# certify

## travel & expense *made easy*

# Certify Travel
# Quick Start Guide

# Contents

# Logging into Certify



- To access your company's online booking website go to: **https://enterprise.Certify.com** or to the specific URL given to you by your company.
- Enter your information in the following fields (your login credentials will be provided by your **Travel Manager** or **Online Administrator**):
- Company Name
- Member ID
- Password
- Click **Login**. We recommend entering your profile information once you log into the system to ensure proper use of the tool

# LOGGING INTO CERTIFY

## Lost Password

- If you cannot remember your password to log into your company's online booking website, go to **https://enterprise.certify.com**
- Click the **Lost Password** link
- On the **Forget Password** form, enter:
- Last Name
- Email
- Company Name
- Click **Go**
- If you have a valid email address saved within your profile and the information you submit matches what we have on file, you will receive an email with your login information.

# LOGGING INTO CERTIFY

## Reset my Password

- Once logged in, hover over **Profile** from the **Main Menu** on the top of your homepage
- Click **Change Password** in the drop-down menu
- Enter your Current Password, New Password, and Verify New Password
- Click **Save**
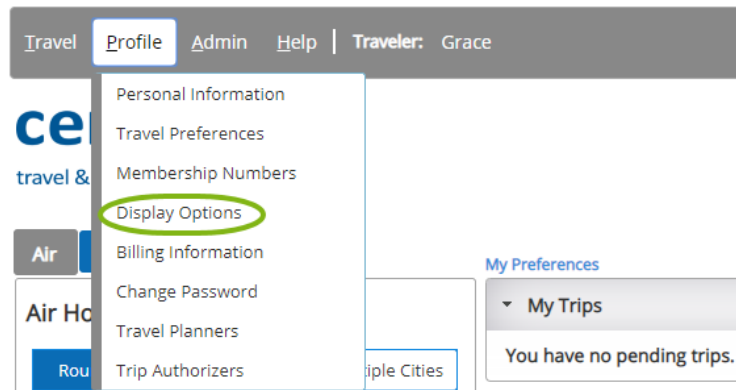- You will see a **Password Changed Successfully** message pop up.

# Your Travel Profile

## Display Options

- To change your display options, hover over **Profile** from the Main Menu on the top of your home page.
- Select **Display Options** in the drop-down list.





- The **Display Options** page will open.
- Here, you can update your preference on the following:
- Date/Time/Distance format
- Preferred language
- Currency format
- Hotel mapped options
- Number of Car/Air results per page
- Once you choose your preferences, click the **Save** button.

# YOUR TRAVEL PROFILE

## Assign my Travel Planner

- Once logged in, hover over **Profile** from the Main Menu on the top of your home page.
- Select Travel Planner in the drop-down list.
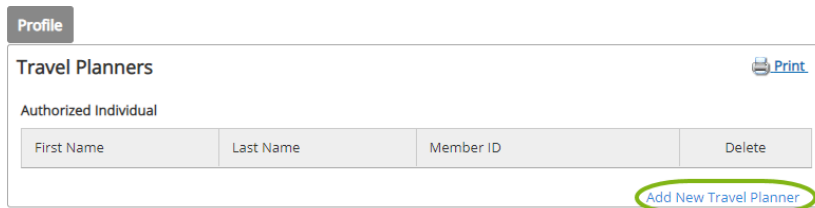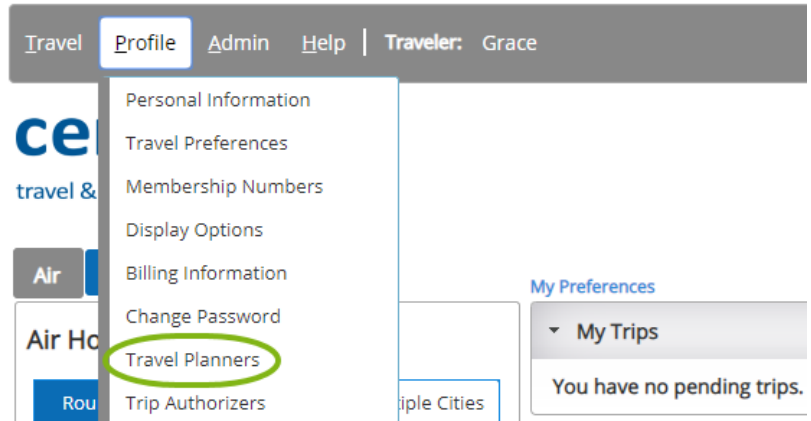


