NotaryBerry Notary Guide

Online guide: https://notaryberry.com/resources/notaries

Updated September 15, 2026 · Notary web portal

This guide covers account approval, daily availability, invitations, session preparation, notarization, journals, recordings, and earnings. The notary workspace is in the browser; the iOS app is the customer app.

In this guide

1. Before applying

Confirm your commission and any required remote-online authorization with your commissioning authority before offering sessions. Platform approval does not replace that authorization. Use the NASS state notary directory to find your state's official information. Requirements differ by jurisdiction; this guide explains platform use rather than granting authority for a notarial act.

- Prepare your commission information and expiration date, professional contact details, digital certificate, seal, and any insurance or bonding information required for your account.
- Have access to your email and authenticator. Use a camera, microphone, stable connection, and a private workspace suitable for reviewing client documents.
- Keep your certificate file and its password available for setup, but never share them in a support message.

2. Register and obtain approval

1. Choose notary signup, enter your email and password, and follow the verification email.

2. Complete the six profile steps: photo, legal name, personal details, home address, commission details, and agreements. Use Previous to review earlier answers before continuing.
3. Review the agreements and required attestations, then complete the offered identity questions and document/selfie verification. Follow the displayed attempt limits and timer. When the final application step appears, select Submit application and acknowledge the submission result; closing the page before that step does not submit the application.
4. Watch for the approval email. If your account is pending, wait for review or contact support with the application email; creating another account will not complete the first application.
5. Sign in after approval and complete MFA and any remaining account requirements.

Use a current authenticator code for protected actions. If another session is active, review the session confirmation before continuing on this device.

3. Finish account, certificate, and payout setup

1. Open **My Account** and verify your legal name, contact address, commission state, number, and expiration date.
2. Upload your digital seal. In **Digital Certificate**, use **Choose file** or **Replace file** to provide the requested certificate file and password. A public certificate image or a PDF of the certificate is not the private-key file needed for digital signing.
3. Complete state-specific attestations under Commission, then the coverage, bond, and certificate fields under Insurance & bond. Florida requirements appear when Florida is selected as the commission state.
4. Finish the payout-account setup offered by the portal and check its status after returning from the payment provider.
5. Save, review the confirmation, and wait for success. Reopen the account to check the saved details and previews.

If you use IdenTrust, its certificate export instructions explain exporting a certificate in PFX/P12 form. Confirm the certificate and issuing provider meet your commissioning requirements.

For a certificate replacement, choose Replace file, select the PFX/P12 file, enter its password, and review the certificate confirmation. A rejected password leaves the saved certificate in place; select the file again to retry. A file preview is not a completed save, and an uploaded certificate alone does not make an account ready. Follow each missing-requirement message before accepting work.

4. Manage signatures and statement templates

In **My Signature # Manage**, choose an electronic font or pen signature, review its affirmation, and select **Add Signature**. Confirm and verify the saved preview. Use the delete control only for the signature you intend to remove.

1. Open **Documents** from your account menu and choose **Register New Notarial Statement**.
2. Select the notarial act and upload its PDF template. Use a readable statement appropriate to your commission and the act. The template page lists the content to prepare.
3. Register the template and wait for the save confirmation. Open its list entry to inspect the preview or download it.

4. Use deletion only when you intend to remove that template; cancel the confirmation to leave it in place.

Templates are reusable statements, not already completed notarizations. Do not upload a previously signed output as a blank template. Select the appropriate act and review the actual session document before use.

5. Use the dashboard and availability control

Use Dashboard, Calendar, and Journals in the header to move between work areas. The dashboard shows your active and upcoming work before available requests. The availability switch and its instructions sit above the request queues. Complete account requirements first, then turn availability on only when you are ready to respond to instant work. Keep the dashboard available while waiting and turn availability off when you step away.

Review a request's document, time, and offered action before accepting. Acceptance may fail if another notary accepted first, your schedule conflicts, or the request changed. Refresh the list and use its current state rather than repeatedly submitting the old action.

Availability does not guarantee a match. Scheduled work remains subject to client confirmation and readiness. On a phone, expand a row to see all details and controls.

6. Read the calendar and request status

Use **Calendar**, choose the month range, and select **Search**. Category buttons filter the sessions; open the client/session link for details. Check the displayed local time and time zone before preparing a session.

Waiting Confirmation / Action Required
Open the detail and complete the specific response shown. Do not assume the signer has confirmed.

Scheduled
Review the document and return when preparation or entry is offered.

Awaiting Signer Response
An invitation is waiting for its recipient to complete the required steps.

In Progress
Use the existing session's entry/recovery action and check participant presence.

Pending Payment
Review the completed session state. Do not perform another notarization solely to recover its payment.

Completed
Check the journal and use the records/earnings views as needed.

Canceled / Expired / ID Verification Failed
Read the reason. These are not completed notarizations; use the allowed follow-up or arrange a new session when appropriate.

7. Invite clients and additional signers

1. Open the private-session invitation form from the dashboard.

2. Enter the client email and the proposed date, time, and time zone. Follow the minimum scheduling window and resolve any conflicting reservation.
3. For multiple recipients, use a distinct email for each person. Review any instant option separately from the scheduled reservation.
4. Review the confirmation and send. Wait for success and check the invitation in your requests /calendar.

The recipient must sign in or register using the invited email and complete the required document, account, payment, and identity steps. A sent invitation is not yet a completed request. Each additional signer verifies independently.

Use resend or cancel only when the invitation's current actions offer it. A schedule that became too close while you were reviewing needs a later eligible time before submission.

