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Sertifi ePayments Customer Check List

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

**☐ Update your contract templates with Sertifi Data Fields**

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

**☐ Create accounts for your users**

* + Each person you want to grant access to the Sertifi portal requires a user account. Sertifi has [four role types](https://support.sertifi.com/Content/Sertifi%20Portal/Roles/Sertifi%20Roles.htm) for you to choose from which grant certain permissions to the users assigned to that role.
  + 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 Sertifi Admin, Auditor, Power Admin, or Super Admin.
  + 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**

* + User roles should be assigned 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 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.

**☐ Adjust General Account Settings, as needed**

* + General Account Settings ensure that your portal is customized and operates the way that you want it to.
  + Learn more about the [General Account Settings](https://support.sertifi.com/Content/Sertifi%20Portal/Roles/Super%20Admin/Account%20Settings/Account%20Settings%20-%20Super%20Admin.htm) and determine which settings you want to enable.
  + Navigate to **Administration** > **Account Settings** > **Account Settings** to make any updates.

**☐ Whitelist Sertifi IP addresses for your email server**

* To ensure you receive all emails sent from Sertifi, you must whitelist the IP addresses given to you by your Customer Success Manager.
* If you’re unsure of how to whitelist IP addresses, contact your IT department or email service provider.

**☐  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\_ticket@sertifi.com](mailto:support_ticket@sertifi.com) or click the support link in the right hand corner of your Sertifi Portal.