- Click the link for Add New Travel Planner.
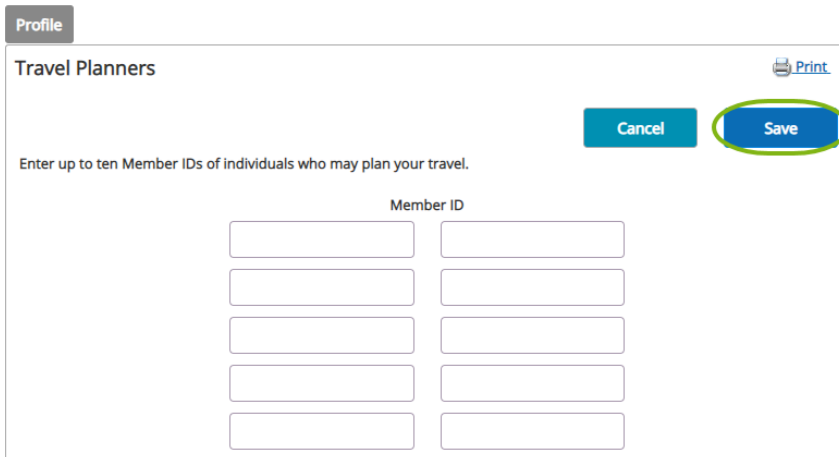


- Enter the Member ID(s) for anyone you would like to plan your travel. (There is no limit on how many total Travel Planners that can be entered).
- Click **Save**.

# YOUR TRAVEL PROFILE

## Switch Travelers

- Hover over your name within the **Main Menu** header on the top of your home page until the drop-down list appears.
- If the traveler doesn't appear in the list, click **Select Another User**.



- Enter the **Member ID**, **First Name** or **Last Name** to access that traveler's profile.
- Click **Search**.



- Select the Traveler's name from the list you wish to switch to.
- Once selected, that Traveler's name should now appear in the Traveler section within the **Main Menu** header on the top of your home page.

# YOUR TRAVEL PROFILE

## Update Travel Preferences

### For a single trip:
On the home screen click on any of the **My Preferences** links to apply to the single trip you are booking.

Select the various Travel preferences under Air, Rail, Car, or Hotel that you have available.
- Save is not necessary here as the selection is only for a single booking.

### Within Profile:
- Once logged in, hover over **Profile** from the Main Menu on the top of your home page.
- Select **Travel Preferences** in the drop-down list.
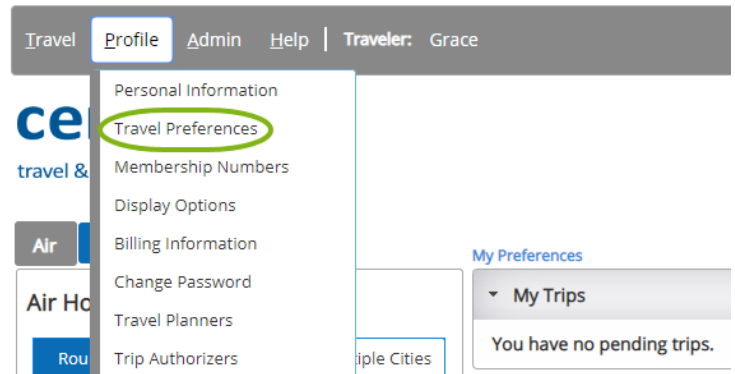
- Select the various Travel preferences under Air, Car, or Hotel that you have available.
- Click **Save**.
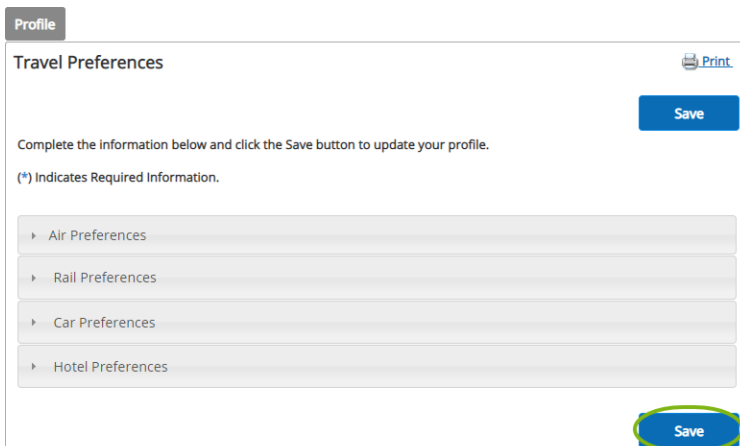
# YOUR TRAVEL PROFILE

