Swiss Re Corporate Solutions Marine Clientside guide

Contents

1

Introduction

SWISS RE CORPORATE SOLUTIONS MARINE is an online web based insurance system. It allows assureds to create online insurance certificates, storage and shipments declarations. The system also allows using the inputted data for the creation of various reports.

The URL for the **SWISS RE CORPORATE SOLUTIONS MARINE** Client Site is: https://swissre.genoainsurance.net/

Navigation

After logging on to the system the Status screen is displayed. The contents of this screen can be tailored to your personal preferences by modifying the details in your Profile. To navigate to the various sections of **SWISS RE CORPORATE SOLUTIONS MARINE** use the menu bar located at the top of the page. This will be referred to as the Top Menu throughout this document. Depending on your access levels some or all of the following options will be available: Status, Shipment, Assured, Underwriting, Analysis, Administration, Profile, Help and Log Off.

Using Lookups in the Application

The **Lookup** 🔍 feature appears throughout the application. This feature enables precise searches to be performed based on the characters entered in the associated text box.

Vessel		🔍
Carrier		🔍

1. **One Character:**
   If one character is entered, the system looks for matches that begin with that character.
   For example: "D"
   Search results include: Day Star, Delta Queen, Dover

2. **Two to Four Characters:**
   If two to four characters are entered, the system looks for words that begin with those characters.
   For example: "Sta"
   Search results include: Atlantic Star, Stallion, Star Clipper

3. **Five Characters or More:**
   If five or more characters are entered, the system scans all records for a match, not only those records that begin with those characters.
   For example: "guard"
   Search results include: Vanguard, Sierra Guardian

Using Filters

While some sections include tables of data that can be sorted by clicking the header, other sections may have more complicated information that requires specific control.

The filter option ▼ can be used to filter the data in a column, displaying entries that match or do not match a specified option or text.

When a column can be filtered, the ▼ icon will be shown at the top of the column. Filter text may be entered to the left of the icon.

Security Role Name	Owner Company	Assigned
▼	▼	☐ ▼
		☑
Ready.		Loaded 1 of 1

1. Click the filter icon ▼, to open the filter menu. The available options will depend on the type of data in the column.

Security Role Name	Owner Company	Assigned
= Not Set		▼ ☐ ▼
Equals To		☑
Does Not Equal To		
Like		Loaded 1 of 1
Does Not Like		
Contains		
Does Not Contain		
Is Null		
Is Not Null		
Is Empty		
Is Not Empty		
Apply All Filters		
Clear This Filter		
Clear All Filters		

Not Set: No filter will be applied to the column.

Equals To: Only displays entries that match the filter text exactly.

Does Not Equal To: Only displays entries that do not match the filter text exactly.

Like: Displays all entries that start with the filter text.

Does Not Like: Displays all entries that do not start with the filter text.

Contains: Displays all entries that contain the filter text.

Does Not Contain: Displays all entries that do not contain the filter text.

Is Null: Displays entries that do not include the field being filtered.

Is Not Null: Displays entries that include the field being filtered, even if that field is empty.

Is Empty: Displays entries that include the field being filtered, but the field is empty.

Is Not Empty: Displays entries that contain any value in this column.

Apply All Filters: If the data has been changed, this option will refresh the filters.

Clear This Filter: Clears the filter text and sets the filter type to **Not Set**.

Clear All Filters: Clears all filter text on the current page and sets all filter types to **Not Set**.

2. Click in the space to the left of the filter icon to enter the filter text. Results will be displayed based on the chosen filter type in relation to this text.
3. Press Enter when the filter text is in place and the filter will be applied.
4. The filter text and filter type can be modified as needed to locate the required entries.

How to enter a date by using the calendar lookup

1. Click to open the calendar.

2. Go forward or back one month at a time using the links in the top right and left, or select the month from the menu at the bottom of the window.

3. Select the year from the menu at the bottom of the window.

4. Click the day in the calendar to close the window and insert that date in the field.

Some screens use a different version of the calendar, please follow the instructions below:

1. Click to open the calendar.

2. Go forward or back one month at a time using the arrows in the top right and left.

3. To select a specific month, click the month and year at the top of the window. The Month Selection opens.
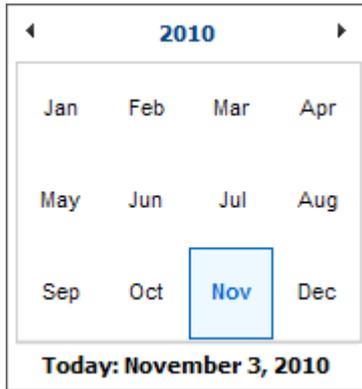
Go forward or back one year at a time using the arrows in the top right and left, then click the month to select it.

4. To select a specific year, click the year at the top of the window. The Year Selection opens.

Go forward or back ten years at a time using the arrows in the top right and left, then click the year to select it.

5. At any time, the **Today** link at the bottom of the window will return to the current date.

6. Click the day in the calendar to close the window and insert that date in the field.

NOTE: Due to differences in international date formats, entering a date manually in the wrong format could result in an incorrect date. Using the calendar lookup ensures that the correct date is being entered.

Your User Profile

Each **SWISS RE CORPORATE SOLUTIONS MARINE** user has a user profile. It contains basic information about each user. It also controls some aspects of the systems functionality as it relates to that user. To view your profile select Profile from the Top Menu.

2

Minimum System Requirements

The application requires the following minimum hardware and software:

Hardware

- A computer connected to the public internet. The application has been tested to operate with a minimum 256kbit/sec access; users will experience greater productivity and improved response times with higher-speed connectivity (DSL, Cable, Fiber, etc.) ideally above 1Mbit/sec.
- A minimum screen resolution of 1024 x 768 for the best possible user experience. Screen resolutions smaller than 1024 x 768 may not display certain content properly.
- Outbound internet connectivity on ports 80 (HTTP) and 443 (HTTPS with SSL) permitted on your network infrastructure or firewalls.

Internet Browsers

Browsers	Support	Comments
Microsoft® Internet Explorer®	The most current generally available version and at least one major prior version	Oceanwide recommends that all current software updates are applied. Note this restriction: The Compatibility View feature in Internet Explorer is not supported.
Mozilla® Firefox®	The most current generally available version and at least one major prior version	Oceanwide recommends that all current software updates are applied.
Google Chrome™	The most current generally available version and at least one major prior version	Oceanwide recommends that all current software updates are applied.
Apple® Safari®	The most current generally available version and at least one major prior version	Apple Safari for iOS and OSx are supported.

- The most current generally available version refers to the most recent officially released version from the vendor.
- Oceanwide will provide support for new browser versions within 3 months of the general availability release date.
- The browser must have JavaScript enabled.
- The browser must support a minimum of 128-bit SSLv3 or TLSv1 encryption.

Additional Software Requirements

- Software that can display Adobe Acrobat version 7.0 or above
- Use of the "Oceanwide Bridge Template Ribbon Tool" is currently supported on Microsoft Office for Windows versions 2007 and 2010

3

Logging On

The secure login system ensures that only authorized users have access. It is recommended that accounts not be shared, and some insuring companies prohibit the sharing of accounts. Contact your insurance representative for more information.

NOTE: When logging on for the first time, or after the password has been reset, the password will need to be changed upon logging in. An email should have been received containing a link to the system (token).

How to use the Access Email

1. The email will contain a link (token) to the system. Click the link, or copy and paste the entire link into the browser Address bar. The Change Password page will open.

