Welcome to BadgeCert!

You are only a few steps away from issuing and managing digital badges on the BadgeCert platform. Follow this step-by-step guide to begin recognizing your earners for their accomplishments. Check out the tooltips ⑦ in the BadgeCert application for more information.

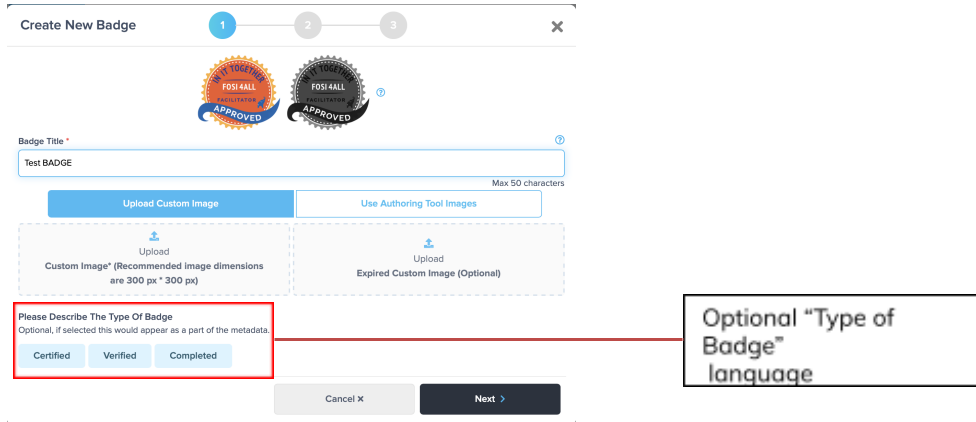## 1 Create badge artwork in Badges

Start by creating the artwork as shown in Figure 1
There are three options to create your artwork:

(1) upload your badge artwork and the system will automatically generate a gray version as the expired badge*
(2) upload your custom badge AND custom expired badge artwork*; or
(3) build a badge with our authoring tool.
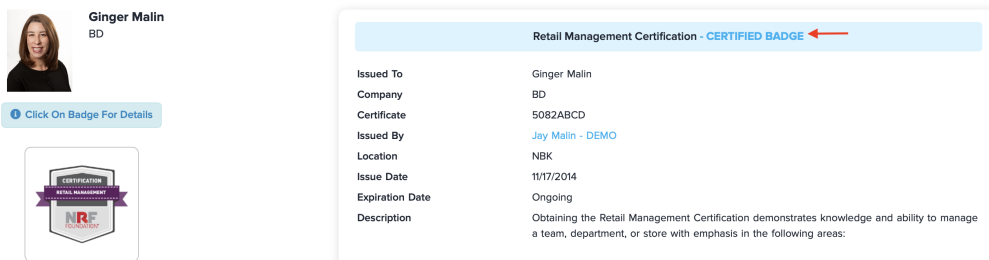*   Note: If you are creating badges that will not expire, the expiration settings/options will not be a factor.

Figure 1 Artwork Upload Options

After your artwork is uploaded, choose the optional "Type of Badge" language seen in Figure 1- (skip this step if adding this language is not desired). Certified, Verified or Completed can be added to the badge metadata header as seen in Figure 2. Typically, "Certified" is used for certifications, "Verified" is used for attendance and "Completed" is used for coursework.

Figure 2 Type of badge optional language in badge metadata.

If you do not wish to show the expired badge image in the earner's portfolio upon expiration and would prefer to have badges removed, in Settings > Expiration select "Remove badges when expired" as shown in Figure 3. In other words, the badge(s) will be completely removed from the earner's portfolio upon expiration.

