

certify 

travel & expense made easy

Certify Travel Quick Start Guide



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LOGGING INTO CERTIFY

Logging into Certify

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User Login

Company

Member ID

Password

[Lost Password](#)

Remember Login

Resources

- ◆ [Quick Reference Guide](#)
- ◆ [Frequently Asked Questions](#)

For issues related to logging into the system or the booking process, please contact your travel agency.

[Terms](#) | [Privacy](#) | [Security](#)

- 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.

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User Login

Company

Member ID

Password

[Lost Password](#)

Remember Login

Resources

- ◆ [Quick Reference Guide](#)
- ◆ [Frequently Asked Questions](#)

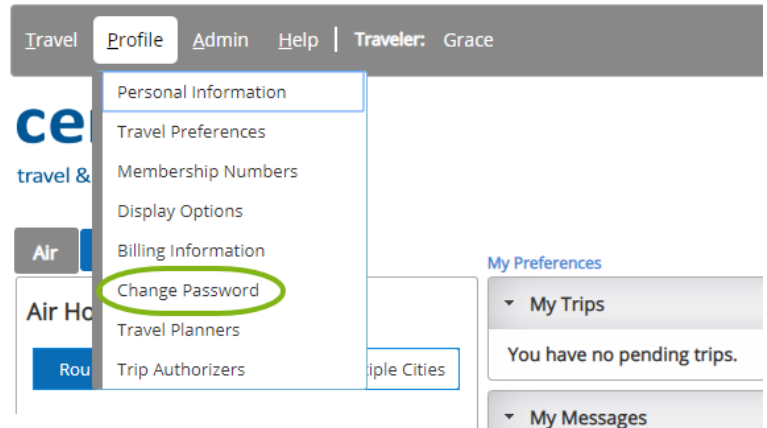
For issues related to logging into the system or the booking process, please contact your travel agency.

[Terms](#) | [Privacy](#) | [Security](#)

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.

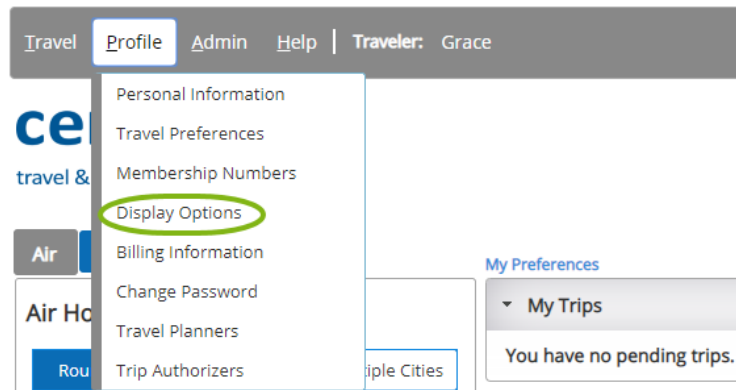
A screenshot of the 'Change Password' form. The form has a title 'Change Password' and a 'Print' icon. Below the title, there is a note: '(*) indicates required information'. The form contains three input fields: 'Current Password', 'New Password', and 'Verify New Password'. To the right of the input fields, there are 'Password Requirements': 'Case Sensitive: Yes' and 'Number of characters: 7 - 100'. A blue 'Save' button is located at the bottom right of the form, circled in green.

YOUR TRAVEL PROFILE

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.

