

## Booking a Basic Policy for Certificate Issuance

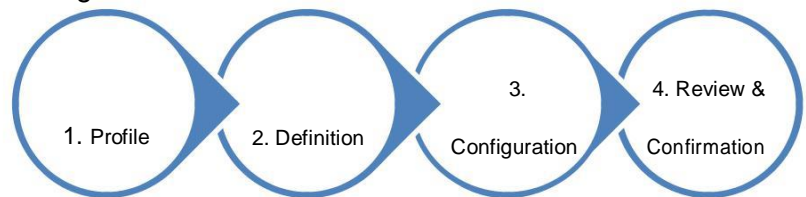
### What does this mean?

A basic policy meets the following criteria:

- Includes one broker and one insurer
- Has the five dimensions of route, conveyance, insured interest, packing method and coverage option required to book a shipment certificate
- Is unrated

You must always follow a four-step process in order to book any policy. This guide describes the minimum setup required in order for you to do the following:

- ✓ Allow your assureds to book shipments and issue certificates of insurance against them
- ✓ Access the Shipment Certificate screen via the extranet or assured portal
- ✓ Manage referrals generated for shipments that are outside of the policy's coverage



### Advanced Features

Refer to a detailed user guide to leverage more advanced policy and shipment features such as:

- Multiple broker and/or insurer policy participants
- Multiple authorized insured value currencies
- Standard policy rates and insuring conditions
- Special rates for specific primary and/or named assureds
- Shipment extended data fields (EDFs)
- Shipment screen customization
- Country restrictions
- Storage incidental to transit
- Additional charges (taxes and fees)




## Policy Setup Process

### Profile



#### Create Policy

1. Select **Policy Setup Beta** from main menu.
2. Click [**Create New**] or [**Create from Template**]. The system opens the **Profile** screen.

 You can modify the **Marine Risk Percentage** provided there are multiple insurers on the policy.

#### Complete Policy's Profile

1. Complete the policy's **General Information** fields.
2. Select the primary participants for the policy. The system automatically sets the primary broker or the insurer with the policy's **owner company** depending on its company type.


percentage to 100%. Click the **Manage Participant Details** hyperlink to edit the broker and insurer policy details.

### Definition



#### Complete Definition According to Policy Requirements

1. Select **Definition** from the side menu.
2. At minimum, check the checkboxes for the following questions:
  - **Are assureds reporting shipment activity?**
  - **Will assureds be generating certificates of insurance?**
3. Click [**Save**].

 Refer to the detailed user guide to learn how each Definition question controls different screens and panels.


### Configuration



#### Manage Policy Participants

##### Attach Existing Assureds to Policy

1. Select **Configuration > Participants > Assureds** from the side menu.
2. Click [**Add**].
3. Select an assured company.
4. Check the **Primary Assured** checkbox; the policy must have at least one primary assured to book shipments.
5. Select a value for **Bill to Party (Shipment)**.
6. Select **Premium Currency**.
7. Select security roles from the list on the left and pull them to the right to assign rights to the assured.
8. Click [**Save and New**] to add multiple assureds and [**Save and Close**] after adding the last one.

 You must create an assured company before creating your policy. Select **Assured** from main menu then click [**Create Head Office**] if the assured is not in the system.

## Complete Mandatory Policy General Settings

### Select Claim Settling Agent Group

1. Select **Configuration > General Settings > Agent Groups** from the side menu.
2. Select **Primary Agent Group**
3. Click [**Save**].

## Select the Assured Portal Assureds Will Use to Book Shipments

1. Select **Configuration > General Settings > Assured Portal** from the side menu.
2. Select the site assureds can use from the left side and pull it over to the right side.
3. Click [**Save**].

## Complete Shipment Settings

### Select Insured Value Option

1. Select **Configuration > Shipment > Shipment Settings** from the side menu.
2. On **Shipment General Settings** tab, in the **Valuation** panel, select a **Total Sum Insured Calculation Method** option to determine how the insured value is calculated on the **Shipment** screen.
3. Click [**Save**].



Select the '**Cost, Freight & Other Expenses, CIF and Duty**' option to calculate the insured value including CIF markup.

### Attach Policy Routes

1. Select **Configuration > Shipment > Routes**
2. Select the desired shipping routes from the left side of the list and pull them over to the right side.
3. Click [**Save**].



To apply sanction scanning and a penalty scale:

- Select a **Conveyance Database**
- Check '**Force Selection from Conveyance Database**'
- Check '**Apply Vessel Penalty**'

### Attach Conveyances and Certificate Templates


1. Select **Configuration > Shipment > Conveyances** from the side menu.
2. Click [**Add**].
3. Select **Conveyance** and complete all required details.
4. Click [**Save and New**] to add multiple conveyances and [**Save and Close**] after adding the last one.
5. Select the **Certificate Templates** tab (top right of screen).
7. Select **Certificate Template** and select the conveyances the certificate will apply to.
8. Click [**Save and New**] to add multiple certificates and [**Save and Close**] after adding the last one.

### Define the Insured Interests

1. Select **Configuration > Shipment > Insured Interests** from the side menu.
2. Click [**Add**].
3. Complete the commodities' required information.
4. Click [**Save and New**] to add multiple Insured interests and [**Save and Close**] after adding the last one.

## Review



 You must resolve any pending errors by following the on-screen instructions before you can return to the **Review/Confirmation** screen to confirm the policy.

## Review and Confirm the Policy

1. Select **Review/Confirmation** from the side menu
2. Review messages and follow instructions in **Confirmation Errors** and **Policy Definition Errors** panels.
3. Provide comments for **Policy Definition Warnings** and **Potential Configuration Irregularities** displayed.
4. Click [**Save**].
5. Click [**Confirm**]. Policy Status is 'Confirmed'.