



Holder Management Permissions

The new Holder Management permissions provide greater control over who can view, create, edit, merge, and delete holders in the Global Holder Library. Whether assigning permissions to internal agency staff or Insured users, these settings help ensure users have access only to the holder management functions they need, supporting better data integrity and reducing the risk of unintended changes.

Accessing the Holder Management Permissions

The screenshot shows the Certificate Hero user interface. On the left is a dark blue navigation menu with options: ADMIN, Users, Groups (highlighted in orange), Insureds, Analytics, and Email Config. The main content area is titled "Admin: Groups" with a sub-header "Division: Division one". Below this is a tabbed interface with "Groups" selected. A search bar "Search 8 groups" and a "FILTER" button are present. Action buttons include "TOGGLE COLUMNS", "EDIT", "CLONE", and a red "+ CREATE GROUP" button. A table lists group details with columns: CREATED, LAST UPDATED, NAME, TYPE, USERS, STATUS, and ACTIONS. The first row shows a group named "Admin" with 13 users and an "ACTIVE" status. An arrow points to the "ACTIVE" status, and another arrow points to the "ACTIONS" dropdown menu, which shows "Edit" and "Clone" options.

CREATED	LAST UPDATED	NAME	TYPE	USERS	STATUS	ACTIONS
Aug 29, 2022	Jul 13, 2026	Admin	Broker	13	ACTIVE	[Dropdown: Edit, Clone]

1. From the left-hand navigation menu, select Groups.
2. Edit an existing permission group or create a new one.
3. In the Holder Management section, expand the available permissions.
4. Select the permissions you want to assign to the group.

Holder Management Permission Overview

Holder Management		SELECT ALL
Access ⓘ	☐	
Create ⓘ	☐	▲
Edit ⓘ	☐	▲
Merge ⓘ	☐	▲
Delete ⓘ	☐	▲

Access

Allows users to access the Global Holder Library, view holder records, and select holders from the library when issuing a certificate or creating a COI template.

Create

Allows users to create new holders in the Global Holder Library when issuing a certificate, creating a COI template, or directly from the Global Holder Library. Users can also edit only the holder records that they created.

Prerequisite: Holder Management → **Access**

Edit

Allows users to edit any holder record in the Global Holder Library, including records created by other users.

Prerequisite: Holder Management → **Access**

Merge

Allows users to merge duplicate holder records using the holder merge feature.

Prerequisite: Holder Management → **Access**

Delete

Allows users to delete holder records from the Global Holder Library.

Prerequisites: Holder Management → **Access** and **Create**

Saving Your Changes

After selecting the desired permissions, click **Save**.

- If you edited an existing permission group, the updated permissions are applied immediately to all users assigned to that group.
- If you created a new permission group, it is available for assignment as soon as it is saved.

Insured Portal View Example

Example Assigned Holder Manager Permissions

- Access
- Create

Holder Management	
SELECT ALL	
Access ⓘ	☒ ⓘ
Create ⓘ	☒
Edit ⓘ	☐
Merge ⓘ	☐
Delete ⓘ	☐

User View When Trying to Edit

- User attempts to edit a global holder library entry
- All editable fields are greyed out, and user is unable to modify the entry

Manager: Holders ⓘ Division: Division one ABC Construction, LLC FILTER TOGGLE COLUMNS EDIT DEACTIVATE + CREATE HOLDER				
NAME ↑	PRIMARY ADDRESS	# OF ADDRESSES	STATUS	ACTIONS
☒ ABC Construction, LLC	1234 Main Street Suite 500 Dallas, TX 75201	1	ACTIVE	× Edit

Edit Holder



NAME *

ABC Construction, LLC

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	EMAIL
	1234 Main Street	Suite 500	Dallas TX 75201	USA	

EDIT

REMOVE

ADD ADDRESS

SHOW PREVIEW

CANCEL

SAVE