## Add/Update Membership Numbers

- Once logged in, hover over **Profile** from the Main Menu on the top of your home page.
- Select **Membership Numbers** in the drop-down list.
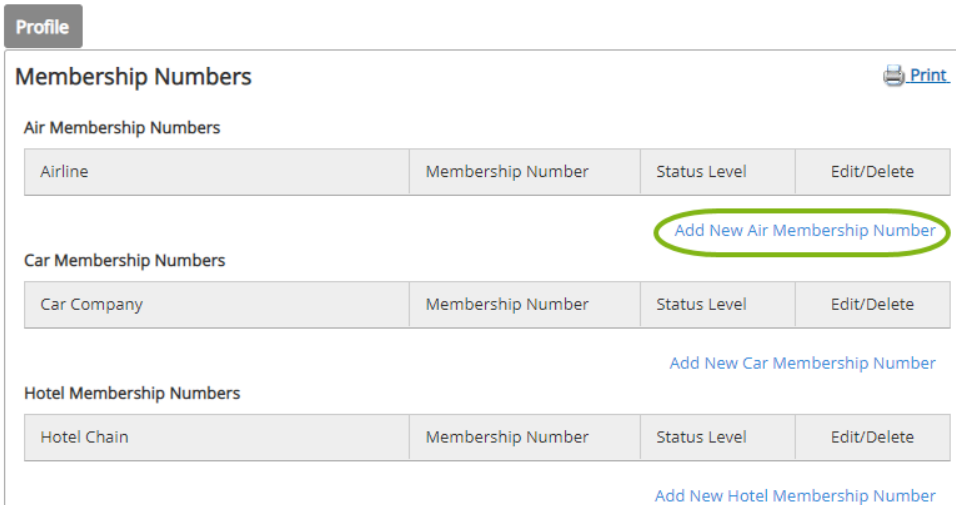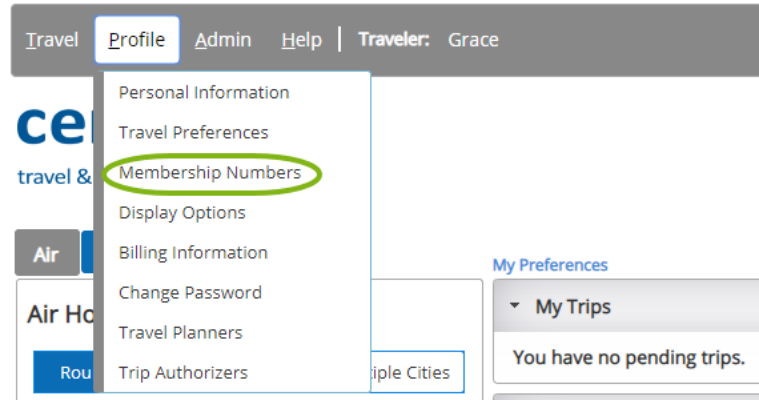




- The Membership Numbers page will open. Here, you can add your membership and/or loyalty numbers for airlines, cars, and hotels.
- Click the Add New (Air/Car/Hotel) Membership Number (Loyalty Association) link.

