

**User Email Configuration – Setup Guide**

Each user in Certificate Hero can configure their own **email settings** for sending certificates. These configurations are tied to your account, ensuring that the emails you send reflect your preferred reply-to address, message body, and signature.

This setup applies to both **single certificate issuance** and **bundle issuance (bulk jobs)**.

**Accessing Email Configuration**

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1. From the left-hand **User Menu**, select **Email Config**.
2. This will bring you to the **User Email Configuration Manager**.

Here, you will see options to customize your outbound email templates.



**Outbound Email (Single Certificate Issuance)**

When you send a single certificate via email, the **Outbound Email Template** is used.

You can configure the following fields:

* **Reply To Email** – The email address where replies should be directed.
* **Body** – The main message of your email (example: *“Hello, please see attached.”*).
* **Signature** – The closing line of your email (example: *“Thank you, Certificate Hero Customer Success Team ”*).



On the right-hand preview panel, you’ll see how your outbound email will appear to recipients.

**Bundle Email (Bulk Issuance)**

When you send multiple certificates at once (bulk revisions or renewals), the **Certificate Bundle Email Template** is used.

You can configure the same key fields:

* **Reply To Email** – Often set to a department inbox (example: *customersuccess@certificatehero.com*).
* **Body** – Typically includes a more formal message for multiple recipients (example: *“Dear Valued Customer, please see the attached certificates of insurance.”*).
* **Signature** – May be signed by a department rather than an individual (example: *“Thank you, Certificate Hero Customer Success”*).



The preview panel will display how your bundle email will look to recipients, including any download links generated for bulk certificate distribution.

**Saving Your Configuration**

Once you’ve entered your details, click the blue **Update** button to save your template.

* Use **Cancel** if you want to discard changes.
* Your configuration is saved individually, meaning your changes will not affect other users at your agency.

**Example Configurations**

* **Single Issuance (Outbound)** – A quick, simple message with your personal contact information.
* **Bundle Issuance** – A more formal email sent on behalf of a department, with a shared reply-to address.

**🔹 Important Note: User-Specific Configuration**

Email templates in Certificate Hero are configured on **a per-user basis**.

* Changes you make to your **Reply-To, Body, or Signature** apply only to your account.
* Other team members must configure their own email templates separately.
* Agency-wide defaults are not automatically applied.

This ensures that certificates sent from your account reflect your **personal or departmental contact details**, while other users at your agency maintain their own.