



How to Issue a Certificate Uploading a Sample Certificate

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There are four different ways to initiate the certificate processing flow.

Selecting the ACORD form type

This method will allow you to manually select the desired ACORD form. Certificates can be issued by selecting the required policies or by selecting a previously created certificate template.

Uploading a sample certificate

This method will allow you to upload a sample certificate and add the required policies base on the sample.

Uploading a contract

This method will parse an uploaded contract, scan for the insurance clause, and pull the required policies.

Entering insurance clause/requirements

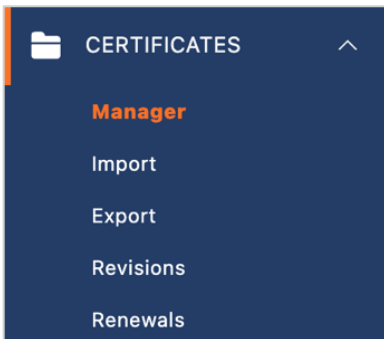
This method will allow you to enter the insurance requirements and pull the required policies.

This guide will take you through how to issue a certificate by [Uploading a sample certificate](#).

We will review the most common form, the **ACORD 25**.

Starting the Certificate Issuance Process

To begin, drop down the “Certificates” menu and click “Manager”.



Within the Certificate Manager, click the orange “Create Certificate” button.



Select “Sample Certificate” and upload the a copy of the sample certificate.
After uploading the sample certificate, click the blue “Create Certificate” button.



Sample Certificate Editor

This will bring you to the Certificate Editor, which is split in two sections – the COI resources on the left and a preview of the ACORD form itself on the right.

Certificate Editor
ASSIGN DELETE SAVE AS TEMPLATE SAVE REVIEW

Notes History CID Sample Certificate

INSURED NOTES

Please send a copy of all certificates to admin@builders.com

CERTIFICATE NOTES

Add notes related to this certificate...

SAVE

ENDORSEMENTS 0 endorsements attached

111% ⬇ ⬆

ACORD
CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
1/19/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
YOUR AGENCY HERE
Address Line 1
Address Line 2
City, State Zip

CONTACT NAME: Rebecca's Agency Contact
PHONE (A/C, Ext.): 8138100579 **FAX (A/C, Ext.):**
EMAIL ADDRESS: rtmppkins@certificatehero.com

INSURER(S) AFFORDING COVERAGE **NAIC #**
INSURER A: CNA Insurance Companies 14063
INSURER B:
INSURER C:
INSURER D:
INSURER E:
INSURER F:

INSURED
Builders, Inc.
95 Rochester Street
Teterboro, NJ 07608

COVERAGES **CERTIFICATE NUMBER:** 2890 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TR	TYPE OF INSURANCE	INSO. WVD.	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	<input checked="" type="checkbox"/>	GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000
						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000
A	GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	<input checked="" type="checkbox"/>	CAU9120	09-01-2020	09-01-2021	MED EXP (Any one person) \$ 5,000
						PERSONAL & ADV INJURY \$ 1,000,000
A	<input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED <input type="checkbox"/> SCHEDULED <input type="checkbox"/> AUTOS ONLY <input type="checkbox"/> AUTOS <input type="checkbox"/> HIRED <input type="checkbox"/> NON-OWNED <input type="checkbox"/> AUTOS ONLY	<input checked="" type="checkbox"/>	EXCESS9120	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
						BODILY INJURY (Per person) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB	<input checked="" type="checkbox"/>	OOSWC9120	09-01-2020	09-01-2021	AGGREGATE \$ 5,000,000
						E.L. EACH ACCIDENT \$ 1,000,000
A	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS LIABILITY <small>ANY PROPRIETORS/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NJ)</small> If yes, describe above DESCRIPTION OF OPERATIONS below	<input checked="" type="checkbox"/>	OOSWC9120	09-01-2020	09-01-2021	E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
						E.L. DISEASE - POLICY LIMIT \$ 1,000,000

When a sample certificate is uploaded, a copy of the sample certificate you just uploaded will be available for reference within the Sample Certificate tab of the COI resources.

Certificate Editor
Notes History CID **Sample Certificate**

+ -

ACORD
CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
1/19/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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PRODUCER
YOUR AGENCY HERE
Address Line 1
Address Line 2
City, State Zip

CONTACT NAME: Rebecca's Agency Contact
PHONE (A/C, Ext.): 8138100579 **FAX (A/C, Ext.):**
EMAIL ADDRESS: rtmppkins@certificatehero.com

INSURER(S) AFFORDING COVERAGE **NAIC #**
INSURER A: CNA Insurance Companies 14063
INSURER B:
INSURER C:
INSURER D:
INSURER E:
INSURER F:

INSURED
Builders, Inc.
95 Rochester Street
Teterboro, NJ 07608

COVERAGES **CERTIFICATE NUMBER:** 2890 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TR	TYPE OF INSURANCE	INSO. WVD.	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	<input checked="" type="checkbox"/>	GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000
						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000
A	GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	<input checked="" type="checkbox"/>	CAU9120	09-01-2020	09-01-2021	MED EXP (Any one person) \$ 5,000
						PERSONAL & ADV INJURY \$ 1,000,000
A	<input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED <input type="checkbox"/> SCHEDULED <input type="checkbox"/> AUTOS ONLY <input type="checkbox"/> AUTOS <input type="checkbox"/> HIRED <input type="checkbox"/> NON-OWNED <input type="checkbox"/> AUTOS ONLY	<input checked="" type="checkbox"/>	EXCESS9120	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
						BODILY INJURY (Per person) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB	<input checked="" type="checkbox"/>	OOSWC9120	09-01-2020	09-01-2021	AGGREGATE \$ 5,000,000
						E.L. EACH ACCIDENT \$ 1,000,000
A	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS LIABILITY <small>ANY PROPRIETORS/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NJ)</small> If yes, describe above DESCRIPTION OF OPERATIONS below	<input checked="" type="checkbox"/>	OOSWC9120	09-01-2020	09-01-2021	E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
						E.L. DISEASE - POLICY LIMIT \$ 1,000,000

The certificate preview on the right provides a real-time display of any additions and edits you make to the certificate.

The **GREY** selectors indicate areas on the certificate that you can interact with and modify, and you can utilize these grey selectors to fill out the various fields of the certificate.

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 12/28/2023		
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>						
PRODUCER YOUR AGENCY HERE Address Line 1 Address Line 2 City, State Zip		CONTACT NAME: Kristin Collins PHONE (AC, No, Ext): 1-800-HERO E-MAIL: kcollins@certificatehero.com ADDRESS:		Select Contact FAX (AC, No): INSURER(S) AFFORDING COVERAGE NAIC #		
INSURED Builders, Inc. 95 Rochester Street Teterboro, NJ 07608		Select Named Insured(s)		INSURER A: INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:		
COVERAGES CERTIFICATE NUMBER: 4546350 REVISION NUMBER:						
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>						
INSR LTR	TYPE OF INSURANCE	ADDL SUBR (REQD, WVD)	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		Add Policy			EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (EA occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPIOP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY		Add Policy			COMBINED SINGLE LIMIT (EA accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED: RETENTION \$		Add Policy			EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NJ) If yes, describe under DESCRIPTION OF OPERATIONS below	<input type="checkbox"/> Y/N <input type="checkbox"/> N/A	Add Policy			PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)						
Edit Description of Operations						
CERTIFICATE HOLDER			CANCELLATION			
Select/Add Holder			SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
Sign Here			AUTHORIZED REPRESENTATIVE <i>Signature</i>			
ACORD 25 (2016/03) The ACORD name and logo are registered marks of ACORD © 1988-2015 ACORD CORPORATION. All rights reserved.						

The following fields will be pre-filled with agency selected default data.

- Named Insured
- Agency Contact
- Signature

The following fields will start off without data entered.

- Selecting the Policies/LOB profiles
- Entering the Certificate Holder
- Adding verbiage to the Description of Operations
- Attaching Endorsements

[Back to Top](#)

Updating the Agency Contact

Within the contact section of the certificate, click “Select Contact”.

uch endorsement(s).		Select Contact
CONTACT NAME:	Kristin Collins	
PHONE (A/C, No, Ext):	1-800-HERO	FAX (A/C, No):
E-MAIL ADDRESS:	kcollins@certificatehero.com	

You will now be able to update the contact within the Certificate Editor.

Certificate Editor

Notes History CID **Contact**

CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

Kristin Collins

Selecting an Existing Agency Contact

To select an existing contact, click the contact’s name.

Certificate Editor

Notes History CID **Contact**

CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

Kristin Collins

You can scroll through the list of the existing contacts...

Certificate Editor

Notes History CID **Contact**

CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

Choose a contact...

- Rebecca's Agency Contact (Default)
- Agency Contact
- Kristin Collins

...Or type ahead to find the name of the contact you would like to select.

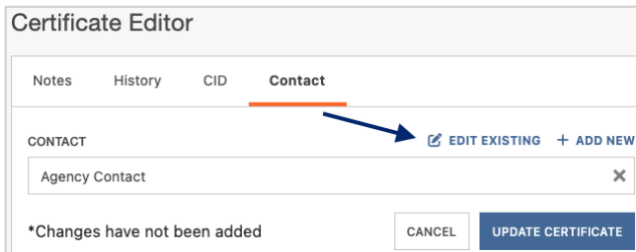
CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

agency CONTACT

AGENCY CONTACT


Edit an Existing Agency Contact


To edit an existing contact, select the desired contact name and click “Edit Existing”.