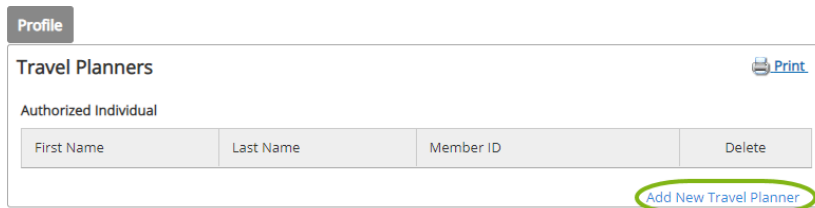
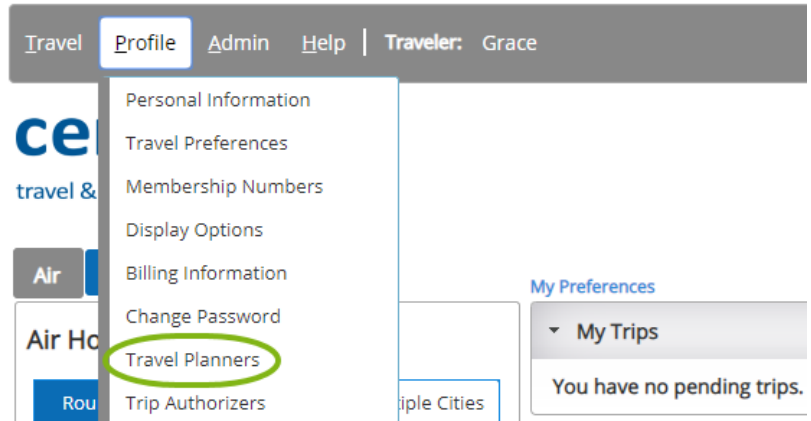
A screenshot of the 'Display Options' profile page. The page title is 'Display Options' and it includes a 'Print' icon and a 'Save' button (circled in green). The instructions state: 'Complete the information below and click the Save button to update your profile. (*) indicates required information'. The form contains several sections: 'Date Format' with radio buttons for 'Nov 22 or 11/22' (selected) and '22 Nov or 22/11'; 'Time Format' with radio buttons for '12 hour clock Ex: 8:00pm' (selected) and '24 hour clock Ex: 20:00'; 'Distance Format' with radio buttons for 'Miles' (selected) and 'Kilometers'; '* Preferred language' with a dropdown menu set to 'English'; '* Show currency rates in the country's currency' with a dropdown menu set to 'USA'; '* Default Custom Location/Airport display' with a dropdown menu set to 'Airport'; checkboxes for 'Default to Hotel Mapped Options', 'Default to suggested itinerary', and 'Default to creating an itinerary' (selected); 'Display Up to' dropdowns for 'air options per page' (set to 15), 'car options per page' (set to 15), and 'rail options per page' (set to 5); and a checkbox for 'Display 508 Compliant Assistive Text'.

- 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.

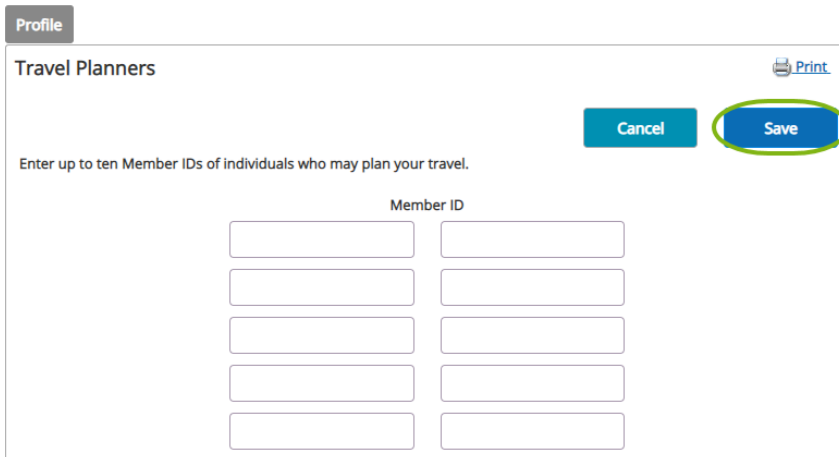
YOUR TRAVEL PROFILE

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.

