



# Sertifi

## Sertifi eAuthorize Customer Check List

[Sertifi Support Center](#)

### Credit Card Authorization Form

- Send your credit card authorization form in either Microsoft Word or PDF format to your Sertifi Customer Success Manager.

### Create accounts for your users

- Each person you want to grant access to the Sertifi portal requires a user account. Sertifi has [four role types](#) for you to choose from which grant certain permissions to the users assigned to that role.
- Learn more about the various roles in the Sertifi portal and determine which roles you want to assign your users to. You can select from Sertifi Admin, Auditor, Power Admin, or Super Admin.
- Create your user accounts.
  1. Navigate to **Administration > Create Admin** in the Sertifi portal.
  2. Enter the email address you want the user to use when accessing Sertifi.
  3. Select the role you want to assign for that user.
  4. Click **Create Account for User**.
  5. Repeat the process for each user you want to add to the portal.
- Access [Video Instructions](#)

### Add users to security groups

- User roles should be assigned to security groups to determine if the user can view or edit payment information in the portal.
- Add users to the Account security group.
  1. Navigate to **Administration > Account Settings > Security Settings**.
  2. Select the silhouette icon next to the security group to view payment information.
  3. Click **Add Member**.
  4. Ensure the admin+ you want to add is active in the portal.
  5. Enter the email address of the admin+ you want to add, and then click **Add**.
- Access [Video Instructions](#)

### Create an Allowed IP Address List in Security Settings

- An Allowed IP Addresses list ensures that only the IP addresses you enter can access your portal.
- Create your Allowed IP Address List.
  1. Navigate to **Administration > Account Settings > Security Settings**.
  2. Navigate to **Restrict Access to Site by IP Address**.
  3. Enter the description or name for the IP address you want to allow.
  4. Enter the IP Address in the Allowed IP Address box.
  5. Click the checkmark.
  6. Toggle the Restrict Access to Site by IP Address from **Off** to **On**.
- Don't add IP addresses starting with 10, 172, 192.
- You can find your Public IP address by going to <http://whatismyipaddress.com/>, or Google “what's my IP address” and Google will tell what your IP address is.

**Adjust Default Reminders, as needed**

- Default Reminders and Notifications are set on your portal to automatically send signing reminders to your participants.
- Learn more about the default settings for [Reminders and Notifications](#).
- Navigate to **Administration > Account Settings > Default Reminders** to make any updates.

**Adjust General Account Settings, as needed**

- General Account Settings ensure that your portal is customized and operates the way that you want it to.
- Learn more about the [General Account Settings](#) and determine which settings you want to enable.
- Navigate to **Administration > Account Settings > Account Settings** to make any updates.

**Whitelist Sertifi IP addresses for your email server**

- To ensure you receive all emails sent from Sertifi, you must whitelist the IP addresses given to you by your Customer Success Manager.
- If you're unsure of how to whitelist IP addresses, contact your IT department or email service provider.

**Watch a recorded training**

- You can watch a recorded eAuth training video here (10 min):
  - <https://www.screencast.com/users/mmorgan7568/folders/Camtasia%20Studio/media/46293eaf-30f5-494a-91b1-bb242894352b/embed?theme=dusk>

If you have any questions or issues when completing these items in your Sertifi Portal, don't hesitate to reach to Sertifi Support at [Support@sertifi.com](mailto:Support@sertifi.com) or by clicking the support link in the right hand corner of your unique Sertifi Portal URL.