

## Managing Certificates in CSR24

When you login to CSR24 you will first view your homescreen. Depending on your permission level different areas of the homescreen will be available to you.

From the left hand menu select **MANAGE CERTIFICATES**.

### **VIEW/PRINTING EXISTING CERTIFICATES**

If you need to view/print a certificate that's already been issued, select REPRINT CERTIFICATES. You will see a list of previously issued certificates. You can use the search feature to locate a certificate as well.

- The PDF icon will open up a preview of the certificate in your web browser. It will display PREVIEW across it. This tool can be used to verify you are selecting the intended certificate.
- Click on the name of the certificate holder and you will be given options to reprint or resend. Reprint will automatically down the certificate in PDF format. Resend will allow you to send the certificate to others.

### **ISSUING A NEW CERTIFICATE**

Select ISSUE A CERTIFICATE from the Manage Certificates menu. Here you will see your certificate templates. Click on the certificate template name. You will see a list of previously used certificate holders. You can select from this list or click ADD HOLDER from the blue button in the upper right.

- **ADDING A NEW HOLDER** – Fill in the holder's name and address and any additional information available. If you have a job or contract number to reference you can type this in the description of ops box called "HOLDER SPECIFIC PORTION."
- If you want the holder or another party to automatically receive a copy of the certificate, enter in their information under recipient 1, 2, and 3.
- Click submit. You will automatically receive a copy of the certificate via email.
- **SELECTING AN EXISTING HOLDER** – Click on the name of the holder. Their information will auto populate on the next screen. Make any needed updates or additions. Fill in any required additional wording in the description of ops holder specific portion and desired recipients to receive a copy of the certificate and hit submit.

### **NEED HELP?**

**email: [info@jdfulwiler.com](mailto:info@jdfulwiler.com) or contact your account team**