



Sertifi

This guide provides examples of the most commonly encountered admin and user scenarios when getting started with Sertifi ePayments and steps on how to troubleshoot.



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Markup Scenarios

A signer submitted markup on your document and you accepted it.

When you go to review a document from your signer, your signer might choose to submit markup. The signer can select to add highlights, textboxes, strikethroughs, and comments to the document. When this happens, the document doesn't receive a signature, but uploads as a comment in the Stream of the file room. You receive an email notification when this happens. Click the link in the email to view the File Room, and then open the document to review the markups.

Click Accept at the top-right of the screen for each markup. Make your changes to your document and then add a new version of the document, with changes, to the file room.

For details on accepting markup, see [Accepting and rejecting markup](#).

For details on how to add a file to the file room, see [Send a file](#).

A signer submitted markup on your document and you rejected it.

When you go to review a document from your signer, your signer might choose to submit markup. The signer can select to add highlights, textboxes, strikethroughs, and comments to the document. When this happens, the document doesn't receive a signature, but uploads as a comment in the Stream of the file room. You receive an email notification when this happens. Click the link in the email to view the File Room, and then open the document to review the markups.

Click Reject at the top-right of the screen for each markup and then enter your reason for rejecting the markup. You should then contact your signer to discuss any disagreements and add a new document to the file room.

For details on accepting markup, see [Accepting and rejecting markup](#).

For details on how to add a file to the file room, see [Send a file](#).



Payment Scenarios

Admins can't clone or refund payments in the portal.

No admins can automatically clone or refund payments even if they're a Sertifi Super Admin. There is a Security Group which allows admins to clone or refund payments if their account is added to the group. Only Super Admins can add members to the group including adding themselves.

Sertifi never provides this access. It must be provided at the property level by the Super Admin.

For details on how to enable permissions and create security groups, see [Security groups](#).

Admins have permission to clone and refund, but they aren't seeing it in the portal.

An admin lets you know that although they have permission to clone and refund, they still can't see the payment information in the portal. Once a payment or authorization is completed, your admins have 30 days to clone or refund payments. The payment information is completely removed from the Sertifi system after 30 days and can't be retrieved.

For details on when to review payment information, see [Payment Management](#).



Login Scenarios

A user is working from home and receives an error on login stating, "Unable to login from this location."

When you set up your Sertifi portal, you probably set up IP restrictions for your account. IP restrictions ensure that no one outside your IP range can log into your Sertifi Closing Pro portal. However, you may run into an issue where a user is working from a different location or home machine and can't access the portal since the IP address of that machine isn't listed in your IP restrictions. The user needs to locate the IP address for their machine and give that IP address to the Super Admin for the portal. The Super Admin for that portal then needs to contact Sertifi Support with the IP address and e

adding the additional address to the portal's restriction list. This adds the user's public IP address to the restricted list.

For details on how to enable users to work from home or another location and still access the Sertifi Closing Pro portal, see [Remote employees](#).

A user is logging into the portal but doesn't see the home screen.

Sometimes, users can attempt to log in to their Sertifi portal with the incorrect URL. All Sertifi portals follow the URL convention of www.sertifi.com/NAMEOFPROPERTY. For example, www.sertifi.com/MarriottProperty1. If a user navigates to a different URL, they won't be able to log in and see the portal. Once the user logs in to their correct portal, they can bookmark the page once they've logged in for easier access.

For more information on where to log in, see [Logging in](#).

A user wasn't prompted to create a password after they activated their account.

After a user activates their account for the portal, they should receive an email prompting them to create a password. If this didn't happen, the user can try creating a password by click Forgot password at the login screen for the portal.

For more information on user passwords, see [Forgot or update your password](#).

For more information on creating user accounts, see [Creating an account](#).



Files Scenarios

A Sertifi user can only see their files in the portal, instead of all the files within the portal. If you're a Sertifi Power Admin, Sertifi Auditor, or Sertifi Super Admin, you're able to see all the files in the portal, regardless of who the file owner is. Sometimes, it can appear that you only have access to your own files. The View Files tab only shows you the files that you own. If you're a Power Admin+ and want to see all the files within a portal, you must navigate to **Home > View All Files**.

For more information on viewing files, see [Viewing all files](#).

A Sertifi user doesn't see the tab in the portal that says Send File.

In order for a Sertifi Admin, Power Admin, or Super Admin to see the tab in the portal that says Send File, they must be logged in to their dedicated Sertifi portal-

For more information on where to log in, see [Logging in](#).

For more information about Sertifi user roles and their permissions, see [Sertifi Roles](#).



Managing user accounts Scenario

An employee has left the company, and a new employee has taken their place. I need to remove the old employee and add the new one to the portal.

If you need to add new users or remove old user from your Sertifi Closing Pro portal, you must contact the Super Admin for that portal. Adding and removing users isn't something Sertifi Support can do on your behalf. Contact your Super Admin to take care of these updates.

For more information on adding and removing users, see [Disabling admins and users](#).

For more information on creating new admins, see [Creating admins and users](#).

