CERTIFICATE HERO®

Contract Analysis Enhancements

Enhancement Features:

Customized Viewing Experience

Tailor how you view and analyze contracts with enhanced flexibility! The Certificate Editor now features a customizable multi-window view, giving you full control over formatting and display options. Easily switch between windows, close unnecessary ones with a single click, and navigate seamlessly using intuitive tabs. This upgrade streamlines your workflow, making it easier to highlight key clauses, adjust layouts, and filter contract details—so you can focus on what matters most.

Contract Search

Easily find key information with the new search feature in the Contract window! Even unstructured PDFs are now searchable, allowing you to quickly locate specific terms or phrases. This enhancement ensures faster, more efficient contract review!

Quick Finds

Quickly locate key contract details with the new Contract Quick Finds dropdown! Powered by AI, this feature allows you to jump directly to commonly required criteria – such as Additional Insured status or AM Best Rating – with highlighted results for easy reference.

Contract Query

Get instant answers with an AI-powered chat directly from the contract. Simply ask a question, and the system will extract relevant information, saving time and eliminating the need to manually search lengthy documents.

Customized Viewing Experience

Once you have uploaded the contract, you're brought to the Certificate Editor. The first enhancement includes the ability to add and remove the windows that appear.

You can have an few as one window, and as many as four – depending on your viewing preference.
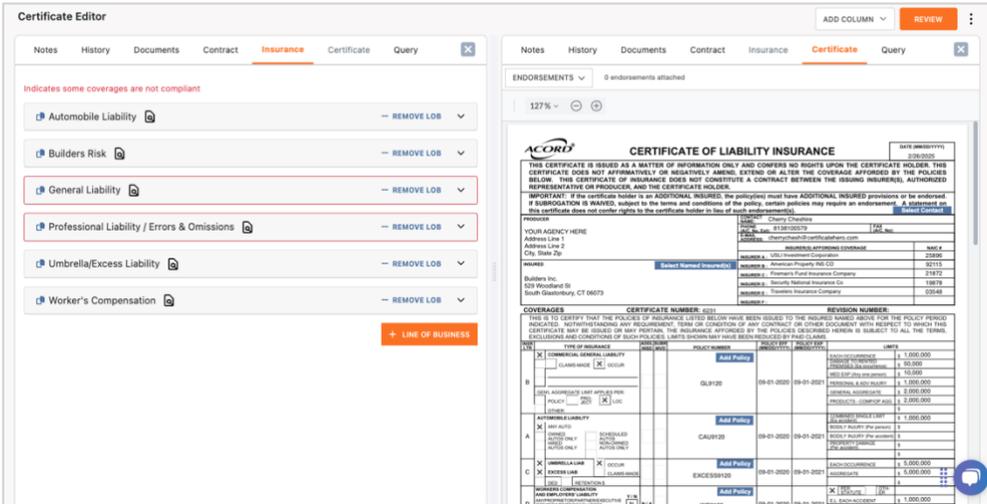
To view an additional window, in the upper right corner select the "Add Column" dropdown.