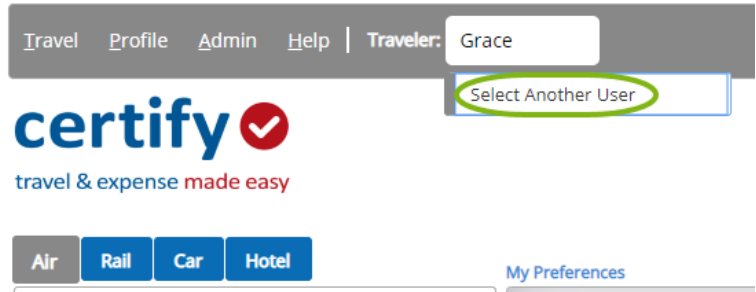


- Enter the Member ID(s) for anyone you would like to plan your travel. (There is no limit on how many total Travel Planners that can be entered).
- Click **Save**.

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**.



Travel Preferences **Trip List** **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

- 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.

Travel Preferences **Trip List** **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

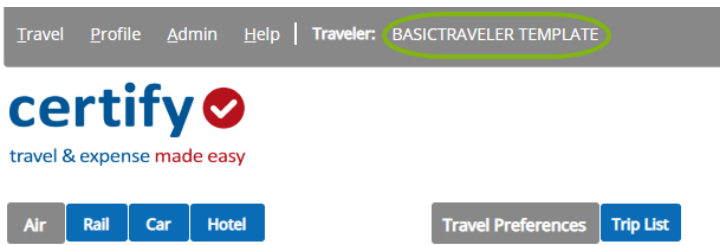
Search

Click the user you wish to select in the list below.

Select	Member ID	First Name	Last Name
Select	BASICTRAVELER	BASICTRAVELER	TEMPLATE

Back

Back

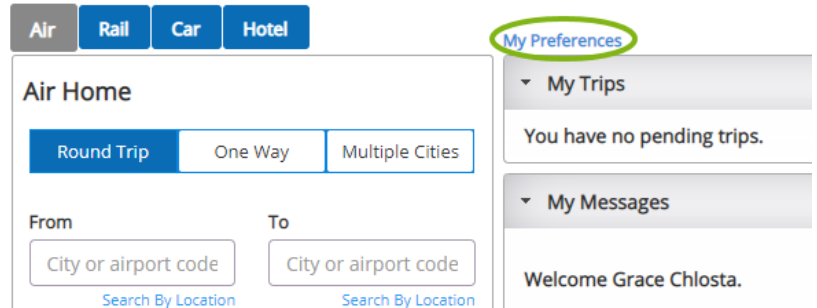


YOUR TRAVEL PROFILE

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.

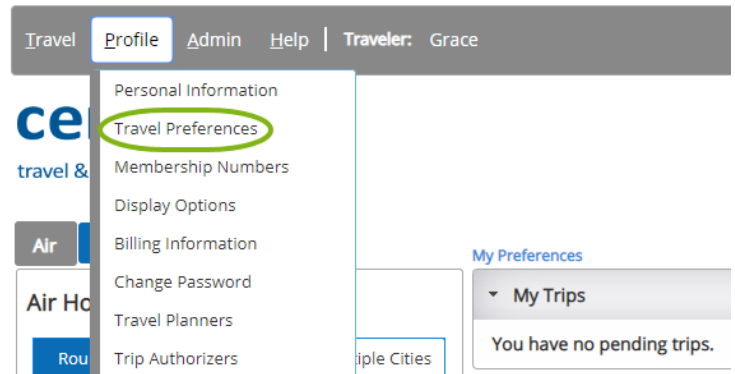
- Save is not necessary here as the selection is only for a single booking.

