

# Validation Manager for Web Host Resellers and Their Customers

### Contents

What is the Validation Manager?	3
Where Resellers can Find the Validation Manager Link	3
Validation Manager for Web Host Reseller	3
Where End-user Customers Can Find the Link	6
Confirmation Email	6
Validation Processing Email	7
How a Partner can use the Validation Manager	7
DV SSL Certificate	8
DCV – Domain Control Validation	8
OV SSL Certificate	9
DCV – Domain Control Validation	9
CAA Check Status	9
Order Authorization	9
Organization Validation	10
Validation Completed	10
EV SSL Certificate	11
DCV – Domain Control Validation	11
CAA Check Status	11
Agreement Execution	11
Signer Verification	11
Organization Validation	11
Second Approval	11
Validation Completed	11
OV Code Signing	13
Order Authorization	13
Organization Validation	13
Validation Completed	14
EV Code Signing	14
Signer Verification	14
Organization Validation	14
Second Approval	15
Validation Completed	15
Document Signing	15
S/Mime, Secure Email Certificates	15
Personal	15
Enterprise	15
Partner API	15

# What is the Validation Manager?

Sectigo has created the Validation Manager Tool for customers and Web Host Reseller to check order status and participate in the validation process.

Validation Manager works with all type of EV and OV certificates for end user customers.

Please watch this short video about the Validation Manager before you continue. The link to the Validation Manager Tutorial is found on the Sectigo Support page and redirects you to a YouTube video: <https://www.youtube.com/watch?v=NVxfR1-yvcM&feature=youtu.be>

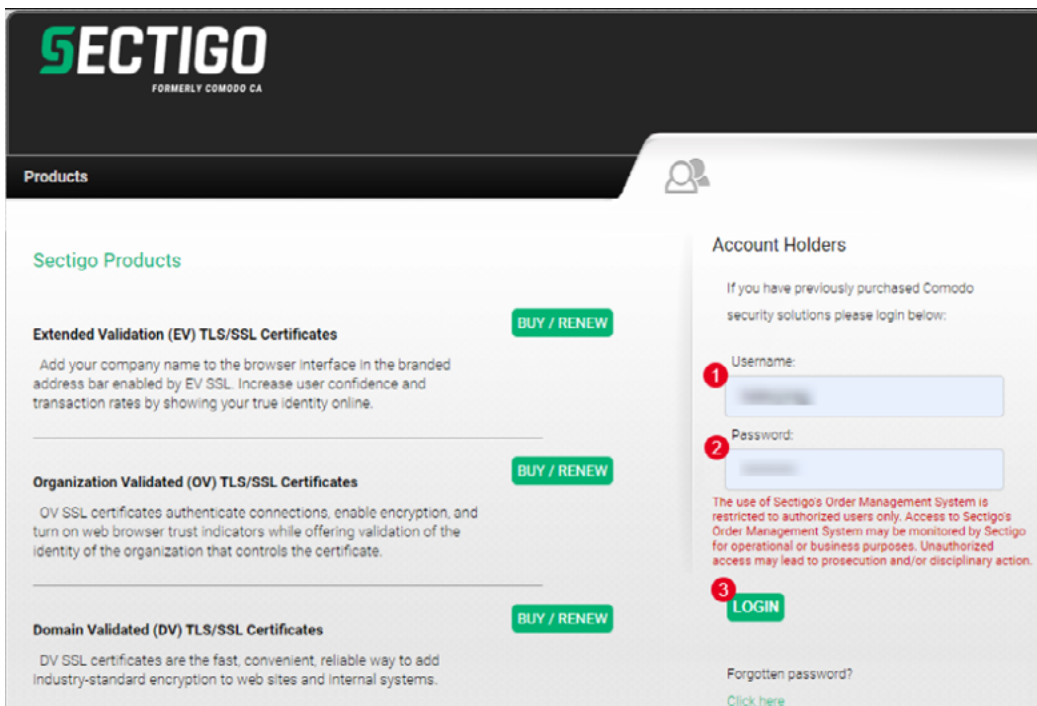
## Where Resellers can Find the Validation Manager Link

There are multiple locations in the Reseller Management Center to get the Validation Manger link for an order depending upon the Web Host Reseller permissions.

