



As you set up your Sertifi Portal as a Super Admin, it's important you're familiar with the different security settings available for you. You can assign your team specific roles in the Portal and grant even more permissions for different payment actions, depending on the Sertifi product you purchased.

This quick start guide walks you through Sertifi's Admin roles, granting view payment permissions in Sertifi eAuthorizations, and granting refund and cloning permissions in Sertifi ePayments.

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Sertifi Portal Roles

Each user you create for your team is known as an "admin." There are three different types of admin roles, along with Auditors and users.

Admin roles

The admin roles include:

- **Admin** – given basic level access. Admins can send and receive folders but are limited to viewing their own folders only. Admins have no access to any account settings.
- **Power Admin** – given higher-level access. Power Admins can send and receive folders and can view all folders within a portal. Power Admins have no access to any account settings.
- **Super Admin** – given the highest level of access. Super Admins can send and receive folders and can view all folders within a Portal. Super Admins can access account settings to create other admins, remove admins, grant access to viewing payment information, and adjust notification settings. You can have a maximum of 3 Super Admins in your Portal by default.

The additional roles include:

- **Auditor** – given read-only access. Auditors can view all folders within a portal but can't send folders or access any account settings.
- **User** – given signing ability. Users refer to signers. Users can access folders sent to them but have no permissions when it comes to the Portal.



Viewing Payment Information – Sertifi eAuthorizations

By default, no one can view payment information your eAuthorizations Portal, unless specifically granted the permission to do so. Only the Super Admin has access to this page and must grant themselves these permissions as well.

This requires a Super Admin updating the security group in Sertifi for a particular admin.

To grant permission to view payment information:

1. Log into your Sertifi Portal at the unique URL given to you when your Customer Success Manager created your portal. It appears as www.sertifi.com/YourUniqueURL. Contact Sertifi for this information if you need it at support.ticket@sertifi.com.
2. Navigate to **Administration > Account Settings > Security Settings**.
3. Click the silhouette icon next to View Payment Information.
4. Click **Add Member**.
5. Enter the email address of the admin you want to add to the group. Ensure you use the same email address that your admin uses to access the portal.
6. Click **Add**.

You can find [video instructions here](#).

If you also need this access as a Super Admin, add yourself to this group as well, using the above steps. It doesn't matter what Admin role a team member has; you MUST add them to this group in order to view payment information.



Granting Clone & Refund Access – Sertifi ePayments

By default, no one can clone or refund a payment in the Sertifi Portal, unless specifically granted the permission to do so. Only Super Admins have access to this page and must grant these permissions to themselves as well.

This requires a Super Admin updating the security group in Sertifi for a particular admin.

To grant permission to view payment information:

1. Log into your Sertifi Portal at the unique URL given to you when your Customer Success Manager created your portal. It appears as www.sertifi.com/YourUniqueURL. Contact Sertifi for this information if you need it at support_ticket@sertifi.com.
2. Navigate to **Administration > Account Settings > Security Settings**.
3. Click the silhouette icon next to **Clone & Refund**.
4. Click **Add Member**.
5. Enter the email address of the admin you want to add to the group. Ensure you use the same email address that your admin uses to access the portal.
6. Click **Add**.

If you also need this access as a Super Admin, add yourself to this group as well, using the above steps. It doesn't matter what Admin role a team member has; you **MUST add them to this group in order to clone or refund a payment.**