8. Prepare the session

Open an accepted request from its customer-name link. If confirmation is pending, the page explains what the customer needs to do. Select the document name to preview it within the session page, then close the preview to continue preparation.

1. Open the request detail, inspect the uploaded document and statement answers, and confirm you can perform the requested act.
2. Select the required notarial act or statement and complete any document-preparation fields before creating the room.
3. Check signer confirmation and verification status in the inline preparation panel. Additional signers must complete their own required steps; one person's success does not cover the others.
4. Select Continue to session at the bottom of the notarial-statement card. The checklist opens below the card on this page. Once every signer is ready and the readiness checks finish, select Open meeting, then Open meeting in a new tab. Set up camera and microphone in the meeting.

If the document is wrong, arrange its correction while replacement is still available. If the session cannot proceed, use the offered cancel/requeue action and read the confirmation. Do not work around a missing readiness requirement by opening another room.

9. Conduct and finish the meeting

The meeting opens in a new browser tab. Keep the original session page open and use **Return to meeting** to switch back. If the tab is blocked, allow pop-ups for this site and select **Open meeting in a new tab**. When the meeting ends, return to the session page for the next step.

1. Confirm the intended participants are present and audio/video works. Complete the identity, willingness, and notarial procedures required for the act.
2. Confirm that the meeting is being recorded before performing the online notarization. Follow the recording controls shown in the meeting. If recording or participant access fails, resolve it before proceeding.
3. Review the document with the signer. Give the intended signer editing access when needed, then verify the completed signature fields.

4. Apply your statement, signature, seal, and digital certification through the provided workflow. Check the output and wait for the successful upload/certification result.
5. End the meeting through its end-session control and return to the journal/finalization screen. Closing your browser alone is not confirmation that the meeting completed.
6. Complete the required journal and check that the request advances to the expected completion /payment state.

If disconnected, reopen the same request promptly and use its available rejoin action. If a side remains absent, the session can end under its timeout rules. A meeting ending without successful certification is not a completed notarization. Contact support when the saved document, room state, and journal disagree.

10. Complete and maintain journals

Open **Journals** and resolve entries marked as needing attention. Use the current MFA code when asked, review the factual fields, and complete the required finalization information before confirming.

Completed journal facts are not an ordinary editable profile form. The **Notary Note** has its own save action; check the save confirmation after changing it. Contact support about an incorrect finalized fact rather than treating a note as a silent correction.

Open a journal by its date/time link. Use **Download Journal Entry** for the entry and the offered audit-document download for the audit record. They are separate from the client's signed PDF and from the video recording.

11. Download journals and recordings

1. Open the relevant journal. A recording may become available after processing; a completed journal does not mean the video is already ready.
2. Choose **View Recording**, read and accept the records/privacy notice, and complete fresh MFA if requested.
3. Check that the intended recording opens. If it is unavailable, note the session and time and contact support; do not infer that the recording is safely archived from the journal status alone.
4. For a bulk copy, choose **Download Journals & Recordings**, resolve any incomplete entries, read the notice, authenticate, and save the ZIP. Open it and verify the expected records.

> **Records responsibility:** NotaryBerry's stated policy requires session recordings to be securely retained for at least 10 years. Follow your commissioning authority's requirements and any applicable preservation obligation. Keep authorized exports secure and verify they are readable; portal access alone is not proof that every recording is present.

Share recordings and journal information only through an authorized process. The customer's signed-PDF window is different: those PDFs can be removed after confirmed saving or 72 hours after payment. It is not the recording-retention period.

12. Check earnings and payouts

Open **Earnings** from the account menu. Select **From month** and **To month**, then **Search**. Read the total sessions, gross revenue, monthly breakdown, and chart for that range. A blank range can legitimately show no completed results.

Save as PDF opens the browser's print flow. Review the preview, choose Save as PDF or the PDF save option, and select your destination. Canceling the print dialog leaves the earnings page available. Earnings totals are not a confirmation that money has arrived in your bank. Check payout status and provider details separately. If figures appear wrong, confirm the range and session completion /payment state before contacting support.

13. Maintain your account

Keep your commission, certificate, seal, contact information, and required insurance current. Update the certificate and seal when the underlying credentials change. Review any new state-specific requirements after changing commission information.

Use the account's edit/upload control, select the replacement, complete required confirmations, and save. Wait for success and reopen the account or protected download to check the replacement. Certificate of Insurance has a separate file selector; verify its saved filename and Download link after saving. If validation fails, correct the reported file or password; do not repeatedly delete and re-upload your existing credentials.

For password recovery use the sign-in recovery action. For lost MFA access, sign out and use **Regenerate multi-factor authentication** during sign-in. Keep certificate passwords and MFA codes out of support messages.

14. Troubleshooting and support

No available work

Check readiness and availability. Keep the dashboard open when accepting instant work; demand and matching availability vary.

Invite or acceptance rejected

Check recipient addresses, schedule, and current request status. Resolve highlighted fields and review the confirmation again.

Certificate rejected

Confirm the correct private-key file, password, identity/commission details, and validity. Use the provider's export instructions if needed.

Protected download asks for MFA again

Use a fresh code after reading the consent. Do not keep retrying an old recording link.

Journal or recording missing

Check the correct session and completion state, then contact support with its reference and approximate time. Do not claim that a missing record was retained.

Page or save appears stale

Wait for its result, reopen the same record, and verify the saved values. If your session expired, sign in again before continuing.

Use **Contact Us** or support@901ers.com. Include the session/reference, date and time zone, visible error, browser/device, and action attempted. Do not attach passwords, private keys, MFA codes, identity documents, or recordings to an ordinary support message.