CHANGE PASSWORD	
USER ID	
NEW PASSWORD	
CONFIRM NEW PASSWORD	
	CHANGE PASSWORD

1. The **User ID** field will already be filled. Enter a **New Password**. Passwords are case-sensitive, and may be composed of letters, numbers, and special characters.

2. Enter the same password in the **Confirm New Password** field.

3. Click **Change Password**. The password is changed and the Status Page loads.

NOTE: The token will expire after 72 hours or after you have logged in for the first time, and changed your password. If you were not able to log into the system in the 72 hours following the receipt of the token, contact your insurance representative in order to request a new one.

Guidelines for new passwords
- The password should be entirely new. The system will not accept a password that has already been used recently.
- The new password may not contain your User Name.
- A character may not be repeated three times in a row.
- If other rules apply, a message will appear when you try to change the password. The message will detail what must be changed in the new password.

How to log on to the system

1. Open a browser and enter the web site address in the address bar. The Login page will open.

NOTE: Creating a shortcut to the site or adding it to the Favorites should be done before logging in. Using the History or a shortcut created after login could make it difficult to access the system.

2. Enter the user name and password. Passwords are case sensitive.

NOTE: If the user name is entered and a password automatically appears, then the Windows Autocomplete feature is enabled. This feature is not part of the system, and will not be updated if the password changes within the system. If the password has changed recently, the password that appeared should be deleted and the new password entered manually. See Windows Autocomplete in the FAQ for more information.

3. Click OK. If the login was successful, the Status page opens.

Using the Forgot Your Password Option

If a password is forgotten, **the Forgot Your Password link** on the logon page can be used to reset the password and allow access.
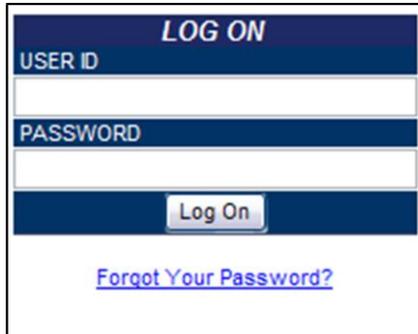
1. In **the Log On** window, click **Forgot your Password** to open the User Validation window.

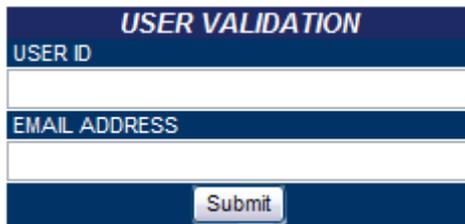2. Enter your **User ID** and **Email Address** and click **Submit**. If you have more than one email address or if your email address has changed, you will need to enter the email address that is registered in your account.

3. A message will appear confirming that an email has been sent to your email address. See the section on Using an **Access Email** for further instructions.

NOTES:

If the Autocomplete feature is being used to remember passwords, it must be updated manually. See the FAQ section for more information on the Autocomplete feature.

If there are any difficulties with using the Forgot Your Password feature, the password may need to be reset by an administrator. Contact your insurance representative for assistance.

Verifying a Certificate Without Logging On

The printed certificate of insurance is often provided to clients, banks, or other officials as proof that the cargo is insured. If there is any doubt, anyone with access to the information found on the certificate may be able to verify the status and details of the shipment without needing an account for the system.

1. In the **Log On** window, click **Verify Certificate**. The **Verify Certificate** window opens.

2. Enter the **Certificate Number**, **Security Number**, and a third detail randomly selected from the shipment information. All requested information is available on the printed certificate.

3. Click **Verify Certificate**.

4. If the provided information is correct, the detailed shipment information will be displayed.

4

Navigating The Client Side Home Page

After logging in, the Status page opens. The Status page may show lists of recent shipments and templates, based on the settings in the User Profile. Clicking on the certificate or reference numbers will open the shipment, providing quick access to recent work.

Along the top of the page is the main menu, used to navigate between features in the system. Point to a menu to open any submenus.

NOTE: Access to menu and submenu items depends on the user's access rights. For more information on available rights, contact your insurance representative.

Policy	Shipments	Tools	Help	Log Off

- **Policy:** If only one policy is available, it will be selected automatically. If multiple policies are available, clicking this menu will open a list of policies to choose from. Most work done in the system will be linked to the chosen policy, and will be subject to any restrictions in that policy. The currently active policy will be displayed in a gray bar directly under the main menu.

- **Shipments:** Includes options for creating and searching for shipments and shipment declarations.

- **Storage:** Includes options to create, modify, and post storage declarations, as well as view saved and posted storage declarations.

- **Analysis:** Includes options to generate, view, and download analysis reports for claims and shipments.

- **Tools:** Includes options to access stored documents, manage the user profile, perform sanctions searches, search for vessels, and access the Data Output Center.

- **Help:** Access the Online Help and the Learning Center.

- **Log off:** Closes the session and exits the application.

5

Managing the User Profile

The Profile page is used to maintain your account settings, including name and contact information, regional settings, and what tables will be shown on the Status page. It is recommended to setup this screen first when logging into the application for the first time.

How to change the user profile

1. In the main menu bar, open the **Tools** menu, and select **Profile**. The **Employee Information** page opens. Click the collapse icon ▬ to hide each section, and click the expand icon ⊞ to view each section again.
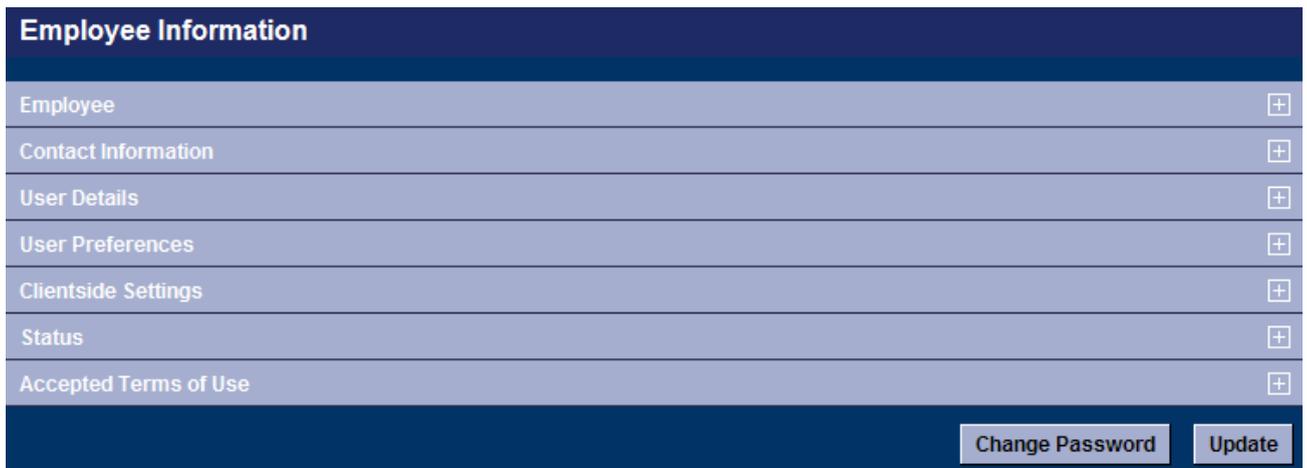
Employee Information	
Employee	⊞
Contact Information	⊞
User Details	⊞
User Preferences	⊞
Clientside Settings	⊞
Status	⊞
Accepted Terms of Use	⊞
	Change Password Update

