

NOTARIZE OPTIONS FOR SOFTPRO SELECT

OPTION ONE:

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:

Edit Buyer Signature

Buyer Short name:

Buyer Payee name:

Title:

Signature line:

Signature for:

Joe Buyer

Sue Buyer

Red boxes contain
Notarize tags for
signatures

EXAMPLE OF ACKNOWLEDGMENT LOOKUP ENTRY:

Scrollable Field Editor

STATE OF

COUNTY OF

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 Public

My Commission Expires:

Red boxes contain
examples of Notarize
tags that can be added
to acknowledgments

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

- 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.

E-Signing Application	Notarize Buyer
Fictitious business name registrant's city	None
Authorized signatory	Notarize Buyer
Split Calculation Balance 1	Notarize Seller

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.

OPTION TWO:

1. Notarize tags for signatures and acknowledgments are added directly to the documents in white 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

Joe Buyer

 Date Of Signing

Date

 Sue Buyer

Sue Buyer

 Date Of Signing

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:

The screenshot shows a software window titled "Edit Buyer Signature". It contains several input fields: "Buyer Short name" (with text "Buyer Organization/Person1 & Person2"), "Buyer Payee name" (with text "Buyer Organization and Buyer Person1 and Buyer Person2"), and "Title" (with a dropdown menu showing "Borrower"). Below these is a "Signature line" section with a "Signature for:" dropdown (showing "B2") and a large text area containing "Cannot edit this". Underneath are two "Name" sections: "Name 1" with a text field containing "Buyer Person1" and a label "Can edit this", and "Name 2" with a text field containing "Buyer Person2" and a label "Can edit this". An "OK" button is located at the bottom right of the window.

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.**