



Sertifi

This guide provides examples of the most commonly encountered user and Admin scenarios when getting started with Sertifi eSignatures (previously Closing Pro) with steps on how to troubleshoot.

If you have questions not covered in this guide, please reach out to our Sertifi Support team at any time Support@Sertifi.com.



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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](#).



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 eSignatures 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 (support@sertifi.com) with the IP address and error message. Once Support is complete with adding the IP address to the portal's restriction list, you should be able to login now.

For details on how to enable users to work from home or another location and still access the eSignatures 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/HiltonProperty1. 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](#).

A Sertifi user can't send files or can only see Signing and Administration in their portal.

In order to send a file, you must at least be an Admin in your portal. User is a signing-only access level. Anyone without Admin access should speak to their Super Admin to add them.

For more information on how to add an admin, see [Create accounts for your users](#).

If you have admin access and can't send a file, check if you are in your correct portal. Please keep in mind "www(dot)sertifi(dot)com" is not a working portal but rather the 'engine' that runs it. Anyone accessing that webpage would not have any "work" options as far as sending documents, etc. Your working portal URL will look something like www.sertifi.com/BUSINESS_NAME.

A Sertifi user wants to change their email or information on their signed document.

For legal purposes, once you have completed and signed a document it cannot be changed. If you need that document to be associated with a different email or edited, the sender will need to send you a new document for filling out and signing. You will need to reach out to them directly.

For more information, please reach out to Sertifi Support at support@sertifi.com.



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 eSignature 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](#).

