



Let's Get Started with

# Astrean Academy

## **Before you start, here's some helpful hints:**

- Once you've created your personalized Astrean URL... never look back. Only use that URL for all your account needs from here on out.
- If you can't find a way to exit out of a pop-up, simply click on the screen anywhere the pop up is not. That should exit out of it for you.
- If while you're navigating through Astrean and you have a question - remember, we are always here to help! Click on the green question mark in the bottom right-hand corner and chat with us. We will do our best to get through this, together!



## Signing up an organization

So, you've decided Astrean is the best tool for your remote online notarization business... GREAT! We think you're going to like what you see... Let's get started!

First, visit [www.Astrean.com](http://www.Astrean.com) and click the button "Get Started". Navigate to "don't have an account." Fill in your Email Address, Phone Number (hint\* this should be your cell number, as we'll text you a verification code), and Password. There's a few terms and conditions to read over when you're in the mood and then you're ready to "Sign Up". You will be texted an Astrean token almost immediately. Enter that in, then confirm.

Now, it's on to some quick details to personalize your account: Enter in your Job Title, Company Address, and Company Phone Number, then submit! You're almost finished.

**One more critical step.** Time to input your Organization Name. This is extra important as this will determine your personalized Astrean URL from here on out. For example: "AmazingCompany.Astrean.com" or "Love.Astrean.com " Don't worry – you can check to be sure your organization hasn't already been used. Try it out!

Once you've got your name, re-enter your email address and credit card info. You'll be verified then! Now, head on over to your personalized Astrean URL ([yourselection.Astrean.com](http://yourselection.Astrean.com)) and invite your team to join.





## Inviting team members to join

This is the easy part. All you have to do is share your personalized Astrean link (yourselection.Astrean.com) with your team. Your team will just need to click on “Don’t have an account? Sign Up”. They’ll enter in an Email Address, Phone Number (reminder – tell them to use their cellphone) and Password. Yeah... they have to read the terms and conditions too! But after that, they are all set!

**Requesting to be a Notary:** If your admin doesn’t assign you to be a notary – this is what you’ll want to do. Login into your personalized Astrean account. On the upper right-hand corner, click on the white and green person icon and select “Become a Notary”. Click fill in the appropriate information and click the submit or apply button (depending on your state).

Now is when it gets really cool! Time to verify you’re who you really say you are. Fill out the form that pops up, entering your First Name, Last Name and Date of Birth (hint\* an actual birthday with the correct year – not just what you tell people is required... we will check this!). Then, upload a pic of the front side of your driver’s license and a selfie. Click “Confirm”. We’ll take it from there! If you are who you say you are, you’ll get this note, letting you know you’re all set: Successfully Submitted Notary Application.

If this process doesn’t work, it’s best you check with your admin and have them assign you. This process can only be attempted one time.





## Assigning appropriate permissions

Within your personalized Astrean URL, enter in your Email and Password. Head on over to the menu dropdown – you’ll find this by clicking on the “Hamburger Icon” in the top left corner. Select “Admin”. All of your team members that have signed up within your personalized Astrean URL will be listed here. You can disable them if you don’t want them to have access, make them a co-admin, or if they are a notary, just flip the switch. We’ve really made it that easy!





## Request an online notarization

On the main dashboard within your personalized Astrean account, you'll see the big green button under the flashing red one, labeled "Request Notarization". Click that, and give your document a name, identify the document type (hint, it's likely a PDF), choose your file to upload and "Confirm". You'll get a pop-up letting you know that you've done everything right. You can click anywhere on the screen to exit the request.

At this point, it's helpful to verify a few necessary pieces of information. If the "Photo ID Verification" is not selected, this is a step that needs to be completed. Easily done with Astrean! Click on the "Verify" button to select an option... You can either select a previous verification (if you have one) or start fresh if you're a newbie.

### **Here's the steps for a newbie:**

Let's verify you are whom you say you are. Fill out the form that pops up, entering your First Name, Last Name and Date of Birth. Then, upload a pic of the front of your driver's license and a selfie. Lastly, click "Confirm". We'll take it from there! If you are who you say you are, you'll get this note, letting you know you're all set: Successfully Submitted Notary Application.

### **If you've done this before, just select "Use Previous" and pick one.**

If you've done this before, select that identify verification from the list and click "Confirm" to move to the next step! You'll get a pop up confirming everything went through. Click anywhere on the screen to exit the pop-up. Helpful hint: don't be alarmed if the button doesn't show it's completed right away - simply refresh your screen and it will be updated!





## Schedule an online notarization

Within your personalized Astrean account, click on the “Schedule Notarization” on the green header. Then select the green “Schedule Notarization” button. Pick your date and time slot.

Note, you can only select times on the hour or every half hour.

Once you click “Next” you’ll be brought to a familiar screen. Give your document a name, identify the document type (likely a PDF), choose the file to upload and click “Next”. Once everything looks good, you can click “Schedule”.

We know what you’re thinking now... Yes, the popup is still up but you saw it scheduled in the background. Just click anywhere on the screen outside of the box, and you’ll be all set!

Remember, it’s best to complete the KBA and Verification process now too - so when it’s time to sign, you’re ready!





## The RON (remote online notarization) process

Within your personalized Astrean account, the notary can go to the upper right-hand corner and click on the “Notary Dashboard”. Accept the pending notarization. Now, both the notary and the signee are ready to go into the video call by clicking on the “Enter Video Call” button.

Once both parties are in the video chat, the users will need to be verified. After verification is complete, click on the “Sign Document” button. Agree to the terms and walk through the signing steps. Attach your Notary Seal and Short Form Certificate too. Sign below the video chat in the “E-signature Section” to complete the process.

All your historical documents will be easily accessible with your within your dashboard:

For users - download the documents when you need

For notaries - add any notes that might be beneficial moving forward.

Viola! You’ve completed an easy-to-use, legally binding, safe, secure online notarization.

