# Sertifi Tutorial

Overview: Sertifi automates the process of sending and obtaining documents for approval and signature. A completely web based solution, senders and signers can send, sign and store documents through their web browser.

**Signers:**

Signing a document with Sertifi is easy:

1.) Receive email requesting your approval / signature. Follow instructions inside the email
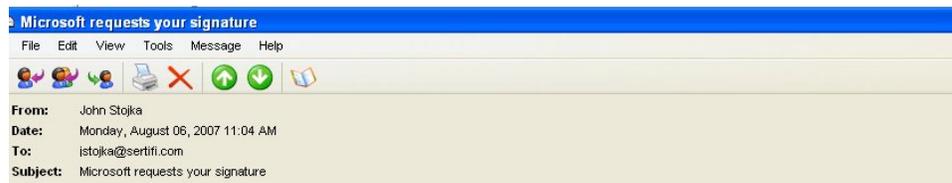


2.) At the bottom of the document you will see the Sertifi approval box. Users can add "fields to the box" such as "approve or disapprove" these fields will be stored with the documents

## Senders

Sending out a signature request is easy.   Log into www.sertifi.com/cap



**Click here if you forgot your password**

Setting up the transaction:

Sertifi enables you to send multiple documents out to multiple recipients.   To set up a transaction three pieces of information are needed: file name; email addresses and the document or documents you will be sending

1.) **From your login- click "send a signature request"**

**2.) Enter the "file name" and email addresses of who you will be sending the document to.**

IMPORTANT:  If you would like to collect comments from the approvers, you must add an additional comments field:



**3.) Upload your document from your computer.  Users**
**Can also upload "reference documents' that are not signed**
**Or need to be signed but available for the signer to reference.**

You can add additional fields that "approvers" must complete before they approve or sign.  If you would like to collect "comments" you may add it here

**Civil Air Patrol**

Create a new signature request

File Details ———— **File Contents** ———— Verification     (Step 2 of 3)

**File Contents**

**Forms**
Place a check for each form to include in this file.
Forms can be filled out either by you and/or your customers.

**Documents**
Upload any additional documents from your computer to place in this file

| Document | | Title |
|---|---|---|
| 1: | Browse... | |
| 2: | Browse... | |
| 3: | Browse... | |
| 4: | Browse... | |
| 5: | Browse... | |

**Reference Documents**
☐ Check this box if you will be uploading any reference documents

**Upload reference documents that are not signed but viewable for signers to reference**

Cancel          ←Prev   Next→

---

## 4.) Click finish. You have completed the transaction!

**Civil Air Patrol**

Create a new signature request

File Details ———— File Contents ———— **Verification**     (Step 3 of 3)

**Verification**

Verify your selections below:

| | |
|---|---|
| **File name:** | John |
| **Send to emails:** | jstojka@sertifi.com |
| **Second Signers:** | |
| **CC to emails:** | |
| **Cosign:** | No |
| **Allow documents to be signed:** | Either Electronically or Print, Sign, and Fax |
| **ID Check:** | No |
| **Group Password:** | |
| **Additional Fields:** | |
| **Forms:** | |
| **Documents:** | te |
| **Reference Documents:** | |
| **Invite Customers:** | Yes |
| **Invite Email Message:** | |

Cancel          ←Prev   Finish

# Manage Your Transaction

Sertifi enables you to manage all of your documents you have sent out for approval.
Sertifi enables you to:

- View activity.  See who has clicked on the link inside the document and who has an has not signed
- Upload documents to your current transactions.  You  can add existing documents or replace the documents your have sent
- Retrieve signed and unsigned documents
- Invite users to sign again
- Close the transaction and "remove" anyone who has not signed
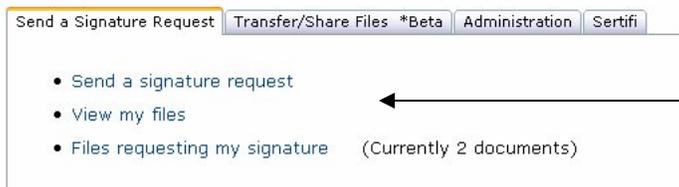- Archive the file

View Activity



**Click " View my Files"**

**Civil Air Patrol**

Electronic Signing Service

**Powered By**
**Sertifi**
TRUST SERVICES

> Go to Administrative Page

Logged in as jstojka@sertifi.com [ Logout ] FAQ - Support

## My Files

View Archived Files

| File name | Owner | Signers | Created On | Pending | Completed |
|-----------|-------|---------|------------|---------|-----------|
| John | jstojka@sertifi.com | jstojka@sertifi.com | 08/02/2007 01:50 PM CST | 0 | 1 |
| Test with hollie | jstojka@sertifi.com | wawa@wawg.cap.gov | 08/02/2007 01:42 PM CST | 0 | 0 |
| Decline to sign | jstojka@sertifi.com | jstojka@sertifi.com | 07/26/2007 02:09 PM CST | 1 | 0 |
| Expense Report July | jstojka@sertifi.com | akhdqcap@gci.net tjmccabe1@msn.com | 07/26/2007 01:58 PM CST | 0 | 1 |
| Test Invoice | emueller@glr.cap.gov | jstojka@sertifi.com | 07/18/2007 01:36 PM CST | 0 | 1 |

**Files that have not been signed by all parties**

**Click on file to get more detail – who has signed, who has not signed, who has opened the email**

---

**Civil Air Patrol**

Electronic Signing Service

**Powered By**
**Sertifi**
TRUST SERVICES

> Go to Administrative Page   > Go to My Customer Files

Logged in as jstojka@sertifi.com [ Logout ] FAQ - Support

## File: Test with hollie

### Signed documents

📝  Test      Document declined.

**Status of document " Declined or Signed "**

**- Last visit displays when users have clicked on the link in their email**

### Participants

[ Add Participant ]

👤 wawa@wawg.cap.gov      Signer      Last Visit: 08/03/2007 02:44 PM CST
[ Edit - Remove - Invite ]    Signed 0 of 1    Last Invite: 08/02/2007 01:42 PM CST

### File Maintenance

[ Invite All Signers ]   [ Upload Additional Documents ]   [ Delete This File ]

**-IMPORTANT
Remove users – must remove all users who have not signed to show "completed contract".**