Certificate Editor

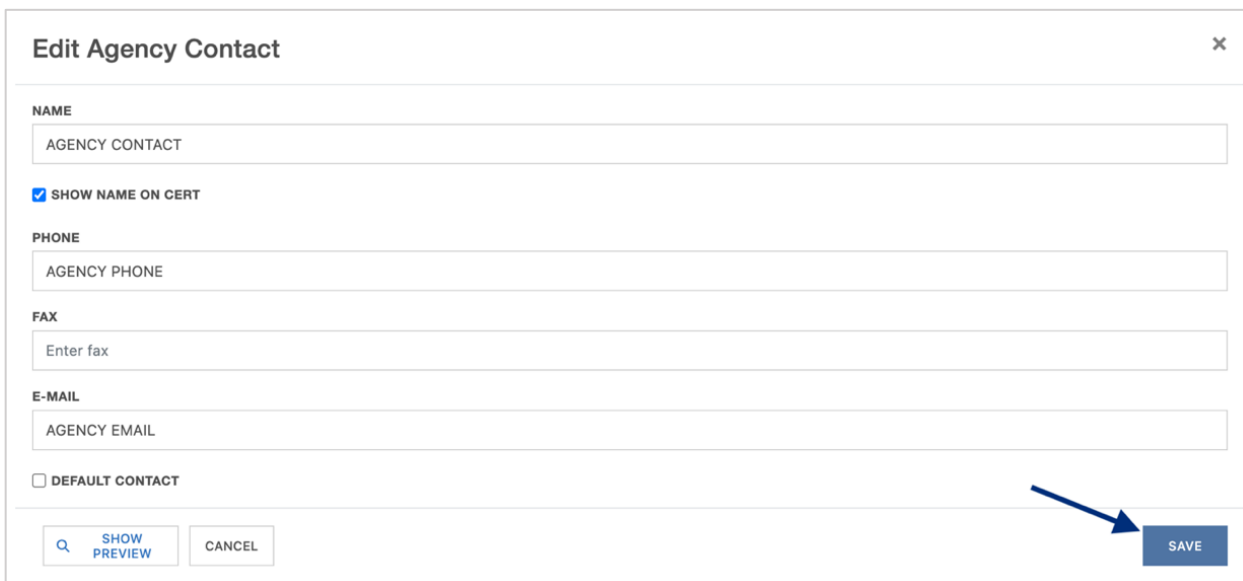
Notes History CID **Contact**


CONTACT  EDIT EXISTING + ADD NEW

Agency Contact 

*Changes have not been added

Within the edit form, proceed with the revisions and click “Save”.



Edit Agency Contact 

NAME

AGENCY CONTACT

SHOW NAME ON CERT

PHONE

AGENCY PHONE


FAX

Enter fax

E-MAIL

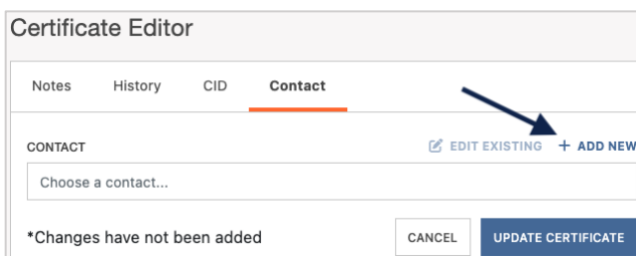
AGENCY EMAIL

DEFAULT CONTACT




Adding a New Agency Contact

To add a new contact, click “Add New”.



Certificate Editor

Notes History CID **Contact**

CONTACT  EDIT EXISTING + ADD NEW

Choose a contact...

*Changes have not been added

Within the create form, fill out the applicable fields and click “Save”.

Create Agency Contact ✕

NAME
Agency Contact

SHOW NAME ON CERT

PHONE
(555) 555-5555

FAX
(555) 555-4444

E-MAIL
agencycontact@agencyemaildomain.com

DEFAULT CONTACT

Once you have selected, revised, or added an Agency Contact, click “Update Certificate” to reflect the change on the certificate.

Certificate Editor

Notes History CID **Contact**

CONTACT

Agency Contact

*Changes have not been added

The Agency Contact on the certificate has been updated:

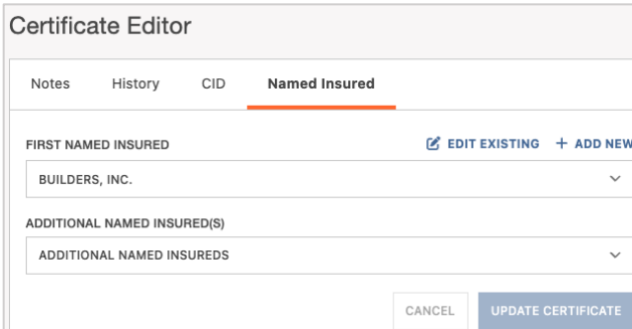
ich endorsement(s).		Select Contact
CONTACT NAME:	Agency Contact	
PHONE (A/C, No, Ext):	(555) 555-5555	FAX (A/C, No): (555) 555-4444
E-MAIL ADDRESS:	agencycontact@agencyemaildomain.com	

Updating the Named Insured

Within the Insured section of the certificate, click “Select Named Insured(s)”.

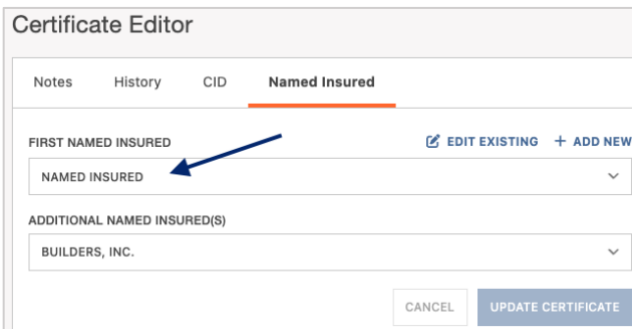


You will now be able to update the Named Insured within the Certificate Editor.

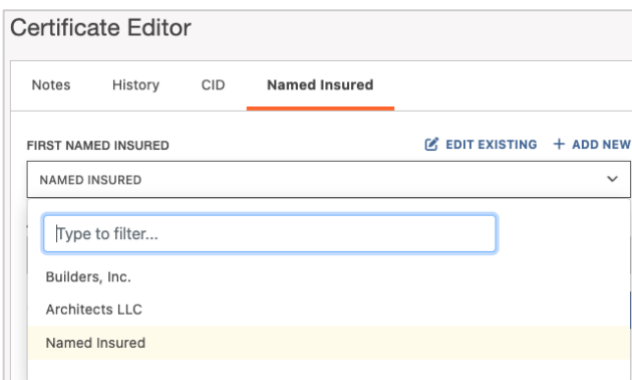


Selecting an Existing Named Insured

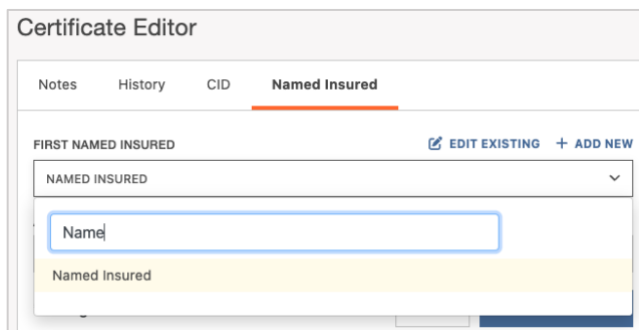
To select an existing Named Insured, click the First Named Insured.



You can scroll through the list of the existing Named Insureds...

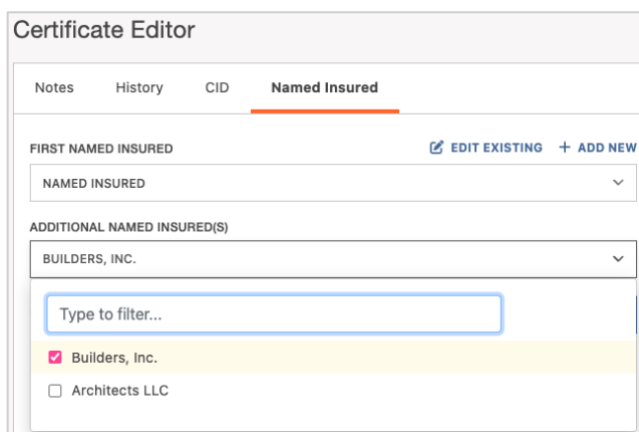


...Or type ahead to find the Named Insured you would like to select.



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'FIRST NAMED INSURED' section, a dropdown menu is open, displaying a search input field with the text 'Name' and a list of search results, with 'Named Insured' highlighted in yellow.

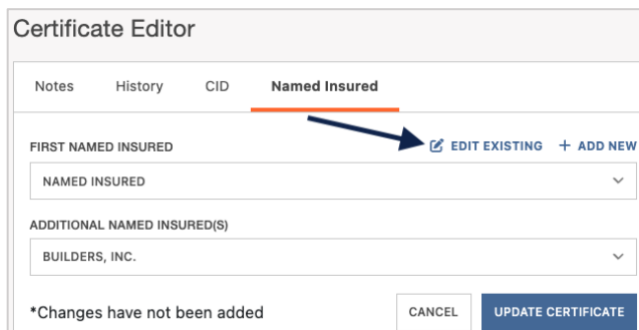
You can also add Additional Named Insured(s) to be reflected on the certificate. Click on the “Additional Named Insured(s)” dropdown and selected the additional Named Insured(s) you’d like shown.



