SOFTPRO™ 360

Notarize
User Guide (v1.0)

October 2021

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Introduction

The SoftPro 360-Notarize integration provides SoftPro 360 users the ability to seamlessly create and track document packages for electronic signature and/or electronic delivery. This integration is used to prepare the title and escrow documents packages such as opening and closing packages and push them to the Notarize website. If the documents have been tagged, the package can be submitted directly without review. Otherwise, they can be reviewed and tagged on Notarize's website prior to submitting for signing.

The recipient is notified by email that packages are ready for review and/or electronic signature. Once the package is signed, the document package will be returned to 360 where the 360 user can accept the e-signed documents back into the ProForm Order.

Accessing

From the Select toolbar:

1. Select the Services tab
2. Click the Settlement Services folder to expand
3. Double-click **Notarize – Online Closings**
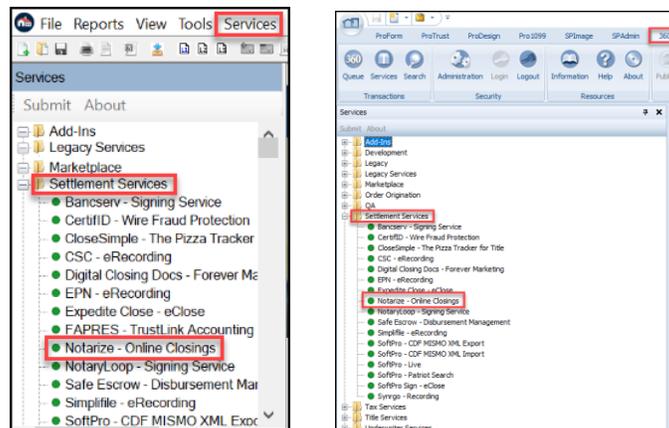
The Welcome screen appears providing information on the Notarize vendor. You can check the Skip Welcome Screen checkbox to prevent the Welcome screen from being shown in the future when opening Notarize.

Click the **Cancel** button to exit the Notarize process or Next to launch the Notarize integration product.

Logging into Notarize

The Notarize Package Management screen appears. Login using the Login * hyperlink in the upper right corner to create a package.
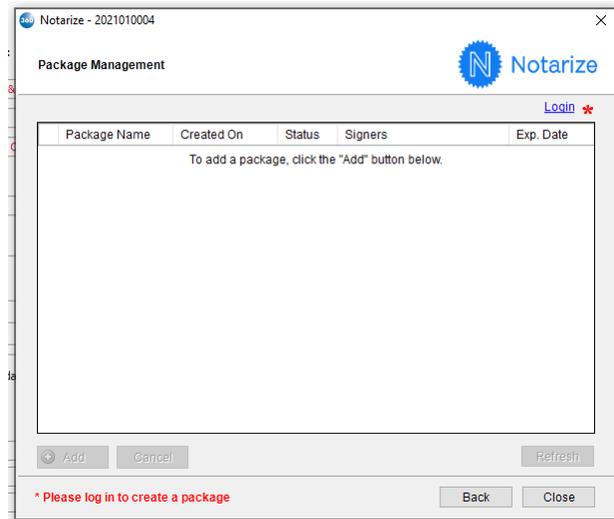
The **Remember Me** checkbox is automatically checked and the API key, once entered is cached for subsequent visits.

Once the API key is entered, there are two possible actions:

- If no package has yet been added for the order, clicking the **OK** button opens the Add Package information screen.
- If at least one package has already been added for the order, clicking the **OK** button reopens the Package Management screen.
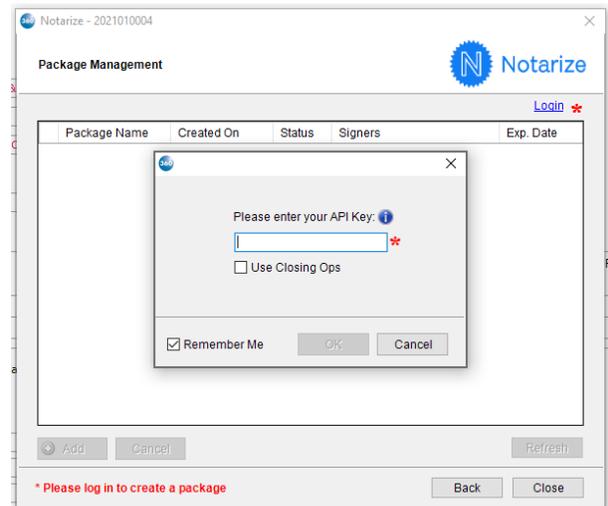
The Package Management Screen

