A close-up of a sign

Description automatically generated

**Setting Up Your Libraries in Certificate Hero - Before Go Live**

Get ahead of go-live and save time by populating your libraries in Certificate Hero. Setting up these libraries in advance ensures that your certificates are accurate, consistent, and ready to issue the moment you go live.

Each section below provides a quick walkthrough, an explanation of the manager’s responsibilities, and links to video support resources.

**Endorsements**

**What it’s for:**  
Endorsements store the forms and attachments often required on certificates. These may include ISO forms, carrier-specific forms, or insured-specific endorsements.

**How to set up:**

* Access from **Managers -> Endorsements**.
* Add or upload endorsement forms (in PDF format or from a preloaded library option).
* Assign endorsements to policies or insureds so they’re ready during issuance.
* Once saved, endorsements can be quickly attached to certificates or COI templates.

**Pro tip:** Endorsements tied to the wrong policy won’t be available. Check your policy selection if you don’t see the endorsement.

**Resources:**

* <https://support.certificatehero.com/endorsements>
* <https://support.certificatehero.com/certificate-blocks-endorsements>

**Description of Operations - Language Library**

**What it’s for:**  
The DOO library saves commonly used text blocks for the Description of Operations field, so you don’t have to retype standard language.

**How to set up:**

* Access from **Managers -> Desc of Ops**.
* Create templates with commonly used endorsement or client wording.
* Give each template a clear name so it’s easy to identify later.
* Save to reuse during certificate issuance or when building templates.

**Pro tip:** Using a DOO template ensures consistency across certificates and helps reduce manual typos.

**Resources:**

* <https://support.certificatehero.com/update-doo>
* <https://support.certificatehero.com/certificate-blocks-language-library>

**Producers**

**What it’s for:**  
The Producer Manager stores producer details (agency/broker contact information shown on certificates). Populating this ensures the correct producer info auto-fills at issuance.

**How to set up:**

* Open **Producer Manager** from the left-hand navigation.
* Add producers with identifying details, such as name, email, and phone number.
* Edit or update producer records as needed.
* Set a producer as your default so it auto-populates when creating certificates.

**Pro tip:** Setting your default producer ahead of time saves you from manually re-selecting it every time you issue a certificate.

**Resource:**

* <https://support.certificatehero.com/producer-manager>

**Agency Signature**

**What it’s for:**  
The Agency Signature library stores digital signature entries that appear on certificates. Users can also set their own default signature in **User Account Defaults**.

**How to set up:**

* Access from **Managers -> Agency Signature**.
* Upload or edit a signature image or text entry.
* Save multiple entries if your agency uses more than one signer.
* In your **User Account Defaults**, select your personal default signature.

**Pro tip:** If your signature doesn’t appear on a certificate, double-check that you’ve set it as your **User Default**.

**Resource:**

* <https://support.certificatehero.com/certificate-blocks-agency-signature>

**Quick Tip**

Each of these libraries is designed to streamline certificate issuance, making it faster, more consistent, and less manual. Once set up, you’ll see them directly inside the **Certificate Editor** and **Template Editor**.

**Save time at go-live - pre-populate your libraries today.**