



COORDINATORS, CLOSERS AND OFFICE MANAGERS

NotaryBoard guide for title agencies

How to set up your agency, invite your notaries, read the availability board, send signing requests and keep track of every signing.

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1. What NotaryBoard does for you

NotaryBoard shows you which of your notaries are free before you pick up the phone. Each notary connects their calendar, and you see when they're busy. You never see what they're doing.

When you have a signing, you send it to one notary or to several at once. The first to accept gets it, and a hold goes on their calendar automatically. Everyone else is told it's covered.

NotaryBoard doesn't supply notaries. You invite the notaries you already work with, and it's free for them.

TITLE AGENCY

- Availability
- Notaries
- Requests
- Offices
- Team
- Billing
- Help
- Summit Title & Escrow

Free trial: 14 days left, with full access to every feature. [Choose a plan](#)

Availability

4 ON ROSTER

You're all set

Your workspace is fully configured.

- ✓ Add an office location
- ✓ Invite a notary
- ✓ Get a notary connected
- ✓ Send your first signing request

Your notaries' real free/busy for the week ahead — you see **when** they're booked, never what they're doing.

All states

Filter by county...

Sep 30 – Oct 6

Free

Booked

Signing hold

Requested, awaiting answer

Notary	WED 30	THU 1	FRI 2	SAT 3	SUN 4	MON 5	TUE 6
Dana Brooks NJ · Bergen, Passaic	Free	11:00 AM - Whitaker Refinance	10:00 AM - requested by Alex 11:00 AM - 12:00 PM	1:00 PM - requested by Jamie 11:00 AM - 12:00 PM	11:00 AM - 12:00 PM	Free	Free
Maria Lopez NJ · Essex, Hudson	Free	9:00 AM - 12:30 PM 1:30 PM - 5:00 PM	9:00 AM - 12:30 PM 1:30 PM - 5:00 PM	1:00 PM - requested by Jamie 9:00 AM - 12:30 PM 1:30 PM - 5:00 PM	9:00 AM - 12:30 PM 1:30 PM - 5:00 PM	Free	Free
Sam Patel NJ · Union, Middlesex	Free	2:30 PM - Alvarez Refi Closing	3:00 PM - 4:00 PM	1:00 PM - requested by Jamie	Free	Free	Free
Taylor Reed NJ · Morris, Essex, Passaic No calendar connected	Free	Free	3:00 PM - requested by Alex	Free	Free	Free	Free

Live free/busy from connected calendars, judged against 8am–8pm local. Page forward up to ~8 weeks — as far ahead as calendars are synced. Notaries without a connected calendar show only their NotaryBoard signings.

Account

Your Availability page. The checklist at the top walks you through setup.

2. Your first 15 minutes

The checklist on your Availability page tracks these four steps. Each one takes a few minutes.

1. Add your office locations (Offices).
2. Invite the notaries you already use (Notaries).
3. Wait for at least one notary to connect.
4. Send your first signing request (Requests).

Rather have us do it? Click "Want us to set it up for you?" on your Availability page and send us your notaries, offices and staff. We'll build your board for you.

3. Add your offices

Offices are where notaries pick up and return documents, and where in-office signings happen. When you send a signing, you pick the office and the notary sees its address.

1. Open Offices in the sidebar.
2. Enter the office name and full address.
3. Tick "Make this the primary office" for the one you use most. It's picked for you on new requests.
4. Click Add office. Repeat for each branch.

More than one branch is an Agency plan feature (\$299/month). It's included while you're on your free trial.

Your title agency's office locations — used as the pickup / drop-off point on signing requests.

Add an office

Your pickup / drop-off locations. When you send a signing that needs document pickup, you'll choose which office — and the notary sees the address.

OFFICE NAME

Newark HQ

ADDRESS

120 Broad St, Newark NJ

☐ Make this the primary office

Add office

YOUR OFFICES

Morristown

PRIMARY

10 Park Place, Morristown, NJ 07960 · 2 signings

Remove

Red Bank

25 Broad Street, Red Bank, NJ 07701 · 1 signing

Set primary

Remove

Multiple branches are an Agency-plan feature — included free while you're on trial. (Address geocoding + drive-time estimates come with the maps integration.)

4. Invite your notaries

Your board only shows notaries who have connected with your agency. There are two ways to connect them.

1. By email: on Notaries, type the notary's email and click Send invite. If they're already on NotaryBoard, they get a request to connect. If not, we email them an invitation to join. Either way, they land on your roster once they accept.
2. By code: copy your connect code (or the invite link) and send it to your notaries. They enter it on their profile, and the request shows up under Pending for you to approve.

Connected shows everyone on your board. Pending shows invites and requests still waiting. The Starter plan connects up to 10 notaries. Pro and Agency are unlimited.

Invite the notaries you work with and manage your roster. Connected notaries appear on your availability board.

Invite a notary

Enter a notary's email. If they're on NotaryBoard they get an invite to connect; if not, we email them to join — either way they land on your roster once they accept.

Send invite

Or let notaries reach out to you — share your **connect code**. They enter it on their profile to request a connection you approve.

