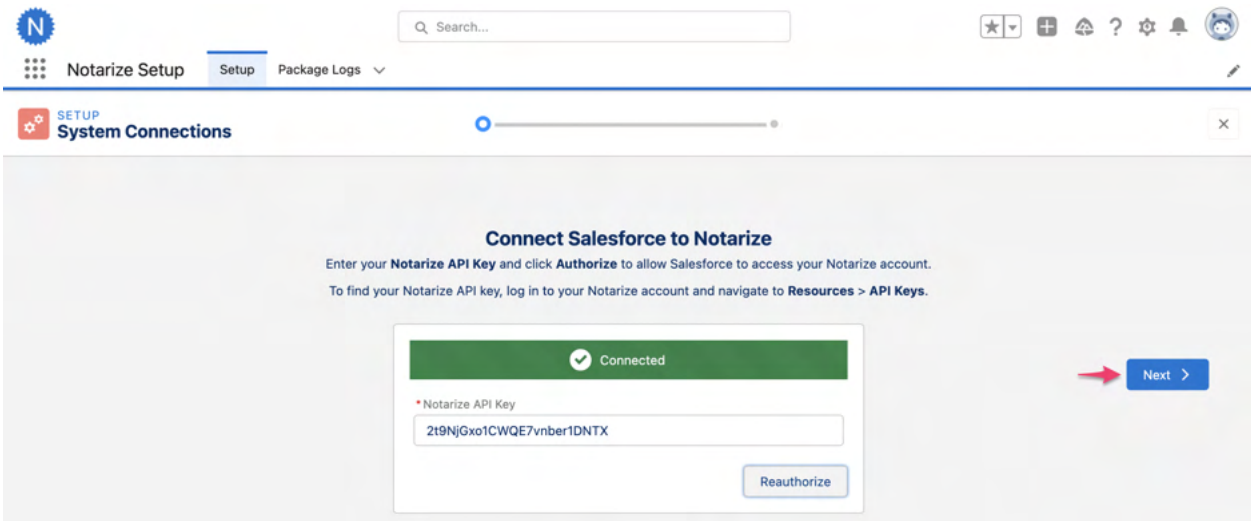
- On the Notarize Setup app, click **Get Started**