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'ADDITIONAL NAMED INSURED(S)' section, a dropdown menu is open, displaying a search input field with the text 'Type to filter..' and a list of search results, with 'Builders, Inc.' checked and highlighted in yellow, and 'Architects LLC' unchecked.

Edit an Existing Named Insured

To edit an existing Named Insured, select the desired entity and click “Edit Existing”.



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. A blue arrow points to the 'EDIT EXISTING' button in the 'FIRST NAMED INSURED' section. The 'ADDITIONAL NAMED INSURED(S)' dropdown is set to 'BUILDERS, INC.'. At the bottom, there is a status message '*Changes have not been added' and two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

Within the edit form, proceed with the revisions and click “Save”.

Edit Named Insured [X]

NAME
Named Insured

INSURED STREET ADDRESS
123 Main Street
Enter primary address cont'd

CITY
Anywhere

STATE CA [v] **ZIP CODE** 90210

[SHOW PREVIEW] [CANCEL] [SAVE]

Please Note: To edit any Additional Named Insureds, follow these same steps.

Adding a New Named Insured

To add a new Named Insured, click “Add New”.

Certificate Editor

Notes History CID **Named Insured**

FIRST NAMED INSURED [EDIT EXISTING] + ADD NEW
BUILDERS, INC. [v]

ADDITIONAL NAMED INSURED(S)
ADDITIONAL NAMED INSUREDS [v]

[CANCEL] [UPDATE CERTIFICATE]

Within the create form, fill out the applicable fields and click “Save”.

Create Named Insured [X]

NAME
Named Insured

INSURED STREET ADDRESS
123 Main Street
Enter primary address cont'd

CITY
Anywhere

STATE CA [v] **ZIP CODE** 90210

[SHOW PREVIEW] [CANCEL] [SAVE]

Once you have selected, revised, or added a Named Insured, click “Update Certificate” to reflect the change to the certificate.

Certificate Editor

Notes History CID **Named Insured**

FIRST NAMED INSURED [EDIT EXISTING](#) + [ADD NEW](#)

NAMED INSURED

ADDITIONAL NAMED INSURED(S)

BUILDERS, INC.

*Changes have not been added

CANCEL UPDATE CERTIFICATE

The First Named Insured on the certificate has been updated:

INSURED **Select Named Insured(s)**

Named Insured
123 Main Street
Anywhere, CA 90210

Any Additional Named Insured(s) will show in the Description of Operation:

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES

Additional Named Insureds: Builders, Inc.

Updating the Policies

Within the Policies section of the certificate, click “Add Policy” for the policy you want to add to the certificate.

TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
COMMERCIAL GENERAL LIABILITY			Add Policy			EACH OCCURRENCE	\$
<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$
						MED EXP (Any one person)	\$
						PERSONAL & ADV INJURY	\$
GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	\$
<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG	\$
OTHER:							\$

This will take you to the Line of Business (LOB) editor within the certificate editor. On the far left of this section you can switch through various LOBs to add to the certificate. You can also select existing LOB profiles or add new LOBs profiles.

Line of Business

- General Liability
- Automotive
- Umbrella
- Workers Comp

ADD LOB

CHOOSE PROFILE: NO PROFILE

EDIT EXISTING + ADD NEW

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY				
<input type="checkbox"/> CLAIMS-MADE BASIS	<input type="checkbox"/> OCCURRENCE BASIS	<input type="checkbox"/> Certificate Only Field	EACH OCCURRENCE LIMIT	Value
<input type="checkbox"/> COVERAGE A	Coverage A Name	<input type="checkbox"/> ADDITIONAL INSURED	DAMAGE TO RENTED PREMISES LIMIT	Value
<input type="checkbox"/> COVERAGE B	Coverage B Name	<input type="checkbox"/> Certificate Only Field	MEDICAL EXPENSE	Value
<input type="checkbox"/> PER POLICY	<input type="checkbox"/> PER PROJECT	<input type="checkbox"/> WAIVER OF SUBROGATION	PERSONAL & ADVERTISING LIMIT	Value
<input type="checkbox"/> PER OTHER	Other Name		GENERAL AGGREGATE LIMIT	Value
			PRODUCTS - COMP/OP AGGREGATE LIMIT	Value
			Coverage Name	Value

CANCEL SAVE

Selecting an Existing Policy LOB

To add an existing LOB, click the “Choose Profile” dropdown and select the policy you would like to add.

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

CHOOSE PROFILE

NO PROFILE

No Profile

2020 GL (Default) - 20-21 General Liability

HIDE EXPIRED

This will populate the data from your Agency Management System (AMS).

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

ADD LOB

CHOOSE PROFILE

2020 GL (DEFAULT) - 20-21 GENERAL L...

EDIT EXISTING + ADD NEW

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
GL9120	20-21 General Liability	09-01-2020	09-01-2021	

AMS Value: Checked COMMERCIAL GENERAL LIABILITY

AMS Value: Unchecked CLAIMS-MADE BASIS

AMS Value: Unchecked COVERAGE A

AMS Value: Unchecked COVERAGE B

AMS Value: Unchecked PER POLICY

AMS Value: Unchecked PER OTHER

Certificate Only Field ADDITIONAL INSURED

Certificate Only Field WAIVER OF SUBROGATION

AMS Value: Not Found Coverage A Name

AMS Value: Not Found Coverage B Name

AMS Value: Unchecked PER PROJECT

AMS Value: Unchecked PER LOCATION

AMS Value: Not Found Other Name

EACH OCCURRENCE LIMIT: 1,000,000

DAMAGE TO RENTED PREMISES LIMIT: 50,000

MEDICAL EXPENSE: 5,000

PERSONAL & ADVERTISING LIMIT: 1,000,000

GENERAL AGGREGATE LIMIT: 2,000,000

PRODUCTS - COMP/OP AGGREGATE LIMIT: 2,000,000

Coverage Name Value

CANCEL SAVE

You can either select the next LOB on the left to add to the certificate...

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

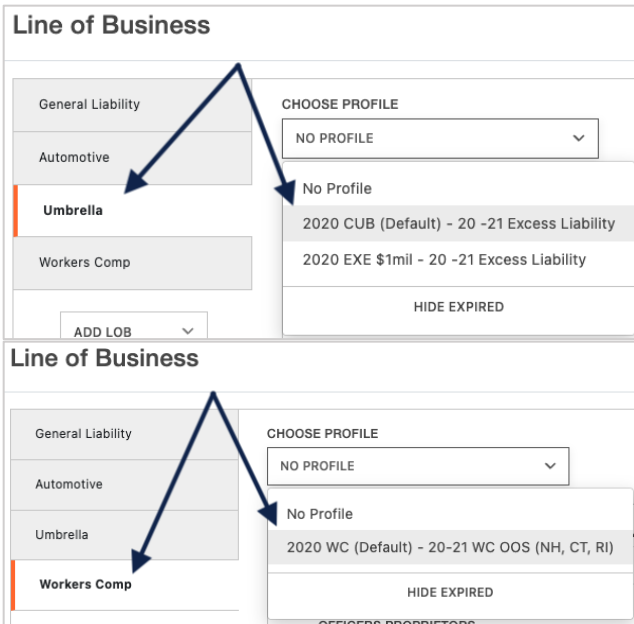
CHOOSE PROFILE

NO PROFILE

No Profile

2020 CAU (Default) - 20-21 Auto Liability

HIDE EXPIRED



...Or click “Save” in the lower right of the LOB editor to finish adding the selected policy(ies) to the certificate.



Editing an Existing Policy LOB

Please Note: While you are *unable to increase the limits* pulled from your AMS to show on the certificate, you *can update to show a lower limit*.

To edit an existing LOB, within the LOB editor click “Edit Existing”.



This will ensure the values are no longer greyed out and are ready for you to edit. Proceed with the revisions.

Please Note: Any changes you make to the LOB within the Certificate Manager will *update not just the certificate*, but the LOB across the board.

After your edits are complete, click “Save” in the lower right of the LOB editor to add the revised policy(ies) to the certificate.



Adding a New Policy LOB

Don’t see the policy you want to show on the certificate? Add a new LOB while issuing a certificate by clicking “Add New”.

This will allow you to create a new LOB Profile right from within the certificate editor, without having to leave your certificate and entering the policies.

Please Note: While you are *unable to increase the limits* pulled from your AMS to show on the certificate, you *can update to show a lower limit* on this screen.

The ACORD Form type will already be selected determined by the ACORD form you selected at the beginning of the process.

Create General Liability LOB Profile

ACORD FORM
ACORD 25

POLICY

LOB TYPE

LOB TYPE NAME

PROFILE NAME

SET AS DEFAULT

Select the desired policy from the Policy drop down.

Create General Liability LOB Profile

ACORD FORM
ACORD 25

POLICY
(2020-09-01) GL9120 20-21 General Liability

HIDE EXPIRED

LOB TYPE NAME

After selecting the policy, the LOB Type and LOB Type Name will pre-populate.

Enter a name for the LOB profile you are creating.

Create General Liability LOB Profile

ACORD FORM
ACORD 25

POLICY
(2020-09-01) GL9120 20-21 GEN...

LOB TYPE
GL

LOB TYPE NAME
General Liability

PROFILE NAME
2020 Sample GL

SET AS DEFAULT

AMS Value: C
 COMMERCIA

AMS Value: Ur
 CLAIMS-MAC

AMS Value: Ur
 COVERAGE A

AMS Value: Ur
 COVERAGE E

AMS Value: Ur
 PER POLICY

AMS Value: Ur

Review and confirm the data pulled from the AMS.