Employee: The employee information identifies the owner of the account and their company.
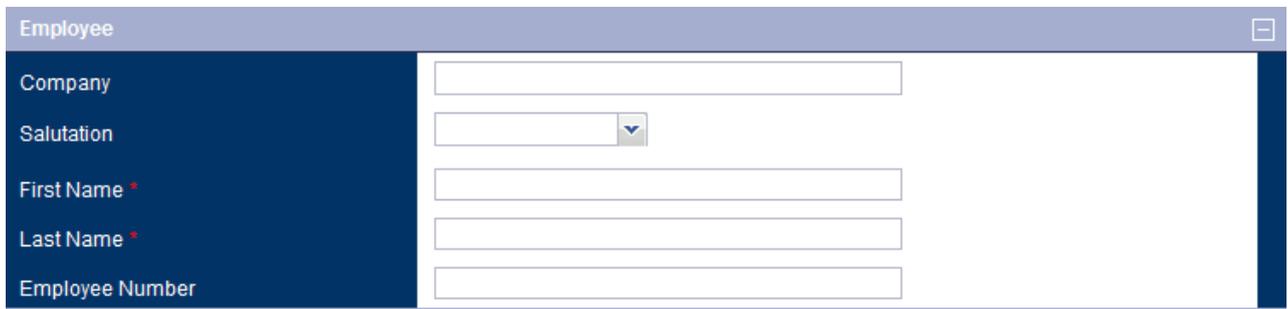
Employee	⊟
Company	
Salutation	▾
First Name *	
Last Name *	
Employee Number	

Company: Identifies the company the account is registered to. This field cannot be changed. Any changes to the company name should be reported to your insurance representatives.

Salutation: Select an appropriate salutation. This field is optional.

First Name/Last Name: Any changes to the name will affect any location where the name is displayed in the system, including shipments and documents created before the name is changed.

Employee Number: Enter an employee number or other identifier. This field is optional.

Contact Information: The contact information may be used to contact you about your account.

Contact Information	
Email *	
Phone	

Email: Any notification emails sent from the system will be sent to this address, including password reset emails. Since password reset emails can only be sent to the registered email address, it should be kept current.

Phone Number: You may enter your phone number, including any extensions if necessary. This field is optional, but recommended.

User Details: Lists the login information for the account.

User Preferences: The system is in use around the world, and supports many languages and regional settings. These can be set to your preferences, and will affect the menus, forms, and other features.

User Preferences	
Use Browser Settings	☐
Default Language	English
Date Format	MM/DD/YYYY
Number Format	9,999,999.99
Currency *	Canadian Dollars

Use Browser Settings: If this box is checked, the language, date format, and number format defined in your browser setup will be used throughout the system. If unchecked, the options selected here in your profile will be used, without affecting any other websites.

Default Language: Select the language in which to display the system, without affecting other websites. This option is only available if **Use Internet Browser Settings** is unchecked.

Date Format: Defines how dates will be displayed throughout the system, and how they should be entered into forms. If you are not sure of the date format when completing a form, selecting the date from the calendar lookup will always enter the correct date in the proper format. This option is only available if **Use Internet Browser Settings** is unchecked.

Number Format: Defines how numbers will be displayed throughout the system, and how they should be entered into forms. This option is only available if **Use Internet Browser Settings** is unchecked.

Currency: Select the currency that will be shown by default in currency selection fields. Other currencies may still be selected, if available.

Clientside Settings: The status page is the first page displayed when logging in, or when a policy is selected from the **Policy** menu. The clientside settings can include tables of recent information on the status page, or define the default policy.

Clientside Settings	
Referral And Change Request Table	☑
Templates Created Last (Days)	
Shipments Created/Booked Last	-- Please Select --

Referral and Change Request Table: Select this box to display a list of shipments that are currently in referral or have been submitted for changes or cancellation.

Templates Created: Displays shipment templates created within the specified number of days.

Shipments Created/Booked: Displays shipments created within the specified number of days that are Booked and Confirmed or Payment Pending.

NOTE: The shipments displayed on the Status Screen can be accessed directly by clicking the link in the Shipment/Reference column.

Status: Displays some of the history of the account.

Status	
Created By	
Last Modified By	

Created By: Identifies the user who created the account, and the time and date it was created.

Last Modified By: Identifies the last user to make changes to the account, and the time and date the changes were made.

Accepted Terms of Use: Lists all terms of use that have been accepted in relation this account.

Accepted Terms of Use			
Terms Of Use Name	Accepted On	Licensee Site	
Ready.			Loaded 1 of 1

Change Password   Update

Terms Of Use Name: Displays the name of the terms of use document.

Accepted On: Displays the date the terms of use were accepted.

Licensee Site: Displays the name of the website where the terms of use were accepted. Some insuring companies maintain multiple specialized websites.

2.   Once all changes are complete, click the **Update** button.

Changing the Password

To maintain a secure password, it should be changed on a regular basis. The password can be changed at any time through the profile page.

The password will also need to be changed immediately when accessing the system using an access email. An access email will be sent to new users, and to users who have requested a password reset through an administrator or using the Forgot Your Password feature

1.   In the main menu, click **Tools** then click **Profile**. The profile information can be edited in this page. See the Managing the user profile section for more information.

Employee	
Contact Information	
User Details	
User Preferences	
Clientside Settings	
Status	
Accepted Terms of Use	

Change Password   Update

2.   At the bottom of the page, click **Change Password**. The **Change Password** page opens.

3. Enter the Old Password.

4. Enter a New Password. Passwords are case-sensitive, and may be composed of letters, numbers, and special characters.

5. Enter the same password in the Confirm New Password field.

6. Click **Change** to change the password, or click **Edit Profile** to return to the profile page without changing the password.

Guidelines for new passwords
- *The password should be entirely new. The system will not accept a password that has already been used recently.*
- *The new password may not contain your User Name.*
- *A character may not be repeated three times in a row.*
- *If other rules apply, a message will appear when you try to change the password. The message will detail what must be changed in the new password*

6

Issuing Certificates

This is a primary function of the application. In order to book a shipment, request a quote, or create a template, the shipment information must first be entered in the shipment page.

How to create a shipment

1. In the main menu bar, open the Shipments menu and select Certificates. The Shipment Information page opens.

2. Fill in all required fields in the shipment form.

    Shipment Date: The estimated date that the shipment will depart on the selected conveyance.

Date of Departure: Click in the field to open a calendar lookup. Type or use the calendar lookup to select the date on which the insured shipment is scheduled to depart. The date will be spelled out to the right of the field to ensure the correct date is entered in the proper format.

Policy Effective Date: Displays the currently selected policy period. If a new date is selected that falls within the effective dates of a different policy period the system will automatically refresh the form to display the correct policy period. If there is no policy period that covers the selected date, the system will select the nearest policy period and the shipment will need to go into referral.

Assureds: Determines which companies are involved in the shipment.

Primary Assured: Depending on the user's rights, there may be a choice of companies which may be associated with the shipment being insured.
This box contains a list of options when:

*   A third party, such as a freight forwarder, broker, etc. is insuring shipments on behalf of the insurance policy's actual assured.
*   The user is insuring a shipment on behalf of a primary assured within their administrative scope. This would be any company in the system for which they have the right to issue insurance.

Named Assured: The named assured is the beneficiary of the insurance coverage, and is the name that will appear on the certificate. Begin typing the name, then select the named assured from the list.

If the necessary named assured is not already in the list, finish typing in the name, then complete the rest of the company information.

Once the information has been entered, the named assured may be saved for future use or made available to other users.

