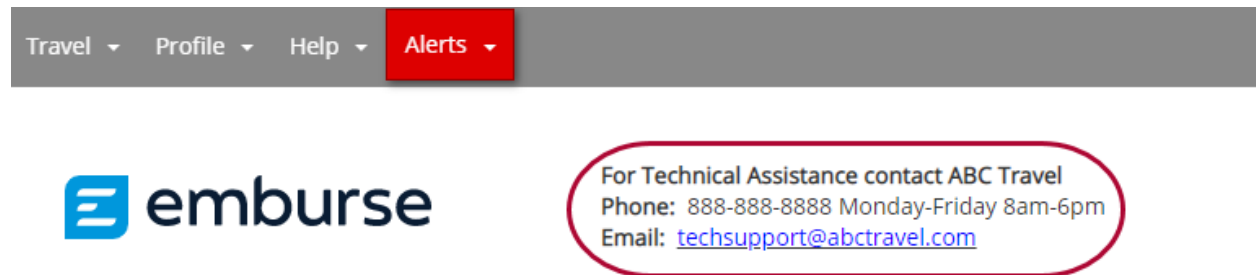


CERTIFY & NEXONIA TRAVEL OVERVIEW

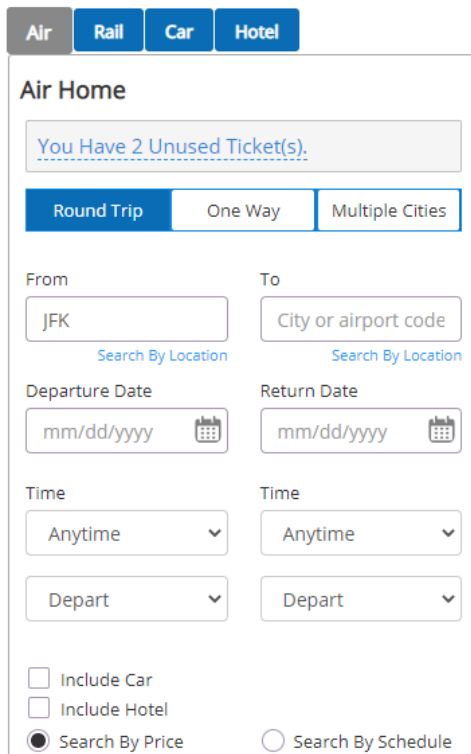
Training Webinar Guide

Travel Homepage

After logging in there are a few important areas to note on the Travel homepage. At the top of the screen is the contact information for your **Travel Management Company (TMC)**. If you need to make changes to your travel after booking, contact them.

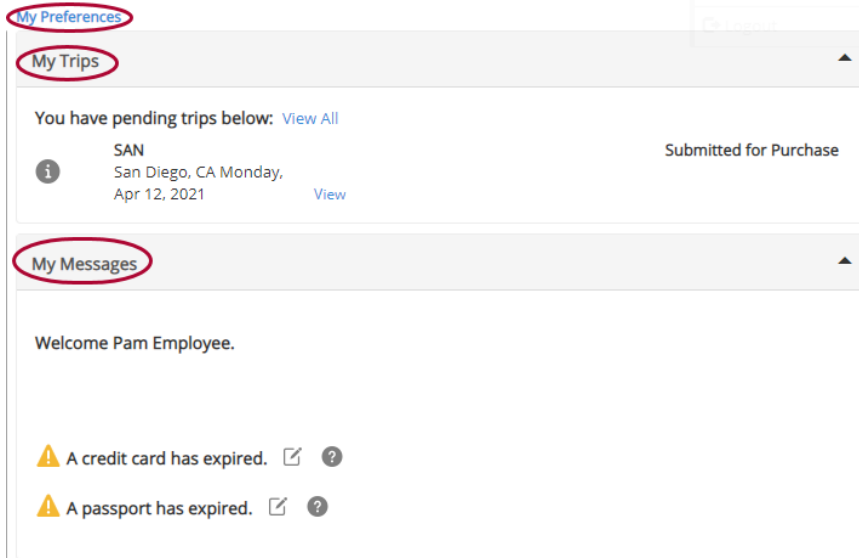


On the left are search parameters to book **air**, **car**, **hotel**, and **rail** trips.