Within Profile:

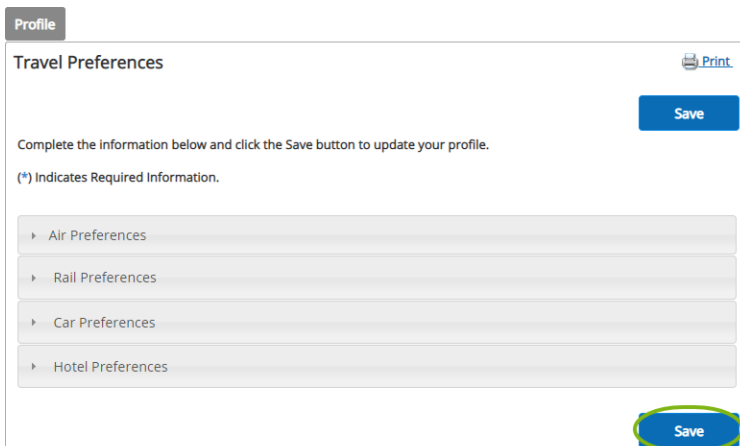
- Once logged in, hover

over **Profile** from the Main Menu on the top of your home page.

- Select **Travel Preferences** in the drop-down list.



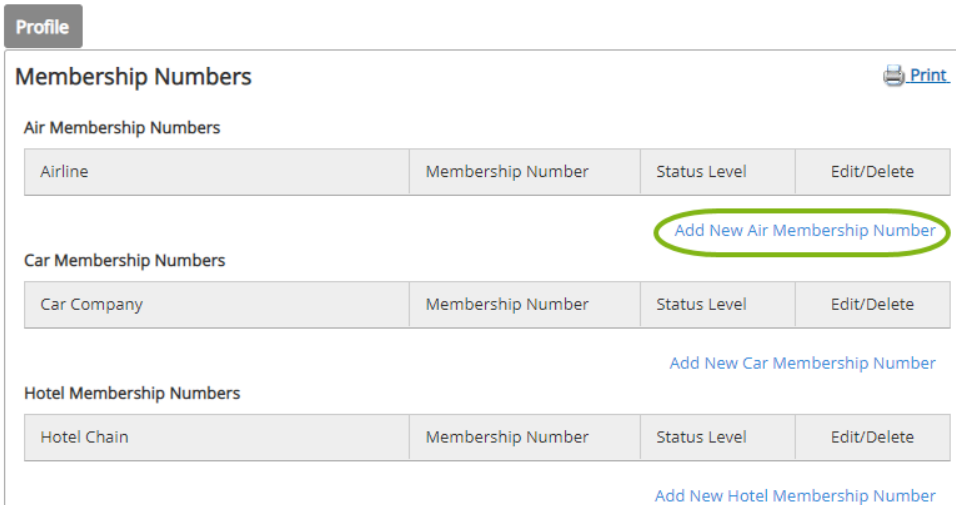
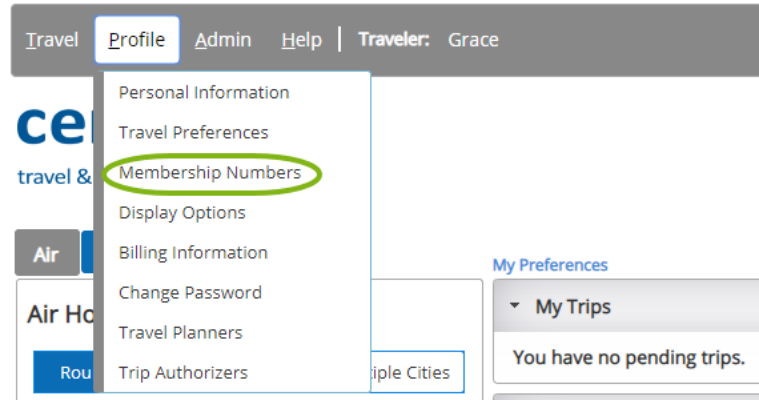
- Select the various Travel preferences under Air, Car, or Hotel that you have available.
- Click **Save**.



