



Certificate Hero Group Permissions

What are the Certificate Hero Group Permissions?

Group permissions will allow you to set up and manage user groups to assign permissions for using the website.

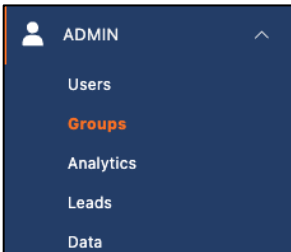
User Groups are used to determine sets of permissions and then assign users to those groups. With Admin permissions, a user can create and manage the groups and roles they assign their users to.

Table of Contents

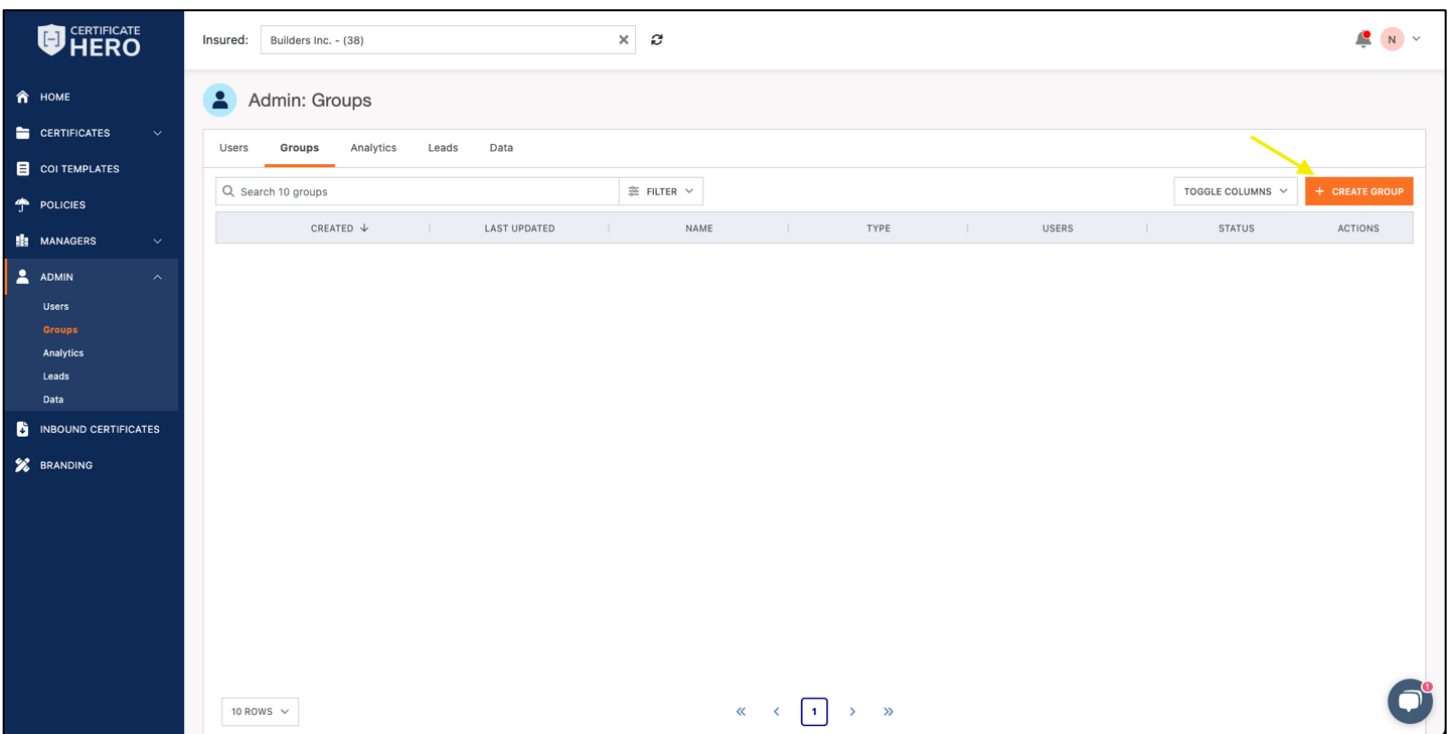
Creating a Group	2
Selecting User Group Permissions	4
Permissions Overview	5
Certificates	5
Description of Operations	6
Notes	7
Endorsements	8
Certificate Templates	9
LOB (Line of Business) Templates	9
Language Library	10
Policies	11
Bulk Jobs	11
Email Templates	12
Holder Management	13
Named Insured Management	13
User Management	14
Group Management	15
Analytics	15
Leads	15
Signatures	16
Inbound Certificates	17
Agency Contacts	17
CI Documents	18