- **Save Assured Information:** If the named assured was selected from the lookup, this option will save any changes that were made. If a new named assured was entered, this option adds the named assured to the lookup for future shipments. The named assured will only be available to your account, unless it is shared using the following option(s).
- **Make Available to Third Party Companies Attached to this Policy:** Makes the named assured available to any and all organizations and companies attached to the currently selected policy. It will be available to any users in

    those companies who have the rights to view shared information.
- This option should only be selected if all attached organizations are known. Contact your insurance representative to determine if this option should be used.
- **Make Available to Other Users Within My Organization:** Makes the named assured available to users connected to your company who have the rights to view shared information. This includes parent branches and any

    subsidiaries.

NOTE*: The named assured will only be updated or saved when the shipment is confirmed for booking or referral, or when it is submitted for a quote. The* **Verify Coverage** *and* **Print Draft** *options will not save the named assured, and the* **Save Template** *option will only save the named assured in the template itself.*

Reference Number: This box may be used for an internal tracking number or other identifying information. The reference number may be used to search for shipments once they have been saved.

Reference Number	

Cargo information: Select the type of cargo, how it is being shipped, and coverage.

Commodity *	Perishable Foods
Packing/Shipment Method *	Conventional
Coverage Option *	All Risk

Commodity: Select the commodity being shipped. This menu includes all insured interests available in the active policy. If only one commodity is available, it is displayed automatically.

Packing/Shipment Method: Select the packing/shipment method used for the shipment. If only one packing/shipment method is available, it is displayed automatically.
The menu provides options only if the insurance coverage, premium charged or other conditions or exclusions vary based on the packing/shipment methods available for the selected commodity.

Coverage Option: The insurance policy may provide a choice of insuring terms or coverage options for the selected commodity. The insuring conditions vary according to coverage option, and in some cases the premium charged also varies. Select the coverage option to be associated to the selected commodity.

If only one coverage option is available, it is selected automatically.
The menu provides options only if the insurance coverage, premium charged or other conditions or exclusions vary based on the coverage options for the selected commodity.

Insured Value: This section is used to declare the sum for which the cargo is to be insured. Depending on how the policy is set up, some or all of the following may have to be entered:

Insured Value Currency *	Canadian Dollars	Currency Converter
Insured Value *		Valuation Clause

Insured Value Currency: Select the currency in which the values are declared. Click **Currency Converter** to calculate an accurate value for the shipment in a different currency, if necessary. This is for information only and will not affect thevalues shown in the **Shipment Information** window.

Insured Value: If this is the only field provided, enter the total sum to be insured.

For any questions about what amounts are insurable by the policy or how to calculate any of the above fields, refer to the insurance policy's **Valuation Clause**, available using the link to the right of the Insured Value section, or contact your insurance representative.

Voyage Information: Provide the specific information about how the cargo is being transported.

Conveyance	Ocean Vessel		☐ With Transshipment
Vessel			☐ Override Vessel Validation
Carrier			
Voyage Number			

Conveyance: Select the conveyance from the available options, as defined in the policy.

With Transhipment: Check this box if the shipment involves more than one connecting conveyance. This box only appears if the policy calls for an additional premium to be levied on transhipments.

Vessel: Type all or part of the vessel name and use the lookup 🔍 to search the vessel database. The database lists only those vessels that are listed as "Live" and "In Commission".

This field is directly tied to the **Carrier** field. When a vessel is selected, the registered carrier is automatically entered in the **Carrier** field. If the carrier is known, and the vessel is unknown, selecting the carrier first may facilitate the vessel selection.

If the required vessel cannot be found in the lookup list, leave the **Carrier** field blank and perform the search again. The vessel may be registered under a different carrier. If the vessel is still not found, select the **Override Vessel Validation** box to bypass the forced lookup and generate a referral to the insurance representative.

In some cases, the enabled policy may not require that the carrier or vessel information be selected from the lookup. However, the manual entry of a carrier or vessel is still mandatory.

Carrier: Since this functionality is directly tied to the **Vessel** field, when a carrier is chosen from the lookup 🔍, the available vessels to pick from are restricted to those that are registered under the selected carrier. If the vessel is known and the carrier is unknown, selecting the vessel first may facilitate the carrier selection.

If the required carrier cannot be found in the lookup list, select the **Override Vessel Validation** box to bypass the forced lookup and generate a referral to the insurance representative.

In some cases, the enabled policy may not require that the carrier or vessel information be selected from the lookup. However, the manual entry of a carrier or vessel is still mandatory.

Voyage Number: Enter a voyage number, flight number, or a transit reference number, if necessary.

Override Vessel Validation: If the vessel and/or carrier field entries must be looked up from the system, however there are no choices that match the required names, then this option may be checked to override the lookups. Once this box is checked, any names may be entered into the **Vessel** and **Carrier** fields without using the lookups. The shipment will go into referral so that the vessel and carrier information may be reviewed by the insuring company, and approved for booking.

Route information: Enter the locations for the cargo origin and destination, as well as the ports or airports where the cargo was loaded and unloaded from the chosen transport.

Origin Information	
Country *	CANADA
State/Province	
City / Place	
Text To Appear On Certificate	CANADA

Loading Information	
Country *	Same As Country of Origin
Loading Facility	🔍
Text To Appear On Certificate	CANADA
No Risk Prior To Loading	☐

Destination Information	
Country *	-- Select a Country --
State/Province	
City / Place	
Text To Appear On Certificate	-- Select a Country --

Discharge Information	
Country *	Same As Country of Destination
Discharge Facility	🔍
Text To Appear On Certificate	
No Risk After Discharge	☐

Origin Information: Specifies the location where the insurance coverage starts.

Country: Select the country where the insurance coverage starts. The drop-down lists all active countries in the world, including aliases.

City/Place: Enter the place or city where the insurance takes effect.

Text to Appear on Certificate: If given the right, this box allows the editing of the actual "Place of Origin" text to appear on the certificate. This box is automatically populated with the information entered in the boxes above unless modified.

Loading Information: Specifies the location where the cargo is loaded onto the chosen transport.

Country: Select the country in which the port or airport of loading is located. The drop-down lists all active countries including aliases.

Loading Facility: Depending on the selected conveyance, a port or airport may need to be selected from the lookup 🔍. A free-text entry may be made when use of the lookup is not required.

Text to Appear on Certificate: If given the right, this box allows the editing of the actual "Place of Loading" text to appear on the certificate. This box is automatically populated with the information entered in the boxes above unless modified.

No Risk Prior to Loading: Check this box if the coverage is to begin only when the cargo is loaded onto the specified conveyance. This information will appear in the printed certificate.

Destination Information: Specifies the location where the insurance coverage ends.

Country: Select the country where the insurance coverage ends. The drop-down lists all active countries in the world, including aliases.

City/Place: Enter the place or city where the insurance coverage ends.

Text to Appear on Certificate: If given the right, this box allows the editing of the actual "Final Destination" text to appear on the certificate. This box is automatically populated with the information entered in the boxes above unless modified.

Discharge Information: Specifies the location where the cargo is unloaded from the chosen transport.

Country: Select the country in which the port or airport of unloading is located. The drop-down lists all active countries including aliases.

Discharge Facility: Depending on the selected conveyance, a port or airport may need to be selected from the lookup 🔍. A free-text entry may be made when use of the lookup is not required.

Text to Appear on Certificate: If given the right, this box allows the editing of the actual "Place of Discharge" text to appear on the certificate. This box is automatically populated with the information entered in the boxes above unless modified.

No Risk After Discharge: Check this box if the coverage is to cease at the time the cargo is unloaded from the primary conveyance. This information will appear in the printed certificate.

Claim Settling Agent: Use the lookup to assign a claims settling agent to the shipment. Click the lookup icon 🔍 to display all settling agents approved for the countries involved in the shipment, as defined in the active policy. Click **Show Contact Details** to view more information on the selected agent.