Figure 3 Expiration Setting Workflow Option
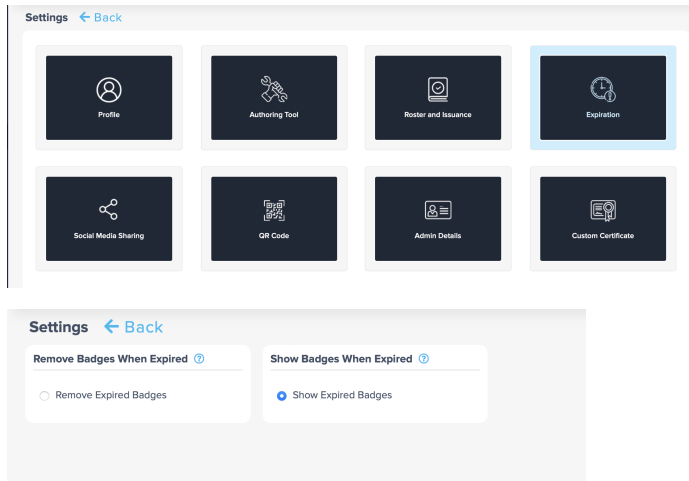
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Add badge description and add optional fields
Then add the metadata that will be displayed on the badge
Enter a description that will display earners' metadata as shown in Figure 4. You can add up to two additional optional custom fields that will populate on earners' badges. Note: all fields are English, however, earner metadata may be supplied in different languages.

Figure 4 Add Badge Description and Optional Additional Metadata Fields

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Optional stackable credential/micro-credential

You can optionally level-up your badges

You have the option to create stackable credentials that can level-up to a micro-credential badge as shown in Figure 5. The options include leveling-up with points or with badges or rolling down with badges. Check out the tooltips ⑦ for more information.

Figure 5 Optional Stackable/Leveled Badges

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Optional default certificates and wallet cards

Create a downloadable, printable certificate

Printed certificates or wallet cards are not as secure as a digital badge, but are oftentimes needed by earners. Once selected, you can add an optional QR code (go to Settings > QR code to configure it) to the certificate to reference the digital badge. There are two options to create printable .pdf certificates- a) Add a default certificate- the template is shown in Figure 7 or b) Add a custom certificate as shown in Figure 8.

To create your certificates and wallet cards:

1) As shown in Figure 6, go to Badges > Click the badge > Click View Badge. Turn on Downloadable PDF to add an auto-generated .pdf certificate to the digital badge that can be downloaded and printed anytime.

2) Figure 7 shows the standard PDF certificate without and with the optional QR code. The QR code option is selectable in Settings > QR Code (see Figure 3 for Setting options). The QR code, when scanned with the camera on common mobile devices will link directly to the badge verification page or a custom URL that you submit to verify the accomplishment.

Figure 6 Downloadable PDF Option and Single Badge Issuance Email Template

Figure 7 Default certificates (without and with QR code)

1) If you wish to use your own custom certificate or wallet card artwork instead of BadgeCert's default certificate, you need to sign up for a Silver, Gold or Enterprise package. The standard default certificate can be added to your badges at no cost.

2) To use your own custom certificate or wallet card artwork instead of a default certificate, go to Settings > Custom Certificate. This option will only appear in Figure 3 bottom right block if you have purchased a package that includes this feature. Once you are in Custom Certificate, click 'Add Certificate' in the top right corner. From here, you can upload your artwork and drag and drop the desired wildcards into the correct position (Figure 9). Click Preview to view a sample of a populated certificate, and if it meets your expectations, click Submit. You will then be able to connect the badge to the custom certificate by going to Badges > Click the badge > Click View Badge (Figure 6- left image), then go to the Certificate or Wallet card option (Figure 8) and using the drop-down menu, click on the desired certificate. You can learn more about how to use this feature in the [BadgeCert Knowledgebase](#).