The Package Management screen allows for tracking the following fields for each package:

- The Package Name
- The Created On date
- The Status, from Notarize
- Signers of the document(s)
- The Expiration date of the package

The Package Management screen provides the following functionality:

- The *Add* button opens the Package Information screen and begins the workflow for adding a new Package.
- The *Cancel* button cancels a selected existing Package.
- The *Refresh* button retrieves the status for a Package from Notarize.
- The *Back* button brings you back to the Welcome screen
- The *Close* button closes the Notarize service.
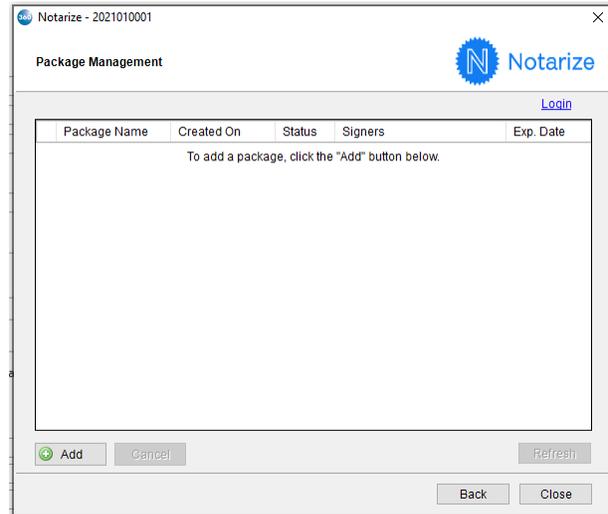
The Package Processing Workflow

From the Package Management screen, you will be presented with several screens depending upon the action selected. The typical workflow involves the following screens, which will be navigated in the order shown:

- Clicking the *Add*, or *Refresh*/*Cancel* buttons in the Package Management screen reveals the Package Information screen, where information for the package is entered.
- The Package Information screen is detailed in the section titled 'Options in the Package Information screen.'
- Clicking the *Next* button in the Package Information screen reveals the Recipients screen, where recipients of documents are selected. The Recipients screen is detailed in the section titled 'Options in the Recipients Screen.'
 - o Choose to view details from the Recipients screen which will be displayed in popups for Signers or Contacts. The Signers and Contacts Detail popups are detailed in the section covering the Recipients screen titled 'Options in the Recipients Screen.'
- Clicking the *Next* button in the Recipients screen reveals the Document Selection & Submission screen, where documents are selected to be included in the package and the package may be submitted to Notarize.
  - o The Document Selection & Submission screen is detailed in the section titled 'Options in the Document Selection & Submission Screen.'
  - o Once the package has been submitted to Notarize, the executed documents will be returned and can be processed. This process is detailed in the section titled 'Handling Executed Documents returned by Notarize.'

Options in the Package Information Screen

The Package Information screen offers several options:
- A custom name for a **Package Name** is required.
- A transaction type from the **Transaction Type** dropdown is required. Current supported Transaction Types:
  - No Notary Meeting Types – No Documents may be marked as "Notarization":
    - Title Only:
    - Hybrid Purchase – Cash Buyer
    - Hybrid Purchase – Seller
    - Hybrid - Trailing Documents
  - Full RON Types (Requirement – At least one document must have requirement of "Notarization"):
    - Title Only:
      - Purchase-Seller
      - Purchase - Cash Buyer
      - Trailing Documents
    - Lender Collab:
      - Purchase – Loan Buyer/Borrower
      - Refinance