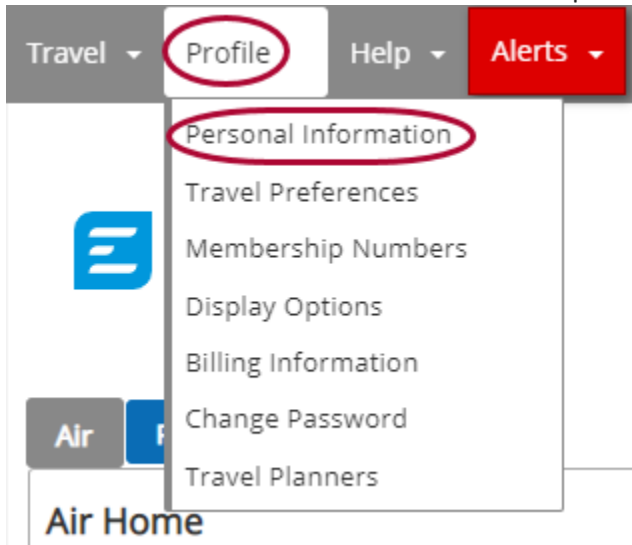
The image shows a search interface for air travel. At the top are four tabs: "Air", "Rail", "Car", and "Hotel". The "Air" tab is selected. Below the tabs is a search form titled "Air Home". The form includes a notification box that says "You Have 2 Unused Ticket(s)". Below this are three tabs for trip types: "Round Trip", "One Way", and "Multiple Cities". The "Round Trip" tab is selected. The form has two columns for "From" and "To". The "From" field contains "JFK" and has a "Search By Location" link below it. The "To" field contains "City or airport code" and has a "Search By Location" link below it. There are two date pickers for "Departure Date" and "Return Date", both showing "mm/dd/yyyy" and a calendar icon. There are two time pickers for "Time", both showing "Anytime" and a dropdown arrow. There are two "Depart" pickers, both showing "Depart" and a dropdown arrow. At the bottom, there are four checkboxes: "Include Car", "Include Hotel", "Search By Price" (which is selected), and "Search By Schedule".

Click **My Preferences** to set your travel preferences. Any pending trips will be listed under **My Trips**. Any messages such as expiring credit card will be listed under **My Messages**.



Personal Information

Click **Personal Information** from the **Profile** dropdown menu.



In the **Name** tab, be sure your name is spelt exactly as it is on your passport or legal ID. Below your emails, be sure to check off the box. If any updates are made to your itinerary, this makes sure you will be notified.

Name | Addresses | Phone Numbers | Emergency Contact | TSA Information | Passport Info

Name

Prefix:

*First Name:

Middle Name or Initial:

*Last Name:

*Primary E-Mail Address:

Secondary E-Mail Address:

Always email my itinerary activity

In the next tabs, add your **company's address**, **phone numbers**, and **emergency contact**. Store your TSA number in the **TSA Information** tab. Finally, enter your passport information in the **Passport Info** tab. When complete, click **Save**.

Personal Information

[Print](#)

Save

Complete the information below and click the Save button to update your profile.

(*) Required to complete a reservation.

Name | **Addresses** | Phone Numbers | Emergency Contact | TSA Information | Passport Info

Travel Preferences

In the left sidebar, click **Travel Preferences**.

Menu

- Personal Information**
- Travel Preferences**
- Membership Numbers
- Display Options
- Billing Information
- Change Password
- Travel Planners

Here set preferences for:

- **Air** – set preferred airlines, default class of service, preferred seats, ticketing options, and more.
- **Rail** – set default class of service, maximum number of connections, set preferences, and more.
- **Car** – set preferred rental car companies, top three car types, default credit cards, and more.
- **Hotel** – set preferred hotel chains, select non-smoking rooms, exclude hotel chains from your search, and more.

When complete, click **Save**.

Travel Preferences

[Print](#)

Save

Complete the information below and click the Save button to update your profile.

(*) Indicates Required Information.

Air Preferences	▼
Rail Preferences	▼
Car Preferences	▼
Hotel Preferences	▼

Save

Membership Numbers, Display Options, and Billing Information

Click **Membership Numbers** from the left sidebar. If you have any loyalty program numbers such as frequent flyer numbers, add them here by clicking **Add**.

Airline	Membership Number	Status Level	
British Airways	976431989	Silver	

Click **Display Options** from the left sidebar. Here, select your preferred date format, language, and currency to view prices in.