Select the window you wild like to view, and an additional window will appear on the screen.
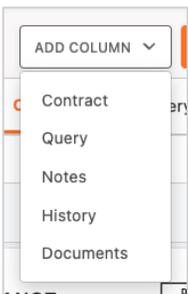
The image below is an example the user viewing three tabs, in this case viewing the Insurance requirements, the ACORD form and the contract.
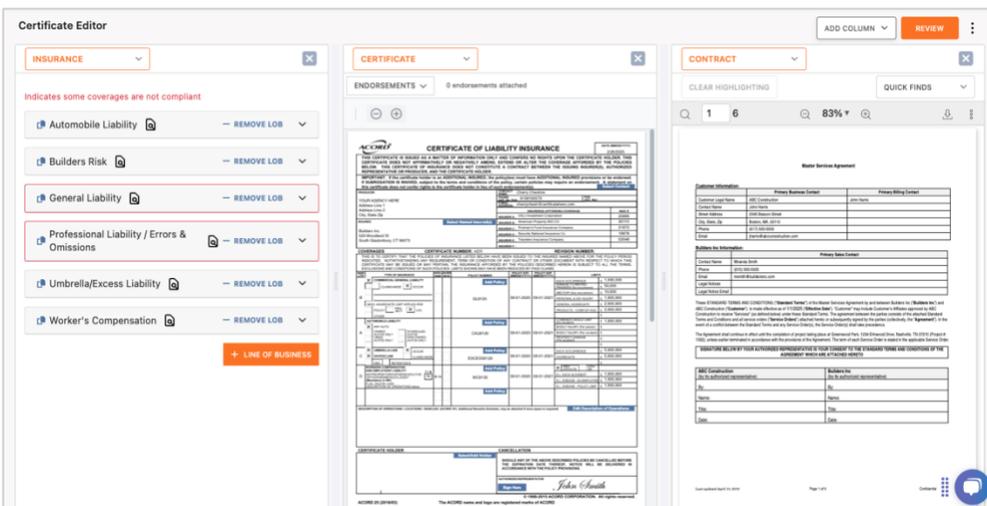
The image below is an example of the user viewing the maximum number of windows, in this case viewing the Insurance requirements, the ACORD form, the contract that was uploaded, and the attached internal Documents.
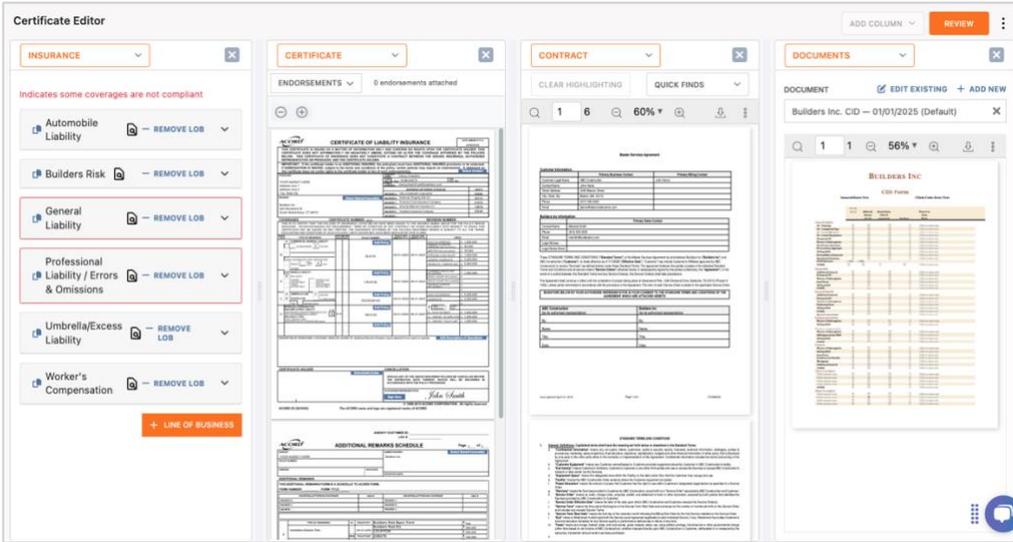
The image below is an example of a user viewing only one window.
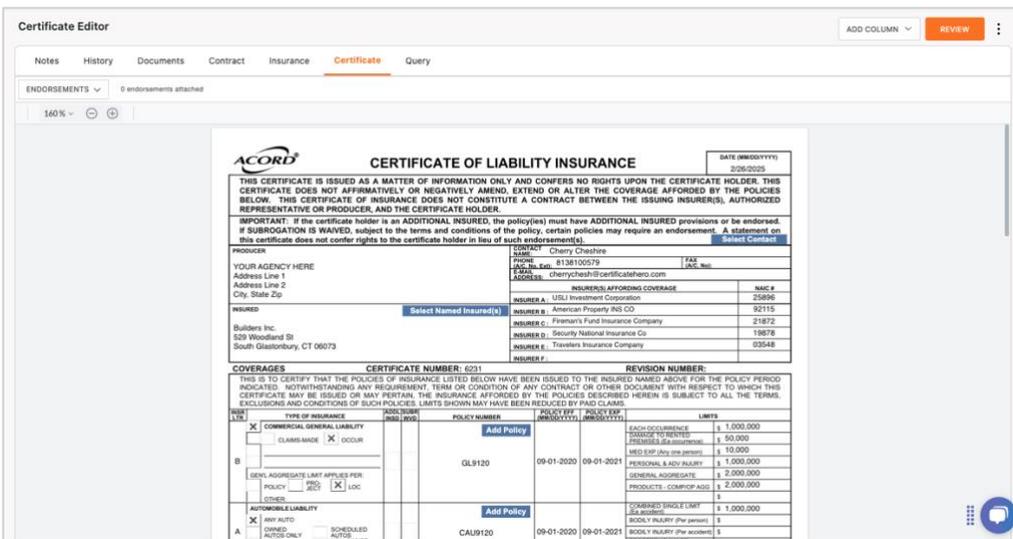
The dropdown at the top of each window will allow you to switch to any window that is not currently displayed. Simply click the dropdown and select a different window's content to view.