Creating a Group

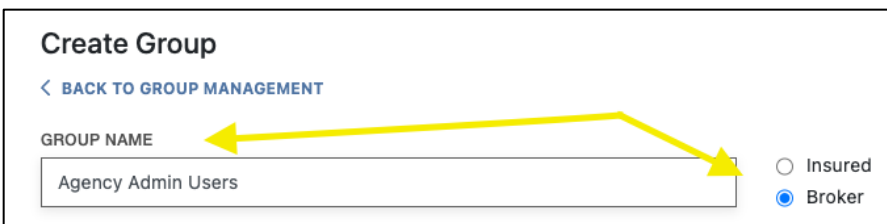
To access the User Groups, within the lefthand menu, click “ADMIN”. Then click “Groups”.



To create a User Group, begin by clicking the orange “CREATE GROUP” button.



Provide the User Group a name and select whether the group relates to Insured users, or internal Broker users.



It is recommended to name the group to coincide with the role. For example, “Agency Admin Users” could pertain to broker users with admin permissions; or Insured – Template Only for insured users only permitted to issue certificates from Certificate Templates.

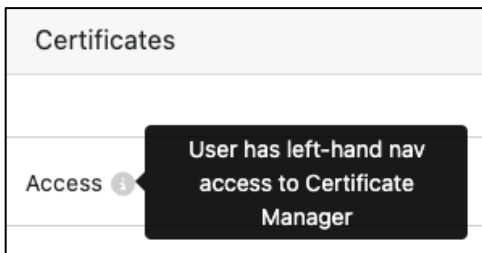
After naming the group, use the accordion dropdowns to open different sections and check off any permissions you wish to enable for this group.

Certificates	▼
Description Of Operations	▼
Notes	▼
Endorsements	▼
Certificate Templates	▼
LOB Templates	▼
Language Library	▼
Policies	▼
Bulk Jobs	▼
Email Templates	▼
Holder Management	▼
Named Insured Management	▼
User Management	▼
Group Management	▼
Analytics	▼
Leads	▼
Signatures	▼
Inbound Certificates	▼
Agency Contacts	▼
Ci Documents	▼
Ingestion	▼

Selecting User Group Permissions

While selecting the permissions, you can reference the Tool Tip icons to review additional information on the permission.

For example, the Tool Tip for Access Certificates explains enabling this permission will allow the user to have left-hand navigation bar access to the Certificate Manager.



If a prerequisite permission is required, the Tool Tip icon can be used to identify what is required to enable the permission you are currently on.

For example, the Tool Tip for creating insured notes will advise access to insured notes is required first.



Once the desired permissions for the group are enabled, click the blue “CREATE GROUP” button at the bottom of the screen to activate the group.



Users can now be assigned to this group and given the associated permissions.

Permissions Overview

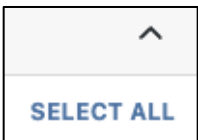
Certificates

Set the permissions within the Certificate Manager and required for processing certificates.