- Select the **Airline** (Car or Hotel) Vendor, input your **Membership Number** and **Status Level**.
- Click **Save** to complete adding or updating your Membership information.
- To edit, go back to prior screen and click the **Edit** link next to the appropriate number you previously saved.
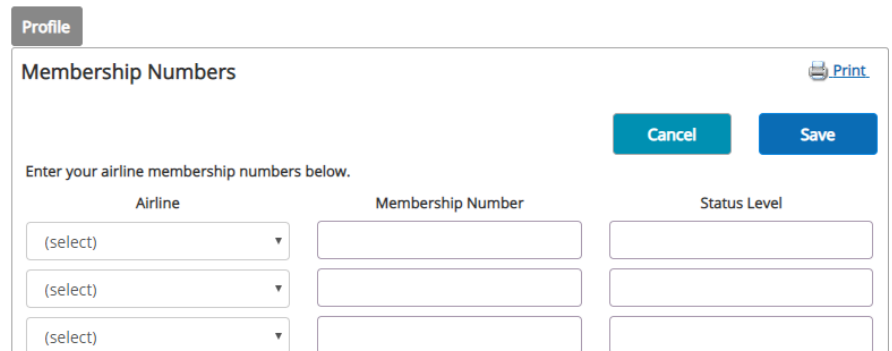
# BOOK A TRIP

## Book a Trip

- Once logged in, select the appropriate travel button for **One Way**, **Round Trip**, or **Multiple Cities**.
- Fill out the **From** and **To** fields with the city or airport code.
- Select the **Date** from the calendar and the **Time** from the drop-down list.
- If you'd like to include a **car** or **hotel** to your search, check off the appropriate selections.

*Please Note: If you choose to include a **Car** or **Hotel**, the option for "based on air search criteria" will show up. By un-checking this box, you will be able to customize your search for these pieces.*



### Complete Options or Leg by Leg:



- Once you click the Search button, your results page will open up with all of your travel options. (Your results may include flights to/from nearby airports based on your travel preferences. Also Note: if you hover over the airport code, the entire airport name will appear.)
- Complete priced itinerary options are available via the Air Matrix to add to your shopping card.
- Alternatively, you may choose to build your own priced itinerary via the leg by leg tab options.
- Click the **Price** button or build your own itinerary.

# BOOK A TRIP

## Include Car and/or Include Hotel option:

- The Car Availability page will now open.
- Either click the **Continue Without Car** button or select the car rental vendor you prefer and **Add to Cart**.



- Review your itinerary choices in the shopping cart.
- Here you can:
- Name your trip
- Save your research
- View more options
- View rules
- View any warnings
- View the seat map
- Cancel and restart search
- Remove Car or Hotel
- Once reviewed, click the **Purchase** button.

*Please Note: Based on your company settings, you may have the option to Reserve (HOLD) your trip as well. This means your trip will be saved to go to ticketing at a later time.*

**The Hotel Availability page will now open.**

- The Hotel Availability page will now open.
- You can either click the **Continue Without Hotel** button or select the hotel you prefer and click **Show Rates** to choose your room preference.
- Click **Add to Cart** if you want to include it on your itinerary.



\*\*These buttons have the ability to be customized on your company's preferences and therefore may be labeled differently than what is on the document.