Display Options [Print](#)

Save

Complete the information below and click the Save button to update your profile.
(*) indicates required information

Date Format
 Nov 22 or 11/22
 22 Nov or 22/11

Time Format
 12 hour clock Ex: 8:00pm
 24 hour clock Ex: 20:00

Distance Format
 Miles
 Kilometers

* Preferred language: English
* Show currency rates in the country's currency: USA

Default to Hotel Mapped Options

Billing Information

Click **Billing Information** from the left sidebar. If your administrator has added a corporate card for you, it will appear here. To add a new card, click **Add**.

Billing Information [Print](#)

Your profile contains the following credit cards.

+ Add ?

Name	Card	Expiration Date	Use as "My Preferred"
Corporate Travel Visa	VISA - XXXXXXXXXXXX1111	12 / 2022	
Personal Mastercard	MASTERCARD - XXXXXXXXXXXX4336	9 / 2020	

Travel Planners

Click **Travel Planners** from the left sidebar. Travel Planners are delegates who can book travel on your behalf. Click **Add** to add a travel planner.

Travel Planners [Print](#)

Authorized Individual

+ Add

First Name	Last Name	Member ID
Erin	Planner	PLANNER

Enter the **Member ID** of a user and your planner will be able to access your travel account to book your travel. If you don't know the user's Member ID, contact your company's travel administrator. Click **Save** when complete.

Profile

Travel Planners

[Print](#)

Cancel Save

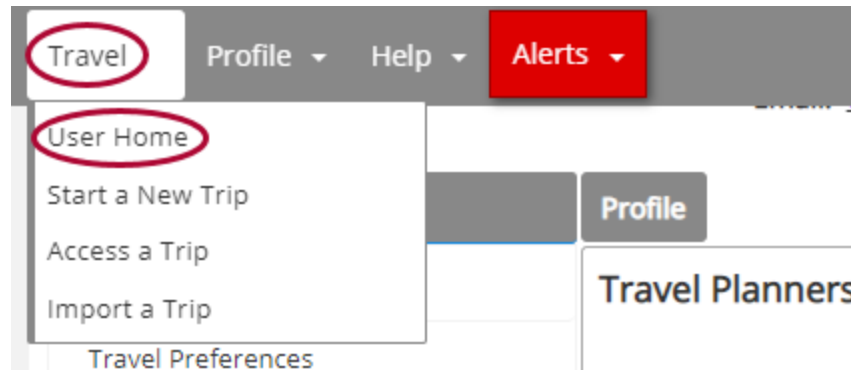
Enter up to ten Member IDs of individuals who may plan your travel.

Member ID

19309203

Booking Travel

Hover over the **Travel** tab and click **User Home** to go back to your homepage from anywhere within Travel.



Start on the **Air** tab. You may see **Unused Tickets**. These appear when you had to cancel airfare, and a fraction of the airfare is credited back to your account. Next, enter criteria such as:

- **Round-Trip, One Way, or Multiple Cities.**
- **From** and **To** cities, or specific airport codes.
- **Departure Date** and **Return Date.**

To add a **rental car** and **hotel** to your trip, check off the boxes.

Air Rail Car Hotel

Air Home

You Have 2 Unused Ticket(s).

Round Trip One Way Multiple Cities

From: JFK To: LAX
Search By Location Search By Location

Departure Date: 02/22/2021 (Mon) Return Date: 02/25/2021 (Thu)

Time: Anytime Depart

Include Car
 Include Hotel

Search By Price Search By Schedule

After checking off including a **Hotel**, use the search parameters to search for a hotel near the airport or a specific address. Enter additional search criteria such as **Check In** and **Check Out** dates and click **Search**.

Include Car
 Based on air search criteria
 Include Hotel

Search For Hotels By:
Airport/Custom Location

Airport:
LAX

Hotel Name Contains:
FULL OR PARTIAL NAME

Check-In Date: 02/22/2021 Check-Out Date: 02/25/2021

Search By Price Search By Schedule

Search

Your **Air** results appear first. The top of the page is a table to view available flights by carriers. Below the table are round-trip flights sorted by price. To the left, use filters to filter your available search results.

Search By Location
 Search By Location

2/22/2021 Mon

2/25/2021 Thu

Search

Advanced

Complete Options

JFK - LAX Feb 22

LAX - JFK Feb 25

Cancel & Restart Search Email

Results contain options that have a change in date(s).
 Additional **baggage fees** may apply.