Certificates ^	
	SELECT ALL
Access ⓘ	<input type="checkbox"/>
Create ⓘ	<input type="checkbox"/> ▲
Acord 25 ⓘ	<input type="checkbox"/>
Acord 21 ⓘ	<input type="checkbox"/>
Acord 22 ⓘ	<input type="checkbox"/>
Acord 23 ⓘ	<input type="checkbox"/>
Acord 24 ⓘ	<input type="checkbox"/>
Acord 27 ⓘ	<input type="checkbox"/>
Acord 28 ⓘ	<input type="checkbox"/>
Acord 31 ⓘ	<input type="checkbox"/>
Acord 855 Ny ⓘ	<input type="checkbox"/>
Create from Sample COI ⓘ	<input type="checkbox"/> ▲
Create from Contract ⓘ	<input type="checkbox"/> ▲
Create from Insurance Clause ⓘ	<input type="checkbox"/> ▲
Import And Export ⓘ	<input type="checkbox"/> ▲
Send Email ⓘ	<input type="checkbox"/>
Send Fax ⓘ	<input type="checkbox"/>

- Access
 - Permits the user to access the Certificate Manager
- Create
 - Permits which ACORD Form types the user can issue from
- Create from Sample COI
 - Permits the user to start their certificate by uploading a Sample COI
- Create from Contract
 - Permits the user to start their certificate by uploading a contract for parsing
- Create from Insurance Clause
 - Permits the user to start their certificate by copying and pasting insurance clause or requirements for parsing
- Import and Export
 - Permits the user to Import and Export the certificates for an Insured
- Send Email
 - Permits the user to distribute certificates from within Certificate Hero via email
- Send Fax
 - Permits the user to distribute certificates from within Certificate Hero via fax

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



Description of Operations

- Create
 - Permits the user to edit the Description of Operations on a certificate.



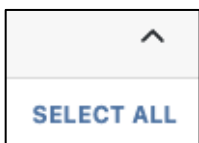
Notes

Set the permissions that will enable a user to either access or create Insured and/or Certificate Notes.

Notes		^
		SELECT ALL
Insured Notes Access ⓘ	<input type="checkbox"/>	
Insured Notes Create ⓘ	<input type="checkbox"/>	⚠
Certificate Notes Access ⓘ	<input type="checkbox"/>	
Certificate Notes Create ⓘ	<input type="checkbox"/>	⚠

- Insured Notes Access
 - Permits the user to view Insured notes
- Insured Notes Create
 - Permits the user to add Insured notes
- Certificate Notes Access
 - Permits the user to view Certificate notes
- Certificate Notes Create
 - Permits the user to add Certificate notes

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



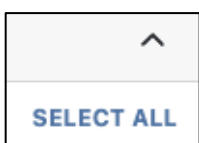
Endorsements

Set the permissions that will enable the level of access a user has when viewing, creating and deleting endorsement forms within the endorsement form library, and insured endorsements.

Endorsements		^
		SELECT ALL
Access ⓘ	<input type="checkbox"/>	
Create ⓘ	<input type="checkbox"/>	⚠
Delete ⓘ	<input type="checkbox"/>	⚠
Form Access ⓘ	<input type="checkbox"/>	⚠
Form Create ⓘ	<input type="checkbox"/>	⚠
Tags Allowed ⓘ	<input type="checkbox"/>	⚠
Tags Editable ⓘ	<input type="checkbox"/>	⚠

- Access
 - Permits the user access to the Endorsement Manager
- Create
 - Permits the user to create new, and modify existing endorsements
- Delete
 - Permits the user to delete an existing endorsement
- Form Access
 - Permits the user access to the Endorsement Form Manager
- Form Create
 - Permits the user to create new, and modify existing endorsements forms
- Tags Allowed
 - Permits the user to use endorsement tags
- Tags Editable
 - Permits the user to edit existing endorsement tags

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



Certificate Templates

- Create
 - Permits the user to create certificate templates
 - Permits the user to select which ACORD Forms for which they can create templates