YOUR TRAVEL PROFILE

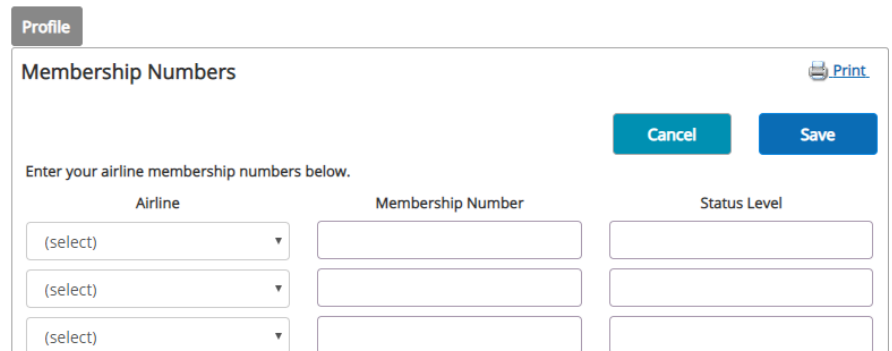
Add/Update Membership Numbers

- 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.

Air **Rail** **Car** **Hotel**

Air Home

Round Trip **One Way** **Multiple Cities**

From Search By Location **To** Search By Location

Departure Date **Return Date**

Time **Time**

Depart **Depart**

Include Car
 Include Hotel
 Search By Price Search By Schedule

Itinerary Preference

Search

Complete Options or Leg by Leg:

Complete Options **BOS - LAX** **LAX - BOS** [Shopping Cart](#)

[Modify Air Flights](#) [Cancel & Restart Search](#) [Email](#)

Show All 226 Results	JetBlue Airways	United Airlines	American Airlines	Mixed Carriers	Alaska Airlines	Delta	Spirit Airlines	Sun Country
Non-stop	\$610 6 Results	\$685 3 Results	\$731 12 Results	\$747 2 Results	\$772 6 Results	\$861 6 Results		
1 Stop	\$482 8 Results	\$539 65 Results	\$552 56 Results	\$713 3 Results	\$731 13 Results	\$637 36 Results	\$451 6 Results	\$641 1 Results
3 Stops							\$436 3 Results	

Results may include flights to/from nearby airports based on your travel preferences.

Displaying 226 of 226 Fares

1 2 3 4 5 6 7

Spirit Airlines Flight(s) 857 / 719

1:04 pm BOS Stop(s): 3 12h 1m 10:05 pm LAX

(LAX) Los Angeles Intl Airport

9:50 pm LAX Stop(s): 1 7h 18m 8:08 am BOS

\$436 USD

[Flight Details](#) [View Rules](#)

- 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**.

Car Availability

Shopping Cart

Modify Car Cancel & Restart Search Email

All 14 results	Sun	ACE	BUDGET	Budget	Enterprise	Mevo	EA	E-Z	AVIS	
Economy 2 or 4 Door	44.23	299.03	300.36	309.00	385.93	400.00	413.44	413.44	421.00	421.00

Displaying 1 - 14 of 14 options

Continue without car

Ace Rent-A-Car

Off Terminal
Economy 2 or 4 Door
Unlimited Miles

299.03 USD per week

Add to Cart

View Rules Vehicle Types

1 2 3 4 5 6 7 8 9 ... 20

Displaying 1 - 10 of 200 Hotels

Hyatt Regency Los Angeles Intl Arpt

209.00 USD / 434.00 USD

6225 West Century Boulevard
Los Angeles, California 90045
424-702-1234
0.78 Miles
Hotel Info | Map

Show Rates

continue without hotel

- 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.

- 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.