Create General Liability LOB Profile

ACORD FORM: ACORD 25

POLICY: (2020-09-01) GL9120 20-21 GEN...

LOB TYPE: GL

LOB TYPE NAME: General Liability

PROFILE NAME: 2020 Sample GL

SET AS DEFAULT

AMS Value: Checked
 COMMERCIAL GENERAL LIABILITY

AMS Value: Unchecked
 CLAIMS-MADE BASIS

AMS Value: Unchecked
 COVERAGE A

AMS Value: Unchecked
 COVERAGE B

AMS Value: Unchecked
 PER POLICY

AMS Value: Unchecked
 PER OTHER

AMS Value: Checked
 OCCURRENCE BASIS

AMS Value: Not Found
Coverage A Name

AMS Value: Not Found
Coverage B Name

AMS Value: Unchecked
 PER PROJECT

AMS Value: Unchecked
 PER LOCATION

AMS Value: Not Found
Other Name

EACH OCCURRENCE LIMIT: 1,000,000

DAMAGE TO RENTED PREMISES LIMIT: 50,000

MEDICAL EXPENSE: 5,000

PERSONAL & ADVERTISING LIMIT: 1,000,000

GENERAL AGGREGATE LIMIT: 2,000,000

PRODUCTS - COMP/OP AGGREGATE LIMIT: 2,000,000

Coverage Name: X Value

+ ADD OVERFLOW COVERAGE

SAVE

When ready to select to add the new policy to the certificate, click “Save” in the lower right of the LOB editor to update the data on the certificate.

CANCEL **SAVE**

Additional Insured and/or Waiver of Subrogation Boxes

If you need to check the Additional Insured and/or Waiver of Subrogation boxes, you can do so while within the LOB editor. Select the policy, check the Additional Insured and/or Waiver of Subrogation boxes, and click “Save”.

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

ADD LOB

CHOOSE PROFILE: 2020 GL (DEFAULT) - 20-21 GENERAL L...

EDIT EXISTING + ADD NEW

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
GL9120	20-21 General Liability	09-01-2020	09-01-2021	

AMS Value: Checked
 COMMERCIAL GENERAL LIABILITY

AMS Value: Unchecked
 CLAIMS-MADE BASIS

AMS Value: Unchecked
 COVERAGE A

AMS Value: Unchecked
 COVERAGE B

AMS Value: Unchecked
 PER POLICY

AMS Value: Unchecked
 PER OTHER

AMS Value: Checked
 OCCURRENCE BASIS

AMS Value: Not Found
Coverage A Name

AMS Value: Not Found
Coverage B Name

AMS Value: Unchecked
 PER PROJECT

AMS Value: Unchecked
 PER LOCATION

AMS Value: Not Found
Other Name

Certificate Only Field
 ADDITIONAL INSURED

Certificate Only Field
 WAIVER OF SUBROGATION

EACH OCCURRENCE LIMIT: 1,000,000

DAMAGE TO RENTED PREMISES LIMIT: 50,000

MEDICAL EXPENSE: 5,000

PERSONAL & ADVERTISING LIMIT: 1,000,000

GENERAL AGGREGATE LIMIT: 2,000,000

PRODUCTS - COMP/OP AGGREGATE LIMIT: 2,000,000

Coverage Name: Value

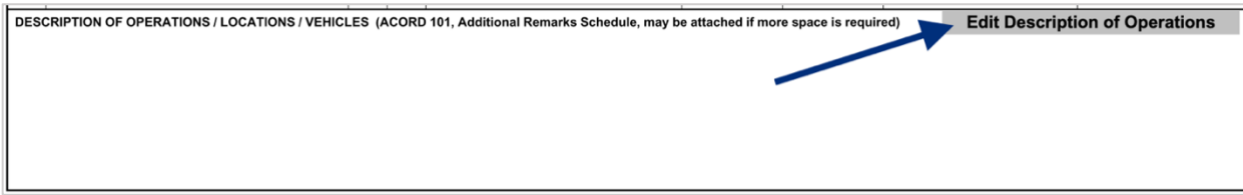
CANCEL **SAVE**

The selected policies and any applicable revisions or additions are now reflected on the certificate:

COVERAGES		CERTIFICATE NUMBER: 2638			REVISION NUMBER:		
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add Policy GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			Add Policy CAU9120	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			Add Policy EXCESS9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			Add Policy OOSWC9120	09-01-2020	09-01-2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

Updating the Description of Operations

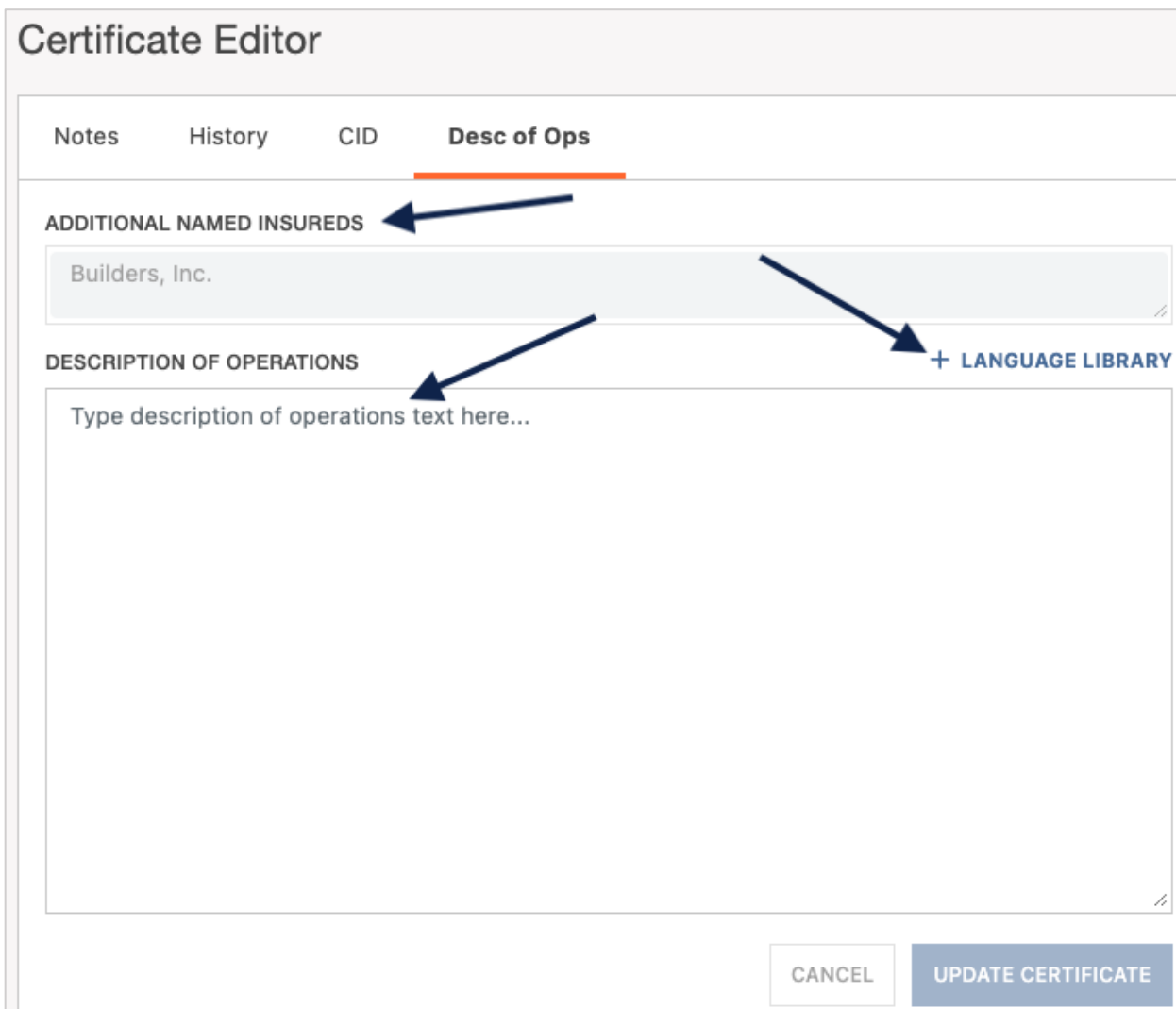
To add verbiage to your Description of Operations (DOO), click “Edit Description of Operations”.



You will now be able to update the DOO verbiage within the Certificate Editor.

Please Note: Any previously selected Additional Named Insureds will be reflected in the “Additional Named Insureds” box, indicating this will be present in the DOO as well.

You can either select previously entered verbiage templates from the Language Library, or manually enter the verbiage in the free form DOO box.

A screenshot of the "Certificate Editor" interface. At the top, there are tabs: "Notes", "History", "CID", and "Desc of Ops". The "Desc of Ops" tab is selected and highlighted with an orange underline. Below the tabs, there are two main sections. The first section is titled "ADDITIONAL NAMED INSUREDS" and contains a text box with the value "Builders, Inc.". A blue arrow points from the "ADDITIONAL NAMED INSUREDS" label to the text box. The second section is titled "DESCRIPTION OF OPERATIONS" and contains a large text area with the placeholder text "Type description of operations text here...". A blue arrow points from the "DESCRIPTION OF OPERATIONS" label to the text area. To the right of the text area, there is a button labeled "+ LANGUAGE LIBRARY". A blue arrow points from this button towards the text area. At the bottom right of the interface, there are two buttons: "CANCEL" and "UPDATE CERTIFICATE".