Certificate Templates	
Create ⓘ	<input type="checkbox"/>
Acord 25 ⓘ	<input type="checkbox"/>
Acord 21 ⓘ	<input type="checkbox"/>
Acord 22 ⓘ	<input type="checkbox"/>
Acord 23 ⓘ	<input type="checkbox"/>
Acord 24 ⓘ	<input type="checkbox"/>
Acord 27 ⓘ	<input type="checkbox"/>
Acord 28 ⓘ	<input type="checkbox"/>
Acord 31 ⓘ	<input type="checkbox"/>
Acord 855 Ny ⓘ	<input type="checkbox"/>

LOB (Line of Business) Templates

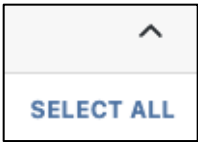
Set the permissions that will enable the level of access a user has when viewing, creating and deleting LOB Templates.

LOB Templates	
	SELECT ALL
Access ⓘ	<input type="checkbox"/>
Create ⓘ	<input type="checkbox"/> ▲
Delete ⓘ	<input type="checkbox"/> ▲

- Access
 - Permits the user access the LOB Profiles Manager, and access the LOB Profiles while processing certificates
- Create
 - Permits the user to create, edit, deactivate and set LOB profiles as default

- Delete
 - Permits the user to delete existing LOB profiles from the manager.

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



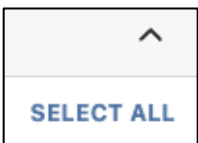
Language Library

Set the permissions that will enable the level of access a user has when viewing, creating and deleting Language Library Templates.

Language Library		^
		SELECT ALL
Access ⓘ		<input type="checkbox"/>
Create ⓘ		<input type="checkbox"/> ▲
Delete ⓘ		<input type="checkbox"/> ▲

- Access
 - Permits the user to access the Language Library
- Create
 - Permits the user to create new Language Library templates
- Delete
 - Permits the user to delete existing Language Library templates

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



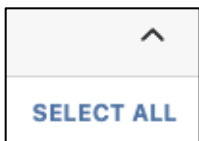
Policies

Set the permissions that will enable the level of access a user has when importing, viewing and creating policies.

Policies		^
SELECT ALL		
Access ⓘ	<input type="checkbox"/>	
Create ⓘ	<input type="checkbox"/>	⚠

- Access
 - Permits the user to view imported policies
 - Permits the user to create LOB profiles from the imported policies
- Create
 - Permits the user to import new policies from the Policies manager and within the renewal flow
 - Permits the user to edit existing policies from the Policies manager and within the renewal flow

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



Bulk Jobs

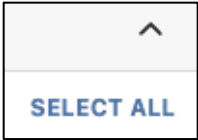
Set the permissions that will enable the level of access a user has when performing bulk jobs.

Bulk Jobs		^
SELECT ALL		
Access ⓘ	<input type="checkbox"/>	⚠
Create Revisions ⓘ	<input type="checkbox"/>	⚠
Create Renewals ⓘ	<input type="checkbox"/>	⚠

- Access
 - Permits the user to access the Bulk Jobs menu to view and download bulk certificates
- Create Revisions
 - Permits the user access to create and edit bulk revisions

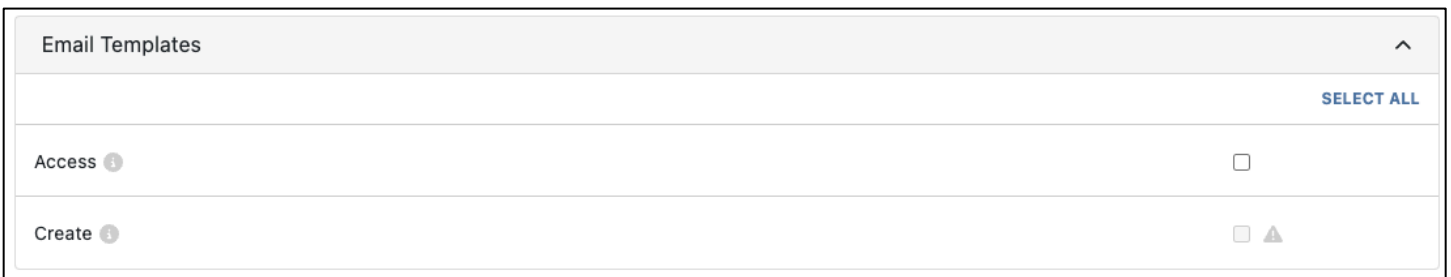
- Create Renewals
 - Permits the user access to create and edit renewals