Show All 215 Results	American Airlines	Delta	JetBlue Airways	Alaska Airlines
Non-stop	\$289 4 Results	\$337 25 Results	\$369 9 Results	
1 Stop	\$288 153 Results	\$413 5 Results	\$273 13 Results	\$340 6 Results

Sort Options

Price

Clear All Filters

Flight Number Filter

JetBlue Airways Flight(s) 1001 / 131
1:35 pm JFK Stop(s): 1 12h 0m 10:35 pm LAX

Penalty

\$273 USD

JetBlue Airways Flight 1424
9:00 pm LAX Stop(s): 0 5h 10m 5:10 am JFK

Click **Flight Details** to view expanded details of the trip. To choose a flight, click the **price**.

JetBlue Airways Flight(s) 1001 / 131
1:35 pm JFK Stop(s): 1 12h 0m 10:35 pm LAX

JetBlue Airways Flight 1424
9:00 pm LAX Stop(s): 0 5h 10m 5:10 am JFK

Penalty

\$273 USD

Flight Details

View Rules

COVID-19 Safety

Warnings

Next, choose your **rental car**. Use the search filters on the left to filter your search results. To the right, view individual car details and policy rules. To add the car, click **Add to Cart**.

General
 In Policy (30) \$14+
 Contract Rates

Car Vendors
 Ace (2) \$14+
 Alamo (2) \$46+
 Avis (2) \$64+
 AVR Van Rental (1) \$40+
Show More


Car Categories
 Compact (15) \$14+
 Compact Elite (1) \$76+


Don't see what you are looking for?
Your car travel preferences included these car types: Compact 2-4 Door, Mini Passenger Van

Continue without car

1 2

Displaying 1 - 15 of 30 options

Enterprise

IN Terminal Minivan Automatic - Any Fuel/Power w/AC Unlimited Miles



46.55 USD Per Day

Add to Cart

View Rules

Vehicle Types

Warnings

Next, choose your **Hotel**. Use the filters on the left to filter your search results. On the right are your search results based on your criteria. Below the hotel picture are the amenities the hotel has. Click **Show Rates** to view the hotel's available room and its rules. Select a room by clicking the **price per night**.

General

In Policy (200)
 Contract Rates

Hotel Name Contains

Full or Partial Name

Crown Rating

(9)
 (45)
 (58)
 (52)
Show More ▾

Amenities

Business Center (155)
 Coffee Maker (180)
 Complimentary Breakfast (138)
 Fitness Room (134)
Show More ▾

Hyatt Regency Los Angeles Intl Arpt

149.00 USD / 669.00 USD

6225 West Century Boulevard
Los Angeles, California 90045
424-702-1234
0.78 Miles
[Hotel Info](#) | [Map](#)

Show Rates

2 Queen ADA tub 2 Queen beds: Accessible tub with grab bars: View Rules	149.00 USD Per Night
2 Queen ADA shwr 2 Queen beds: Accessible roll in shower: View Rules	149.00 USD Per Night

The next page shows your full itinerary, but it is not reserved. To save your trip, give it a name on the left and click **Save Research**. This will not book your trip but save it to come back to later. To purchase your trip now instead, click **Purchase**.

Purchase Summary

[You Have 2 Unused Ticket\(s\).](#)

Trip Name:

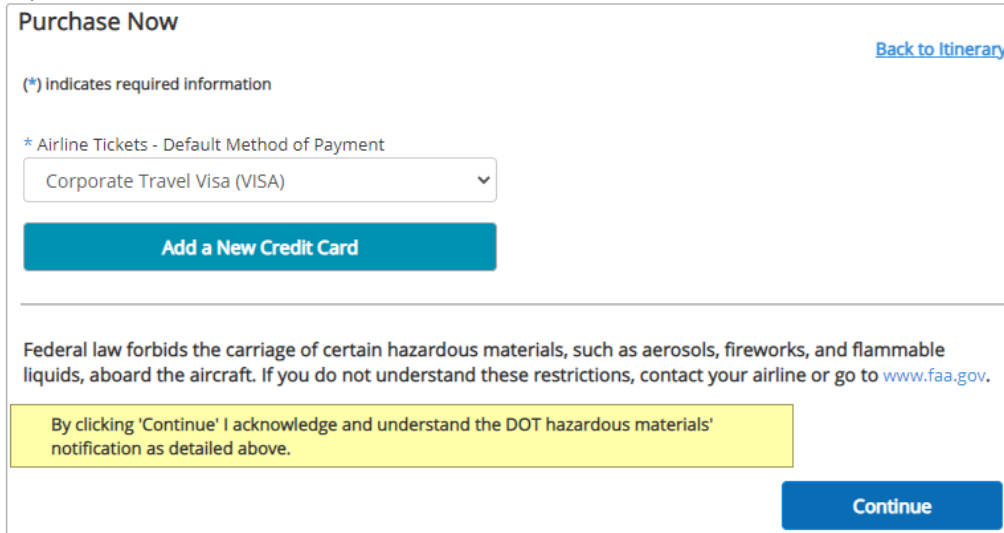
Save Research

Cost Summary
Rates are approximate & subject to applicable taxes/fees. Car & Hotel rates are based on first day/night charge. View Rules for more details or contact your travel administrator. Additional Airline baggage fees may apply. Details [here](#).

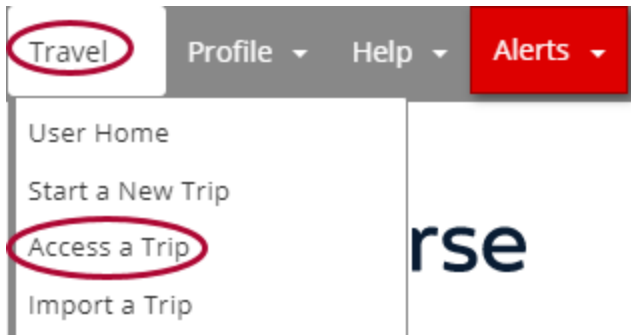
Airfare: **272.60 USD**
✓ Penalty: [View Rules](#)
Estimated Car Cost: **139.65 USD**
Estimated Hotel Cost: **447.00 USD**
Estimated Total Trip Cost: **859.25 USD**

Purchase

On the next few pages, choose to add **parking**, choose **seats** for your flight if possible, and accept the **Fare Rule Acknowledgement**. On the **Purchase Now** page, choose which credit card to use to book the trip.

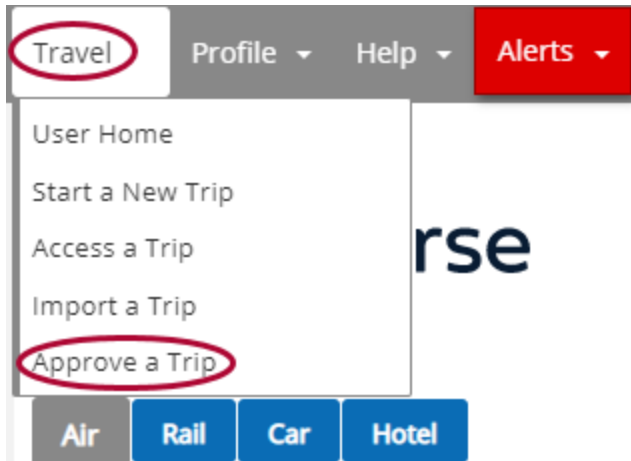


On the **Purchase Confirmation** page, remember to write down your **trip locator** confirmation code as you'll use it to check in to flights and more. To view the status of your trip at any time, click **Access a Trip** from the **Travel** menu.

