



Sertifi

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



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Payment Scenarios

Admins can't access payment information in the portal.

No admins can automatically see credit card information even if they're a Sertifi Super Admin. There is a Security Group which allows admins to unmask credit card information if their account is added to the group. Only Super Admins can add members to the group including adding themselves. The blue credit card icon appears in the File Maintenance Room after being added to the group.

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](#).

For details on how to grant permissions for admins to view payment information, see [Viewing payment information](#).

Admins have permission to view payment information, but they aren't seeing it in the portal.

An admin lets you know that although they have permission to view payment information, they still can't see the payment information in the portal. Once a payment or authorization is completed, your admins have 30 days to view the associated payment information. 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 [Payments File Maintenance](#).

A payer received the following error message, "Transaction denied by issuer."

When payers receive this error message, they must take action on their end – this isn't an issue Sertifi Support can help with. Signers can attempt and fail their authorization three times before they're locked out. The signer should contact the card issuer (phone number on the card) and ask why the transaction was declined. The signer should then contact the property or company to ask for a new form.

The signer can also try submitting an authorization with a different card.

For more information about payment issues, see [Troubleshooting payment and authorization errors](#).



Login Scenarios

An admin is working on a different computer or from home and receives an error on login stating, "Unable to login from this location."

This would only occur if the Super Admin enabled IP restrictions in the portal. IP restrictions ensure that no one outside selected IP addresses can log into your Sertifi Closing Pro+ portal. A user working from a different location or home machine is unable to 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 provide it to their Super Admin.

In the case Super Admin receives the same error, they need to contact Sertifi Support with the IP address(es) to authorize adding the additional address to the portal's restriction list.

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

An admin is logging into the portal but doesn't see the home screen.

Sometimes, admins attempt to log in to their Sertifi portal with the incorrect URL. All Sertifi portals follow the URL convention of www.sertifi.com/PropertyName_UniqueID. If a user navigates to a different URL, they won't be able to log in and see the portal. This commonly occurs when admins bookmark the login page instead of the portal homepage. Check the bookmark URL to see if it matches the portal URL.

Once logged into the portal, admins should bookmark the homepage.

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

An admin wasn't prompted to create a password after they activated their account.

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

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

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



Files Scenarios

An admin can only see My Files in the portal, instead of All Files within the portal.

Only a Power Admin, Auditor, or Super Admin can see all the files in the portal, no matter the file owner. However, the View Files tab only shows My Files. The View All Files screen can only be accessed from the homepage.

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

An admin doesn't see the tab in the portal that says Send File.

This would only occur if they signed in as a User or Auditor. For an 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 with their activated email address.

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

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

An admin goes through the sending process, but when the file is sent, no document was attached.

When an admin sends a form through the Sertifi eAuthorizations sending process, the admin can sometimes miss checking the box which attaches the form in the document library. Within View Files, admins should see a 1 in either the Open or Signed column. If all columns show a 0, it's likely that a document wasn't added. The admin can click the name of the file, and then click Add Documents to add the appropriate document.

For more information about the sending process, see [Send a file](#).



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 admins or remove old admins from the Sertifi eAuthorizations portal, you must contact the Super Admin for that portal. Adding and removing admins 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 admins, see [Disabling admins and users](#).

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