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



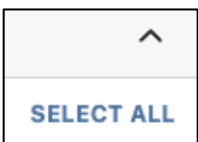
Email Templates

Set the permissions that will enable the level of access a user has to create email templates for outbound Certificate Hero emails.



- Access
 - Permits the user to access the email templates
- Create
 - Permits the user to revise the existing email templates

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



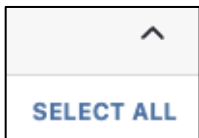
Holder Management

Set the permissions that will enable the level of access a user has to the Holder Library.

Holder Management		^
		SELECT ALL
Access ⓘ	<input type="checkbox"/>	
Create ⓘ	<input type="checkbox"/>	⚠
Delete ⓘ	<input type="checkbox"/>	⚠

- Access
 - Permits the user to view the existing holders in the Holder Library
 - Permits the user to select a holder from the Holder Library when processing certificates
- Create
 - Permits the user to create, modify, deactivate and activate holders within the Holder Library
- Delete
 - Permits the user to delete existing holders from the Holder Library

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



Named Insured Management

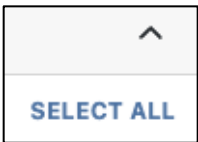
Set the permissions that will enable the level of access a user has to the Named Insured Library.

Named Insured Management		^
		SELECT ALL
Access ⓘ	<input type="checkbox"/>	
Create ⓘ	<input type="checkbox"/>	⚠
Delete ⓘ	<input type="checkbox"/>	⚠

- Access
 - Permits the user to view the existing holders in the Named Insured Library

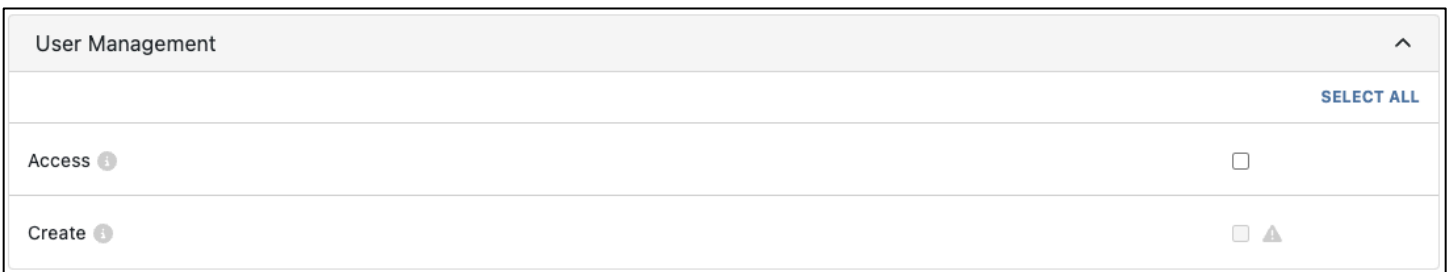
- Permits the user to select a holder from the Named Insured Library when processing certificates
- Create
 - Permits the user to create, modify, deactivate and activate holders within the Named Insured Library
- Delete
 - Permits the user to delete existing holders from the Named Insured Library

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



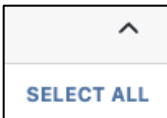
User Management

Set the permissions that will enable the level of access a user has to the users.