- Property - Select the Closing Property for a transaction in the **Property** dropdown list. The Properties displayed in the Property dropdown will include all Properties associated with the linked ProForm order.
- The Company field displays the Title Company returned from Notarize.
- Select a loan from the ProForm Order that will be displayed in the Loan field.
- Enter free-form instructions for the Notary in the Notary Instructions text box.
  - This note will be displayed in the email that will be sent to the Signer(s) from Notarize.
- Include free-form instructions for the document signers in the Note to Signer(s) field.
  - This note will be displayed in the email that will be sent to the Signer(s) from Notarize.
- Check box to require Signers provide a secondary ID.
- The Settlement Date/Time field displays the settlement date as it appears in the linked ProForm order.
  - This value can be changed using the date picker for the Settlement Date/Time box.
  - If there is no date provided in the ProForm or Select Order, the Settlement Date/Time will display the default value of 'TBD,' or 'To Be Determined.'
- The Expiration Date/Time field displays the expiration date as it appears in the ProForm or Select Order.
  - This value can be changed using the date picker for the Expiration Date/Time box.
  - The Package Expiration Date/Time must be a date equal or greater than the Settlement Date/Time.
- Once all data is entered, click the **Next** button to go to the Recipients screen.

Options in the Recipients Screen

The Recipients screen allows the selection of Signers and Contacts for the Notarize Package. The Recipients screen offers the following options:

- The Recipients screen will open displaying values for all Buyer/Borrowers and Sellers linked from the ProForm Order.
  - o The values displayed in the Recipients screen are read-only and can only be changed by opening the ProForm or Select Order to make changes.
- Select the appropriate Signers or Contacts to be included with the package by clicking the **Signers** or **Contacts** checkbox in the Signers or Contacts display of the screen.
- For Organizational Buyer/Borrowers, the Recipients screen will display the Buyer officers/signees from the ProForm or Select Order. For Organizational Sellers, the Recipients screen will pull in the Seller officers/signees from the ProForm or Select Order. If there are no officers/signees associated with the Organizational Buyer or Seller, the option to select that Signer will be disabled.
- If a red asterisk appears next to a Signer, there are attributes missing for that Signer.

- Click the **Add Contact** hyperlink to add additional contacts to the Package.
- The **Show to Signer** checkbox indicates that the Contact should be shown to the Signer and the **Access to Package** checkbox gives permission for the contact to access the package.
- Click the hyperlinked value in the Signers or Contacts **Name** field (shown above) to enter or adjust the following information:
  - o First Name
  - o Last Name
  - o Email Address
  - o Role – consisting of the following SoftPro and Notarize Roles:
    - Escrow Officer Closer
    - Selling Agent
    - Listing Agent
    - Title Officer Examiner
  - o Phone Number
- Clicking **Next** in the Recipients screen displays the Document Selection & Submission screen.
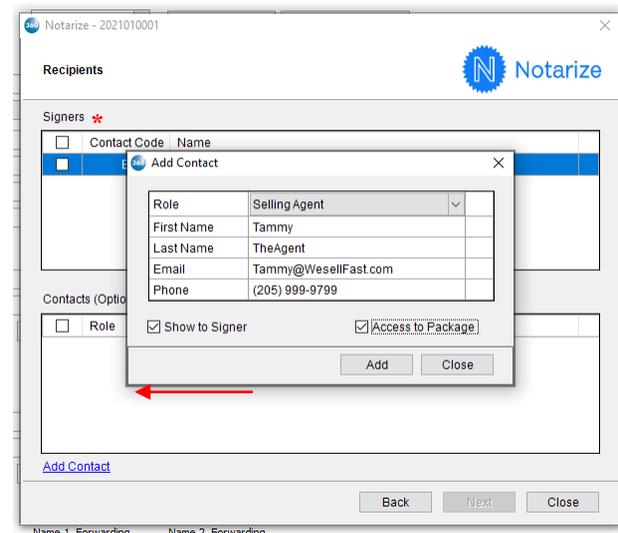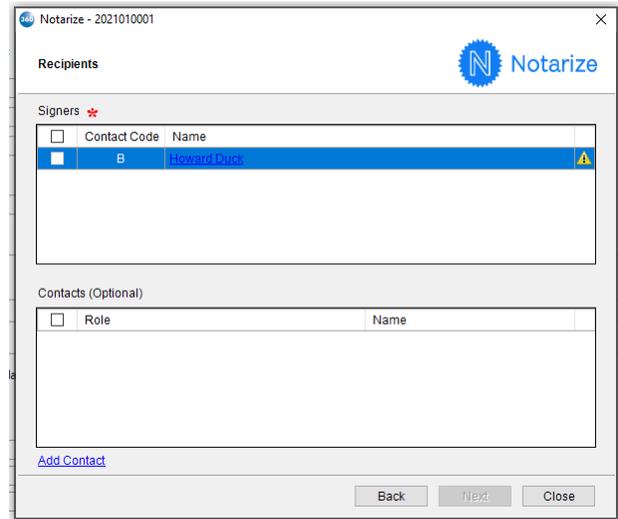
Options for Document Tagging