Figure 8 Custom certificates and Wallet Cards
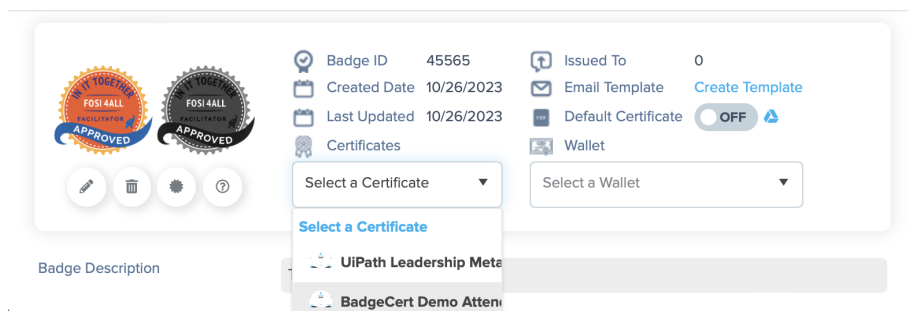
Figure 9 Creating Custom certificates and Wallet Cards
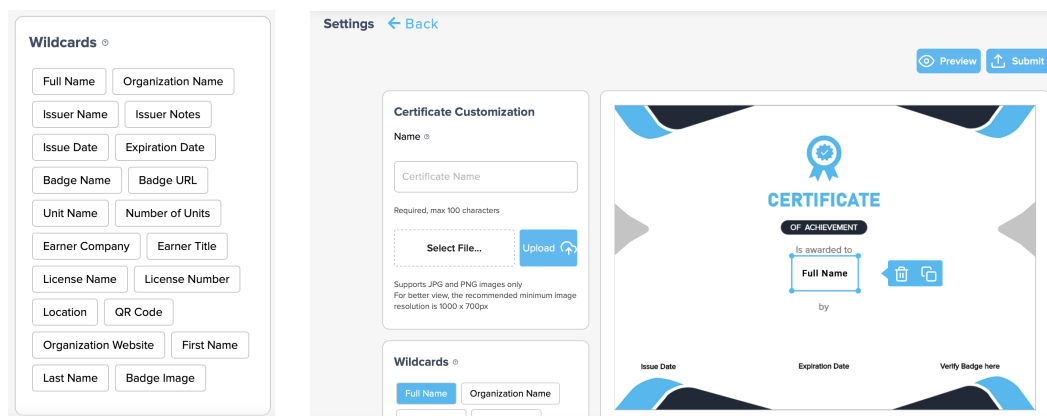
Set up your communication settings

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It is important to create the right workflow and messaging

To customize your email earner notification templates and configure the timing they are sent out, visit Settings > Roster and Issuance and go to the communication dashboard as shown in Figure 10. You can select and configure the following email templates:

(1) *Optional Welcome email* sent upon badge issuance that invites the earner to the platform. This will be sent simultaneously with the Issuance email. Many customers who do not want 2 emails going out to earners will keep this feature off (it is shown off in Figure 10).

(2) *Badge Issuance email* sent upon issuance of a digital badge to an earner. You can set-up a universal template for all badge issuances as shown in Figure 10- highlighted in red, or you can create a single unique template for each badge as shown in Figure 11 when you go to Badges >Click on the badge>Click View symbol (Figure 6- left image). The template for either instance will be pre-populated and can be edited/customized by adding wildcards and language appropriate for your stakeholders. This email can be in plain text or HTML and will be sent from your white labeled "From Address" when you configure it for your account (See pages 8-10 of this document for how to set up your "From Address").

(3) *Optional Expiration Reminder email* before and upon expiration of a digital badge. You have the option of sending emails 1 day, 7 days and/or 30 before a badge expires and/or set up your own customized reminder intervals.

(4) *Issuance Reminder email* to earners who may have forgotten to use their badge(s) and encourage them do so. This email is very effective for encouraging all stakeholders to engage with their badges. If an individual has already clicked on their email and badge at least once, this email will automatically be suppressed.