- Access
 - Permits the user to access the admin User manager
- Create
 - Permits the user to create and modify users

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



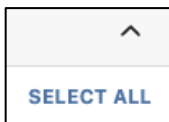
Group Management

Set the permissions that will enable the level of access a user has to the user group permissions.

Group Management		^
SELECT ALL		
Access ⓘ	<input type="checkbox"/>	
Create ⓘ	<input type="checkbox"/>	▲

- Access
 - Permits the user to access the admin Group manager
- Create
 - Permits the user to create and modify Groups

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



Analytics

- Permits the user to to view analytic reports

Analytics		^
Access ⓘ	<input type="checkbox"/>	

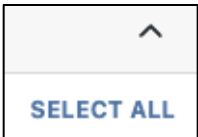
Leads

Set the permissions that will enable the level of access a user has to the Leads dashboard.

Leads		^
SELECT ALL		
Access ⓘ	<input type="checkbox"/>	
Update ⓘ	<input type="checkbox"/>	▲
Assign ⓘ	<input type="checkbox"/>	▲

- Access
 - Permits the user to view the Leads dashboard
- Update
 - Permits the user to update Leads
- Assign
 - Permits the user to assign Leads

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



Signatures

Set the permissions that will enable the level of access a user has to the Signatures manager.

Signatures		^
		SELECT ALL
Access ⓘ		<input type="checkbox"/>
Create ⓘ		<input type="checkbox"/> ▲
Delete ⓘ		<input type="checkbox"/> ▲

- Access
 - Permits the user to view the existing signatures in the Signature Library
 - Permits the user to select a signature from the Signature Library when processing certificates
- Create
 - Permits the user to create, modify, deactivate and activate signature within the Signature Library
- Delete
 - Permits the user to delete existing signature from the Signature Library

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



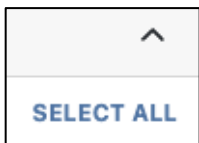
Inbound Certificates

Set the permissions that will enable the level of access a user has to the Inbound Certificates.

Inbound Certificates		^
SELECT ALL		
Access ⓘ	<input type="checkbox"/>	
Create ⓘ	<input type="checkbox"/> ⚠	

- Access
 - Permits the user to access Inbound Certificates
- Create
 - Permits the user to create and import certificates into the Inbound Certificates menu

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



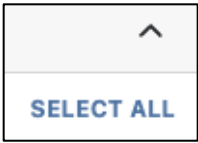
Agency Contacts

Set the permissions that will enable the level of access a user has to the Agency Contacts menu.

Agency Contacts		^
SELECT ALL		
Access ⓘ	<input type="checkbox"/>	
Create ⓘ	<input type="checkbox"/> ⚠	
Delete ⓘ	<input type="checkbox"/> ⚠	

- Access
 - Permits the user to view the existing Agency Contacts in the Agency Contacts Library
 - Permits the user to select an Agency Contacts from the Agency Contacts Library when processing certificates
- Create
 - Permits the user to create, modify, deactivate and activate Agency Contacts within the Agency Contacts Library
- Delete
 - Permits the user to delete existing Agency Contacts from the Agency Contacts Library

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.



CI Documents

Set the permissions that will enable the level of access a user has to the CIDs menu.

Ci Documents		^
		SELECT ALL
Access ⓘ		<input type="checkbox"/>
Create ⓘ		<input type="checkbox"/> ▲
Delete ⓘ		<input type="checkbox"/> ▲

- Access
 - Permits the user to view the existing CID form in the CIDs Manager
 - Permits the user to select an CID form the CIDs Tab when processing certificates
- Create
 - Permits the user to create, modify, deactivate and activate CID form within the CIDs Manager
- Delete
 - Permits the user to delete existing CID forms from the CIDs Manager

Tip: To enable all pre-requisite permissions for this section without needing to select them one by one, you can click the blue “SELECT ALL” font in the upper right corner.

