eSignature Onboarding Checklist
Sertifi Support Center

As you get started with your new Sertifi eSignature solution, complete the following checklist to ensure you and your Sales team are set up for success to start sending out contracts and closing deals faster.

☐ **Watch the eSignature training overview videos**

Please find the on-demand training resources below which you can watch anytime and can even share with your whole staff to review at their convenience.

- o Sertifi eSignatures Overview (2 min)
- o eSignatures Full Training Video (16 min)

☐ **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.

- o Learn more about Data Fields and determine which fields you want to use.
- o Access the Data Fields Video Instructions (7 min)

☐ **Create accounts for your users**

Each person you want to grant access to the Sertifi portal requires an admin account. Sertifi has four Admin role types for you to choose from which grants certain permissions to the users assigned to to that admin role. You can select from Sertifi Admin, Auditor, Power Admin, or Super Admin.

- o How to create/add an admin
  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.

- o Access the Adding an Admin Video Instructions (2 min)

☐ **Adjust Default Reminders, as needed**

Default Reminders and Notifications are set on your portal to automatically send signing reminders to your participants.

o   Learn more about the default settings for [Reminders and Notifications](#).
o   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.

o   Learn more about the [General Account Settings](#) and determine which settings you want to enable.
o   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.

o   If you're unsure of how to whitelist IP addresses, contact your IT department or email your service provider.

If you have any questions or issues when completing these items in your Sertifi Portal, don't hesitate to reach to Sertifi Support at Support@Sertifi.com or click the support link in the right-hand corner of your Sertifi Portal.

You can also subscribe to our [Sertifi System Status](#) and [Sertifi Release Notes](#) for additional system updates.