

# NotaryLoop User Guide

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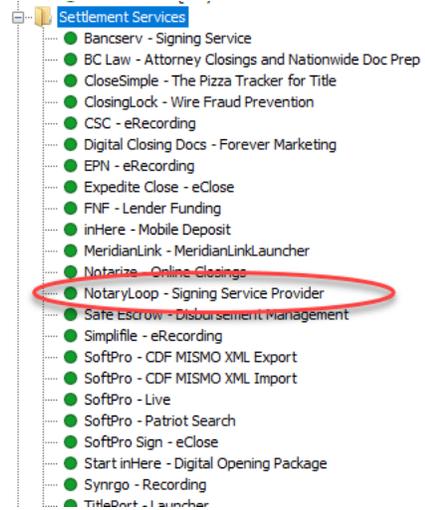
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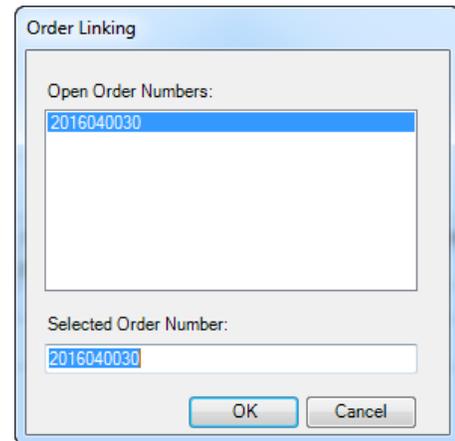
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## Submitting a Transaction via NotaryLoop

**NotaryLoop**, a signing services Provider, can be found in the **SoftPro 360** Service menu under Settlement Services. Double click **NotaryLoop – Signing Service Provider**, or highlight and click on the **Submit** button to submit a transaction to this Provider.

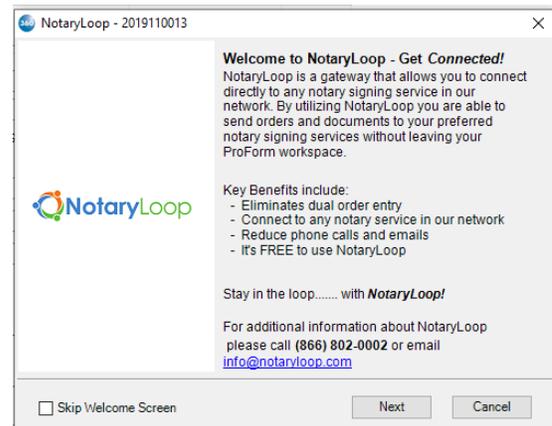


You must link each transaction to a ProForm Order. If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The current active order will be highlighted and entered in the **Selected Order Number** field. You have the ability to select from any of the open orders, or you may choose to overwrite the **Selected Order Number** with an order that is not currently open. Once you have confirmed the order to link, click OK to continue to the next screen.



## Welcome Screen

The **Welcome** screen will provide some basic information about **NotaryLoop**. To skip this screen in the future, click the **Skip Welcome Screen** option at the bottom of the screen. Click **Next** to continue.



## Login Screen

Existing users enter your **NotaryLoop** username and password and click **Next** to continue. To set up an account with **NotaryLoop** contact customer service via email or the number listed. Click **Next** to continue.

info@notaryloop.com'. At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'." data-bbox="524 111 852 311"/>

## Signing Services Screen

The **Signing Services** screen shows the following.

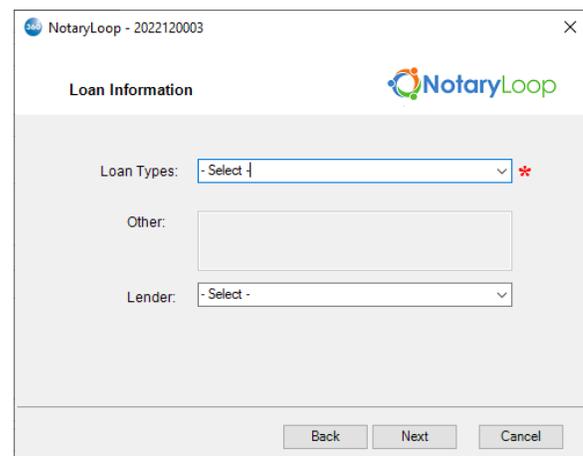
- Signing Services
  - Options are returned from NotaryLoop
  - This option is required
- Language
  - Options are returned from NotaryLoop
  - This option is required
- eSign Options
  - Options are returned from NotaryLoop
- Do you require Scanback?
  - This option is required



## Loan Information Screen

The **Loan Information** screen shows the following.