Language Library

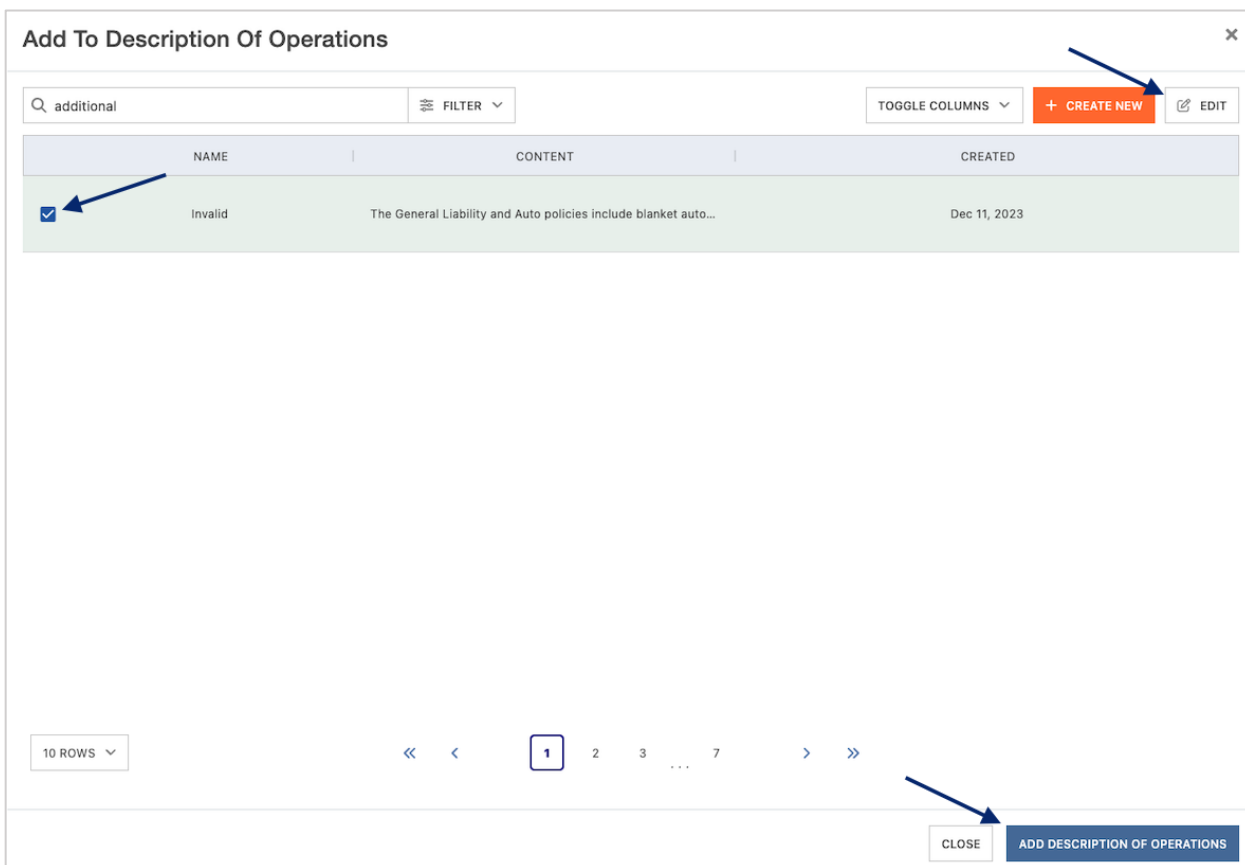
To view your verbiage templates, click “Language Library”.



You can search for your desired language library template by scrolling through the existing entries, or by utilizing the type ahead search bar at the top.

Once you found the language you want to add, check the box on the far left.

From here you can either edit that existing template or add to the DOO.

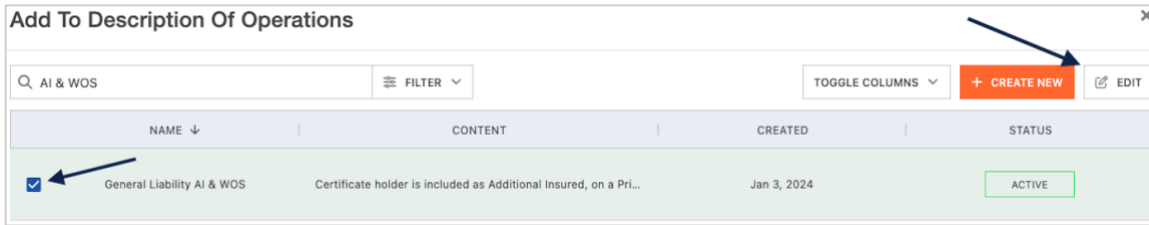


The 'Add To Description Of Operations' dialog box is shown. It features a search bar with the text 'additional', a 'FILTER' dropdown, a 'TOGGLE COLUMNS' dropdown, a red '+ CREATE NEW' button, and an 'EDIT' button. Below these is a table with columns for NAME, CONTENT, and CREATED. The table contains one row with the name 'Invalid', content 'The General Liability and Auto policies include blanket auto...', and created date 'Dec 11, 2023'. A checkbox is checked in the left margin of this row. At the bottom, there is a '10 ROWS' dropdown, a pagination control showing page 1 of 7, and two buttons: 'CLOSE' and 'ADD DESCRIPTION OF OPERATIONS'. Blue arrows point to the '+ CREATE NEW' button, the checkbox, and the 'ADD DESCRIPTION OF OPERATIONS' button.

NAME	CONTENT	CREATED
Invalid	The General Liability and Auto policies include blanket auto...	Dec 11, 2023

Editing Language Library Template

To add an existing Language Library template, ensure the template you want to edit is checked and click “Edit”.

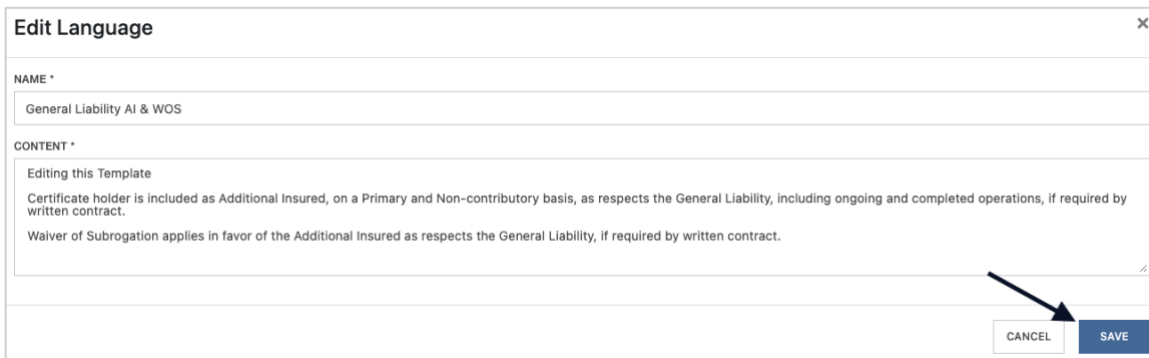


Add To Description Of Operations

Q AI & WOS FILTER TOGGLE COLUMNS + CREATE NEW EDIT

NAME ↓	CONTENT	CREATED	STATUS
<input checked="" type="checkbox"/> General Liability AI & WOS	Certificate holder is included as Additional Insured, on a Pri...	Jan 3, 2024	ACTIVE

Within the edit form, proceed with the revisions and click “Save”.



Edit Language

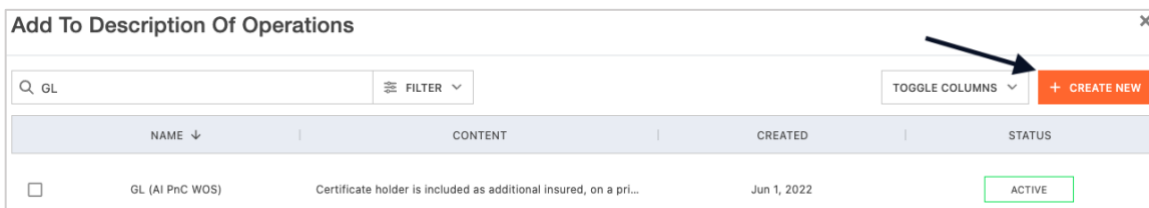
NAME *
General Liability AI & WOS

CONTENT *
Editing this Template
Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.
Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

CANCEL SAVE

Create a New Language Library Template

To create a new Language Library template, click “Create New”.

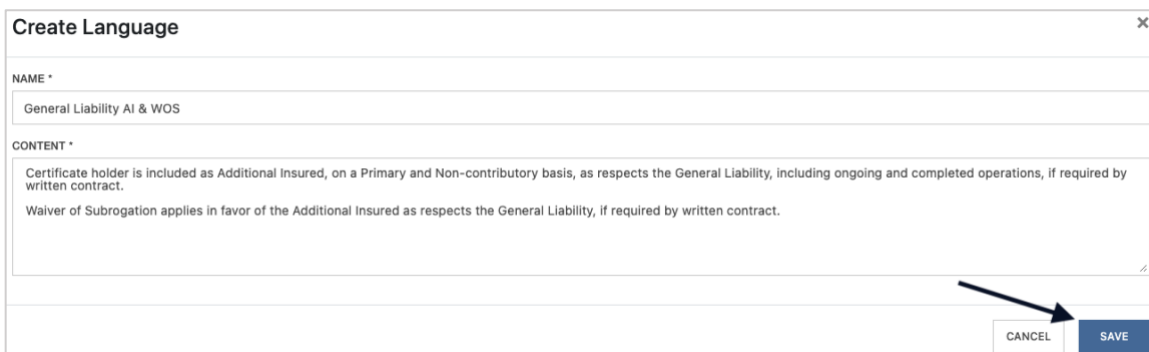


Add To Description Of Operations

Q GL FILTER TOGGLE COLUMNS + CREATE NEW

NAME ↓	CONTENT	CREATED	STATUS
<input type="checkbox"/> GL (AI PnC WOS)	Certificate holder is included as additional insured, on a pri...	Jun 1, 2022	ACTIVE

Within the create form, fill out the applicable fields and click “Save”.