If you would like to close out of one of the windows to reduce the number of items on the screen, you can click the X in the upper right corner of the window.

You can continue to click this X until you have the number of windows on the screen that fits your preferred view.
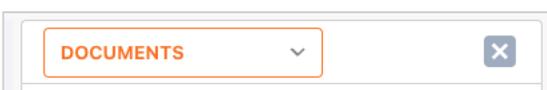
Depending on the number of windows you are viewing, you can also change the view of your window by selecting one of the tabs at the top of each window.

As shown in the image below, you can switch between viewing the Notes, the certificate History, the attached internal Documents, the uploaded Contract, the Insurance requirements, the Certificate ACORD form and the Query feature.

Contract Search

The next enhancement is the ability to search within the contract. With this new feature, even unstructured PDFs are now searchable, allowing you to quickly find specific information in your uploaded document.

To use this feature, click the search icon in the upper left corner of the Contract window. Enter a word or phrase in the search box, and the system will highlight all instances in yellow, making it easy to locate across pages.

Quick Finds

The next enhancement includes the Quick Finds dropdown within the Contract window view. These Quick Finds are Pre-found AI concepts, allowing you to quickly jump to commonly required criteria, for example: Additional Insured status, or the AM Best Rating.

When you select one of the quick finds options from the dropdown, you will be directed to that section of the contract, with the requirement highlighted yellow.
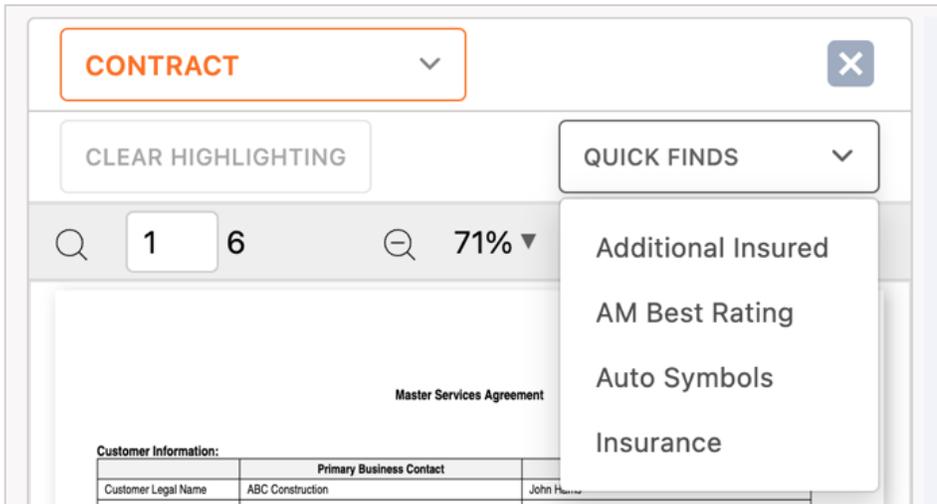
The image below is an example of a user selecting AM Best Rating from the Quick Finds dropdown.
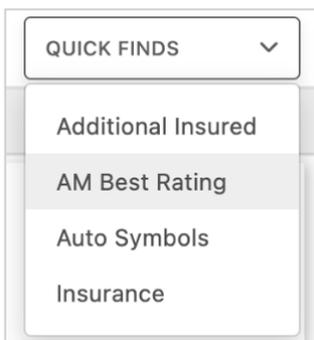
The contract view then updates to show the rating within the contract, highlighted yellow for easy reference.
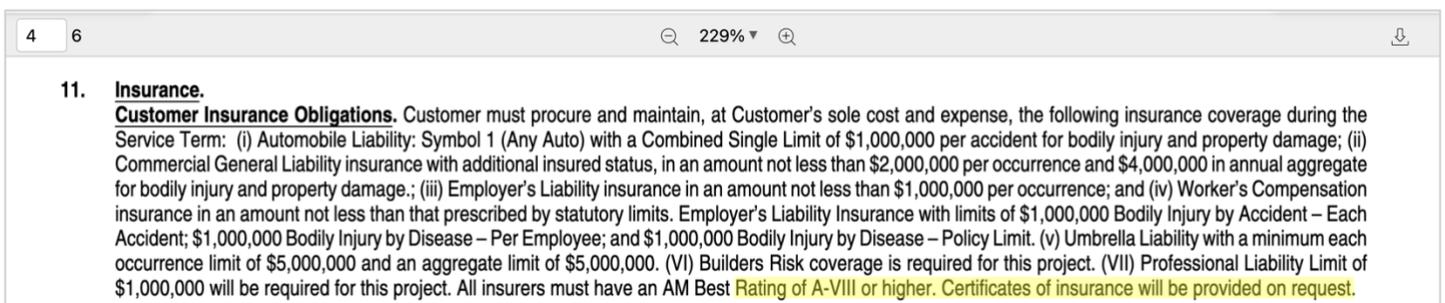
Along with the Quick Finds dropdown, you now also can select a policy to jump directly to its requirements in the contract.

Within the Insurance window, to the right of the Line of Business you'll notice a policy quick find icon.

Clicking the icon will jump you to the appropriate section of the contract. If you do not already have a view of the Contract window open, one will open for you once you've clicked this icon.
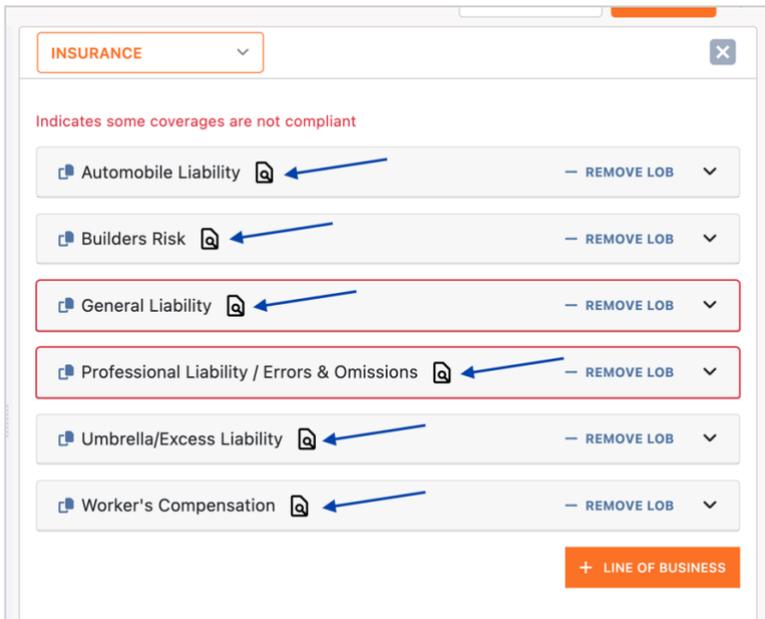
The image below is an example of a user that has clicked the policy quick find icon for the Automobile Liability policy. To the left of the Line of Business requirement, you can see the verbiage highlighted within the contract.