# BOOK A TRIP

## Guest or Variable Bookings:

- Depending on your company settings, you may have the ability to book on behalf of a Guest Traveler (Variable Traveler).
- Once logged in, hover over your name within the Main Menu header on the top of your home page until the drop-down list appears. Select **Guest Traveler**.
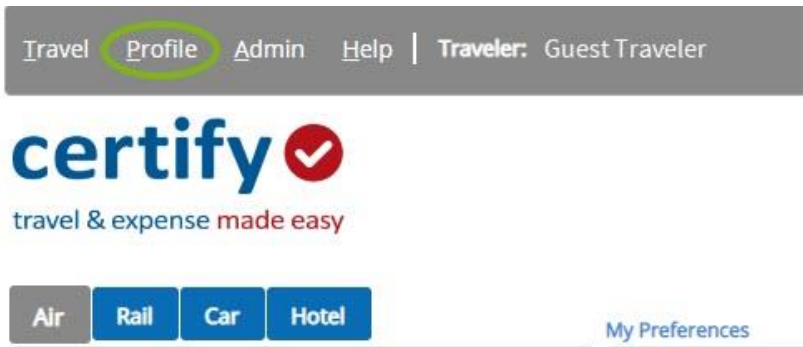




- **Guest Traveler** should now appear in the Traveler section within the Main Menu header on the top of your home page.

*Please Note:* *In some instances, pending company preference, the **Profile** section may be disabled. Guest Travelers do not have a profile, so the information housed there will not be saved or transfer through to the booking.*

- Follow the previous steps to book the trip on behalf of a **Guest (Variable) Traveler**.
- Upon clicking the **Purchase** button, you will be required to fill out the **Variable Traveler Information** form with your contact and TSA information in order to complete the booking.
- Once you fill out all mandatory fields, click **Continue** to complete the booking process.

# BOOK A TRIP

## Access a Trip

- Once logged in, hover over **Travel** from the Main Menu on the top of your home page.
- Select **Access a Trip** in the drop-down list.
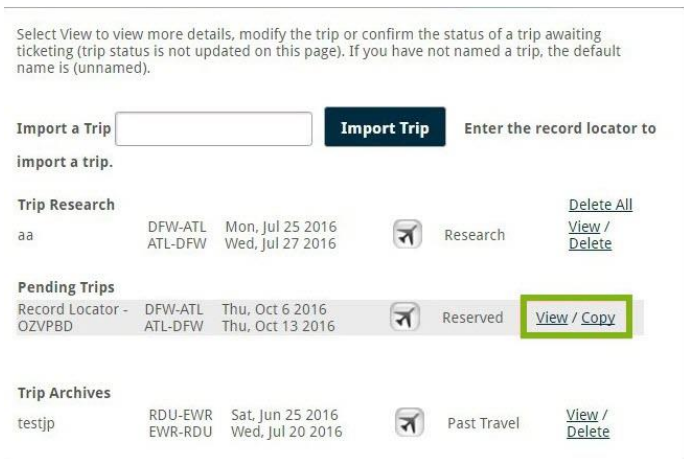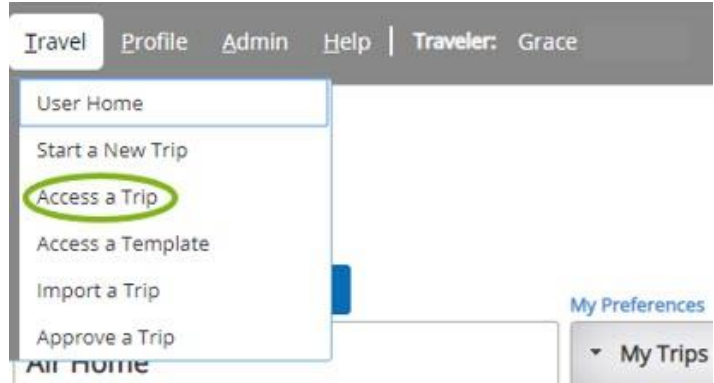
- The Trip List tab will open. Click the **View** link from the Pending Trips list next to the trip you wish to display or modify.

- Click **Modify** in the shopping cart to make adjustments to your air, car, or hotel segments.
- Choose the Reserve or Purchase button once your choices have been finalized.