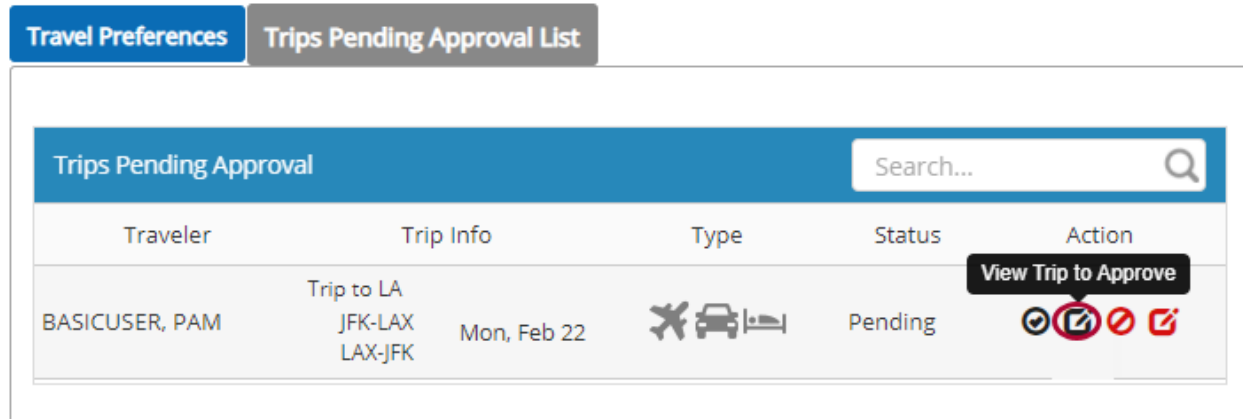


Approving a Trip

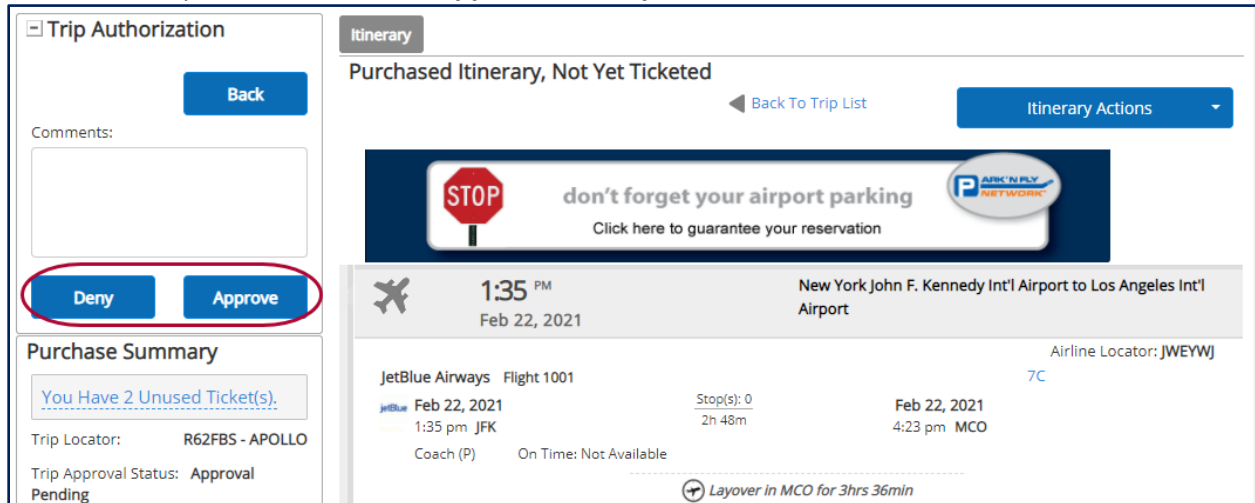
Once a trip has been submitted for purchase, **Trip Authorizers** have 24 hours to approve a trip. If it is not approved within 24 hours, it will be automatically cancelled. When a trip has been submitted, **Authorizers** receive an email. You can **approve** or **deny** the trip from the email, or login to your travel profile to view trip details. To do so, click **Approve a Trip** from the **Travel** bar.



In the **Type** column, review what type of travel you're reviewing. To view full details, click **View Trip to Approve**.



Review the trip details, then click **Approve** or **Deny** on the left.



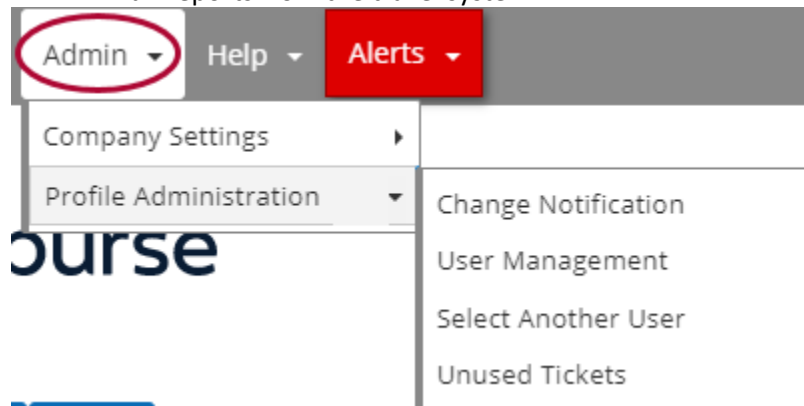
Certify and Nexonia Integration

For **Certify** users, once your trip is approved and purchased, the receipt will appear in your **Certify Wallet**. Once your receipts are there, simply add them to an expense report. For **Nexonia** users, similarly to **Certify**, once your trip has been approved and purchased the receipt will appear in **Nexonia**. **Nexonia** will also create a draft expense report with the expense items created.