SoftPro will be offering two options for further configuration options should you find the need to display tags on any documents on the Notarize site:

Option One (For additional information see [Appendix A](#))
- Notarize tags are added to signature lines and acknowledgment fields in the order to display tags on any documents produced that contain those fields.
- Accomplished in conjunction with a Custom Order Rule to add tags to the signature line field and customer specific acknowledgment lookup entries to add tags to acknowledgment fields.

***Option Two*** (For additional information see [Appendix B](#))
- Notarize tags for signatures and acknowledgments are added directly to the documents in <u>white</u> text and are not visible on the published forms.
- Customers can apply tags to their own documents using a SoftPro created ReadyBloc package that will be accompanied by a user guide.

Please contact SoftPro Support for assistance for either option as a Charge/Quote will apply.

Options in the Document Selection & Submission Screen

The **Document Selection & Submission** screen is used to select documents from the ProForm or Select Order to be sent to Notarize for a given package. This screen supports the following functionalities:

- ***Browse***
   - The ability to browse to a location on a local computer or network to add a document.
- ***Attachments***
   - The ability to attach a document from the ProForm Order.
   - Notarize cannot add documents with the Attachments option if the ProForm Order does not have any attachments. Documents must be added to the ProForm Order first.
   - The ability to attach a document from SmartView. This option is only available to FNF Direct Operations.
- ***Documents***
   - The ability for Impact© users to select attachments using the Documents button. (*This option is only available to Impact© clients and will not display for users who are not* Impact© *users.*)
- ***Rename***
   - The ability to rename a document once it has been added.
- ***Delete***
   - The ability to delete a document added in error.
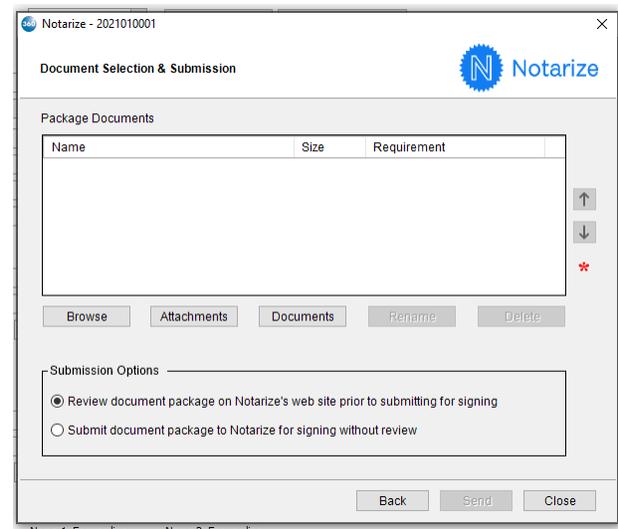
The order of the documents that will be presented to the customer for signing can be made in the **Document Selection & Submission** screen.

The steps to arrange the order of signing are:
- In the **Package Documents** section, there are **Move Up** and **Move Down** buttons that appear to the right of the Documents grid.
- Click on (highlight) a document and click the **Move Up** button or **Move Down** button to change the order in which that document will be presented to the customer for signature. The top-most documents are signed first and bottom-most documents are signed last.
- The size limit for a Package being submitted to Notarize is ***30 MB***.

The **Requirement** dropdown of the Documents grid in the Package Documents section of the screen indicates which action, or requirement, a particular document receives.