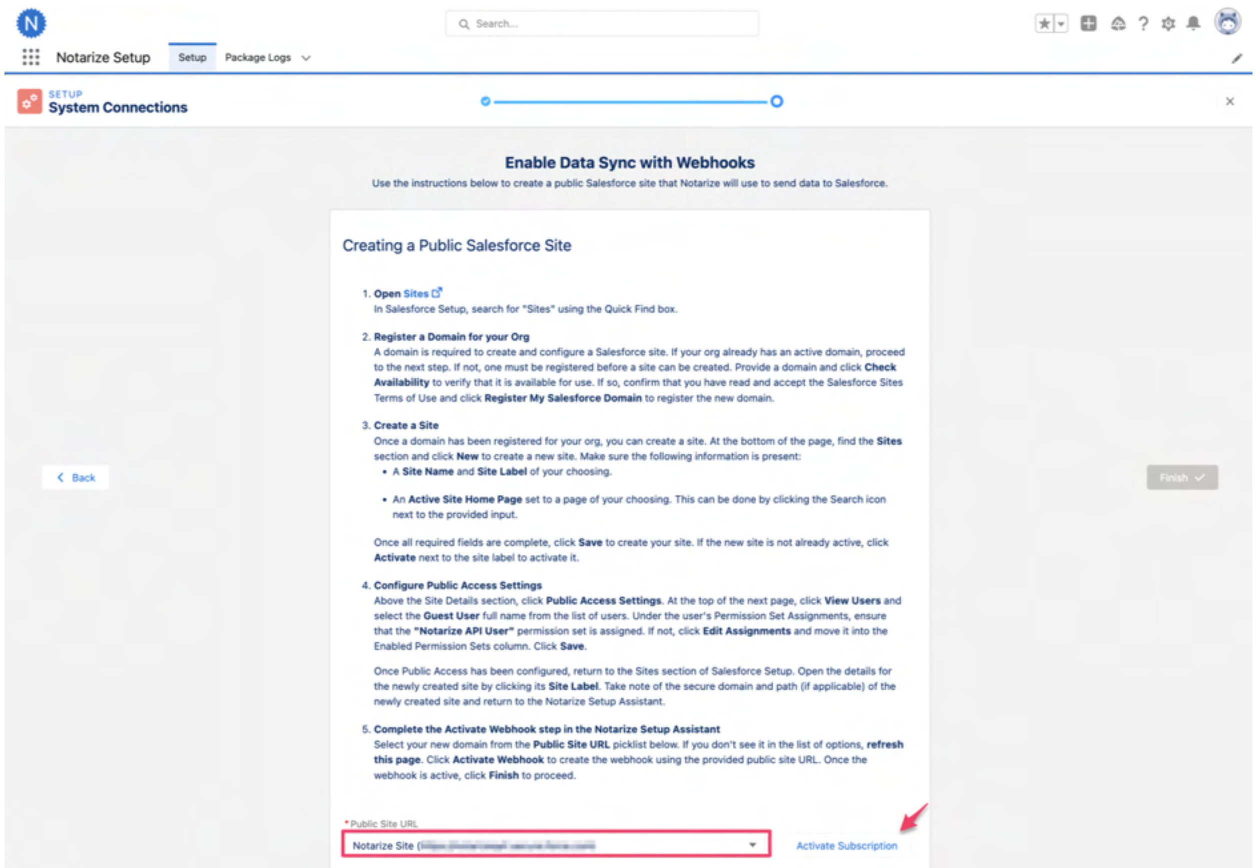

- Enter the **API Key** that you set up in your Notarize instance, then click **Authorize**



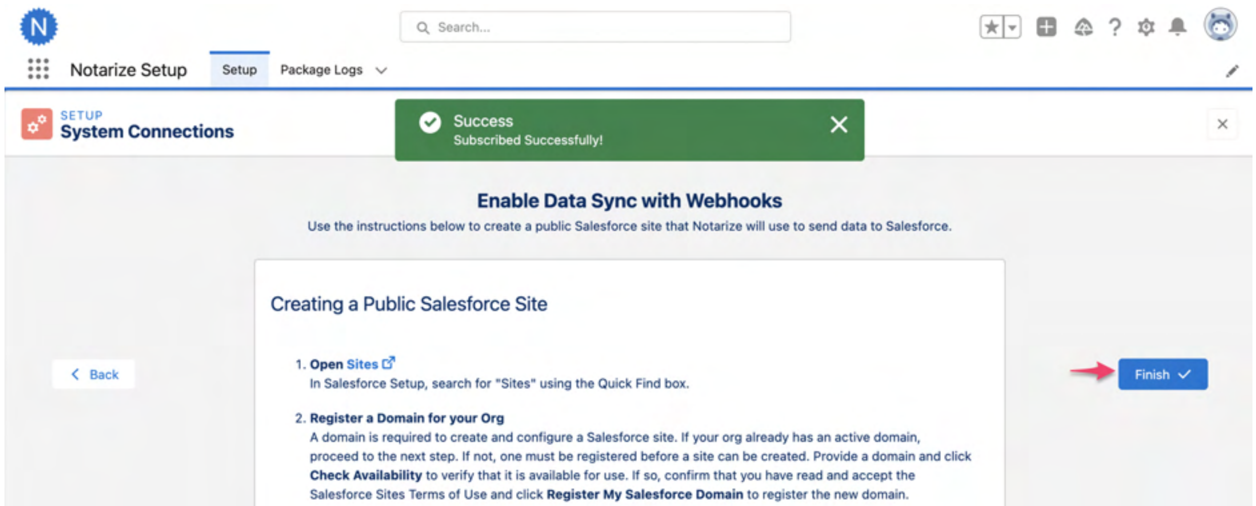
- Once you've successfully connected, click **Next**



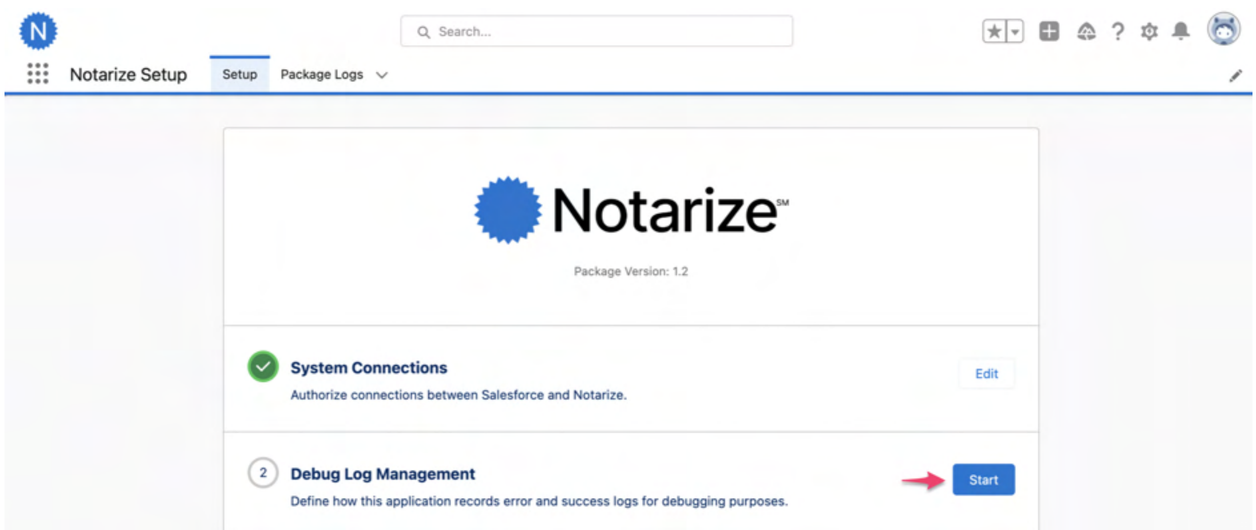
- The next step will guide you through creating a Site for Webhook events.  You've already created and set up a Site from a previous section on this guide, so all you need to do is select the correct Site from the picklist, then click **Activate Webhook**.