### Validation Manager for Web Host Reseller

The Validation Manager is available in the Web Host Reseller – Reporting section.

#### 1. Login to your account



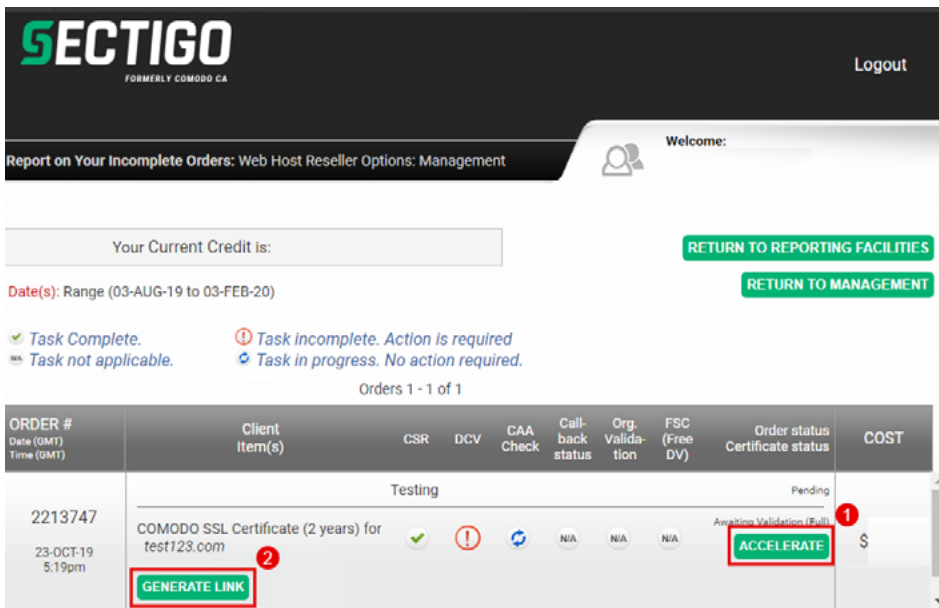
## 2. Select Web Host Reseller

The screenshot shows the Sectigo account management interface. At the top left is the Sectigo logo with 'FORMERLY COMODO CA' underneath. At the top right is a 'Logout' link. Below the header is a navigation bar with 'Account Options: Management'. A 'Welcome:' message identifies the user as 'ENSURED IT'. The main area is titled 'My Account Areas:' and contains several options: 'Reseller', 'E-PKI Manager', 'Code Signing certificates', 'IdAuthority', 'Web Host Reseller' (highlighted with a red box), 'SSL certificates', 'TrustLogos', and 'CodeGuard Partner Portal'. A 'My Account Summary' sidebar on the right shows the last login time as 25-NOV-2019 14:49:23 (UTC), status as 'Active', verification level as 'Class 3', and a password expiration notice.