*Please Note: If you want to access a trip for a guest traveler, you will need to switch to Guest Traveler prior.*

## Cancel a Trip

- Follow the directions to **Access a Trip** *(Travel Menu > Access a Trip > View)*
- Hover over the **Itinerary Actions** link
- Select the **Cancel Reservation** option to cancel your trip

*Please Note: You may receive a warning regarding a cancellation fee, if you accept, click OK.*

# BOOK A TRIP

- Once logged in, hover over **Travel** from the Main Menu on the top of your home page.
- Select **Access Trip** in the drop-down list.
- Click the **Copy** link next to the trip you would like to duplicate.

*Please Note: Trips eligible to be copied are all Pending Trips (Reserved, Purchased, or Ticketed). If a trip is not eligible to be copied, the Copy link will be disabled.*

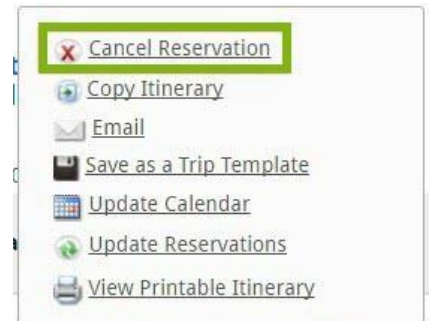Select View to view more details, modify the trip or confirm the status of a trip awaiting ticketing (trip status is not updated on this page). If you have not named a trip, the default name is (unnamed).

Import a Trip [                    ]  **Import Trip**  Enter the record locator to import a trip.

**Trip Research**                                                    Delete All
aa          DFW-ATL   Tue, Jul 26 2016   ✈   Research      View /
            ATL-DFW   Wed, Jul 27 2016                     Delete

**Pending Trips**
PlannerTest   LAX-EWR   Fri, Oct 14 2016   ✈   Reserved   View | Copy
              EWR-LAX   Sat, Oct 22 2016

**Select Another User**                                          ?
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.

Member ID   [                    ]
First Name  [                    ]
Last Name   [                    ]

**Search**                          Keep Current Traveler

- The **Copy Itinerary** tab will open.
- If the logged in User has the right to select another traveler, they will be prompted to do so at this time by filling out the Member ID, First Name, and Last Name or they can click the Keep Current Traveler link.

- The selected copied trip information will be auto-populated and asked to be confirmed before searching. Once you do so, click **Continue**. Confirm the additional copied trip itinerary and click **Search**.
- Your shopping cart will open and you can now continue to book or edit your trip prior to Reserving, Purchasing, or Saving.

When do you want to leave?  10/14/2016   FRI
How long do you want to stay?  7  Nights

Accept Penalty Fares ☑

**Continue**

|  | Airline | Cities | Depart Date & Time |
|---|---|---|---|
| Include? ☑ | United Airlines | **Depart:** Los Angeles Int'l Airport | 10/14/2016 FRI |
| | Flight #502 | **Arrive:** Newark Int'l Airport | 6:00 AM ○ Arrive ● Depart |
| | | | Class: Coach / Economy |

|  | Airline | Cities | Depart Date & Time |
|---|---|---|---|
| Include? ☑ | United Airlines | **Depart:** Newark Int'l Airport | 10/21/2016 FRI |
| | Flight #786 | **Arrive:** Los Angeles Int'l Airport | 9:45 PM ○ Arrive ● Depart |
| | | | Class: Coach / Economy |

**Back**   **Search**

# BOOK A TRIP

## Alternate Option

- If you would like to immediately copy a trip upon creation, click **Itinerary Actions** on the specific itinerary you would like do duplicate.
- Select **Copy Trip** in the drop-down list.
- The same **Copy Itinerary** tab will open, as it did in the previous option of copying a trip.
- To continue, the same steps can be followed in either instance to properly copy a trip.
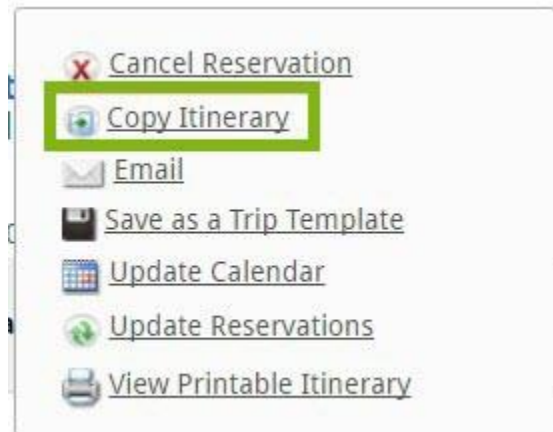


