

Let's Customize Your New Notary Site

Congratulations on becoming a notary! The SimplySchedule.me team is excited to help you start your new career with a professional and easy-to-use website and scheduling tool.

The website template you've been given will do most of the heavy lifting for you. Read through the pages and adjust the wording however you like so it sounds like you.

To help you out, here is a checklist of the personalizations you'll want to make to set up the scheduling tool and make the website your own.

General WordPress Site Customizations

- Site name (default is [YOUR NAME] Mobile Notary Service)
 - Dashboard → Appearance → Customize → Site Identity → Site Title and Logo Control → Site Title
- Site tagline (default is Book your mobile notary appointment)
 - Dashboard → Appearance → Customize → Site Identity → Site Title and Logo Control → Tagline
- Logo
 - Dashboard → Appearance → Customize → Header → Logo
- Site Icon
 - Dashboard → Appearance → Customize → Site Identity → Site Icon
- Social links in footer
 - Dashboard → Appearance → Customize → Footer → Social

Google Analytics - Site Kit

- From your WordPress Dashboard, click "Site Kit" in the left vertical navigation bar
- Check the box that says, "Connect Google Analytics as part of your setup."
- This will redirect you to Sign in with Google
 - Choose the Google account that you'd like to set up Google Analytics with
 - Next, Google will ask you to select the permissions you want to grant, "Select what Site Kit can access" → Use the "Select All" checkbox
- On the Site Kit setup screen:
 - For "Have Google verify site ownership" → click "Verify"
 - For "Turn on metrics in your dashboard" → click "Allow"
 - For "Set up Search Console" → click "Set up"
 - For "Set up Google Analytics" → click "Next"
- You'll be redirected back to the Site Kit plugin screen to "Connect Service"

- Use the account dropdown → select “Set up new account”
- In the “Create your Analytics account” page → click “Create Account”
- Choose the Google account that you’d like to set up Google Analytics with → click Continue on each screen
- On the “Google Analytics Terms of Service Agreement”
 - Click the checkbox, “I also accept the Data Processing Terms as required by GDPR. Learn more”
 - Click the checkbox “I accept the Measurement Controller-Controller Data Protection Terms for the data that I share with Google.”
 - Click “I Accept” → click “Go Back to Dashboard”

To visit your new Google Analytics account, use this URL: <https://analytics.google.com/>

To visit your new Google Search Console account, use this URL:

<https://search.google.com/search-console>

Appointments Plugin

- From your WordPress dashboard, click “Appointments” in the left vertical navigation bar
- Go into Settings
 - General Settings
 - Confirm/update the timezone for the location where you will be performing notarizations
 - Confirm your date and time format
 - Choose the day you want your week to start on
 - Enter your name for “Appointment Contact”
 - Enter your business name for “Business Name”
 - Enter your email for “Default Admin Email”
 - Google
 - Connect the Google account you want to be integrated with your appointment scheduler to sync bookings and check for conflicts.
 - Payments
 - Add your Stripe and/or PayPal account information so clients can pay for their first stamp/seal and for travel fees when they book their notarization
- Go into Appointment Types
 - For each appointment type check and customize:
 - Basics
 - Confirm appointment lengths (15 min default)
 - Availability
 - Set your usual availability hours (make sure your usual hours match what’s on your website’s “Contact” page.)
 - Scheduling Options

- Make sure the appointment timezone is locked
- Make sure the timezone listed matches the timezone the notarizations will take place in
- Confirm appointment buffer length before/after (30 min after buffer default)
- Confirm how much advance booking notice you want (18 hr default)
- Confirm how far in advance appointments can be booked (30-day default)
- Set up Payments and enter the amount the client should pay for one stamp/seal plus your travel fee within the service area of that appointment type
- Google Calendar
 - Sync the Google calendar you want these appointments to display on
 - Your synced Google calendar will also be used to check for schedule conflicts (Appointments will be bookable during the general availability hours you set. Within those hours, if your Google calendar shows that you're unavailable, that time slot will be excluded from the list of available appointment times shown to your notary clients when they're scheduling appointments)
- Customer Information
 - Check the default list of mandatory and optional questions the client will be asked to answer during booking. Add to/edit the list.
- Add more appointment types if needed. If you have more than 3 service area radiuses, you can:
 - Clone an existing appointment type of the same kind (jurat, acknowledgment, verbal oath/affirmation)
 - Update the name, instructions, payments, and customer information sections
 - Save
 - Make sure the service area information on your website matches the information in your appointments plugin