Administrator

Administrators have an extra tab in their travel menu called **Admin**. Hover over the tab to view your administrator permissions such as:

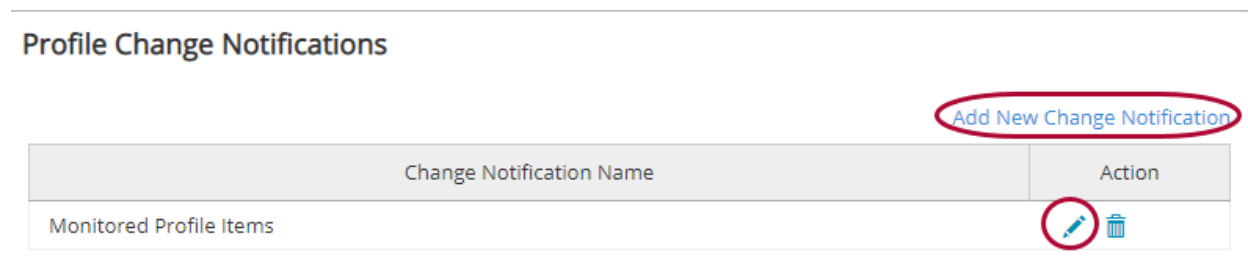
- Configure change notifications.
- Manage your company's travel users.
- View all unused tickets.
- Run reports from the travel system.



Change Notification

First, hover over the **Admin** menu, hover over **Profile Administration**, then click **Change Notification**.

As an **Administrator**, you can receive email notifications when a travel user changes a setting in their travel profile. Click **Add New Change Notification** to add a new profile or click the **pencil** icon to edit an existing profile.



User Management

Next, click **User Management** to manage all your company's travel users. To create new users, fill in all required fields. Delete users by typing in their basic information.

The screenshot shows the 'User Management' interface. On the left is a navigation menu with 'User Management' highlighted. The main content area is divided into two sections: 'Create New User' and 'Delete User'. The 'Create New User' section includes a dropdown for 'User Type' (set to 'NormalUser'), input fields for '*Member ID', '*E-mail Address', '*First Name', 'Middle Name or Initial', and '*Last Name', and a 'Create User' button. The 'Delete User' section includes input fields for 'Member ID', 'First Name', and 'Last Name', and a 'Delete User' button. Both buttons are circled in red.

Select Another User

Next, click **Select Another User** on the left. This is where Admins can access and masquerade into another user's travel account.

The screenshot shows the 'Select Another User' interface. On the left is a navigation menu with 'Select Another User' highlighted. The main content area is titled 'Select Another User' and includes a search instruction: 'To select a user, enter their member ID or other information to search for a specific user. If no search criteria is specified, all users will be returned.' Below this are input fields for 'Member ID', 'First Name', and 'Last Name', and a 'Search' button.

Unused Tickets

Next, click the **Unused Tickets** on the left. Whenever a user cancels a trip, your company's **TMC** will be notified. If there is a credit value, the TMC will upload them here.

	First Name	Last Name	Member ID	Ticket Range	Carrier	Value	Exp. Date	Used	Deleted User	Edit	Add Ticket	Delete
+	Erin	Planner	PLANNER	4353656...	006	250.00	09/02/2021	<input type="checkbox"/>	<input type="checkbox"/>			
+	Pam	Basic User	BASIC	3256448...	001	200.00	09/15/2021	<input type="checkbox"/>	<input type="checkbox"/>			
+	Pam	Basic User	BASIC	8596458...	001	400.00	12/03/2021	<input type="checkbox"/>	<input type="checkbox"/>			

Reports

Click **Company Settings**, then click **Reports** to access travel reports. Click **System & Activity Reports** to view a full list of reports.

Menu Admin

- Company Settings
- Reports
 - System & Activity Reports
- Profile Administration

Need More Help?

Visit our support page directly from your Nexonia account and browse our [Help Center](#). You can also email our Support Team at help@nexonia.com.

Select a Product

- Expenses
- Timesheets
- Time Off
- AP/PO
- Travel