Claim Settling Agent		🔍
	Show Contact Details...	

Other Information: Enter details used to track and identify the cargo.

Full Description Of Cargo	
Mark & Numbers	
Letter Of Credit Conditions	

Full Description of Cargo: Provide a complete description of the cargo, including amounts.

Marks & Numbers: Enter specifics of the cargo being shipped (for example, 1 x 40 ft container, containing 25 pallets of new goods, serial #, seal).

Letter of Credit Conditions: Enter any special terminology required by a letter of credit. Terms and conditions entered in this section must not be broader than those offered by the policy.

Additional Information

Place of Issue	
Date of Issue	

The additional Information section captures further information which will be displayed on the certificate.

Place of Issue: The place the issue for the certificate

Date of Issue: The date the certificate was issued. If this field is left blank it will be populated with the date of departure.

Note	
	Verify Coverage

Note: Enter any comments to be recorded with this shipment. These comments do not appear on the final certificate.

3. Click **Verify Coverage**. The system validates the shipment details against the conditions of the policy.

   If the shipment meets the conditions of the policy: The system calculates and displays the applicable premiums, taxes, and insuring conditions in the Premium Information section. The values will not be displayed if the user does not have the necessary rights.

   Additional options become available, including the option to **Confirm Booking** which will book the insurance.

--Select Certificate Format-- ▾	Print Draft
Verify Coverage	Confirm Booking	Request Quote	Save Template

   Print Draft: Prints out a draft version of the final certificate of insurance using the current shipment data. If the button is grayed out, then a **Certificate Format** must first be selected from the list to the left. If only one format is available, it will be selected automatically.

   NOTE*: Printing a draft does not save the shipment information. The shipment must be confirmed, submitted for a quote, or saved as a template to save the information.*

   Verify Coverage: If any changes are made after verifying coverage, click this button again to validate the changed information.

   Confirm Booking: Books the insurance coverage, and makes the final certificate of insurance available for printing.

   Request Quote: A different premium quote may be requested. Clicking **Request Quote** will lock the shipment information and submit it to the insuring company for a quote.

   Save Template: Saves the current shipment information as a template which can be re-used to submit additional shipments with similar information. A **Reference Number** must be entered to save a template.

   If the shipment does not meet the conditions of the policy: A message appears stating that the shipment must go into referral, and the reason for the referral. Additional options become available, including the option to **Confirm Referral** which will lock the shipment and submit it to the insuring company for review and approval.

Verify Coverage	Confirm Referral	Save Template

   Verify Coverage: If the referral is due to an error in the shipment information, correct the error and click **Verify Coverage** again.

   Confirm Referral: If the shipment information is correct, click **Confirm Referral** to lock the shipment and automatically submit it to the insuring company for approval.

   Save Template: Saves the current shipment information as a template which can be re-used to submit additional shipments with similar information. A **Reference Number** must be entered to save a template.

4. On clicking **Confirm Booking**, **Confirm Referral**, or **Request Quote** a certificate number will be generated. This certificate number may be used to search for the shipment. If the shipment is booked, the certificate of insurance may then be printed. If the shipment goes into referral, the certificate cannot be printed until the referral has been approved.

Printing a Certificate

Once a shipment has been booked and confirmed, the final certificate of insurance may be printed.

NOTE: For most certificates, only one original certificate and one duplicate may be printed. However, many copies may be printed. The first printing will include all versions, while each printing afterwards will only include the copy.

1. At the bottom of the **Shipment Information** window, select a certificate format. If only one format is available, it will be selected automatically.

--Select Certificate Format -- ▾	Print Certificate
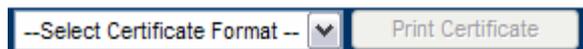
2. Click **Print Certificate**.

3. The options to open or save the file will appear. Click **Open**. The certificate will open in Adobe Acrobat as a PDF.

4. Click **Print** in Adobe Acrobat, and complete the printing according to your printer setup.

NOTE: Since only the first printing will include the Original and Duplicate, they will be lost if the PDF is closed before the certificate is printed from Adobe Acrobat. Also, if there are difficulties printing a certificate, it may be due to pop-up blockers. Disable or bypass the pop-up blocker and then try printing the certificate again.

About Referrals

A referral can occur for several reasons. Some examples include:
*   The date of departure is outside the effective date range of the currently selected policy.
*   One or more details of the shipment are not covered by the policy.
*   A value exceeds the limits of the policy, such as a high insured value, or extended backdating of the date of departure.
*   Certain dangerous cargos, or shipping to areas with a war risk, could be flagged for automatic referral.
*   A country, company, or person involved with the shipment is not in compliance with trade restrictions, such as sanctions .

A referral indicates that the insurance representatives must review some aspects of the shipment before confirming and booking the shipment or declaration.

When a shipment is referred, an email notification is sent to the insurance representatives, who then make a decision. The representatives may accept and book the shipment, reject the shipment, or accept and book the shipment but with a different premium and/or additional conditions of insurance. An email notification will be sent out once the decision is made.

The following is an example of a referral notification. The message will appear at the top of the shipment page after clicking **Verify Coverage**:

Due to date of departure being more than 30 days of backdating tolerance, and the insured value exceeding the maximum insurable value of 5,000,000.00 CAD of the policy, your shipment requires a referral to an underwriter. To proceed with the referral, please complete this form and click the Confirm Referral button. Your request will be sent to your Insurers immediately.

Once a shipment is in referral, it cannot be changed or cancelled, and the certificate of insurance cannot be printed until the shipment is approved. The certificate number may be used to find the shipment in the system and verify the status of the referral.

About Templates

There are many circumstances where it is necessary to create multiple shipments with similar information. For example, it may be a regular shipment that occurs once a month, or a large consignment that is divided into several shipments. To avoid having to enter all of the shipment information multiple times, new shipments may be booked from templates or as copies of one shipment.

If a shipment needs to be duplicated, but will not be needed again, then copying may be a more efficient solution. One full shipment is created and booked, then copied. Each copy would be modified as necessary and then booked.

A template is created once, and then saved in the system. It can then be used to create each shipment. This is intended to be kept and reused, so it is very suitable for recurring shipments.

The creation of a template involves entering a shipment using generic information, then saving the template for future use.

To save a shipment as a template

1. Create a shipment or copy an existing shipment.

2. Enter a reference number in the **Reference Number** box. This is required to save the template, and can be used to find the template later.

3. Click **Verify Coverage** at the bottom of the shipment page.

4. If any required information is missing, complete the fields and **Verify Coverage** again.

5. After the system successfully verifies the shipment information, click **Save Template**. The template is saved under the number entered in the **Reference Number** box. It is now ready for creating shipments.
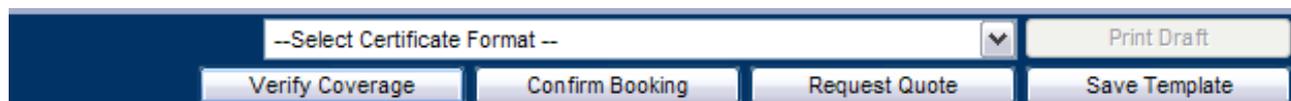
NOTE: *Once the template has been saved, the **Reference Number** can be changed to save another template or proceed to booking the shipment. The shipment may be booked with the same number, but a new template would need a unique number.*

To create a shipment from a template

1. Search for and select a saved template. When searching for the shipment, make sure to select **Template** in the **Status** section.

2. Update the shipment details and click **Verify Coverage**. The system validates the shipment details against the conditions of the policy.

