
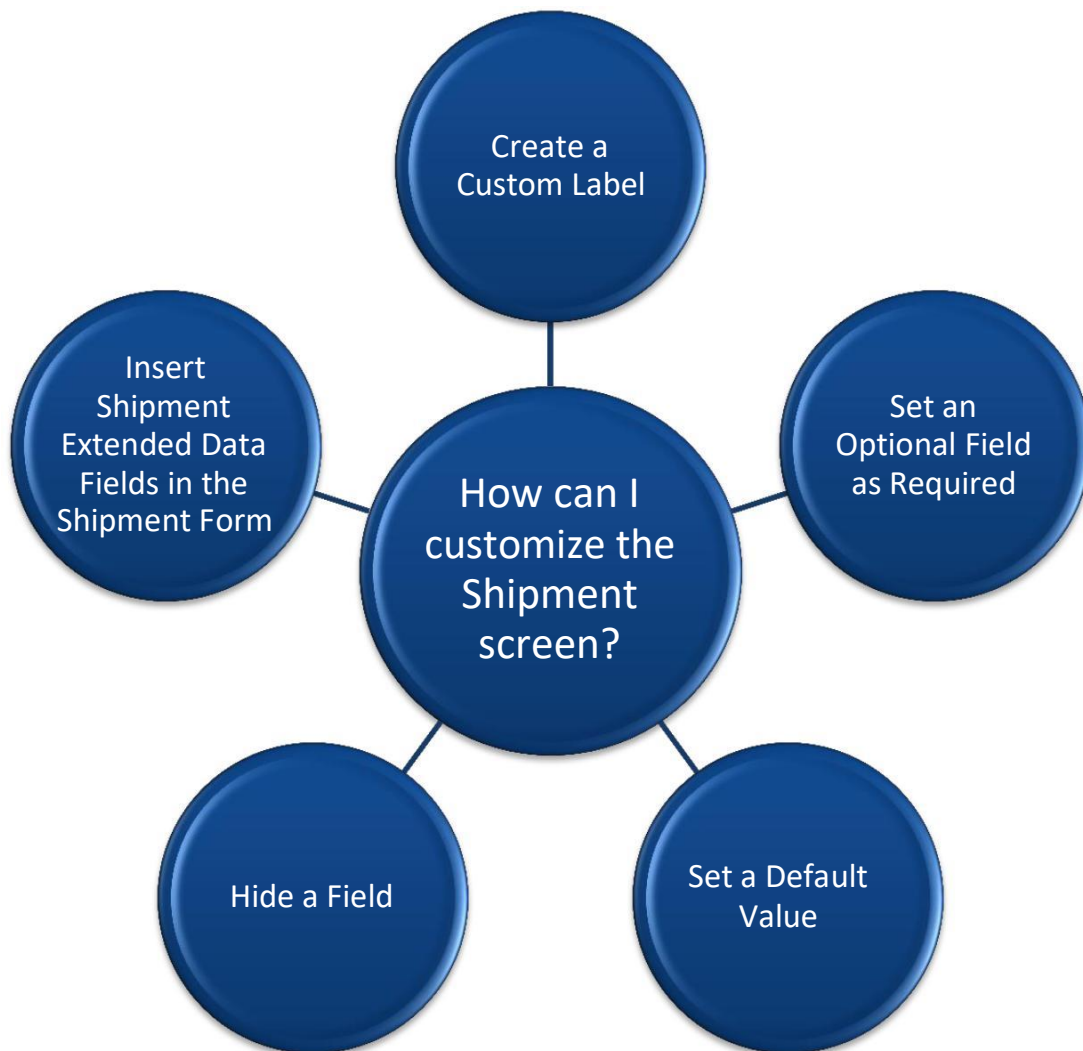



## Customizing the Shipment Screen

There are several ways you can customize the **Shipment** screen for a particular policy. In the Policy Setup module, navigate to **Shipment Screen Customization** (via Configuration > Shipment > Shipment Settings) or **Extended Data Field Configuration** (via Configuration > General Settings > Extended Data Fields) depending on the customizations you wish to apply.

 When you configure the Shipment Screen Customization settings for a policy, the system applies those values to every endorsement and renewal record for the particular policy you are managing.



 For clients booking shipments via web services integrations, the shipment web services are based on the standard shipment screen and cannot be customized via the **Shipment Screen Customization** form.

### Create a Custom Label

You can change any field label on the **Shipment Certificate** screen to a custom value which will apply to every shipment created for a particular policy.

1. Select **Configuration > Shipment > Shipment Settings** from the side menu.
2. Select **Shipment Screen Customization** tab.
3. Select the shipment field (hyperlink) whose label you would like to customize.
4. Enter the Custom Label.
5. Click [**Save**].

### Set an Optional Field as Required

You can make optional fields mandatory for users to complete when creating shipments. Any field you set as required, appears on the **Shipment Certificate** screen with an **\***.

1. Select **Configuration > Shipment > Shipment Settings** from the side menu.
2. Select **Shipment Screen Customization** tab.
3. Select the shipment field (hyperlink) that you would like to set as required.
4. Check Set as Required.
5. Click [**Save**].

### Set a Default Value

You can provide a default value if you want the system to automatically populate a particular field with the same value whenever you create a new shipment for a given policy.

1. Select **Configuration > Shipment > Shipment Settings** from the side menu.
2. Select **Shipment Screen Customization** tab.
3. Select the shipment field (hyperlink) that you would like to set with a default value.
4. Enter or select a default value.
5. Click [**Save**].


### Hide a Field

You can hide any Shipment Certificate field so it is never visible if:

- It is an optional field
  - It is a required field but you specify a default value for it
  - It is conditionally mandatory and your policy setup does not have it as required, or you have set a default value for it
1. Select **Configuration > Shipment > Shipment Settings** from the side menu.
  2. Select **Shipment Screen Customization** tab.
  3. Select the shipment field (hyperlink) that you would like to set as hidden.
  4. Select the Visibility value of **Hidden** or **Hidden if One**
  5. Click [**Save**].

### Insert Shipment Extended Data Fields in the Shipment Form

If you have any shipment extended data fields (EDFs) configured for the policy, you can select where you would like each EDF to appear within the **Shipment Certificate** screen. The screen is divided into 14 logical field groupings where you can choose to insert a shipment EDF. The EDFs appear after the system's core shipment fields in the chosen section.

1. Select **Configuration > General Settings > Extended Data Fields** from the side menu.
2. Select the **Extended Data Field Configuration** tab.
3. Click [**Add**] to attach and configure an optional Shipment EDF, or select the hyperlink for a Shipment EDF from the grid that is already configured for the policy.
4. If you are:
  - Manually adding a shipment EDF to the policy, you:
    1. Click on the Shipment panel header to expand it.
    2. Select the shipment EDFs you wish to associate to the policy and click 
    3. Indicate the EDF's placement by modifying Attach to Panel.
    4. Click [**Save and Close**] or [**Save and New**].
  - Selecting a shipment EDF that is already associated to the policy, you:
    1. Indicate the EDF's placement by modifying Attach to Panel.
    2. Click [**Save**].