## 3. Select Web Host Reseller

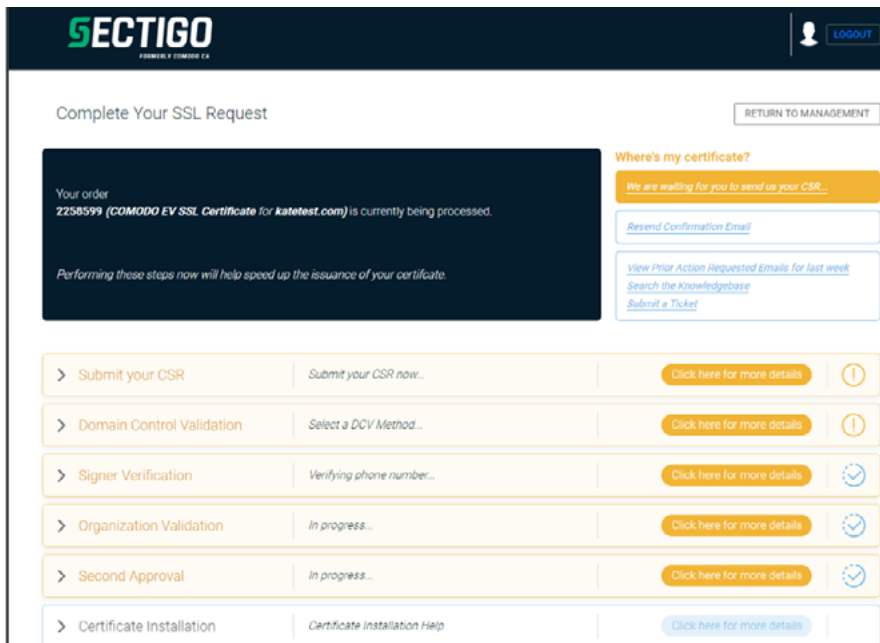
The screenshot shows a form titled 'Report on Your Customers' Orders:'. It asks for an order number (2213747) or a date range (From: 29 NOV 2019, To: 29 MAY 2020). There are several dropdown menus for filtering orders by 'Show orders', 'CSR', 'DCV', 'OV Callback', 'Organization Validation', 'FSC (Free DV)', 'EV Click-through', and 'CAA Check'. A 'Choose delimiter for CSV report' dropdown is set to '|'. At the bottom, three buttons are visible: 'RUN REPORT' (highlighted with a red box), 'WRITE REPORT TO CSV', and 'RETURN TO RESELLER OPTIONS'.

4. Click "Accelerate" to access the Validation Manager customer



Note: The "Generate" options is a to the legacy Order Status Checker. Web Host Resellers should not use the "Generate" link for the Validation Manager

5. Clicking "Accelerate" displays the Validation Manager



The Validation Manager accessed through the Web Host Reseller account is the same view as the end-user customer accesses the Validation Manager the link in their confirmation email.

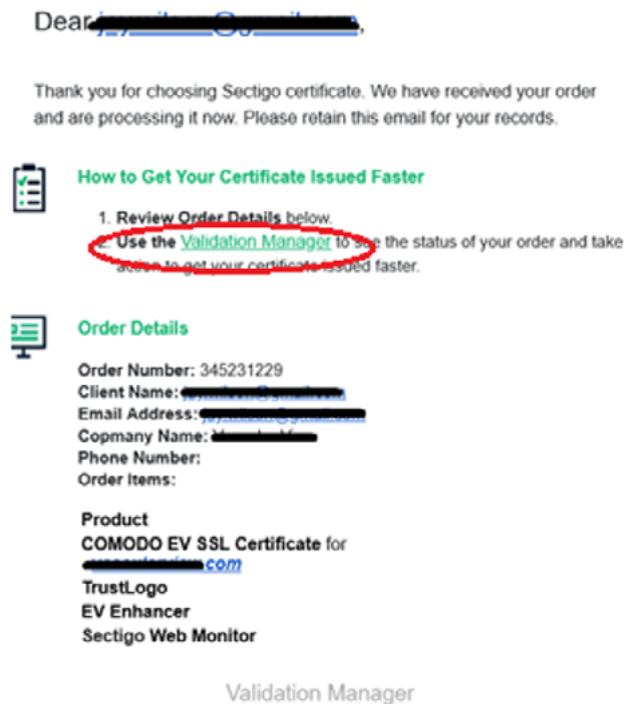
## Where End-user Customers Can Find the Link

The Validation Manager link is sent out to customers in the order confirmation email and when the Validation team sends an email during the validation process.

The link to the Validation Manger in the customer emails redirects to the same page that a Web Host Partner can access from within the Partner Portal.

## Confirmation Email

Confirmation email contains basic information about the order and has a link for the Validation Manager. The Validation Manager page that a Web Host Reseller can access when click on Accelerate from the reporting section is the same as what the customer sees.