   If the shipment meets the conditions of the policy: The system calculates and displays the applicable premiums, taxes, and insuring conditions in the Premium Information section. The values will not be displayed if the user does not have the necessary rights.

   Additional options become available, including the option to **Confirm Booking** which will book the insurance.

Print Draft: Prints out a draft version of the final certificate of insurance using the current shipment data. If the button is grayed out, then a **Certificate Format** must first be selected from the list to the left. If only one format is available, it will be selected automatically.

NOTE: *Printing a draft does not save the shipment information. The shipment must be confirmed, submitted for a quote, or saved as a template to save the information.*

Verify Coverage: If any changes are made after verifying coverage, click this button again to validate the changed information.

Confirm Booking: Books the insurance coverage, and makes the final certificate of insurance available for printing.

Request Quote: A different premium quote may be requested. Clicking **Request Quote** will lock the shipment information and submit it to the insuring company for a quote.

Save Template: If any information was changed other than the **Reference Number**, this will update the existing template. If the **Reference Number** was changed, this will save the current shipment information as a new template.

If the shipment does not meet the conditions of the policy: A message appears stating that the shipment must go into referral, and the reason for the referral.
Additional options become available, including the option to **Confirm Referral** which will lock the shipment and submit it to the insuring company for review and approval.

Verify Coverage	Confirm Referral	Save Template

Verify Coverage: If the referral is due to an error in the shipment information, correct the error and click **Verify Coverage** again.

Confirm Referral: If the shipment information is correct, click **Confirm Referral** to lock the shipment and automatically submit it to the insuring company for approval.

Save Template: If any information was changed other than the **Reference Number**, this will update the existing template. If the **Reference Number** was changed, this will save the current shipment information as a new template.

3. On clicking **Confirm Booking**, **Confirm Referral**, or **Request Quote** a certificate number will be generated. This certificate number can be used to search for the shipment. If the shipment is booked, the certificate of insurance can then be printed. If the shipment goes into referral, the certificate cannot be printed until the referral has been approved.

7

Managing Shipments

One of the most common uses of the system is the creation of shipments in order to book insurance. Shipment information can be entered and saved as templates to be reused, submitted for rate quotes, or booked as insurance coverage. Once booked, a shipment can be copied to generate multiple similar shipments, and the Certificate Of Insurance may be printed as proof of insurance.

All previously-entered shipment data - quotes, referrals, issued certificates and even cancelled shipments - is automatically saved in the database and retrievable through the **Query/List** search function in the Shipment section.

Searching for a Certificate or Template

Depending on access levels and the volume of shipments handled by a company, there may be a large number of shipments and templates available to a user. The **Query/List** page allows a detailed search to be performed, finding shipments using a range of options such as the status of the shipments, dates, values, policies, assured companies and users, or a variety of other options.

NOTE: *Depending on the setup of the login page, it may be possible to verify a shipment without having to log on. Anyone with a copy of the shipment certificate may verify the shipment status and details, even if they do not have an account.*

How to perform a basic shipment search

1. In the main menu bar, open the **Shipments** menu, and select **Query/List**. The **Shipment Search Criteria** page opens in the basic format. Click the **Advanced Search** button to view additional search options, detailed in the next section.

2. Enter any combination of search options, or leave all fields blank and click **Search** to view all available booked shipments. All fields are optional.

Policy / Policy Number: Enter all or part of the policy name or number. A search may be performed with just part of the policy name or number, or either one may be selected from the lookups 🔍, which will automatically fill in both fields.

Policy Year: Enter the policy year the shipment or template was created under. This will be the same year as the effective date of the policy.

Certificate Number: Enter the certificate number generated by the system when the shipment was created. The full numeric certificate number must be included, without any dashes or letters that may appear on the printed certificate.

Reference Number: Enter the reference number identifying the shipment or template.

Primary Assured: Enter all or part of the primary assured name. The lookup 🔍 may be used to select it from the system.

Named Assured: Enter all or part of the named assured name. The lookup 🔍 may be used to select it from the system.

Vessel: Enter all or part of the vessel name. The lookup 🔍 may be used to select it from the system.

Date of Departure: Enter a date range to find shipments with a shipping date during that period. The dates may be entered manually or selected from the calendar lookups 📅.

Date of Issue: Enter a date range to find shipments created during that period. The dates may be entered manually or selected from the calendar lookups 📅. This refers to the actual date the shipment was created on, and not any other dates that may have been selected by the user.

3. In Select the **Status** and **Type of Shipment**. Multiple status options may be selected. If the **Certificate Number** of a specific shipment has been entered, the shipment will be found regardless of status.

Booked: The shipment has been successfully booked.

Referred/RFQ Submitted: The shipment is currently in referral or a Request For Quote (RFQ) has been submitted.

Cancelled: The shipment has been cancelled and will not be invoiced. The reason for the cancellation will be shown in the status of the individual shipment.

Change/Cancellation Pending: A change or cancellation request has been submitted, but is not yet complete.

Rejected Referral: The shipment went into referral, but was rejected. No certificate will be available and no coverage has been provided for the shipment. The reason for the rejection will be shown in the status of the individual shipment.

Template: The shipment has been saved as a template to be used for multiple shipments.

RFQ Declined: The shipment was submitted for a quote, but was declined. The reason the request was denied will be shown in the status of the individual shipment.

Quote Issued: A quote has been issued for the shipment, but not yet accepted.

Quote Rejected: A quote was issued for the shipment, but was rejected by the user.

Type of Shipment: Select which types of shipments should be included in the results. **Certificates** are single shipments, and **Declarations** are part of groups of shipments under an open policy.

4. Select the appropriate **Data Output Options**.

Output Type: This field defaults to **Shipment**, and cannot be changed.

Output Format: The search results may be viewed on the **Screen**, or opened in an **Excel** document.

Output Template: When **Excel** is selected as the **Output Format**, the report template can be selected here. Select the owner company the template was created for, and then select from the available templates. The **Manage Template** link, if available, can be used to modify the templates.

5. Click **Search** to find the shipments, or click **Clear** to reset the form and choose new criteria. The search results will depend on the selected output format.

Output to screen: If the system finds multiple search results, the **Shipment Search Results** page opens above the search criteria form, allowing for changes to further refine the results. Click a link in the **Shipment** column to view detailed information about the shipment. If there is only one match the system opens the shipment directly.

Output to Excel document: The search is performed in the background, and a message will appear once the report is ready. When ready, the report will be available in the Data Output Center, found under the **Tools** menu.

How to perform an advanced shipment search

1. In the main menu bar, open the **Shipments** menu, and select **Query/List**. The **Shipment Search Criteria** page opens in the basic format. Click the **Advanced Search** button to view additional search options. The **Basic Search** button can be used to switch to the simplified search page, detailed in the previous section.

2. Enter any combination of search options, or leave all fields blank and click **Search** to view all available booked shipments. All fields are optional.

Shipment Information:

Named Assured: Enter all or part of the named assured name, and select it from the lookup 🔍. The company must be selected from the lookup or it will not affect the search results.

Reference Number: Enter the reference number identifying the shipment or template.

Certificate Number: Enter the certificate number generated by the system when the shipment was created. The full numeric certificate number must be included, without any dashes or letters that may appear on the printed certificate.

Policy Year: Enter the policy year the shipment or template was created under. This will be the same year as the effective date of the policy.

Declaration Period: Select a period from the **Declaration Period** list. Results for endorsements and renewals are included.

NOTE: *The **Declaration Period** list is activated once a policy has been selected. Only shipment from posted declarations will be included in the search results.*

Insured Value Range: Enter the minimum and maximum value to locate shipments within that range, and select the appropriate currency.

