Booking a Shipment and Issuing a Certificate

Create New Shipment

- Select Shipments from the main menu and then select Certificates
- Complete the shipment form. For field definitions, refer to the Certificate video or the detailed User Guide.

Verify Coverage

- Click [Verify Coverage] so the system validates the shipment against the terms and conditions of the policy
- If the Shipment is insurable, the screen displays the applicable premiums, taxes and insuring conditions
- If the shipment is referred, the screen displays the referral reasons. The user must click [**Submit Referral**]. Refer to the quick reference guide for **Managing Referrals** for details on how referrals are processed.

Edit Shipment

- •Click [Edit Shipment] to unlock the shipment and modify its details
- •You must re-verify coverage in order to continue after editing the shipment

Save Template

- You can save the populated shipment form as a template or you can copy the shipment after it has been saved, to eliminate redundant data entry if there are multiple, similar shipments to enter
- •To save the shipment as a template fill in the Reference Number and click [Save Template]

Print Draft

- •To review a draft of the certificate, select the desired Certificate Template if there is more than one available and click [**Print Draft Certificate**]
- •Click [Open] from the pop-up. Adobe Acrobat opens to display the draft certificate.
- •Click the Adobe print icon from its toolbar to print. Do not use the print icon from the Internet Explorer Toolbar.

Confirm Booking

- •Click [Confirm Booking] to save the shipment and generate a unique certificate number that the system assigns to the shipment.
- •The system refreshes the screen and provides a confirmation message that the shipment has been booked.

Print Certificate

- •To print a certificate of insurance, select the desired certificate template if there is more than one and click [**Print Certificate**]
- Click [Open] from the pop-up. Adobe Acrobat opens to display the certificate.
- •Click the Adobe print icon from its toolbar to print.Do not use the print icon from the Internet Explorer Toolbar.