- Loan Types
  - Options are returned from NotaryLoop
  - This option is required
  - If Other is selected, then the Other text box will be enabled and is required.
- Lender
  - This value is pulled from the ProForm Order displaying loans (up to 5).
  - Lender will display as follows.
    - Lender Name Loan Number Loan Amount



## Closing Information Screen

The **Closing Information** screen shows the following.

- Appointment Date
  - This value is pulled from the Settlement Date of the ProForm Order
  - This date must be today's date or in the future
- Appointment Time
  - This value is pulled from the Settlement Date of the ProForm Order
- Closer to Set Time
  - Check this box if the Appointment Time should be set by the notary
    - Note – Updating this time will not update the time in the ProForm Order
- Property Address
  - This value is pulled from the 1<sup>st</sup> property listed in the ProForm Order
- City, State, Zip
  - These values are pulled from the 1<sup>st</sup> property listed in the ProForm Order
  - City, State, Zip are required fields
- County
  - This value is pulled from the 1<sup>st</sup> property listed in the ProForm Order

The screenshot shows a window titled "NotaryLoop - 2022120003" with a close button in the top right. The main heading is "Closing Information" with the NotaryLoop logo. The form contains the following fields and controls:

- Appointment Date: A date picker showing "12/09/2022".
- Appointment Time: A time picker showing "12:00:00 AM" and a checked checkbox labeled "Closer to Set Time".
- Property Address: A single-line text input field.
- City, State, Zip: Three separate input fields for city, state, and zip code, each with a red asterisk indicating it is a required field.
- County: A single-line text input field.
- Navigation buttons: "Back", "Next", and "Cancel" buttons at the bottom.

## Signer Information Screen

The **Signer Information** screen will show the primary Signer Information and Secondary Signer / Spouse Information for the closing. **NOTE: If there are additional buyers / borrowers, they can be entered in the special instructions field on an upcoming screen.**

The screenshot shows a window titled "NotaryLoop - 2019110013" with a close button in the top right. The main heading is "Signer Information" with the NotaryLoop logo. The form is divided into two sections:

- Primary Signer Information:**
  - Name: "Bob Buyer"
  - Home Phone: "(919) 456-1234" | Cell Phone: "(919) 555-1122"
  - Work Phone: "(919) 555-3344"
- Secondary Signer / Spouse Information:**
  - Name: (empty field)
  - Home Phone: "( ) - - - -" | Cell Phone: "( ) - - - -"
  - Work Phone: "( ) - - - -"
- Navigation buttons: "Back", "Next", and "Cancel" buttons at the bottom.

## Location and Contact Screen

The **Location and Contact** screen shows the closing location address and county. These are required fields. Users can also enter after hours contact information for the loan officer. Click **Next** to continue.

NotaryLoop - 2022120003

### Location and Contact

Closing Location Address

Street Address: 123 South Maple Street

City, State Zip: Maryville TN 37863

County: Blount

Property Address:  Check if closing location is same as property address

Mortgage Information

After Hours Contact: Keith Edmonds

After Hours Contact Number: (865) 712-5543

Back Next Cancel

## Documents To Deliver Screen

The **Documents to Deliver** screen allows the user to select the document(s) that are to be delivered to **NotaryLoop**. The user may select **Browse** to attach documents from any location, **Attachment** to choose documents from the SPImage directory within ProForm, or **ReadyDoc** to attach ProForm ReadyDocs. The **Rename** button will rename the document in the document package window. The **Delete** button will delete the document from the list. Click **Next** to continue.

NotaryLoop - 2019090012

### Documents To Deliver

Documents in this package:

Browse

Attachment

ReadyDoc

Rename

Delete

Back Next Cancel

## Document Return Screen

The **Document Return** screen will show the return address where the documents should be sent. You can select to return the documents using your default shipping information that is on file with **NotaryLoop**, or to provide a shipping label, or to enter your shipping information as special instructions on the next screen. Enter the items to be collected at signing and click **Next** to continue.