Figure 10 Communication Management Dashboard
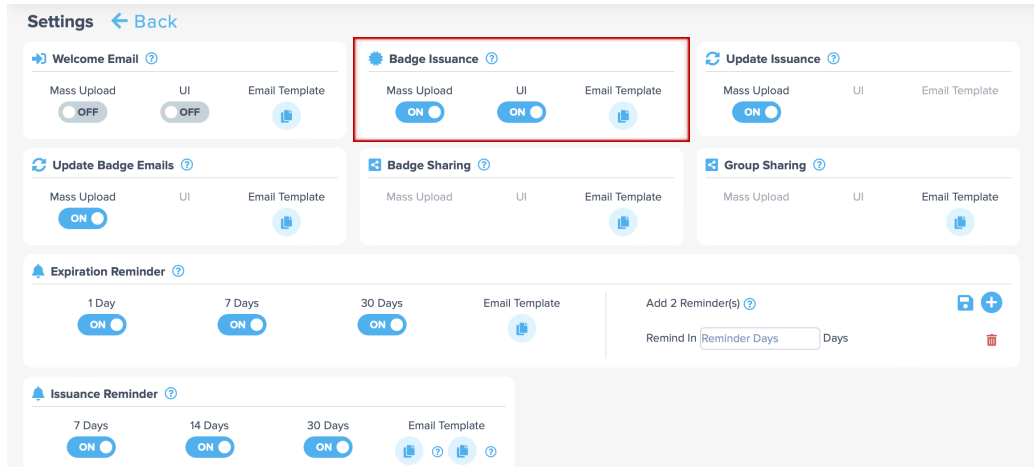
Figure 11 Badge Issuance Template can be created on a per badge basis if desired
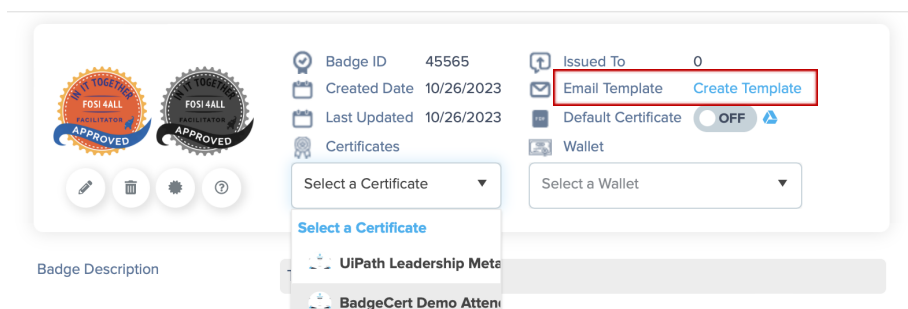
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Upload earner roster
Add earners and issue digital badges

You can upload earners to the system three ways:

(1) Most popular: CSV file mass upload
(2) Modern transactional application program interface (API), contact info@badgecert.com for details
(3) Manually, one-by-one on the portal (good for testing badges are functioning as expected before you go "live")

For the CSV template file, visit:
[CSV FILE TEMPLATE](#)

IMPORTANT! **Leave the header line with field titles on the CSV file when uploading the file.**

Table 1 shows the roster fields required in the CSV file. Figure 12 shows where to find the auto-generated badge ID described in Table 1. The number in "badge1 ID" is used to designate which badge will be issued in the CSV file. If you want to issue multiple badges to the same individual on the same CSV file, you should add additional rows with the same earner's information and change the BadgeID on each line. *More information about .CSV file information in the CSV file FAQ's document found in the [BadgeCert Knowledgebase](#)*

Table 1 roster fields in the CSV file

Field name	Required	Example
First name	Yes	John
Last name	Yes	Doe
email	Yes	jdoe@badgecert.com
Phone country code	Yes, only if phone # is provided	1
Phone	No	312-555-5555
Phone extension	No	12
Mobile Country Code	No	+44
Mobile Number	No	312-555-5555
Company	No	BadgeCert Inc
Title	No	Benefits Manager
badge1 ID	Yes	1234 (See Figure 12 for where to locate ID)
issuedate-b1	Yes	1/1/2014 (This must be MM/DD/YYYY)
expDate-b1	No	01/01/2015 (This must be MM/DD/YYYY)
location-b1	No	Typically organization location, but can be "online" or earner location
issuerName-b1	No	CompanyX
issuerNotes-b1	No	John passed the final oral exam with 100%. (This information will not populate on badge metadata)
licenseName-b1	No	Wood Floor Recovery
licenseNumber-b1	No	01234567
IssuerReferenceLink	No	URL link that is displayed in the badge metadata under "Issuer Name" (Recommended)
artifact2-b1	No	http://fake.programdetails.com
artifact3-b1	No	http://fake.programdetails.com