98FG59

Copy codeCopy invite link

Connected (4)

Pending (0)

Taylor Reed

taylor.reed+clerk_test@example.com · NJ · Morris, Essex, Passaic

NO CALENDAR YET

• CONNECTED

Remove

Sam Patel

sam.patel@example.com · NJ · Union, Middlesex

• CONNECTED

Remove

Maria Lopez

maria.lopez@example.com · NJ · Essex, Hudson

• CONNECTED

Remove

Dana Brooks

dana.brooks@example.com · NJ · Bergen, Passaic

• CONNECTED

Remove

5. Read the availability board

The board shows every connected notary for the week, one row each. It's judged against 8 AM to 8 PM in your time zone.

1. Free (green): nothing on their calendar that day.
2. Booked (tan): busy blocks from their calendar, with the times shown.

3. Signing hold (solid gold): a signing your agency sent that the notary accepted, with the time and the signing's name.
4. Requested, awaiting answer (dashed gold): a request your agency sent that the notary hasn't answered yet, with the coordinator who sent it.

Filter by state or type a county to see only the notaries who cover it.

Use the arrows to page forward, up to about eight weeks.

"No calendar connected" under a name means the board only knows that notary's NotaryBoard signings. Check with them before assuming they're free.

If a notary also works for another agency on NotaryBoard, that agency's signings show here only as busy time. You never see their details, and they never see yours.

All states

Filter by county...

◀

Sep 30 – Oct 6

▶

Free

Booked

Signing hold

Requested, awaiting answer

Notary	WED 30	THU 1	FRI 2	SAT 3	SUN 4	MON 5	TUE 6
Dana Brooks NJ · Bergen, Passaic	Free	● 11:00 AM - Whitaker Refinance	○ 10:00 AM - requested by Alex 11:00 AM–12:00 PM	○ 1:00 PM - requested by Jamie 11:00 AM–12:00 PM	11:00 AM–12:00 PM	Free	Free
Maria Lopez NJ · Essex, Hudson	Free	9:00 AM–12:30 PM 1:30 PM–5:00 PM	9:00 AM–12:30 PM 1:30 PM–5:00 PM	○ 1:00 PM - requested by Jamie 9:00 AM–12:30 PM 1:30 PM–5:00 PM	9:00 AM–12:30 PM 1:30 PM–5:00 PM	Free	Free
Sam Patel NJ · Union, Middlesex	Free	● 2:30 PM - Alvarez Refi Closing	3:00 PM–4:00 PM	○ 1:00 PM - requested by Jamie	Free	Free	Free
Taylor Reed NJ · Morris, Essex, Passaic No calendar connected	Free	Free	○ 3:00 PM - requested by Alex	Free	Free	Free	Free

Gold = accepted signing. Dashed gold = request sent, no answer yet.

6. Send a signing request

1. Open Requests. The new signing request form is at the top.
2. Pick who to send it to. Filter by county to narrow the list. Pick one notary, or several to send it to all of them at once. The first to accept wins.
3. Add the signing title and order or escrow number (notaries need it to bill).
4. Set the date, time and length.
5. Choose where it happens: at the signer's location (type the address) or at one of your offices.

6. Choose how documents are handled, such as pick up and return to the office, print eDocs and ship back, or remote online (RON). Pick the office for pickup or return when asked.
7. Add notes for the notary if needed: page count, witnesses, scanbacks.
8. Optionally tick staff to copy on the confirmation (see below).
9. Click Send request. Notaries get it by email right away, and by text on Pro and Agency if they've added a mobile number.

If a notary you picked already has a request from your agency waiting for an overlapping time, you'll see a heads up with who sent it. You can still send.

Sending to several notaries at once, and text alerts, are on the Pro (\$129/month) and Agency plans.

New signing request

SEND TO

🔍 Filter by county or state...

4 of 4

Select all

Dana Brooks

NJ · Bergen, Passaic

Maria Lopez

NJ · Essex, Hudson

Sam Patel

NJ · Union, Middlesex

Taylor Reed

NJ · Morris, Essex, Passaic

SIGNING TITLE

Refi closing — Martinez

ORDER / ESCROW NUMBER

e.g. 2026-04821

DATE & TIME

mm/dd/yyyy, --:-- --



DURATION (MIN)

60

WHERE IS THE SIGNING?

Signer's location

At our office

LOCATION

Street, City, State

DOCUMENT HANDLING

Pick up & return to office

PICKUP OFFICE

Morristown (primary)

NOTES FOR THE NOTARY

Page count, witnesses, scanbacks, RON ok, etc.

CC STAFF ON CONFIRMATION (OPTIONAL)

Sales reps or processors who should get the confirmation email with a calendar invite once a notary accepts.

Jordan Lee



Name

email@yourcompany.com

Add staff member

Send request

7. Keep track of your requests

Every coordinator at your agency sees every request under Sent requests, newest first.