NotaryLoop - 2022120003

### Document Return

Document Return Address:

Name: SoftPro Settlement Services

Address: 4800 Falls of Neuse Road

City, State, Zip: Raleigh NC 27771

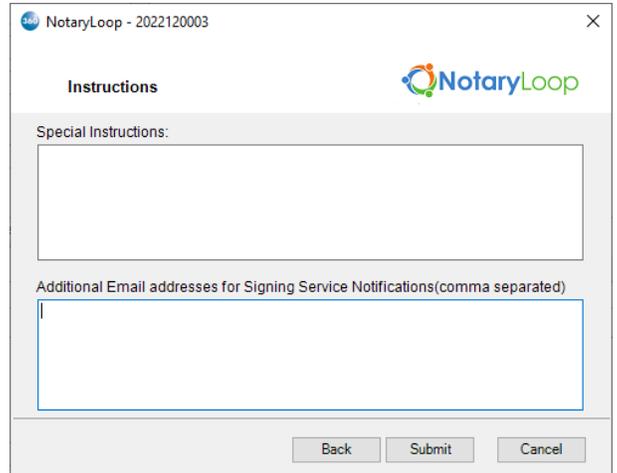
Document Delivery Type: Mailed via carrier Service (USPS/FedEx/UPS/ETC)

Items to be collected at the signing:

Back Next Cancel

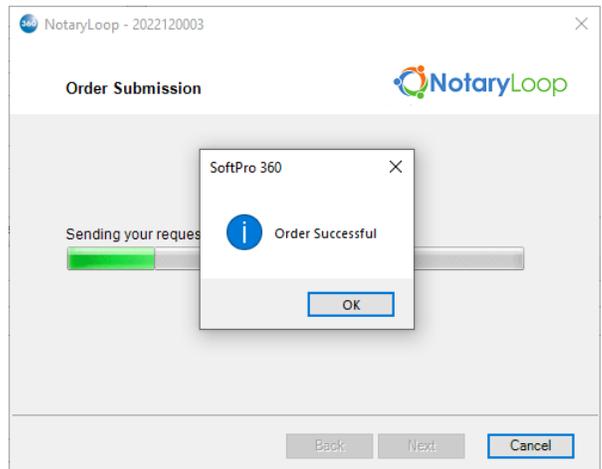
## Instructions Screen

The **Instructions** screen will allow users to enter any special instructions and additional email addresses for notifications to be sent to. Click **Submit** to send your order to **NotaryLoop**.



## Order Submission Screen

Once the transaction has been successfully submitted to **NotaryLoop**, the **Order Status** screen will show a successful message. Click **OK** to complete the submission process.

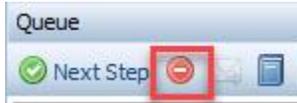


The transaction will now show in the **SoftPro 360** queue with an **"In Progress"** status.

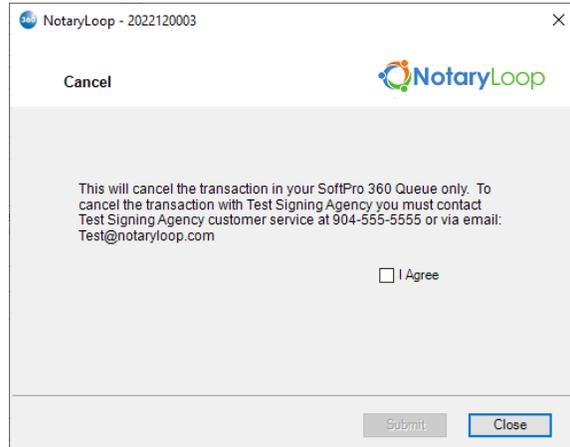
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Transaction Number
NotaryLoop	Signing Service	In Progress	2016040030	Default	Sawyer Hill	5/2/2016 2:28 PM	410060-70-160502-000791

## Canceling a Transaction

The user may cancel a **NotaryLoop SoftPro 360** transaction. To do so, highlight the transaction in the **SoftPro 360** queue and click on the **cancel** icon



The user will see the following dialog box.



Select **"I Agree"** and click submit to cancel the transaction in **SoftPro 360**. **Note: This will not cancel your transaction via NotaryLoop. You must contact the signing service directly to cancel the transaction.**

## Completing a Transaction

Once the closing has taken place, NotaryLoop will update the transaction status to **"Completed"** in the **SoftPro 360** queue.

A screenshot of the NotaryLoop queue interface showing a table of transactions. The table has columns for Provider, Service, Status, Linked Order, Linked Profile, Created By, Created On, Completed On, and Description. One transaction is highlighted with a green checkmark in the Provider column.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
NotaryLoop	Signing Service	Completed	2016050340	Default	Shefali Nigam	5/9/2016 9:01 AM	5/9/2016 11:10 ...	Title Processing Center, LLC : 05/09/2016