*Please Note:* If the traveler selected has a different travel policy than the user from the trip being copied you may receive the below notification. To continue and override the travel policy, click **Yes**. If you click **No**, you will be brought back to the selected trip.
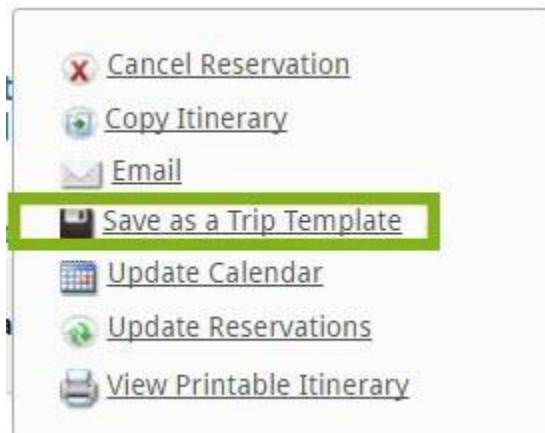
# TRIP TEMPLATES

## Create a Trip Template

- Follow the directions to **Access a Trip** *(Travel Menu > Access a Trip > View)*
- Click the Itinerary Actions link.
- Click the Save as a Trip Template link.





- Fill out the **Template Name**, **Template Type**, and the **Login ID(s)** of anyone you would like to share this template with.
- Click the **Save** button.
- Your template has been saved.

# TRIP TEMPLATES

## Access a Trip Template

- Once logged in, hover over **Travel** from the Main Menu on the top of your homepage
- Select **Access a Template** in the drop-down list.
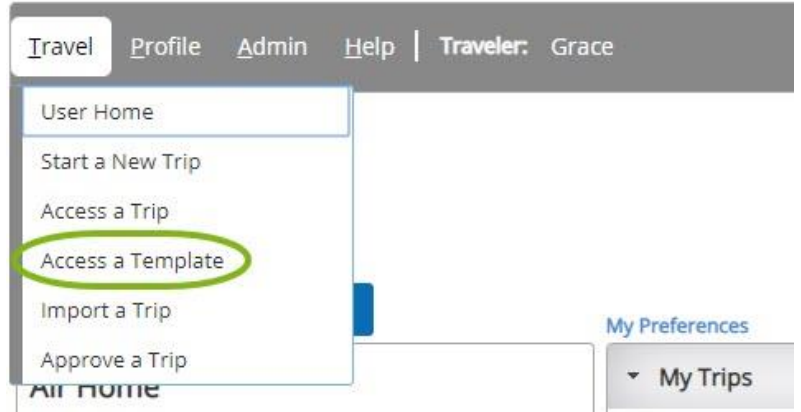


You may reserve an itinerary or modify a template below:

| Template Name | Segments | Type | Use | Edit/Delete |
|---|---|---|---|---|
| testtemplate | ✈ | Personal | Create Itinerary | Edit / Delete |
| testtemplate | ✈ | Personal | Create Itinerary | Edit / Delete |
| DFW-ORD Monthly Site Visit | ✈ 🚗 🛏 | Company | Create Itinerary | Edit / Delete |
| PHL ORD | ✈ | Personal | Create Itinerary | Edit / Delete |
| Dallas trip | ✈ 🚗 🛏 | Company | Create Itinerary | Edit / Delete |
| Atlanta HQ monthly trip | ✈ 🛏 | Company | Create Itinerary | Edit / Delete |
| Test template | ✈ 🚗 🛏 | Personal | Create Itinerary | Edit / Delete |

- The **Trip Templates** tab will open.
- Here, you can **Create Itinerary**, **Edit**, or **Delete** from the template you saved or that was shared with you by clicking the appropriate links.