Sertifi eSignature Tips

As you get started with your Sertifi eSignature account, it's important to remember the following tips to avoid common errors when deploying Sertifi.

- **Bookmarking**: Do **NOT** bookmark the Sertifi login page. Instead, log in to your unique portal URL first, and then bookmark the home page of your portal. (www.sertifi.com/NAMEOFPROPERTY).

- **My Profile**: Check to ensure that the first and last name are correct in your portal.

- **Admins:** Set up your team as admins. Different admin roles provide different levels of access to your portal.

- **Naming files**: Guests and customers see the file name in the email they receive from the portal. As a best practice, Sertifi suggests using the Guest Name + Arrival Date or another unique identifier for the file name.

- **Attaching Documents**: You must click the checkbox next to the name of a document to add it in step 2 of the sending wizard.

- **Signing Documents:** Your recipients can begin the signing process by clicking "Review & Complete". They'll be brought to the page where the documents can be signed. To sign the documents, they'll need to click into each form and complete each of the required fields. When this is complete, they'll see a "Finish & Submit" button at the top of the page. By clicking that, they will finalize the signature process.

- **Forgetting to add a document or document expires:** Click the file name to access the file maintenance screen. From this screen, you can add or replace a document or you can expire or un-expire a document. Notify your guests of any changes made by clicking Invite to send a new email with the updates made.

- **Monitoring file activity**: You can find the audit trail of all activity for a file, such as a guest accessing a form, and the result of authorizations. This is found on the File Maintenance page in the portal, and never expires.

- **Expiring documents**: Signed Documents expire after one year.

- **Archiving files**: All files are stored under Active Files. You can archive files after processing signed documents or guest arrival for better organization within your portal. Archived files are always accessible.

- **Download** any of our Quick start, Training or Reference guides for eSignature on the Sertifi Support Center site to get you and your team set up for success.

- **Contacting Sertifi Support:** You can find Sertifi Support in the top-right corner of your portal to email Sertifi's support team with your technical questions. Or you can email the support team directly at Support@Sertifi.com.