There are four options available in the Requirement dropdown:
- Notarization – the document ***requires*** notarization.
    - The document will be signed in a meeting in front of a Notary and will be available to review ahead of the meeting in read-only mode.
- eSign – the document can be eSigned ahead of the meeting.
    - This option is only available for customers with the Sign Ahead option enabled.
- eSign with Supervision – the document is eSign only with no notarization required but must be signed in the presence of a Notary or witness.
- Read Only – this option is for Hybrid only.
    - In this case, the document is a wet sign document, but is available for digital review prior to the signing meeting.

The **Submissions Options** section of the screen provides two options with the following functionality:
- The **Review document package on Notarize's website prior to submitting for signing** will cause your default browser to open to the Notarize website for performing the review. This is the default action.
- The **Submit document package to Notarize for signing without review** option allows a package to be submitted using the Send button without reviewing the package.
- Once submitted, the **Package Management** screen displays the package submittal **Status**
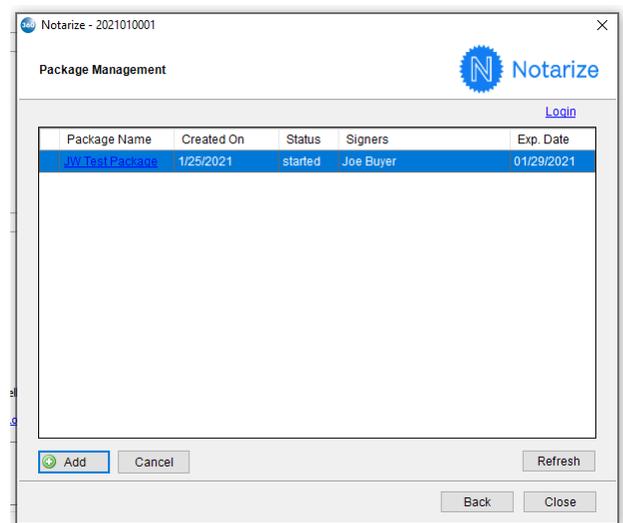
Add a New Package

To add a new Package in the Package Management screen:

- Click the **Add** button in the Package Management screen to open the Package Information screen:

- Enter values in the Package Information screen.
- Click the **Next** button in the Package Information screen to select Signers and Contacts in the resulting Recipients screen.

- Click the **Next** button in the Recipients screen to select the document(s) to be sent in the package in the Document Selection & Submission screen.

- Once the data and documents have been verified and the Order is complete, click the **Send** button in the Document Selection & Submission screen to submit the Package to Notarize.

Refresh or Cancel an Existing Package

To Refresh or Cancel an existing Package:
- In the Package Management screen, click on (highlight) the Package in the grid that is to be recalled or cancelled.
- Click the **Cancel** button.
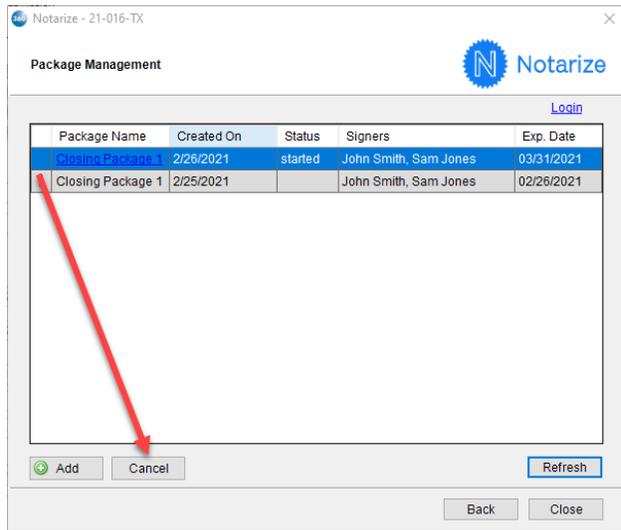
Retrieve the Status of a Package

To retrieve the status of an existing Package from Notarize:
- In the Package Management screen in 360, click on (highlight) the Package in the grid for which the status is desired.
- Click the **Refresh** button.
- The Status column in the Package Management screen's grid is updated with the current Notarize status for that Package.