Create Language

NAME *
General Liability AI & WOS

CONTENT *
Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.
Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

CANCEL SAVE

Once you have selected, revised, or added a template, ensure the template is checked and click “Add Description of Operations”.

The screenshot shows a dialog box titled "Add To Description Of Operations". At the top, there is a search bar with "GL" entered, a "FILTER" button, a "TOGGLE COLUMNS" dropdown, a "+ CREATE NEW" button, and an "EDIT" button. Below this is a table with the following data:

NAME ↓	CONTENT	CREATED	STATUS
<input checked="" type="checkbox"/> GL (AI PrC WOS)	Certificate holder is included as additional insured, on a pri...	Jun 1, 2022	ACTIVE

At the bottom of the dialog, there is a "10 ROWS" dropdown, a pagination control showing "1" of 1 items, and two buttons: "CLOSE" and "ADD DESCRIPTION OF OPERATIONS". An arrow points to the "ADD DESCRIPTION OF OPERATIONS" button.

After you’ve finished adding all language from the library, click “Close”.

This image shows a close-up of the two buttons from the previous screenshot. The "CLOSE" button is on the left and the "ADD DESCRIPTION OF OPERATIONS" button is on the right. A blue arrow points to the "CLOSE" button.

The Description of Operations also allows for free form edits. You can manually type out the DOO verbiage or include additional verbiage to a template added from the Language Library.

The screenshot shows the "Certificate Editor" interface. It has tabs for "Notes", "History", "CID", and "Desc of Ops". The "Desc of Ops" tab is selected. Under "ADDITIONAL NAMED INSURED", there is a text field containing "Builders, Inc.". Below that is the "DESCRIPTION OF OPERATIONS" section, which includes a "+ LANGUAGE LIBRARY" link. The text in this section is:

(FREE FORM VERBIAGE)
Project #: 123456

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

At the bottom, there is a status message: "*Changes have not been added". There are two buttons: "CANCEL" and "UPDATE CERTIFICATE". The "UPDATE CERTIFICATE" button is highlighted.

Once you have reviewed the verbiage to be referenced on the certificate, click “Update Certificate” to reflect the change to the certificate.

Certificate Editor

Notes History CID **Desc of Ops**

ADDITIONAL NAMED INSUREDS

Builders, Inc.

DESCRIPTION OF OPERATIONS + LANGUAGE LIBRARY

Project #: 123456

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

*Changes have not been added

The DOO on the certificate has been updated:

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) **Edit Description of Operations**

Additional Named Insureds: Builders, Inc.
Project #: 123456

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

Anything that did not fit on the first page of the certificate has overflowed to the additional remarks schedule of the certificate, also known as the Certificate Hero 101:

ADDITIONAL REMARKS **Edit Description of Operations**

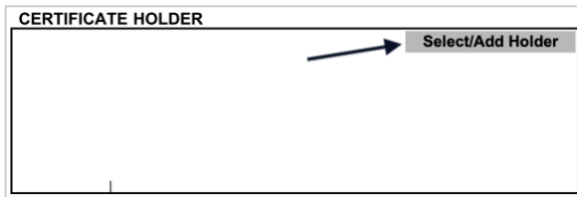
THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: _____ FORM TITLE: _____

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

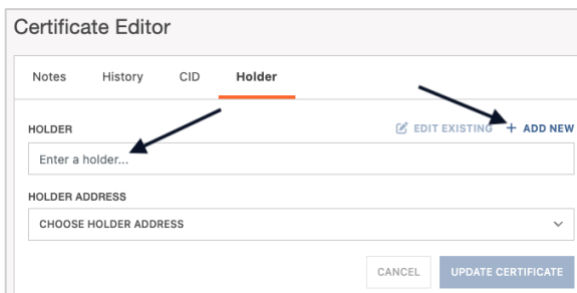
[Back to Top](#)

Updating the Certificate Holder

Within the Certificate Holder section of the certificate, click “Select/Add Holder”.

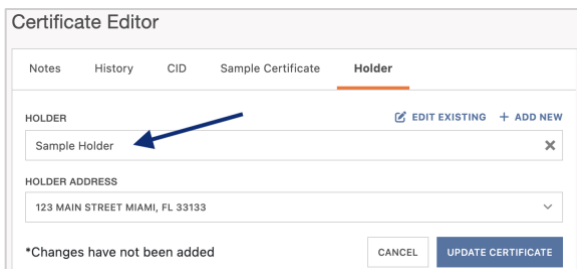


You can select any Holder that has historically been entered by your agency. You can also add a new Holder.

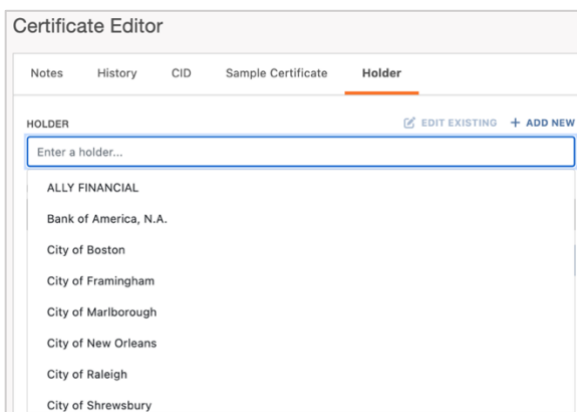


Selecting an Existing Holder

To select an existing Holder, click the Holder name.



You can scroll through the list of the existing Holders...



...Or type ahead to find the Holder you would like to select.

The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. A search bar for 'HOLDER' contains the text 'SAMPLE Holder'. Below the search bar, a dropdown menu shows 'Sample Holder' as the selected option. At the bottom of the form, there are 'CANCEL' and 'UPDATE CERTIFICATE' buttons.

Once you have selected the Holder, you can choose to show the address already on file for that Holder, or to forego showing an address.

The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. The 'HOLDER' dropdown shows 'Sample Holder'. The 'HOLDER ADDRESS' dropdown shows '123 MAIN STREET MIAMI, FL 33133'. A blue arrow points to the address dropdown. At the bottom, there is a status message '*Changes have not been added' and 'CANCEL' and 'UPDATE CERTIFICATE' buttons.

Edit an Existing Holder

To edit an existing Holder, select the desired Holder and click “Edit Existing”.

The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. A blue arrow points to the 'EDIT EXISTING' button next to the 'HOLDER' dropdown. The dropdown shows 'Sample Holder'. Below it, the 'HOLDER ADDRESS' dropdown shows '123 MAIN STREET MIAMI, FL 33133'. At the bottom, there is a status message '*Changes have not been added' and 'CANCEL' and 'UPDATE CERTIFICATE' buttons.

Within the Holder name edit form, proceed with the revising the name of the Holder. If you need to update the Holder address, click “Edit”.

The screenshot shows the 'Edit Holder' form. The 'NAME' field contains 'Sample Holder - EDIT'. Below it, there is a table with columns: ADDRESS LINE 1, ADDRESS LINE 2, ADDRESS LINE 3, CITY STATE ZIPCODE, and COUNTRY. The table contains the following data: ADDRESS LINE 1: 123 Main Street; ADDRESS LINE 2: (empty); ADDRESS LINE 3: (empty); CITY STATE ZIPCODE: Miami FL 33133; COUNTRY: USA. A blue arrow points to the 'EDIT' button next to the 'COUNTRY' field. At the bottom, there is an 'ADD ADDRESS' button and a search bar with 'SHOW PREVIEW' button. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Within the Holder address edit form, proceed with the revisions, and click “Update Address”.

Edit Holder Address

NAME *
Sample Holder - EDIT

ADDRESS LINE 1
123 Main Street

ADDRESS LINE 2
Suite 456

ADDRESS LINE 3

CITY
Miami

COUNTRY
USA

STATE
FL

POSTAL CODE
33133

SHOW PREVIEW

CANCEL UPDATE ADDRESS

Back on the Edit Holder screen, when all revisions are complete, click “Save”.

Create Holder

NAME *
Sample Holder

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	
123 Main Street			Miami FL 33133	USA	EDIT REMOVE

ADD ADDRESS

SHOW PREVIEW

CANCEL SAVE

Add a New Holder

To add a new Certificate Holder, click “Add New”.

Certificate Editor

Notes History CID **Holder**

HOLDER [EDIT EXISTING](#) [+ ADD NEW](#)

Enter a holder...

HOLDER ADDRESS
CHOOSE HOLDER ADDRESS

CANCEL UPDATE CERTIFICATE

Enter the new Holder name.

To add an address to show on the certificate, click “Add Address”.

Create Holder

NAME *

Sample Holder

ADDRESS LINE 1 ADDRESS LINE 2 ADDRESS LINE 3 CITY STATE ZIPCODE COUNTRY

ADD ADDRESS

SHOW PREVIEW CANCEL SAVE

Fill out the address form and click “Add Address”.