## DV SSL Certificate

The actions that are available in Validation Manager for DV SSL.

### DCV – Domain Control Validation

- Display the DCV method chosen
- Accept the code sent in a DCV Email (email has link to enter the code)
- Clicking on the Click here to choose another DCV method can:
- Change the DCV email recipient from the WHOIS lookup to the Default Level 2 and 3 allowable industry regulated pre-constructed emails
- Change the method of DCV and the related CSR hashes
- Provide examples of the alternate DCV methods for HTTP and CNAME



## OV SSL Certificate

The actions that are available in Validation Manager for OV SSL.

### DCV – Domain Control Validation

DCV has 3 methods to verify control of the domain, Email, DNS CNAME and HTTP(S) which are explained here: [https://support.sectigo.com/Com\\_KnowledgeDetailPage?Id=kA01N000000zFU9](https://support.sectigo.com/Com_KnowledgeDetailPage?Id=kA01N000000zFU9)

Validation Manager can:

- Display the DCV method chosen
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Clicking on the “Click here to choose another DCV method” can:

- Change the DCV email recipient from the WHOIS lookup to the Default Level 2 and 3 allowable industry regulated pre-constructed emails
- Change the method of DCV and displays the related CSR hashes
- Provide examples of the alternate DCV methods for HTTP and CNAME

### CAA Check Status

Validation Manager displays if a CAA check failed. CAA Record - Certification Authority Authorization explanation and setup can be found here: [https://support.sectigo.com/Com\\_KnowledgeDetailPage?Id=kA01N000000zFMO](https://support.sectigo.com/Com_KnowledgeDetailPage?Id=kA01N000000zFMO)

### Order Authorization

Authorizing an order requires the validation team to contact the end-user customer and verify that the customer placed an SSL order for the domain with Sectigo.

The first attempt to authorization an order is an automated system call to a verified number and when answered, provides a PIN to the end-user customer.

The Validation Manager provides options for the automated callback which are the same options sent in the callback email to the customer.

- Enter an extension number for the automated call to navigate a customer automated attendant
- “Call me now” to initiate the automated call to the customer
- Schedule the automated callback for a later date and time (most customer will use the “Call Me Now” when they are ready rather than scheduling a later call)
- Request a manual callback for a preferred date/time

- The validation callback team will attempt a manual callback, but the call cannot be guaranteed to be attempted at the customer preferred date and time
- If the callback reaches voicemail, the callback team leaves a message with a confirmation code and a phone number to reach us. The customer can call us and gives the confirmation code to complete order authorization
- Provide a corrected main company business phone number to the Validation team
- Validation team must be able to verify the provided number. If the validation team is not able to verify the phone with a third-party source, they cannot use that phone number suggested by the customer

*Note: if the business main telephone number is not yet verified by the Validation team, the Validation Manager will only provide a status of "Verifying phone number is in process"*

### Organization Validation

If the organization details have not been verified, the Validation Manager presents actions that the customer can do to help get the validation faster. Each action has a knowledge base article that has more detailed information.

Validation Manager can:

- Upload documents directly to the order for the validation team to process and approve
- If partial organization validation is completed, the Validation Manager shows the status and the verified information

### Validation Completed

Upon completing validation and the certificate is issued, the validation Manager is no longer available.

## EV SSL Certificate

The actions that are available in Validation Manager for EV SSL.

### DCV – Domain Control Validation

- Display the DCV method chosen
- Accept the code sent in a DCV Email (email has link to enter the code)

Clicking on the “Click here to choose another DCV method” can:

- Change the DCV email recipient from the WHOIS lookup to the Default Level 2 and 3 allowable industry regulated pre-constructed emails
- Change the method of DCV and displays the related CSR hashes
- Provide examples of the alternate DCV methods for HTTP and CNAME

### CAA Check Status

Validation Manager displays if a CAA check failed. CAA Record - Certification Authority Authorization explanation and setup can be found here: [https://support.sectigo.com/Com\\_KnowledgeDetailPage?Id=kA01N000000zFMO](https://support.sectigo.com/Com_KnowledgeDetailPage?Id=kA01N000000zFMO)

### Agreement Execution

The subscriber agreement is completed by the organization applying for the SSL. The agreement should be sent to the reseller to complete. If the agreement is completed with the reseller information, the validation process becomes more complex.