The image below is an example of a user that has clicked the policy quick find icon for the Builders Risk policy. To the left of the Line of Business requirement, you can see the verbiage highlighted within the contract.

If you would like to remove the highlighting from the contract, in the upper left of the window, click "Clear Highlighting".

Contract Query

Finally, the new Query feature lets you "chat" with the contract. Simply ask a question, and the system will extract relevant information for you. Your queries can cover both insurance and non-insurance topics—if the information is in the contract, this feature can find it.

The image below shows an example of a chat conversation with a contract. In this example, the user inquires about the Additional Insured status, the Waiver of Subrogation status and the project information.
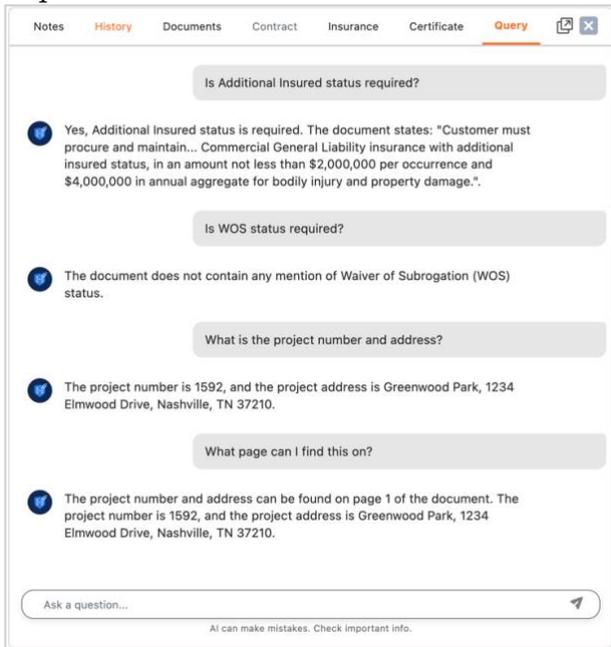
Certificate Hero's AI behind the chat feature is intuitive enough to recognize common abbreviations (e.g., GL for General Liability and WOS for Waiver of Subrogation), understand variations in formatting (such as full questions versus brief phrases), and accurately respond to misspellings.
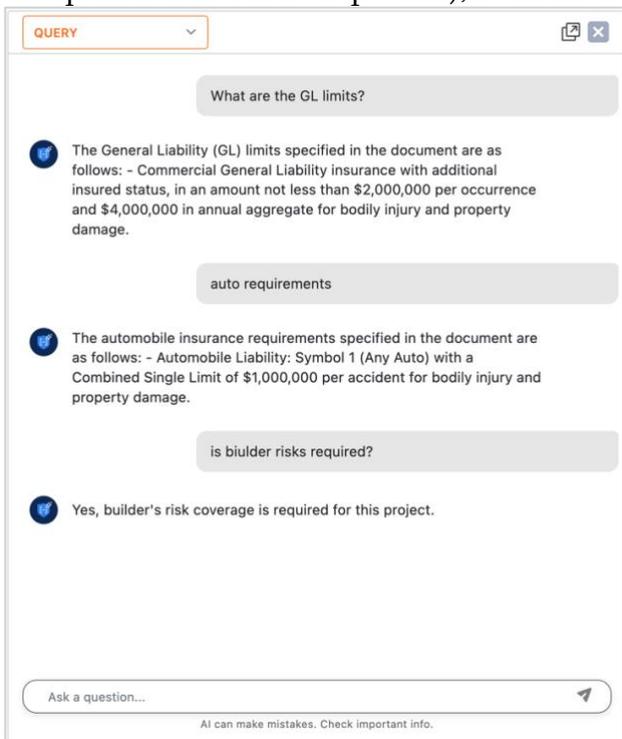
The Query window can also pop-out from the window it begins in. In the upper right corner, click the icon to pop-out the chat box.