Edit Holder Address

NAME *

Sample Holder

ADDRESS LINE 1

123 Main Street

ADDRESS LINE 2

ADDRESS LINE 3

CITY

Miami

COUNTRY

USA

STATE

FL

POSTAL CODE

33133

SHOW PREVIEW CANCEL ADD ADDRESS

After reviewing the new Holder information, click “Save”.

Create Holder

NAME *

Sample Holder

ADDRESS LINE 1 ADDRESS LINE 2 ADDRESS LINE 3 CITY STATE ZIPCODE COUNTRY

123 Main Stree Miami FL 33133 USA EDIT REMOVE

ADD ADDRESS

SHOW PREVIEW CANCEL SAVE

Once you have selected, revised, or added a Holder, click “Update Certificate” to reflect the change to the certificate.

Certificate Editor

Notes History CID **Holder**

HOLDER [EDIT EXISTING](#) + [ADD NEW](#)

Sample Holder X

HOLDER ADDRESS

123 MAIN STREET MIAMI, FL 33133

*Changes have not been added

CANCEL UPDATE CERTIFICATE

The Holder on the certificate has been updated:

CERTIFICATE HOLDER

Select/Add Holder

Sample Holder
123 Main Street
Miami, FL 33133

Updating the Signature

Within the Signature section of the certificate, click “Sign Here”.



You will now be able to update the Signature within the Certificate Editor.



Selecting an Existing Signature

To select an existing Signature, click to choose a signature.



You can scroll through the list of the existing signatures...



...Or type ahead to find the signature you would like to select.



Edit an Existing Signature

To edit an existing Signature, select the desired Signature and click “Edit Existing”.



Certificate Editor

Notes History CID **Signature**

SIGNATURE

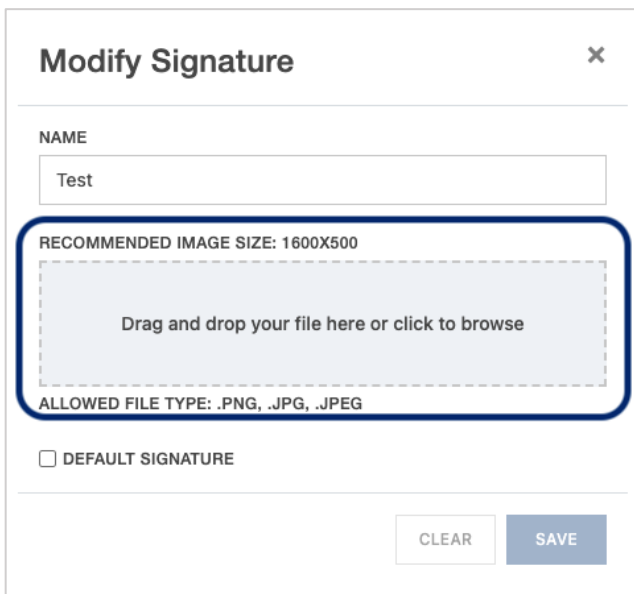
Test NV

*Changes have not been added

CANCEL UPDATE CERTIFICATE

Note: A blue arrow points from the 'EDIT EXISTING' button to the 'SIGNATURE' tab.

From here, you will be able to either upload a new signature, and/or edit the signature name.



Modify Signature

NAME

Test

RECOMMENDED IMAGE SIZE: 1600X500

Drag and drop your file here or click to browse

ALLOWED FILE TYPE: .PNG, .JPG, .JPEG

DEFAULT SIGNATURE

CLEAR SAVE

Within the edit form, proceed with the revisions and click “Save”.



Modify Signature

NAME

Test

Signature

DEFAULT SIGNATURE

CLEAR SAVE

Note: A blue arrow points to the 'SAVE' button.

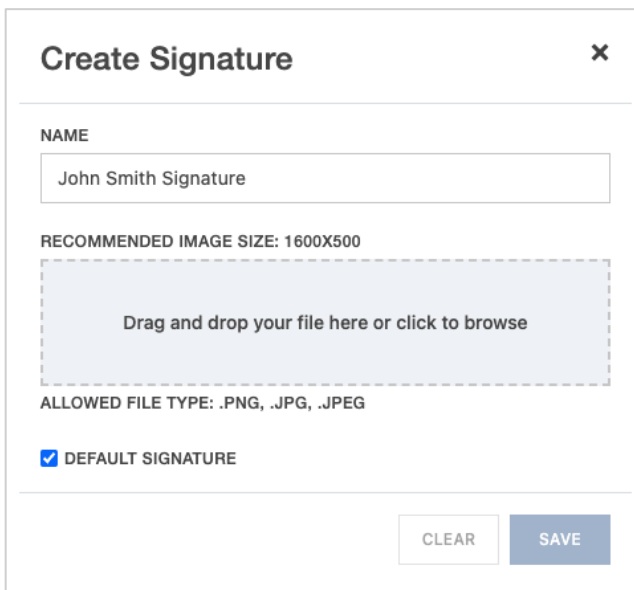
Adding a New Signature

To add a new Signature, click “Add New”.



The image shows the 'Certificate Editor' interface. At the top, there are tabs for 'Notes', 'History', 'CID', and 'Signature'. The 'Signature' tab is selected and highlighted with a red underline. Below the tabs, there is a 'SIGNATURE' section with a text input field containing 'Choose a signature...'. To the right of the input field are two buttons: 'EDIT EXISTING' (with a pencil icon) and '+ ADD NEW'. A blue arrow points to the '+ ADD NEW' button. Below the input field, there is a message: 'You need to select a signature'. At the bottom of the section are two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

Within the create form, fill out the applicable fields and upload the new Signature.



The image shows the 'Create Signature' form. At the top, there is a title 'Create Signature' and a close button 'X'. Below the title, there is a 'NAME' section with a text input field containing 'John Smith Signature'. Below the name field, there is a 'RECOMMENDED IMAGE SIZE: 1600X500' label. Below the label is a dashed box containing the text 'Drag and drop your file here or click to browse'. Below the dashed box, there is a label 'ALLOWED FILE TYPE: .PNG, .JPG, .JPEG'. Below the label, there is a checked checkbox labeled 'DEFAULT SIGNATURE'. At the bottom of the form are two buttons: 'CLEAR' and 'SAVE'.

Then click “Save”.



The image shows the 'Create Signature' form after a signature has been uploaded. The 'NAME' field still contains 'John Smith Signature'. Below the name field, there is a large, stylized signature image. Below the signature image, there is a checked checkbox labeled 'DEFAULT SIGNATURE'. At the bottom of the form are two buttons: 'CLEAR' and 'SAVE'. A blue arrow points to the 'SAVE' button.

Once you have selected, revised, or added a Signature, click “Update Certificate” to reflect the change to the certificate.



The screenshot shows the 'Certificate Editor' interface with the 'Signature' tab selected. The interface includes a navigation bar with 'Notes', 'History', 'CID', and 'Signature'. Below the navigation bar, there is a 'SIGNATURE' section with a text input field containing 'Test NV' and a clear button (X). To the right of the input field are links for 'EDIT EXISTING' and '+ ADD NEW'. A blue arrow points from the input field to the 'UPDATE CERTIFICATE' button. Below the input field, there is a status message: '*Changes have not been added'. At the bottom, there are two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

The signature on the certificate has been updated:

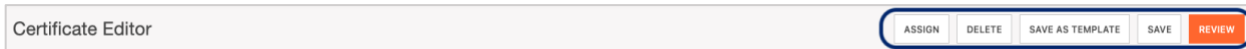


The screenshot shows the 'AUTHORIZED REPRESENTATIVE' section. It features a 'Sign Here' button on the left and a signature in cursive script on the right.

Completing the Certificate

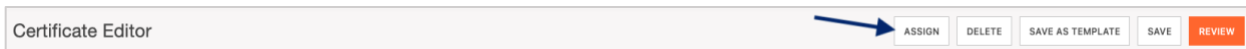
Once you have completed the creation of your certificate, there are several next options you can take. Across the top of the Certificate Editor, you will find the Editor Action buttons:

- Assign the certificate to another team member.
- Delete the certificate if it is no longer needed.
- Save the certificate details as a template for future use.
- Save the certificate to come back to later.
- Review the certificate prior to issuance.



Assigning the Certificate

To assign a certificate to another team member to review or work on, click “Assign”.



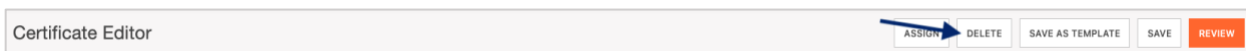
Search for and select the team member the certificate needs to be assigned to and click “Assign User”.

Please Note: The team member you assign to the certificate to must first have a Certificate Hero account.

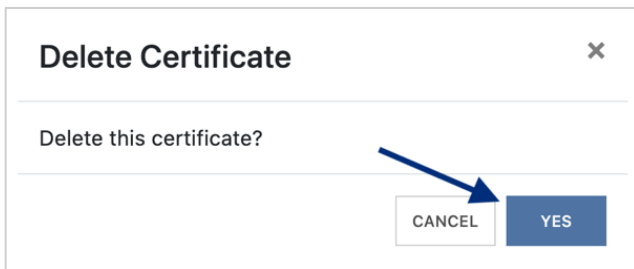


Deleting a Certificate in Progress

If a certificate is no longer needed prior to issuance, click “Delete”.