1. Pending: sent and waiting. "Seen by 2 of 3" tells you how many notaries have opened it.
2. Accepted: shows who took it and how fast. "Hold on their calendar" means it's on the notary's own calendar too.
3. Cancelled: you withdrew it. The notary is told and the hold comes off their calendar.
4. Requested by: which coordinator sent it, so nobody asks the same notary twice.

Edit a pending request to change the details. The notaries get the update.

Cancel a pending request, or cancel an accepted signing, with the buttons under it.

Only one notary can accept. If two tap Accept at the same moment, the second is told it's already covered.

SENT REQUESTS

Whitaker Refinance

ORDER #2026-05141

• ACCEPTED

MASS

EDocs / SHIP

Thu, Oct 1, 11:00 AM EDT · 90 Elm St, Summit, NJ 07901 · 60 min · Requested by Alex Morgan

Accepted by **Dana Brooks** in **under a minute**

Cancel signing

Castillo Purchase

ORDER #2026-05133

PENDING

RETURN TO OFFICE

Fri, Oct 2, 3:00 PM EDT · 301 Main St, Chatham, NJ 07928 · 60 min · Requested by Alex Morgan

Sent to **Taylor Reed**

Sent ✓ · Seen by 0 of 1 · Awaiting first accept

Edit

Cancel

Brennan Seller Package

ORDER #2026-05090

CANCELLED

RETURN TO OFFICE

Sun, Oct 4, 4:00 PM EDT · 7 Harbor Rd, Red Bank, NJ 07701 · 45 min · Requested by Alex Morgan

Sent to **Maria Lopez**

Okafor Refinance

ORDER #2026-05117

PENDING

MASS

EDocs / SHIP

Sat, Oct 3, 1:00 PM EDT · 12 Orchard St, Montclair, NJ 07042 · 60 min · Requested by Jamie Chen

Sent to 3 notaries — Dana Brooks, Maria Lopez, Sam Patel

Sent ✓ · Seen by 2 of 3 · Awaiting first accept

Edit

Cancel

Nguyen Purchase

ORDER #2026-05102

PENDING

RETURN TO OFFICE

Fri, Oct 2, 10:00 AM EDT · 48 Maple Ave, Ridgewood, NJ 07450 · 60 min · Requested by Alex Morgan

Sent to **Dana Brooks**

Sent ✓ · Seen by 1 of 1 · Awaiting first accept

Edit

Cancel

Alvarez Refi Closing

ORDER #2026-04871

• ACCEPTED

RETURN TO OFFICE

Thu, Oct 1, 2:30 PM EDT · Union, NJ · 60 min · Requested by Alex Morgan

Accepted by **Sam Patel** in **under a minute**

Cancel signing

8. Copy staff on confirmations

Sales reps and processors often need to know when a signing is set, without logging in. Add them as staff.

1. In the request form, under "CC staff on confirmation", type their name and email and click Add staff member. They're saved for next time.

2. Tick the staff who should hear about this signing.
3. When a notary accepts, each ticked person gets a confirmation email with a calendar invite. If the signing is cancelled, they get a notice that removes it.

Staff don't use a seat and never need a login.

9. Add your team

Coordinators who send signings need their own login. Everyone on your team shares the same board, notaries and requests.

1. Open Team.
2. Open Members and click Invite. Enter their email.
3. They get an email, sign up, and land inside your agency.

Seats: Starter 2, Pro 5, Agency 10 and up. The top of the Team page shows how many you've used.

Invite the coordinators who dispatch signings with you. Everyone on your team shares the same availability board, roster, and requests.

- Your Agency plan includes 10 seats — 9 still available.

Organization

Manage your organization.



General



Members

General

Organization Profile



Summit Title & Escrow

Update profile

Leave organization

Leave organization

Delete organization

Delete organization

Secured by  clerk

10. Your trial and billing

Every agency starts with a 14-day free trial with every feature and no credit card. A banner shows the days left.

Choose a plan any time under Billing: Starter \$39, Pro \$129 or Agency \$299 a month. You can cancel from the same page.

- Free trial — 14 days left. You have full access to every feature; pick a plan any time to continue after it ends.

STARTER

\$39/mo

For a small title office getting started.

- ✓ 2 seats
- ✓ Up to 10 connected notaries
- ✓ Live availability board
- ✓ Single signing requests
- ✓ Email notifications

Choose Starter

PRO

\$129/mo

For busy agencies dispatching every day.

- ✓ 5 seats
- ✓ Unlimited notaries
- ✓ Mass requests to filtered pools
- ✓ SMS notifications
- ✓ Everything in Starter

Choose Pro

AGENCY

\$299/mo

For multi-branch operations.

- ✓ 10+ seats
- ✓ Multiple office branches
- ✓ Unlimited notaries
- ✓ Everything in Pro

Subscribe to Agency

Your trial

CANCEL

You're on a free trial — no card on file, so there's nothing to cancel. It ends in 14 days and won't charge you. Once you subscribe, you can cancel anytime from here.

11. Getting help

Click Help in the sidebar, or email support@notaryboard.io. A real person answers.

Updated September 30, 2026. Screenshots show a demo agency with made-up people and addresses. Online version and help: notaryboard.io/help · support@notaryboard.io