Policy, Cargo, and Voyage Information:

Policy: Enter all or part of the policy name. While a search may be performed with just part of the policy name, selecting the policy from the lookup will activate additional fields.

Recorded By: Once a policy has been selected from the lookup, shipments can be found based on the company and/or the specific user who created them. Select a company or user from the dropdown lists. If a company is selected, the **Subsidiaries** checkbox may be used to include all subsidiaries of the company.

NOTE: *The ability to view companies, users, and subsidiaries is dependent on the user's account access level.*

Date of Departure: Enter a date range to find shipments with a shipping date during that period. The dates may be entered manually or selected from the calendar lookups.

Date of Issue: Enter a date range to find shipments created during that period. The dates may be entered manually or selected from the calendar lookups. This refers to the actual date the shipment was created on, and not any other dates that may have been selected by the user.

Conveyance: Once a policy has been selected from the lookup, a conveyance may be selected to view shipments using that conveyance.

Route: Once a policy has been selected from the lookup, a route may be selected to view shipments using that route.

Commodity Class: Once a policy has been selected from the lookup, a commodity class may be selected to view shipments of any commodity registered under that class.

Packing Method: Once a policy has been selected from the lookup, a packing method may be selected to view shipments using that method.

Coverage: Once a policy has been selected from the lookup, a coverage option may be selected to view shipments using that option.

Carrier / Vessel: Once a policy has been selected, and if a maritime conveyance has been selected, shipments can be found based on the carrier and vessel used for the shipment. Enter all or part of the carrier name or vessel name, and select it from the lookup. Once either is selected, both fields will be filled in automatically.

Origin and Destination Information:

Origin/Destination: Shipments may be located by **Region** or **Country**, for the **Origin** and **Destination**. If a country is selected, a **State**, **Province**, or **Other** area may be selected from the lookups 🏛.

Invoice Number: Enter an invoice number to locate shipments where that invoice number was included.

3. Select the **Status** and **Type of Shipment**. Multiple status options may be selected. If the **Certificate Number** of a specific shipment has been entered, the shipment will be found regardless of status.

Booked: The shipment has been successfully booked.

Referred/RFQ Submitted: The shipment is currently in referral or a request for quote has been submitted.

Cancelled: The shipment has been cancelled and will not be invoiced. The reason for the cancellation will be shown in the status of the individual shipment.

Change/Cancellation Pending: A change or cancellation request has been submitted, but is not yet complete.

Rejected Referral: The shipment went into referral, but was rejected. No certificate will be available and no coverage has been provided for the shipment. The reason for the rejection will be shown in the status of the individual shipment.

Template: The shipment has been saved as a template to be used for multiple shipments.

RFQ Declined: The shipment was submitted for a quote, but was declined. The reason the request was denied will be shown in the status of the individual shipment.

Quote Issued: A quote has been issued for the shipment, but not yet accepted.

Quote Rejected: A quote was issued for the shipment, but was rejected by the user.

Type of Shipment: Select which types of shipments should be included in the results. **Certificates** are single shipments, and **Declarations** are part of groups of shipments under an open policy.

4. Select the appropriate **Data Output Options**.

Output Type: This field defaults to **Shipment**, and cannot be changed.

Output Format: The search results may be viewed on the **Screen**, or opened in an **Excel** document.

Output Template: When **Excel** is selected as the **Output Format**, the report template can be selected here. Select the owner company the template was created for, and then select from the available templates. The **Manage Template** link, if available, can be used to modify the templates.

5. Click **Search** to find the shipments, or click **Clear** to reset the form and choose new criteria. The search results will depend on the selected output format.

Output to screen: If the system finds multiple search results, the **Shipment Search Results** page opens above the search criteria form, allowing for changes to further refine the results. Click a link in the **Shipment** column to view detailed information about the shipment. If there is only one match the system opens the shipment directly.

Output to Excel document: The search is performed in the background, and a message will appear once the report is ready. When ready, the report will be available in the Data Output Center, found under the **Tools** menu.

Modifying a Booked Shipment

Depending on user rights, it may be possible to modify shipment information for a booked and confirmed shipment, or submit a request to have the changes done by the insurance representatives.

How to modify a booked shipment:

1. Search for and select a booked shipment. When searching for the shipment, make sure to select **Booked** in the **Status** section. The **Shipment Detailed Information** window appears in read-only format.

   Click the **Change** button at the bottom of the window. Most fields will be unlocked for editing.

2. Modify the shipment information and click **Confirm Booking Change**. The system will validate the changes against the conditions of the policy.

   If the changes meet the conditions of the policy: The changes are saved and the system returns to the main shipment page. A new certificate may then be printed with the updated information.

   If the changes do not meet the conditions of the policy: A message appears stating that the shipment must go into referral, and the reason for the referral. Three options are available.

Confirm Booking Change: If the referral is due to an error in the shipment information, correct the error and click **Confirm Booking Change** again.

Confirm Referral: If the shipment information is correct, click **Confirm Referral** to lock the shipment and automatically submit it to the insuring company for approval.

Reject Referral: Cancels the attempted changes and returns to the main shipment page.

How to submit a change request

1. Search for and select a booked shipment. When searching for the shipment, make sure to select **Booked** in the **Status** section. The **Shipment Detailed Information** window appears in read-only format.

2. Click the **Change** button at the bottom of the window. A **Change Request** window will appear.

3. Enter the desired changes and click **Submit**. Be sure to include what field to change and what it should be changed to.

NOTE: *If there is no **Change** button, you will need to contact your insurance representative for more information.*

Copying a Certificate

There are many circumstances where it is necessary to create multiple shipments with similar information. For example, it may be a regular shipment that occurs once a month, or a large consignment that is divided into several shipments. To avoid having to enter all of the shipment information multiple times, new shipments may be booked from templates or as copies of one shipment.

A template is created once, and then saved in the system. It can then be used to create each shipment. This is intended to be kept and reused, so it is very suitable for recurring shipments.

If a shipment needs to be duplicated, but will not be needed again, then copying may be a more efficient solution. One full shipment is created and booked, then copied. Each copy would be modified as necessary and then booked.

1. Search for and select a shipment with the booked and confirmed, referred, or cancelled status.

2. At the bottom of the **Shipment Information** window, click **Copy**. The shipment details are copied into a new shipment, which can be modified if necessary.

3. Click **Verify Coverage**. The system validates the shipment details against the conditions of the policy, and will determine if it may be booked or if it must go into referral.

4. Click **Confirm Booking** or **Confirm Referral**.

   If the shipment information was not changed significantly, a message may appear at the top of the window pointing out that the current shipment is very similar to an existing shipment. Two buttons will be available at the bottom of the page.

   - Click **Book New Shipment** to continue. The certificate is booked and confirmed and has a new certificate number and status.
   - Click **Access Existing Shipment** to discard the new shipment and open the existing shipment.

Cancelling a Shipment

Under certain circumstances, it may be necessary to cancel a shipment after it has been booked. Depending on user rights, it may be possible to cancel the shipment directly, or a request can be submitted to have the shipment cancelled by the insurance representatives.

Cancel a shipment directly

1. Search for and select a booked shipment. When searching for the shipment, make sure to select **Booked** in the **Status** section.

2. At the bottom of the **Shipment Information** window, click **Cancel**.

3. The **Cancellation Request** field is added near the top of the shipment form, just below the **Status**.

4. In the **Reason For Cancellation** field, enter the reason for cancelling the shipment and click **Confirm Cancellation**. With the appropriate rights, the shipment will be cancelled immediately. Otherwise, the request will be sent to the insurance representative for review and approval. An email notification will be sent when the cancellation is completed or rejected.

