Logo, company name

Description automatically generated

Sertifi epayments for Amadeus Sales & Event Management – Advanced

Customer Check List

Sertifi Support Center: [Support Center](https://support.sertifi.com/Content/Home.htm)

**☐ Send the property names and logos to your Sertifi Customer Success Manager**

**☐ Choose a Payment Gateway**

* If you don’t currently have an eCommerce merchant ID (MID) set up, work with your Customer Success Manager to determine which [Payment Gateway](https://support.sertifi.com/Content/Payments/Sertifi%20Payment%20Gateways.htm?Highlight=payments) is best.
* Contact your Finance group, and then request that they contact your merchant services provider, also known as your payment processor, for a new eCommerce MID.
* If you have an eCommerce MID set up, see our supported [Credit Card Payment Processors](https://support.sertifi.com/Content/Payments/Credit%20Card%20Payments/Get%20started%20with%20credit%20card%20payments.htm) to determine next steps.

**☐ Contact your Amadeus Sales & Event Management - Advanced Corporate Administrator**

* Have your administrator with your Sertifi Customer Success Manager to manage the [Sertifi for Amadeus installation](https://support.sertifi.com/Content/Integrations/Amadeus%20Hospitality/Sertifi%20for%20Amadeus.htm)

**☐ Update your contract templates with Sertifi Intelligent Tags**

* + Sertifi Intelligent Tags add the ability to collect signatures and other information from your signers on your contract documents.
  + Learn more about [Sertifi Intelligent Tags](https://support.sertifi.com/Content/Sertifi%20Portal/Documents/Tagging/Sertifi%20Intelligent%20Tags.htm)
  + Add Intelligent Tags to your contract templates.

**In your Sertifi portal(s) you receive from your Customer Success Manager:**

**☐ Create accounts for your accounting team**

* + Each person you want to grant access to the Sertifi portal requires a user account.
  + Learn more about the various roles in the Sertifi portal and determine which roles you want to assign your users to. You can select from [Power Admin or Super Admin](https://support.sertifi.com/Content/Sertifi%20Portal/Roles/Sertifi%20Roles.htm).
  + Create your user accounts.
    1. Navigate to **Administration** > **Create Admin** in the Sertifi portal.
    2. Enter the email address you want the user to use when accessing Sertifi.
    3. Select the role you want to assign for that user.
    4. Click **Create Account for User**.
    5. Repeat the process for each user you want to add to the portal.
  + Access [Video Instructions](http://www.youtube.com/watch?v=RWd2M1Q91cA)

**Add users to security groups**

* + Assign user roles to security groups to determine if the user can view or edit payment information in the portal.
  + Add users to the Account security group.
    1. Navigate to **Administration** > **Account Settings** > **Security Settings**.
    2. Select the silhouette icon next to the security group labeled **Accounting**.
    3. Click **Add Member**.
    4. Ensure the user you want to add is active in the portal.
    5. Enter the email address of the user you want to add, and then click **Add**.
  + Access [Video Instructions](http://www.youtube.com/watch?v=Q7MJInuwIiQ)

**Add email addresses you want to receive a notification when a payment is received**

* Payment Settings control your payment forms, gateways, and any custom payment rules you want to apply to your portal.
* Learn more about [payment settings.](https://support.sertifi.com/Content/Sertifi%20Portal/Roles/Super%20Admin/Account%20Settings/Payment%20Settings%20-%20Super%20Admin.htm) 
  + Update your Payment Settings.

1. Navigate to **Administration** > **Account Settings** > **Payment Settings** > **Payment Form & Receipt Settings**.
2. Add the email addresses for users to receive payment notifications to the **Payment Receipts Email List**.
3. Complete the following fields under Customer Details:
   * + - **Website** – enter your company's website
       - **Location –** enter the address of your property.
       - **Refund Cancellation Policies** – enter **Please Refer to Contract**.
       - **Support Phone Number** – enter the main phone number for your property.
       - **Support Email Address** – add **{OwnerEmail}**

**☐ Adjust Default Reminders, as needed**

* + Default Reminders and Notifications are set on your portal to automatically send signing and payment reminders to your participants.
  + Learn more about the default settings for [Reminders and Notifications](https://support.sertifi.com/Content/Sertifi%20Portal/Roles/Super%20Admin/Account%20Settings/Reminders%20&%20Notifications%20-%20Super%20Admin.htm).
  + Navigate to **Administration** > **Account Settings** > **Default Reminders** to make any updates.

**☐ Enable Real Time Updates**

* + Enabling real time updates pushes your file sends to your Sertifi portal for storage and enables additional portal settings.
  + Learn more about the process to enable [Real Time Updates](https://support.sertifi.com/Content/Integrations/Amadeus%20Hospitality/Install%20and%20Setup/Enabling%20Real%20Time%20Updates.htm)

**☐ Schedule a training call with your Sertifi Customer Success Manager**

* Send your Customer Success Manager an email letting them know you've completed this checklist.
* Include dates and times that work for you and your team to complete a 1-hour training.

If you have any questions or issues when completing these items in your Sertifi Portal please don’t hesitate to reach to Sertifi Support at [support@sertifi.com](mailto:support@sertifi.com) or click the support link in the right hand corner of your Sertifi Portal.