

Prompting *Perplexity*

The plain-English playbook for using Perplexity as a research assistant — fact-checking, local law lookups, and always-current answers for your notary business.

Why this guide exists

Perplexity isn't a writing tool like Claude or ChatGPT — it's built for one job: answering questions with current, cited information pulled from the live web. For a notary, that makes it the right tool for a different kind of task: looking up state-specific notary requirements, checking a fact before it goes in a client email, or researching a referral source before you reach out.

Where Perplexity stands right now (mid-2026)

Perplexity runs on its own Sonar models by default — fast, web-connected, and built specifically to search and cite sources rather than just generate text from memory. Every answer comes with numbered citations you can click through to the original source. Pro plans let you point a question at a specific model (including Claude or GPT-4o) if you want a different writing style, but for research and fact-checking, the default Sonar model is exactly what you want — you don't need to touch the model picker for everyday notary use.

The three rules that make Perplexity actually useful

- Ask it questions you'd otherwise Google. "What are North Carolina's requirements for notarizing a Power of Attorney for a hospice patient" gets you a sourced, current answer instead of ten blue links to sort through yourself.
- Always click through at least one citation before you rely on the answer for anything client-facing. Perplexity is good, not infallible — treat it like a very fast research assistant, not a final authority on notary law.
- Use follow-up questions in the same thread. Perplexity keeps context, so "now summarize that in plain language for a client" works right after a research answer without you re-explaining anything.

Spaces and Pages: organize your research

If you're doing recurring research — say, staying current on NC notary law changes, or building a running file on local elder law attorneys — a Perplexity Space lets you keep related threads and files together instead of losing them in your chat history. Pages let you turn a research session into a clean, shareable summary document, which is useful if you ever want to hand a client or referral partner a one-page explainer.

Ten prompts you can copy today

01 1. State requirement lookup

"What are the current North Carolina requirements for notarizing a Power of Attorney when the signer is in a hospice facility? Cite your sources."

02 2. Fact-check before sending

"Confirm whether a notary in North Carolina can legally notarize a document for a signer who is bedridden but mentally competent, and cite the specific state statute."

03 3. Referral source research

"Give me a short summary of [elder law firm name]'s practice areas and recent news, so I can personalize an outreach email to them."

04 4. Local competitor scan

"Who are the mobile notary services currently operating in the Charlotte, NC metro area, and what do their Google reviews say they do well or poorly?"

05 5. Plain-language legal summary

"Summarize what a Healthcare Power of Attorney legally allows someone to do in North Carolina, in plain language for a family member, and cite your source."

01 6. Industry trend check

"What are current trends in mobile notary and remote online notarization (RON) adoption in the US in 2026? Cite recent sources."

02 7. Local event research

"Are there any upcoming senior health, caregiver, or elder law community events in the Charlotte, NC area in the next 60 days?"

03 8. Compare document requirements

"Compare the notarization requirements for a Power of Attorney versus an Advance Healthcare Directive in North Carolina — what's different?"

04 9. Build a one-page reference

"Turn this research thread into a clean one-page summary I can save for my own reference on hospice signing requirements."

05 10. Verify a claim before you repeat it

"Is it true that [claim you heard from another notary or read online]? Confirm with current sources before I repeat this to a client."

Mistakes that quietly waste your time

- Using Perplexity to write your marketing copy. It can, but it's not built for tone and voice the way Claude or ChatGPT are — use it for research, and take the facts it finds into your writing tool of choice.
- Skipping the citations. The entire value of Perplexity over a plain chatbot is the sourcing — if you're not checking at least the top citation, you're not getting what you paid for.
- Treating one search as final. For anything that touches legal requirements, run a second, differently-worded query to see if you get a consistent answer before you rely on it.
- Forgetting it can't replace your attorney. Perplexity can help you research and understand notary law faster, but it doesn't replace confirming anything ambiguous with an actual attorney or your state's notary division.

Quick reference

TASK	PROMPT STARTER
State law lookup	"What are [state]'s requirements for...? Cite your sources."
Fact-check	"Confirm whether... and cite the specific source."
Referral research	"Give me a summary of [firm/person]'s recent activity and focus areas."
Plain-language legal summary	"Summarize what [document] legally allows, in plain language, with a source."
Local research	"Are there any upcoming [event type] in [city] in the next [timeframe]?"

Want a done-for-you prompt library built specifically for your notary business?
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