

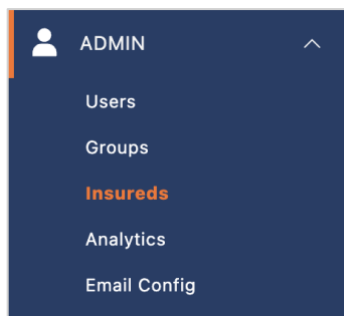


Configure COI Templates for the Insured Portal

The ability to configure COI Templates for the Insured Portal gives agencies greater control over the certificate templates available to their insured users. By hiding templates intended for internal agency use, you can simplify your insured's certificate issuance experience, reducing the risk of an insured user selecting the wrong template, and ensure insured users only have access to the templates appropriate for their needs.

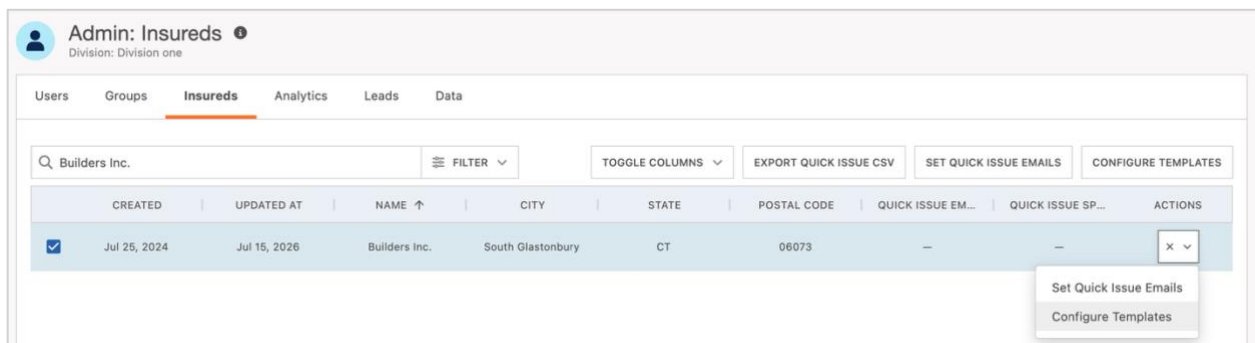
How to Configure the Insured Site COI Templates

From the left-hand navigation menu, with the Admin menu, select Insureds.



Locate the Insured whose Insured Portal COI Templates you want to configure.

From the Actions menu, select Configure Templates.



The Configure Templates window displays a list of all available COI Templates.

Configure Insured's Templates ⓘ

Q Search 6 templates

 FILTER ▾

TOGGLE COLUMNS ▾

	NAME ↑	STATUS	ACORD	EXPIRATION ...	SHOW INSUREDS	ACTIONS
☐	ACORD 25 - GL Only	ACTIVE	25	Sep 1, 2026	✓	...
☐	ACORD 25 - Master (Default)	ACTIVE	25	Sep 1, 2026	✓	...
☐	ACORD 25 - Master w/AI & WOS on All + Endts.	ACTIVE	25	Sep 1, 2026	✓	...
☐	ACORD 25 - Master w/AI, WOS and PNC on GL Only	ACTIVE	25	Sep 1, 2026	✓	...
☐	ACORD 27 - Master	ACTIVE	27	Sep 1, 2027	✓	...
☐	ACORD 28 - Master	ACTIVE	28	Sep 1, 2027	✓	...

10 ROWS ▾

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To hide a COI Template from Insured Portal users, locate the template you want to remove. Then, from its Actions menu, select Hide from Insured Users.

☒

ACORD 28 - Master

ACTIVE

28

Sep 1, 2027

✓

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▾

Set as Quick Issue Default

Hide from Insured Users

View

Repeat these steps for each COI Template you do not want to display in the Insured Portal.

Configure Insured's Templates ⓘ

Search 6 templates

FILTER

TOGGLE COLUMNS

	NAME ↑	STATUS	ACORD	EXPIRATION ...	SHOW INSURED	ACTIONS
☐	ACORD 25 - GL Only	ACTIVE	25	Sep 1, 2026	✓	...
☐	ACORD 25 - Master (Default)	ACTIVE	25	Sep 1, 2026	✓	...
☐	ACORD 25 - Master w/AI & WOS on All + Endts.	ACTIVE	25	Sep 1, 2026	✗	...
☐	ACORD 25 - Master w/AI, WOS and PNC on GL Only	ACTIVE	25	Sep 1, 2026	✗	...
☐	ACORD 27 - Master	ACTIVE	27	Sep 1, 2027	✗	...
☐	ACORD 28 - Master	ACTIVE	28	Sep 1, 2027	✗	...

10 ROWS

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When you have finished configuring the templates, close the Configure Templates window by selecting the X in the upper-right corner. Your changes are saved automatically.

Example: Insured Portal View

When an Insured user logs in and begins issuing a certificate, they will only see the COI Templates that remain visible in the Insured Portal.

New Certificate

ACORD FORM

ACORD 25 (2016/03) CERTIFICATE OF LIABILITY INSURANCE

TEMPLATE

NO TEMPLATE

No Template

ACORD 25 - Master (Default)

ACORD 25 - GL Only