



## Top 10 Getting Started with Sertifi Tips

As you get started with your Sertifi solution, it's important to remember the top 10 following tips to avoid common errors when deploying Sertifi.

- **Bookmarking:** Do **NOT** bookmark the login page. Instead, log in to the portal first, and then bookmark the home page of the portal.
- **My Profile:** Check to ensure that the first and last name are correct in your portal.
- **Viewing Payment Information:** No admin role (Super, Power, Admin) has automatic access to view payment information. The blue credit card icon appears with the proper access and shows the payment information. Only Sertifi Super Admins can provide access to other admins, and they must also add themselves to the proper security group. Other admins should contact their portal's Super Admin for access.
- **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.
- **Forgetting to add a document or document expires:** Click the file name to access the file maintenance screen. From this screen, you can add a document or unexpired a document. Notify your guests or customers by clicking **Invite** to send a new email with the updated or unexpired documents.



- **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 credit cards and documents:** Credit cards expire after 30 days; 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.
- **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.