Note: The Package Management Screen Status column is immediately updated whenever Notarize sends an update for any Package.
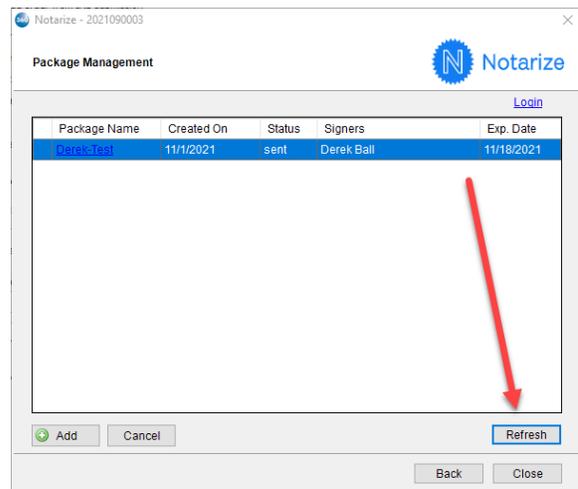
Viewing Documents in the Notarize Website

Documents can be viewed in a draft state on the Notarize website by clicking the **Document Name** on the Document Screen of the Notarize Documents Sections.
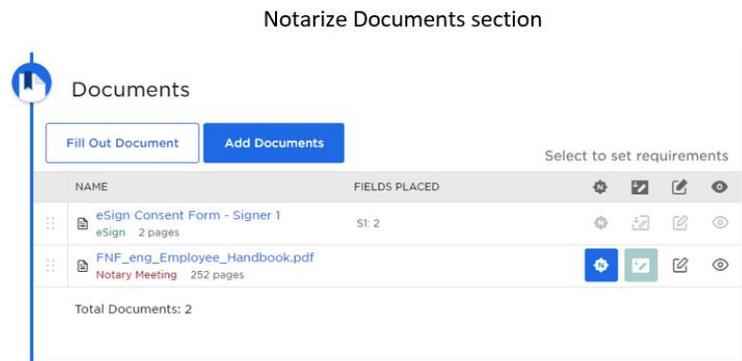

Handling Executed Documents Returned by Notarize

Once Notarize has processed the documents submitted with the package, the status can be manually checked, and the user can manually retrieve the executed documents into the ProForm Order. The method to manually check the status of a package is detailed in the previously discussed *Document Selection & Submission* screen using the **Refresh** button.

If the user is utilizing Select, then the user has the option to automatically retrieve executed documents into their ProForm Order by an Accept Automation process.

Glossary

Term	Definition
ProForm	Part of the SoftPro title production system where title insurance and settlement service orders are processed and managed
SoftPro 360	Module within ProForm that manages integrative services between ProForm and third party software systems
Package	Group of documents sent from the user's Proform order to the Notarize website for signing.
Transaction	Reference of the real estate closing such as the purchase or refinance.

Appendix A - Document Tagging – Option 1

1. Notarize tags are added to signature lines and acknowledgment fields in the order to display tags on any documents produced that contain those fields.

2. Accomplished in conjunction with a Custom Order Rule to add tags to the signature line field and customer specific acknowledgment lookup entries to add tags to acknowledgment fields:

EXAMPLE OF SIGNATURE LINE FIELD RESULT:

EXAMPLE OF ACKNOWLEDGMENT LOOKUP ENTRY:

EXAMPLE OF HOW PUBLISHED DOCUMENT WOULD LOOK:

> **BUYERS:**
>
> [sig|req|signer1   ]
> _____
> Joe Buyer
>
> [sig|req|signer2   ]
> _____
> Sue Buyer
>
>
> STATE OF [state|req|notary   ]
> COUNTY OF [county|req|notary   ]
>
> I, _____, a Notary Public for the of _____ and State of , do hereby
> certify that Joe Buyer and Sue Buyer personally appeared before me this day and acknowledged the due
> execution of the foregoing instrument.
>
> Witness my hand and official seal, this the .
>
> [sig|req|notary   ]
> _____
> Notary Public
>
> My Commission Expires: [expiry|req|notary   ]
>
> [seal|req|notary   ]

EXAMPLE OF HOW DOCUMENT WOULD LOOK IN NOTARIZE:

> **BUYERS:**
>
> ✎ Joe Buyer
> _____
> Joe Buyer
>
> ✎ Sue Buyer
> _____
> Sue Buyer
>
>
> STATE OF ⚑ Notary State
> COUNTY OF ⊘ Notary County
>
> I, _____, a Notary Public for the of _____ and State of , do hereby
> certify that Joe Buyer and Sue Buyer personally appeared before me this day and acknowledged the due
> execution of the foregoing instrument.
>
> Witness my hand and official seal, this the .
>
> ✎ Notary Signature
> _____
> Notary Public
>
> My Commission Expires: 🕐 Notary Comm...
>
> Ⓝ Notary Seal

3. Notarize tags can be added to the signature line field and acknowledgment field by selecting the "Notarize Buyer" or "Notarize Seller" option in this custom field drop-down on the default Order Information screen.