Figure 12 Where to find the auto-generated badge ID Information
Badges > Click on badge > Click View Badge Icon
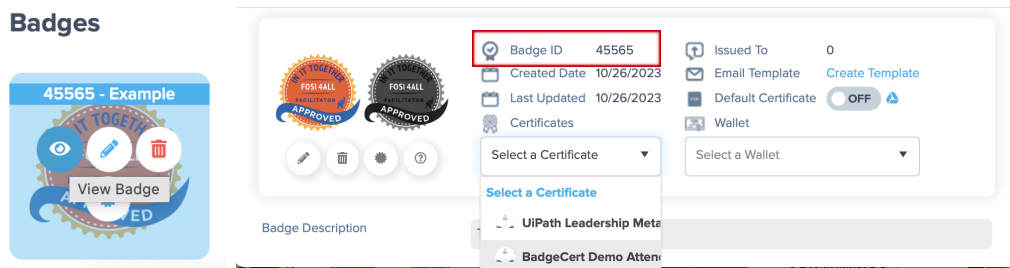
Editing an Issued badge:

Once a badge is issued, it can be edited by the Issuer by hovering over the badge you want to edit and clicking on the edit symbol (pencil) on the badge in Badges (see Figure12). **Please note**: If a change/edit is made on a badge that has already been issued to earners, any changes/edits made will also impact the badges of individuals who have previously been issued the badge. If you don't want badges that have already been issued to be updated with new information, please create a new badge and issue this new badge to earners.

Manage your earners

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Manage customer service requests
From Earners, you can perform the following:

(1) Unlock earner accounts (they are locked after 10 login attempts- See lock icon in Figure 13
(2) Click the edit pencil to Resend email/badges to earners;
(3) Click the edit pencil to Edit badge details;
(4) Click the edit pencil to Delete badges.