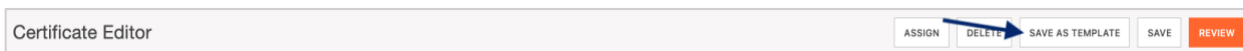
The system will prompt you to confirm if you wish to delete. Click “Yes” to proceed with the deletion.



A dialog box titled "Delete Certificate" with a close button (X) in the top right corner. Below the title is a question: "Delete this certificate?". At the bottom of the dialog are two buttons: "CANCEL" and "YES". A blue arrow points from the text above to the "YES" button.

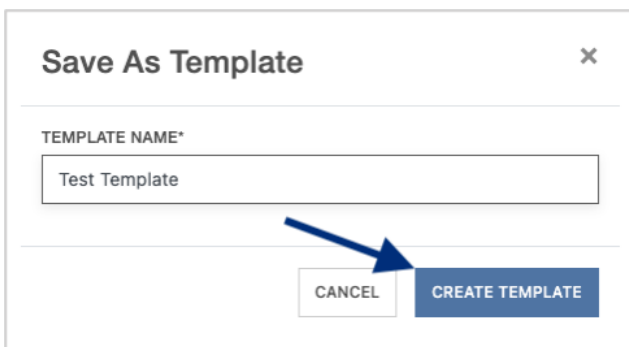
Saving as a Certificate Template

To save the certificate details you just created as a certificate template for future use, click “Save as Template”.



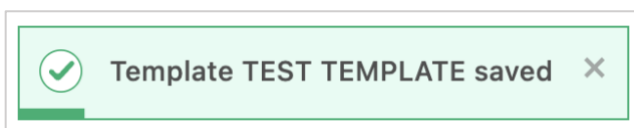
A horizontal toolbar for the "Certificate Editor". It contains five buttons: "ASSIGN", "DELETE", "SAVE AS TEMPLATE", "SAVE", and "REVIEW". A blue arrow points from the text above to the "SAVE AS TEMPLATE" button.

Enter a name for the new certificate template and click “Create Template”.



A dialog box titled "Save As Template" with a close button (X) in the top right corner. Below the title is a label "TEMPLATE NAME*" followed by a text input field containing "Test Template". At the bottom of the dialog are two buttons: "CANCEL" and "CREATE TEMPLATE". A blue arrow points from the text above to the "CREATE TEMPLATE" button.

Once saved, you’ll receive confirmation on the upper right corner that your template has been saved. You can proceed with your current certificate issuance.

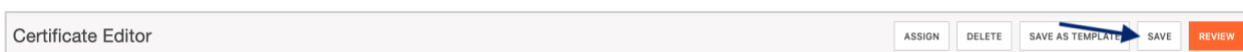


A green confirmation message box with a checkmark icon on the left. The text inside reads "Template TEST TEMPLATE saved" followed by a close button (X).

Saving Certificate for Later

To save the certificate to come back to work on later, click “Save”.

Please Note: You can save the certificate at any point within the process.



A horizontal toolbar for the "Certificate Editor". It contains five buttons: "ASSIGN", "DELETE", "SAVE AS TEMPLATE", "SAVE", and "REVIEW". A blue arrow points from the text above to the "SAVE" button.

You will be brought back to the Certificate Manager where you can find your saved certificate. The Actions menu will show you the options you can take with the saved certificate. To pick up where you left off, click "Edit".

CREATED	STATUS	CERT #	ISSUED	NAMED INSURED	HOLDER	SUMMARY	ACORD FORM	ENDORSEME...	ACTIONS
Dec 29, 2023	IN PROGRESS	4581613	—	TEST NAMED INS...	TEST HOLDER	AUTO, GL, UMB, ...	25	0	<input type="checkbox"/> x v View Edit Delete

Reviewing the Certificate

To preview the certificate and prepare for distribution, click "Review".

Certificate Editor

ASSIGN DELETE SAVE AS TEMPLATE **SAVE REVIEW**

From here, you can review the certificate you just created and prepare for distribution via email/fax.

ACORD **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) 1/2/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION is WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsements.

PRODUCER: YOUR AGENCY HERE
 Address Line 1
 Address Line 2
 City, State Zip

CONTACT NAME: Agency Contact
 PHONE: (555) 555-5555
 FAX: (555) 555-4444
 E-MAIL: agencycontact@agencyemaildomain.com
 ADDRESS: agencycontact@agencyemaildomain.com

INSURER(S) AFFORDING COVERAGE: CNA Insurance Companies NAC # 35127

INSURED: Named Insured
 123 Main Street
 Anywhere, CA 90210

CERTIFICATE NUMBER: 2638 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

FORM #	TYPE OF INSURANCE	ISS. / BGD.	POLICY NUMBER	START DATE (MM/DD/YYYY)	END DATE (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO <input type="checkbox"/> JED <input type="checkbox"/> LOC OTHER:		GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED \$ 50,000 (REMOVED EA EMPLOYEE) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$ COMBINED SINGLE LIMIT \$ 1,000,000 (EA ACCIDENT) BODILY INJURY (Per person) \$ PROPERTY DAMAGE \$ (Per occurrence) \$
A	<input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED <input type="checkbox"/> SCHEDULED <input type="checkbox"/> AUTO-ONLY <input type="checkbox"/> AUTO <input type="checkbox"/> NON-OWNED <input type="checkbox"/> HIRED <input type="checkbox"/> AUTO-ONLY <input type="checkbox"/> AUTO-ONLY		CAU9120	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT \$ 1,000,000 (EA ACCIDENT) BODILY INJURY (Per person) \$ PROPERTY DAMAGE \$ (Per occurrence) \$
A	<input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> UNBELLIA LAB <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		EXCESS9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
A	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYER'S LIABILITY <input type="checkbox"/> ANY PROPRIETOR/PARTNER/RECREATIVE <input type="checkbox"/> OFFICERS/DIRECTORS/BOARDS (Mandatory in NY) If yes, describe above DESCRIPTION OF OPERATIONS below	Y/N N/A	OOSWC9120	09-01-2020	09-01-2021	<input checked="" type="checkbox"/> PER <input type="checkbox"/> DIS- <input type="checkbox"/> STATUTE <input type="checkbox"/> EA E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Additional Named Insureds: Builders, Inc.
 Project #: 123456

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

CERTIFICATE HOLDER
 Sample Holder
 123 Main Street
 Miami, FL 33133

CANCELLATION
 SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE
 Certificate Hero

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AGENCY CUSTOMER ID: _____ LOC #: _____

ACORD **ADDITIONAL REMARKS SCHEDULE** Page 2 of 2

AGENCY: YOUR AGENCY HERE NAMED INSURED: Named Insured
 POLICY NUMBER: _____
 CARRIER: _____ NAC CODE: _____ EFFECTIVE DATE: _____

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM. FORM NUMBER: _____ FORM TITLE: _____

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

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Email the Certificate

To email the certificate, you will:

- Enter the destination email address(es).
- Enter the email subject line.
- Enter any verbiage needed for the email body.
- Mark whether the certificate needs to be deactivated after issuance.

The screenshot shows the 'Email' form interface. At the top, there are tabs for 'Email' and 'Fax'. The form includes fields for 'TO' (containing 'testemail@testemaildomain.com'), 'CC', 'BCC', and 'SUBJECT' (containing 'Test Certificate'). Below these is a 'BODY' field with the text 'Hello, Please see the attached and send confirmation of receipt.' and a '+ LANGUAGE LIBRARY' link. There is an 'ATTACH A FILE (OPTIONAL)' section with a dashed border and the text 'Drag and drop your file here or click to browse'. Below this, it lists 'ALLOWED FILE TYPE: .JPG, .JPEG, .TXT, .DOCX, .CSV, .PDF'. At the bottom, there is a checkbox labeled 'Mark certificate as inactive' and three buttons: 'COMPLETE', 'COMPLETE & DOWNLOAD', and 'COMPLETE & EMAIL'.

Please Note: There is also a language library available for certificate email distribution.

Fax the Certificate

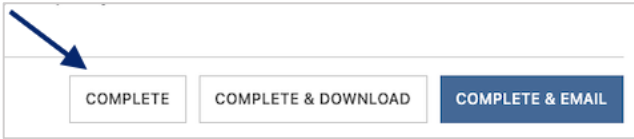
To fax the certificate, you will:

- Enter the destination fax number and contact name.
- Enter the fax subject.
- Enter any fax verbiage.
- Mark whether the certificate needs to be deactivated after issuance.

The screenshot shows the 'Fax' form interface. At the top, there are tabs for 'Email' and 'Fax'. The form includes fields for 'FAX NUMBER' (containing '(555) 555-5555'), 'NAME' (containing 'John Smith'), 'SUBJECT' (containing 'Test Certificate of Insurance'), and a text area for the message (containing 'Please see the attached certificate of insurance.'). Below these is an 'ATTACH A FILE (OPTIONAL)' section with a dashed border and the text 'Drag and drop your file here or click to browse'. Below this, it lists 'ALLOWED FILE TYPE: .JPG, .JPEG, .TXT, .DOCX, .CSV, .PDF'. At the bottom, there is a checkbox labeled 'Mark certificate as inactive' and three buttons: 'COMPLETE', 'COMPLETE & DOWNLOAD', and 'COMPLETE & FAX'.

Certificate Issuance

“Complete” will issue the certificate without distribution and without downloading a copy.



“Complete & Download” will issue the certificate without distribution and will download a PDF copy.



“Complete & Email” will issue the certificate and distribute per your email distribution instructions.



“Complete & Fax” will issue the certificate and distribute per your fax distribution instructions.