5. Click **Reject Cancellation** to return to the normal shipment page without cancelling the shipment.

Cancelled shipments still remain in the system. They can be retrieved at any time by performing a search, selecting **Cancelled** in the **Status** section. A cancelled shipment may be copied to create a new shipment.

Cancel request

1. Search for and select a booked shipment. When searching for the shipment, make sure to select **Booked** in the **Status** section.

2. At the bottom of the **Shipment Information** window, click **Cancel**.

3. A Request window opens for the cancellation.

4. In the **Request Description** field, enter the reason for cancelling the shipment and click **Submit**.
    With the appropriate rights, the shipment will be cancelled immediately. Otherwise, the request will be sent to the insurance representative for review and approval. An email notification will be sent when the cancellation is completed or rejected.

5. Click **Cancel** to return to the shipment page without cancelling the shipment.

Cancelled shipments still remain in the system. They can be retrieved at any time by performing a search, selecting **Cancelled** in the **Status** section. A cancelled shipment may be copied to create a new shipment.

Canceling and Replacing a Certificate

Depending on user access rights, a booked shipment certificate can be cancelled and replaced with a new one. This new shipment certificate will contain the same information as the former certificate, and can be edited before booking. This prevents having to create a replacement shipment from scratch.

Cancel and replace a certificate directly

1. Search for and select a booked shipment. When searching for the shipment, make sure to select **Booked** in the **Status** section.

2. At the bottom of the shipment page, click **Cancel and Replace**.

3. A Request window opens for the cancellation.
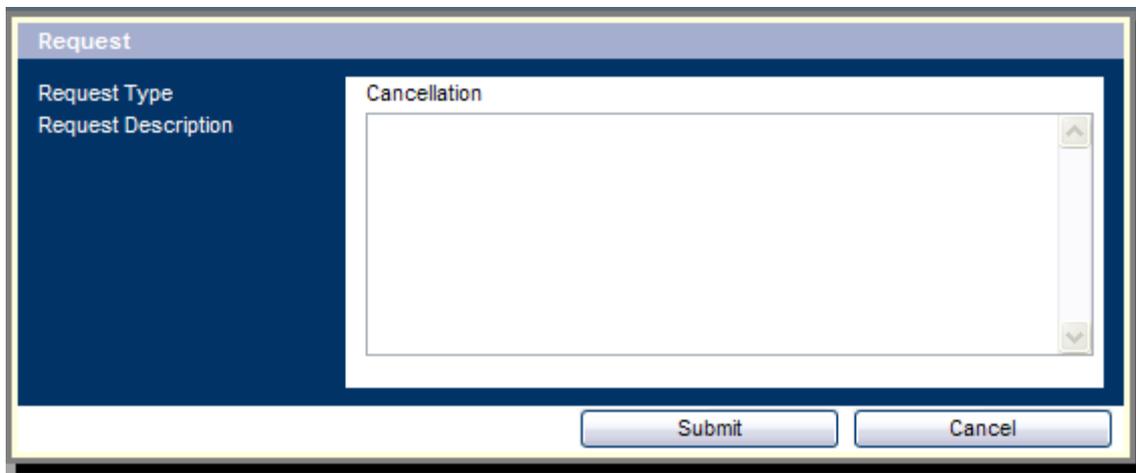
4. Enter a reason for the cancellation in the **Request Description** field, and click **Submit**. The shipment will be cancelled immediately, and the provided reason will be shown in the status of the cancelled shipment.

5. A new shipment page opens with the information from the previous shipment.

6. Modify any information that must be changed.

7. Click **Verify Coverage**. The system validates the shipment details against the conditions of the policy, and will determine if it can be booked or if it must go into referral.

8. Click **Confirm Booking** or **Confirm Referral** to complete the shipment with a new certificate number. The new shipment will include a link to the previous shipment for reference purposes.

Request to cancel and replace a certificate

1. Search for and select a booked shipment. When searching for the shipment, make sure to select **Booked** in the **Status** section.

2. At the bottom of the shipment page, click **Cancel and Replace**.

3. The **Cancellation Request** field is added near the top of the shipment form, just below the **Status**.

4. In the **Reason For Cancellation** field, enter the reason for cancelling the shipment and click **Confirm Cancellation**. The shipment will be cancelled immediately, and the provided reason will be shown in the status of the cancelled shipment.

5. A new shipment page opens with the information from the previous shipment.

6. Modify any information that must be changed.

7. Click **Verify Coverage**. The system validates the shipment details against the conditions of the policy, and will determine if it can be booked or if it must go into referral.

8. Click **Confirm Booking** or **Confirm Referral** to complete the shipment with a new certificate number. The new shipment will include a link to the previous shipment for reference purposes.

Adding Notes to Certificates

Notes may be attached to shipment certificates, and the notes may be sent by email to designated recipients.

1. Create a new shipment or search for and select an existing shipment.

2. Click **Add Notes** or **Notes and Follow-Ups** at the bottom of the window. The note entry window opens.

3. Enter the **Follow-Up Date** or select it from the calendar lookup 🗒. This date reflects the time at which the note will be sent by email to the recipients. If the date is the current date or older, then the email will be sent immediately once the note is saved.

4. In the **Description** field, enter the full text that will be included in the note. This text will also be the main text in any email sent for this note, along with some basic information about the shipment.

5. Enter the **Client Code**, if necessary.

6. In **Scope**, determine who can view this note.
   - **Private:** Only visible to the user who created the note.
   - **Company:** Only visible to the user who created the note and other members of their company who have access to view the shipment.
   - **Insurer:** Only visible to representatives of the insuring companies.
   - **Broker/Assured:** Only visible to the user who created the note, other members of their organization, and representatives of the broker company.
   - **Open:** Visible to anyone who has access to view the shipment. This includes anyone who verifies the shipment without logging in.

7. In the **Other Recipients** field, type the email addresses of any other parties who are to receive a copy of the note. Separate individual addresses with commas.

8. Check the box for **Send Email Now** if the note is to be sent immediately once it is saved.

9. Click **Add** to save the note and return to the shipment page, or click **Clear** to reset all fields. Close the window using the **X** to exit without saving a note.

Attaching Documents to a Certificate

Documents or pictures may be attached to certificates. This may be used to provide additional information for other users viewing the shipment within the system. Attached files will not be printed with the certificate of insurance.

1. Create a new shipment or search for and select an existing shipment.

2. Scroll down to the bottom of the page to the **Attachments** section.

Attachments			
Description		Document	Browse...
			Attach

3. Enter a **Description** of the file to be attached.

4. Select if the file is a document or picture.

5. Click **Browse** to open a standard **Choose File** dialogue box, and locate the file. Select the file and click **Open**.

6. Click **Attach**. The new file appears in the **Attachments** section.

ATTACHMENTS						
DESCRIPTION	TYPE OF FILE	NAME OF FILE	ATTACHER	COMPANY	DATE	DELETE
Contact information for origin storage location	Document	Storage contacts.txt			1/7/2011 2:06:00 PM	☐
ATTACH FILE						
DESCRIPTION		TYPE OF FILE	FILE			
		Document		Browse...		
			Add Notes	Remove		Attach

How to open a document or picture attached to a shipment

1. Click the link in the **Description** column. A window opens with the file name and size.

FILE DOWNLOAD	
FILE NAME	Storage contacts.txt
FILE SIZE	990bytes

Download | Close Window

2. Click **Download** to access the file.

3. Choose to **Save** or **Open** the file.

How to delete a document or picture attached to a shipment:

1. Check the box in the **Delete** column for the files to be removed.

2. Click the **Remove** button.