If tags are needed for both Buyer and Seller contacts, users must select Notarize Buyer, publish all documents for the Buyer contacts, then select Notarize Seller and publish all documents for the Seller contacts.

Tags can be removed from the fields by selecting the "None" option or leaving the field blank.
Field can also be moved up to a custom MyScreen for ease of access.

4. To use this option, customers must set up their Notarize account to support "non-white text tagging".

OPTION ONE PROS:

- Minimal cost to customer.
    - One time charge for Custom Order Rule
    - One time charge if assistance is needed to set up Notarize tag entries in acknowledgment lookup tables.
    - One time charge if customer would like the Notarize custom field moved up to a custom MyScreen
- Users can continue to utilize acknowledgment lookup entries for their forms
- Users control turning the tags on and off for the fields
- No modifications/customizations required to ReadyDocs

OPTION ONE CONS:

- Custom Order Rule for signature tags will only work on new orders created after the rule is installed.
- Since tags will appear as black text on published documents, users must turn tags off (by selecting "None" in the E-Signing Application field before publishing documents that will NOT be sent through the Notarize application
- Limited to only use Notarize tags for signatures and acknowledgments. All other Notarize fields (initial fields, checkboxes, etc.) will need to be added to the documents directly in the Notarize application.

To use OPTION ONE, contact SoftPro Support for assistance with Custom Order Rule and Acknowledgment lookup entries. Charge/Quote will apply.

Appendix B - Document Tagging – Option 2

1. Notarize tags for signatures and acknowledgments are added directly to the documents in <u>white</u> text and are not visible on the published forms.

EXAMPLE OF HOW PUBLISHED DOCUMENT WOULD LOOK:

BUYERS:

_____   _____
Joe Buyer   Date

_____   _____
Sue Buyer   Date

State of

County of

The foregoing instrument was acknowledged before me by means of online notarization, this _____ day of _____, _____ by Joe Buyer and Sue Buyer.

_____
Notary Public

My Commission Expires:

EXAMPLE OF HOW DOCUMENT WOULD LOOK IN NOTARIZE:

BUYERS:

✎ Joe Buyer	📅 Date Of Signing
Joe Buyer	Date
✎ Sue Buyer	📅 Date Of Signing
Sue Buyer	Date

State of 🚩 Notary State

County of Ⓝ Notary County

The foregoing instrument was acknowledged before me by means of online notarization, this _____ day of _____, _____ by Joe Buyer and Sue Buyer.

✎ Notary Signature
_____
Notary Public

My Commission Expires: 🕐 Notary Commi...

Ⓝ Notary Seal

2. Customers can apply tags to their own documents using a SoftPro created ReadyBloc package that will be accompanied by a user guide.

3. SoftPro can update custom documents for customers (charge will apply)

    OPTION TWO PROS:

    - Notarize tags do not need to be turned off when publishing documents that will not be sent through Notarize, since tags are not visible.
    - Users will not have to update acknowledgment lookup entries
    - Once documents are updated, tags will work for both old and new files

    OPTION TWO CONS:

    - Higher cost associated with updating custom documents
    - Documents will no longer use the acknowledgement lookup entries/fields from the program, and will have a "hardcoded" acknowledgment instead (loss of flexibility)
    - Edit Signature functionality on Buyer/Seller contacts will be limited to edits on the *person* level:

To use OPTION TWO, contact SoftPro Support for assistance and provide the following information (Charge/Quote will apply):

- **List of documents that need the ability to include the Notarize tags**
- **The "hardcoded" acknowledgment text/layout you would like on those documents**
- **Any other Notarize tags that you need added to the forms (aside from the Signature/Acknowledgment section) and a markup of where they should appear on the form.**