You can also export a report about your earners that includes badge open rates and badge url links as shown in Figure 13.
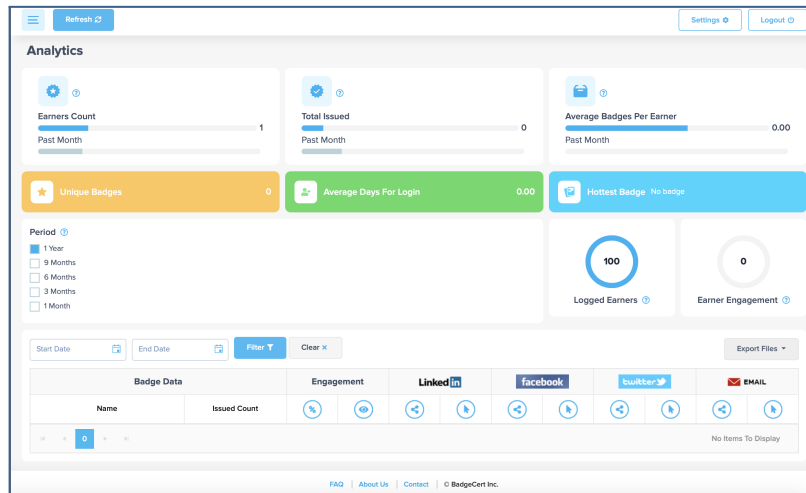
Figure 13 Manage earner accounts
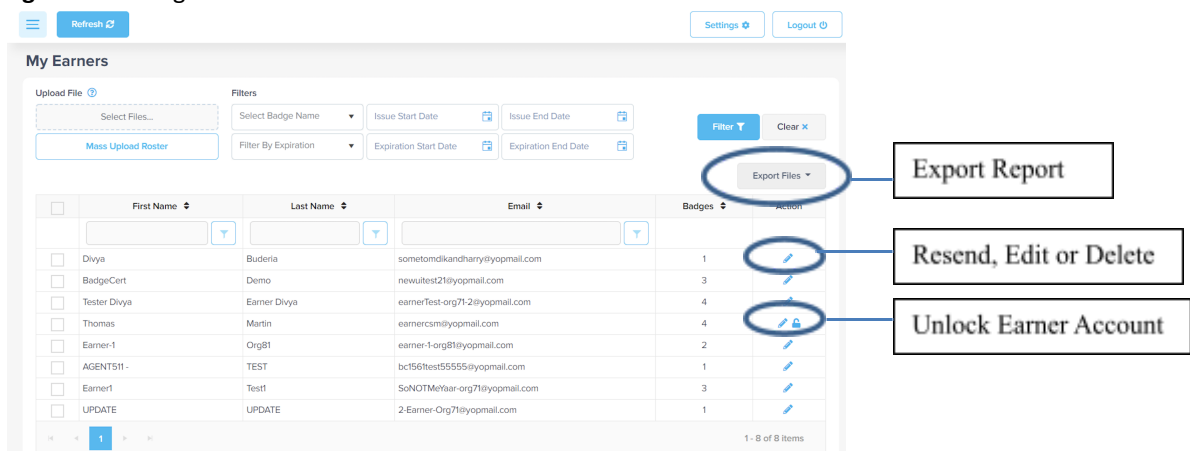
8 Review your analytics

You can use data to learn more about how your credentials are seen in the world
Click on the tool tips ⑦ to understand the data that is presented.

Figure 14 Analytics Dashboard

9 Configure how email is sent (white label "From" address)

You must select the "from" address for emails sent on behalf of your organization such as: badges@yourdomain.org. This will likely improve email going into spam filters by integrating BadgeCert with your email server. If you prefer to use no-reply@badgecert.com, please let our support team know at support@badgecert.com and we can configure it for you.

To send the email from our server (typical) with your custom "from" address, we highly recommend that your IT Department "whitelist" our email server on your email domain server. This is straightforward and is described below.

Please share this with your IT Department:

Set up an SPF config and then add '**include:mailsender.badgecert.com**' to it.

The SPF would have a format like this:

"v=spf1 include:mailsender.badgecert.com ip4:YOURIP ip4:ANYIPTHEYUSETOSENDEMAIL -all"

Replace YOURIP with the IP of your server and you will need to add an ip4: for each IP you use to send out emails.

NOTE: Once this is completed, please validate it by following the directions below.

Validate SPF Config is Correct

To validate that the SPF config is correct, please use this SPF validation link https://www.kitterman.com/spf/validate.html and type in your domain (Figure 15). Then, click on 'Get SPF Record' button and confirm that the TXT validation has BadgeCert's mail server in it (Figure 16). For e.g. if the "from" email address is: "CE@ACCP1.org" you will enter 'accp1.org' (the domain will be the text after @ in your from email address) in the validation page.

Figure 15 SPF Validation Link

Figure 16 Confirmation

SPF record lookup and validation for accp1.org

SPF records are published in DNS as TXT records.

The TXT records found for your domain are:
v=spf1 ip4:52.191.236.182 v=spf1 include:spf.protection.outlook.com include:mailsender.badgecert.com -all

Checking to see if there is a valid SPF record.

Found v=spf1 record for accp1.org:
v=spf1 ip4:52.191.236.182 v=spf1 include:spf.protection.outlook.com include:mailsender.badgecert.com -all

evaluating...
SPF record passed validation test with pySPF (Python SPF library)!

Return to SPF checking tool (clears form)

Use the back button on your browser to return to the SPF checking tool without clearing the form.