Website Homepage

About Me Section

- Replace [CITY OR AREA NAME] with your local service area, for example, San Francisco
- Replace the filler body text with some details you'd like to share about yourself.
- Change out the stock photo for a photo of you.

Services & Fees Section

- Adjust the base price (before travel) of each notary service if needed (default is set to \$15)

Service Area & Travel Fees Section

- Adjust the number of service area radiuses if needed
 - (If you set more than 3 service areas on your website, make sure you also add additional appointment types for each new area within the SSA calendar plugin so clients can book and pay for services in the new areas)*
- Adjust the travel fee pricing for each service area
- Add the zip codes or town names included in each area
- Update the general map location of the Google map so it shows your full service area or delete the map if you prefer

Why Choose Me Section

- Replace the filler body text with personalized professional details
- Consider replacing the 3 stock photos with graphics showing your certifications or professional memberships

Make An Appointment Section

- If you'd like clients to be able to call you, replace the default phone number with your professional phone number.
- If you don't want to share a phone number with clients, delete the info box with the phone number.

Website Services & Fees Page

Notary Services & Fees Section

- Adjust the base price (before travel) of each notary service if needed (default is set to \$15)

Service Area & Travel Fees Section

- Adjust the number of service area radiuses if needed
 - (If you set more than 3 service areas on your website, make sure you also add additional appointment types for each new area within the SSA calendar plugin so clients can book and pay for services in the new areas)*
- Adjust the travel fee pricing for each service area
- Add the zip codes or town names included in each area

- Update the general map location of the Google map so it shows your full service area or delete the map if you prefer

Make An Appointment Section

- If you'd like clients to be able to call you, replace the default phone number with your professional phone number.
- If you don't want to share a phone number with clients, delete the info box with the phone number.

Website FAQs Page

FAQ Section

- Read the template answers to each of the questions and adjust the answer if needed

Make An Appointment Section

- If you'd like clients to be able to call you, replace the default phone number with your professional phone number.
- If you don't want to share a phone number with clients, delete the info box with the phone number.

Website About Page

About Me Section

- Replace [CITY OR AREA NAME] with your local service area, for example, San Francisco
- Replace the filler body text with some details you'd like to share about yourself.
- Change out the stock photo for a photo of you.

Certifications & Memberships Section

- Update or delete the filler bracketed text below the "Certifications and Memberships" header
- Replace filler logos with the logos of your certifications and memberships (*you can decrease the number of images as needed*)
- If you don't want to highlight any certifications or memberships, you could delete this entire section for now

Website Contact Page

- If you'd like clients to be able to call you, replace the default phone number with your professional phone number.
- If you don't want to share a phone number with clients, delete the info box with the phone number.
- Update the "Notarization Hours" to reflect the days and times you are usually available for notarizations (this should roughly match your "Availability" settings in the SSA plugin)
- Update the social media links to your professional social profiles, change the icons, or delete them
- If you'd like to change any of the fields in the form section of the contact page, you can do so using the page editor and clicking into the form
 - You'll be able to view form submissions from your WordPress dashboard by clicking into "Form Entries"

Extra Website Options

- If you want to add testimonial/review blocks to any of your pages now or in the future, you can easily do so once you've received some good reviews on Yelp/Google.
 - On your WordPress dashboard, go to Appearance → Patterns, and you'll see two pre-built blocks that you can put into pages.

Note: *Please carefully read all the existing website template wording and update it as needed. SimplySchedule.me is not responsible for your published site's legal thoroughness and accuracy.*