Once the chat box modal appears, you can move it around the screen.
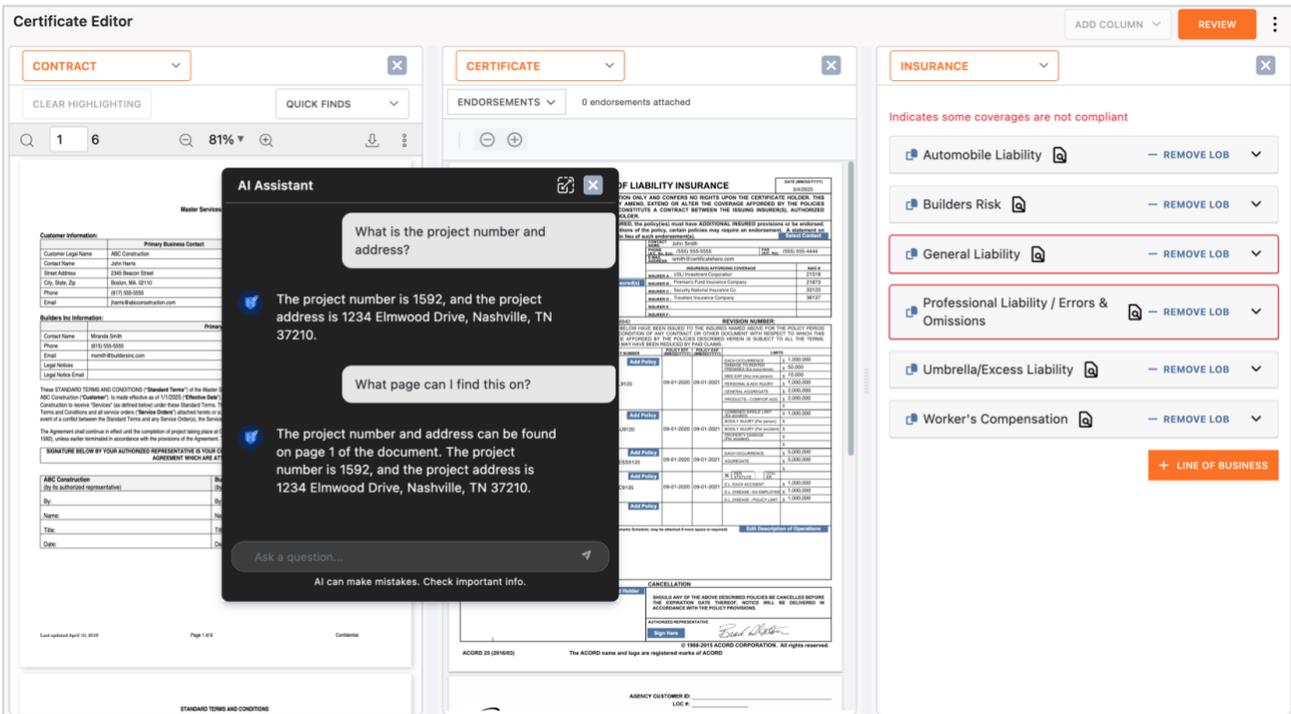
You can either click the X in the upper right corner to close the chat box or click the icon to collapse the modal back into your view.