- Update email address
- Resend the agreement
- Status of link open date

### Signer Verification

Verifying the signer requires the validation team to contact the end-user customer that signed the agreement and verify their agency (employee or acting on behalf of), authority to sign a contract, title, requested and authorized the order.

The authorization is typically a phone call by the validation team to a verified main business telephone number. The validation team will be asked to be transferred to the subscriber agreement signer.

*Note: if the business main telephone number is not yet verified by the Validation team, the Validation Manager will only provide a current status of “Verifying phone number is in progress”*

If the Phone number has been verified by the Validation team, the Validation Manager provides the verified phone number and options.

- Request a Manual Callback for a preferred date/time
- The validation callback team will attempt a manual callback, but the call cannot be guaranteed to be attempted at the customer preferred date and time
- If the callback reaches voicemail, the callback team leaves a message with a confirmation code and a phone number to reach us. The customer can call us and gives the confirmation code to complete order authorization
- Provide a correct main company business phone number
  - Validation team must be able to verify the provided number. If the validation team is not able to verify the phone with a third-party source, they cannot use that phone

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If the organization details have not been verified, the Validation Manager presents actions that the customer can do to help get the validation faster. Each action has a knowledge base article that has more detailed information.

Validation Manager can:

- Upload documents directly to the order for the validation team to process and approve
- If partial organization validation is completed, the Validation Manager shows the status and the verified information

### Second Approval

The final step is the audit or Second Approval. This status only with no actions by the reseller or customer.

Once the order has completed the audit, the cert is issued and the status changes to completed.

### Validation Completed

Upon completing validation and the certificate is issued, the validation Manager is no longer available.

## OV Code Signing

The actions that are available in Validation Manager for OV code signing.

### Order Authorization

Authorizing an order requires the validation team to contact the end-user customer and verify that the customer placed an SSL order for the domain with Sectigo.

The first attempt to authorization an order is an automated system call to a verified number and when answered, provides a PIN to the end-user customer.

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## EV Code Signing

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Verifying the signer requires the validation team to contact the end-user customer that signed the agreement and verify their agency (employee or acting on behalf of), authority to sign a contract, title, requested and authorized the order.

The authorization is typically a callback by the validation team.

*Note: if the business main telephone number is not yet verified by the Validation team, the Validation Manager will only provide a current status of Verifying phone number is in process*

If the Phone number has been verified by the Validation team, the Validation Manager provides the verified phone number

- Request a Manual Callback for a preferred date/time
  - o The validation callback team will attempt a manual callback, but the call cannot be guaranteed to be attempted at the customer preferred date and time
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- Upload documents directly to the order for the validation team to process and approve
- If partial validation is completed, the Validation Manager shows the status and the verified information

### Second Approval

The final step is the audit or Second Approval. This is a status only with no actions by the reseller or customer.

Once the order has completed the audit, the cert is issued and the status changes to completed.

### Validation Completed

Upon completing validation and the certificate is issued, the validation Manager is no longer available.

## Document Signing

Validation Manager is currently not available for document signing products.

## S/MIME, Secure Email Certificates

Validation Manager is currently not available for document signing products.

### Personal

There are no actions in the Validation Manager for this certificate. Only status is available.

### Enterprise

If the organization details have not been verified, the Validation Manager presents actions that the customer can do to help get the validation faster. The actions have a knowledge base article that has more detailed information.

- Upload documents directly to the order for the validation team to process and approve

## Partner API

An API is available to enable the Validation Manager to be used as a tool in your system and for your customers.

Please request the documentation through your sales representative.