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.

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