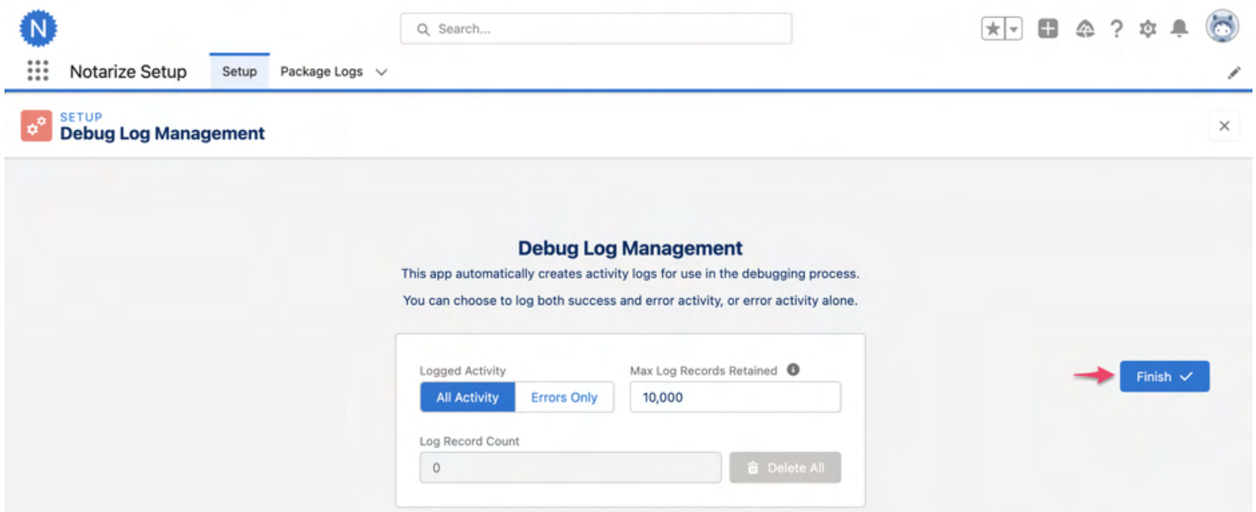
- Once the webhook is successfully activated, click **Finish**




- 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**.