**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.

Purchase Summary

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: 435.36 USD
 ✓ Penalty: View Rules
 Estimated Car Cost: 341.75 USD
 Estimated Hotel Cost: 1463.00 USD
 Estimated Total Trip Cost: 2240.11 USD

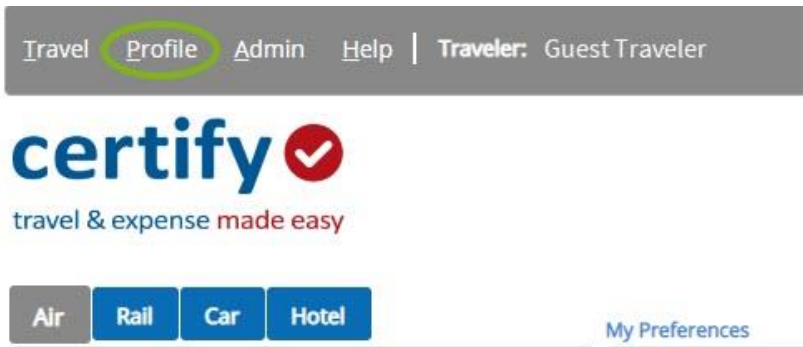
Purchase

Add Car Add Hotel

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.

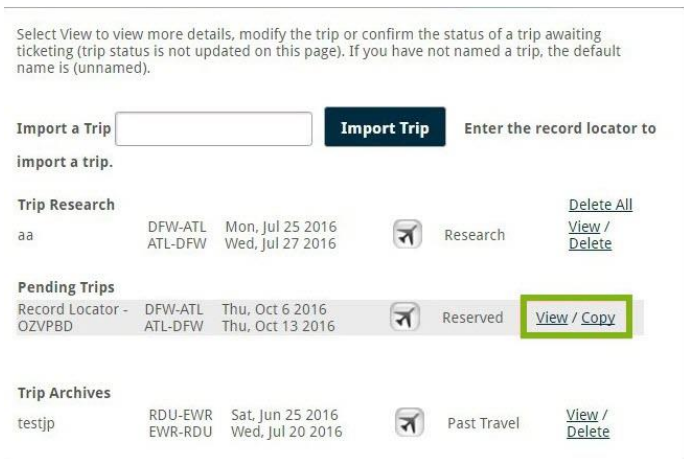
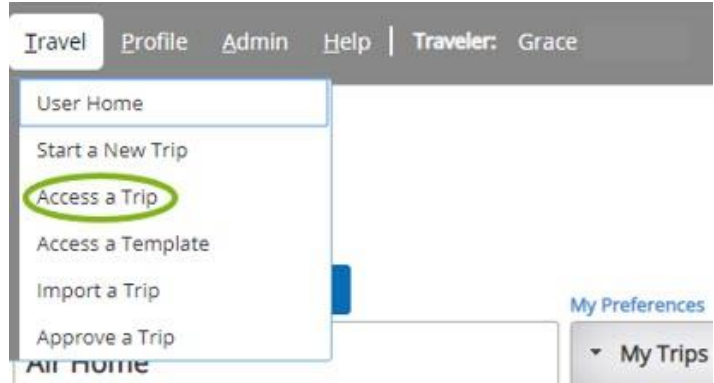
***Please Note:** In some instances, pending company preference, the **Profile** section may be disabled. Guest Travelers do not have a profile, so the information housed there will not be saved or transfer through to the booking.*

- 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.

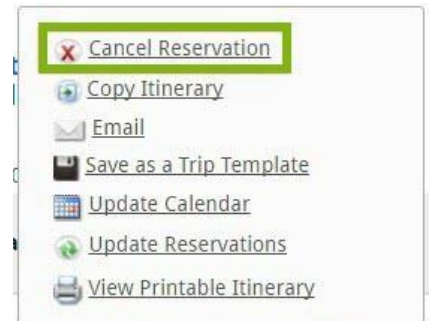
Please Note: If you want to access a trip for a guest traveler, you will need to switch to Guest Traveler prior.



