



Group Permissions Definitions

The below guide will provide a definition to the various permissions when selecting the permissions for a User Group.

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Certificates

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

- 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

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.

- 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

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.

- 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

Certificate Templates

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

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.

- 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.

Language Library

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

- 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

Policies

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

- 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

Bulk Jobs

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

- 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

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

Holder Management

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

- 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

Named Insured Management

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

- 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

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

Group Management

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

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

Analytics

- Permits the user to to view analytic reports

Leads

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

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

Signatures

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

- 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

Inbound Certificates

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

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

Agency Contacts

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

- 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

CI Documents

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

- 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