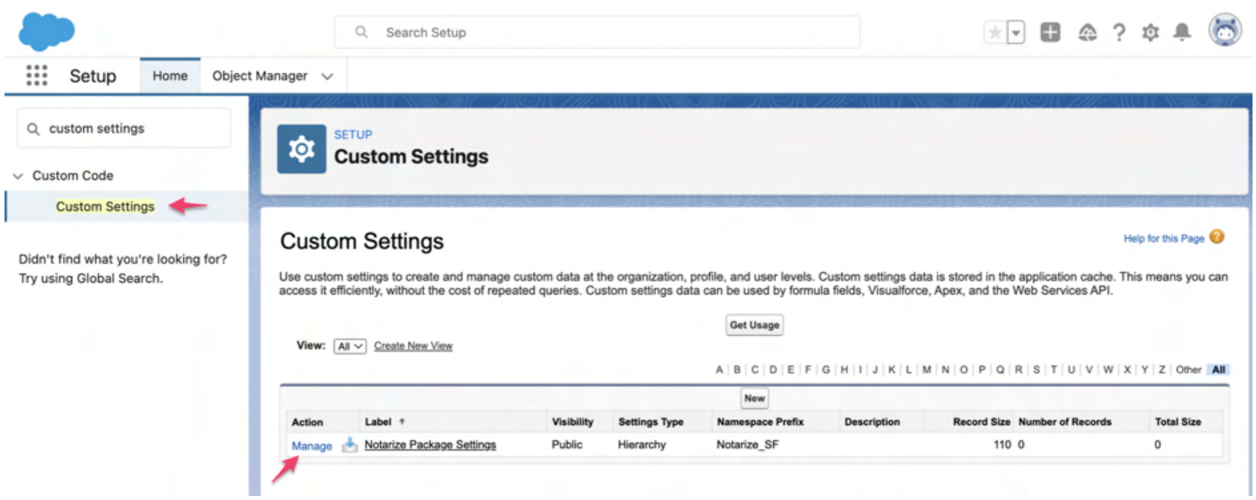


# Appendix

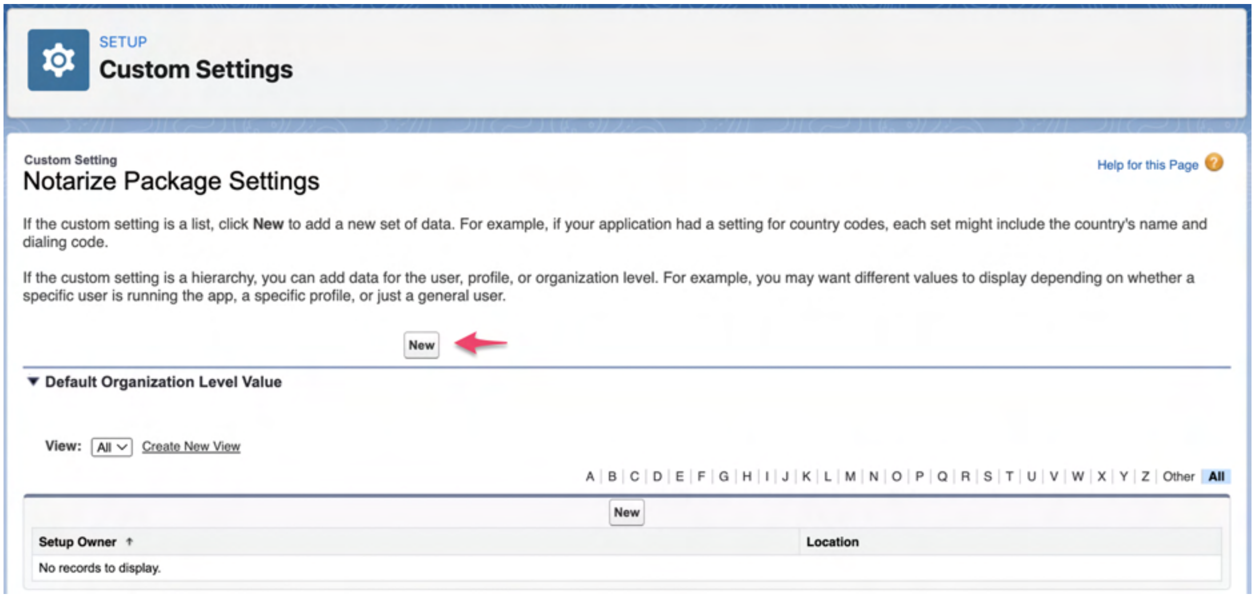
## SET THE NOTARIZE APP TO USE THE TESTING API (OPTIONAL)

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.

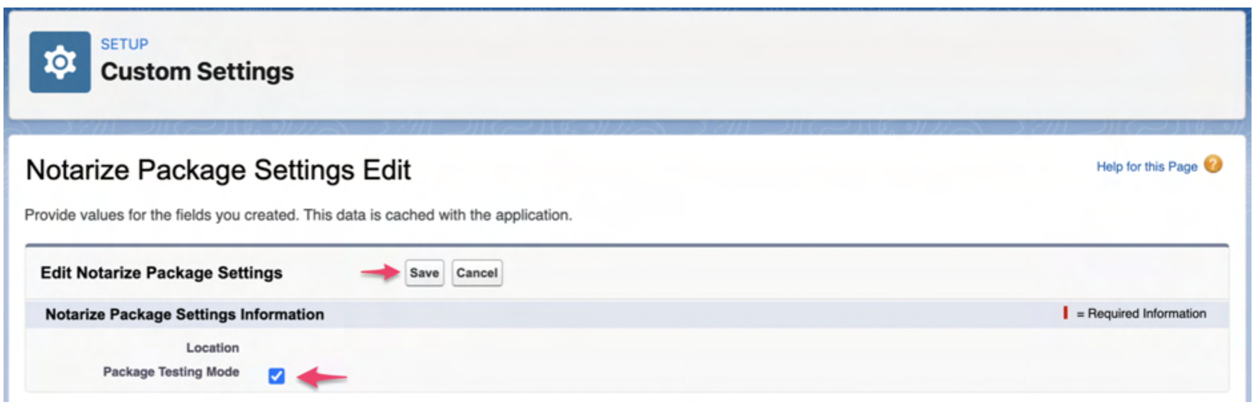
- Navigate to **Setup > Custom Code > Custom Settings** and click **Manage** next to **Notarize Package Settings**



- Click **New**




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




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