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 ATL-DFW	Tue, Jul 26 2016 Wed, Jul 27 2016		Research		View / Delete

Pending Trips

PlannerTest	LAX-EWR EWR-LAX	Fri, Oct 14 2016 Sat, Oct 22 2016		Reserved	View	Copy
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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? **FRI**

How long do you want to stay? Nights

Accept Penalty Fares

Continue

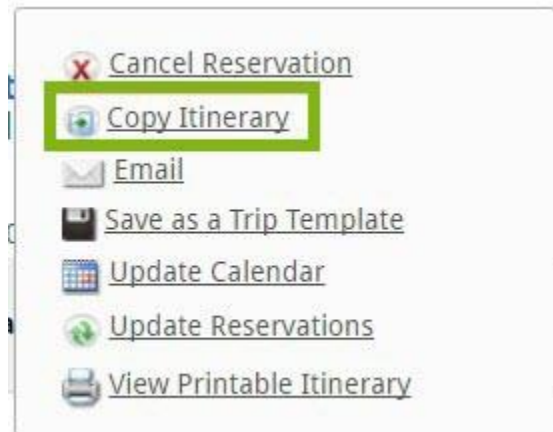
Include?	Airline	Cities	Depart Date & Time
<input checked="" type="checkbox"/>	United Airlines	Depart: Los Angeles Int'l Airport Arrive: Newark Int'l Airport	10/14/2016 FRI 6:00 AM <input type="radio"/> Arrive <input checked="" type="radio"/> Depart Class: Coach / Economy
<input checked="" type="checkbox"/>	United Airlines	Depart: Newark Int'l Airport Arrive: Los Angeles Int'l Airport	10/21/2016 FRI 9:45 PM <input type="radio"/> Arrive <input checked="" type="radio"/> 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 to 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.

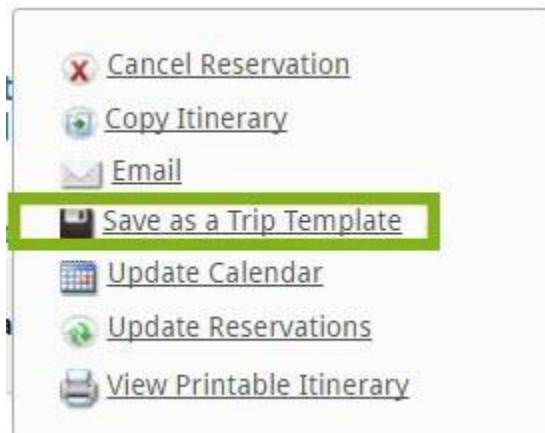
The selected traveler does not have access to the travel policy applied to the original itinerary. Click YES to apply the current travel policy of the selected traveler. Click NO to return to the original itinerary.

Yes **No**

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.



Save as a Trip Template ?

Template Name

Template Type

- Personal
- Company Allow clone company template to personal template
- Policy Branch Specific
- Shared

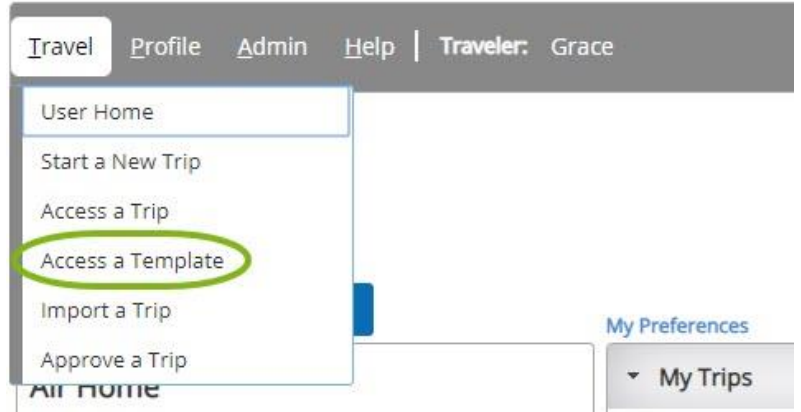
Type the Login ID of the user(s) with whom you wish to share this template. Multiple IDs may be specified by pressing ENTER between each item.

- 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.