



# Certify User Guide

## AmTrav



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*This version is current as of January 1, 2020*

*For continuously updated instructions, please visit our [Help Center](#) within the Certify Support tab.*

## **Certify is T&E expense management made easy**

With thousands of users and satisfied customers worldwide, Certify is the leading fully automated travel and entertainment expense management solution for companies of every size. The easy-to-use

Certify cloud-based interface and mobile application with electronic receipt capture allow organizations to book travel and complete expense reports and reimbursement quickly, easily, and cost-effectively. All while reducing overhead processing costs, increasing compliance with corporate policy and simplifying the overall T&E management process for employees, accountants and administrators.

***Please Note:** As a SaaS-based software, Certify offers several additional services and configuration options that companies may choose, or choose not to, use. Please refer to our online Help Center for even more how-to articles about extra processes and features.*

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## Booking Travel

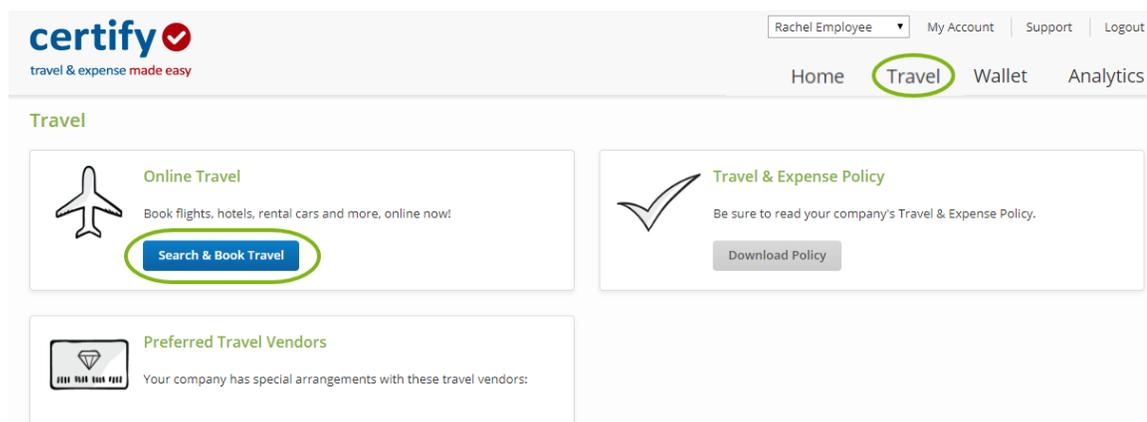
### Travel Reservations

#### Hotel Reservations

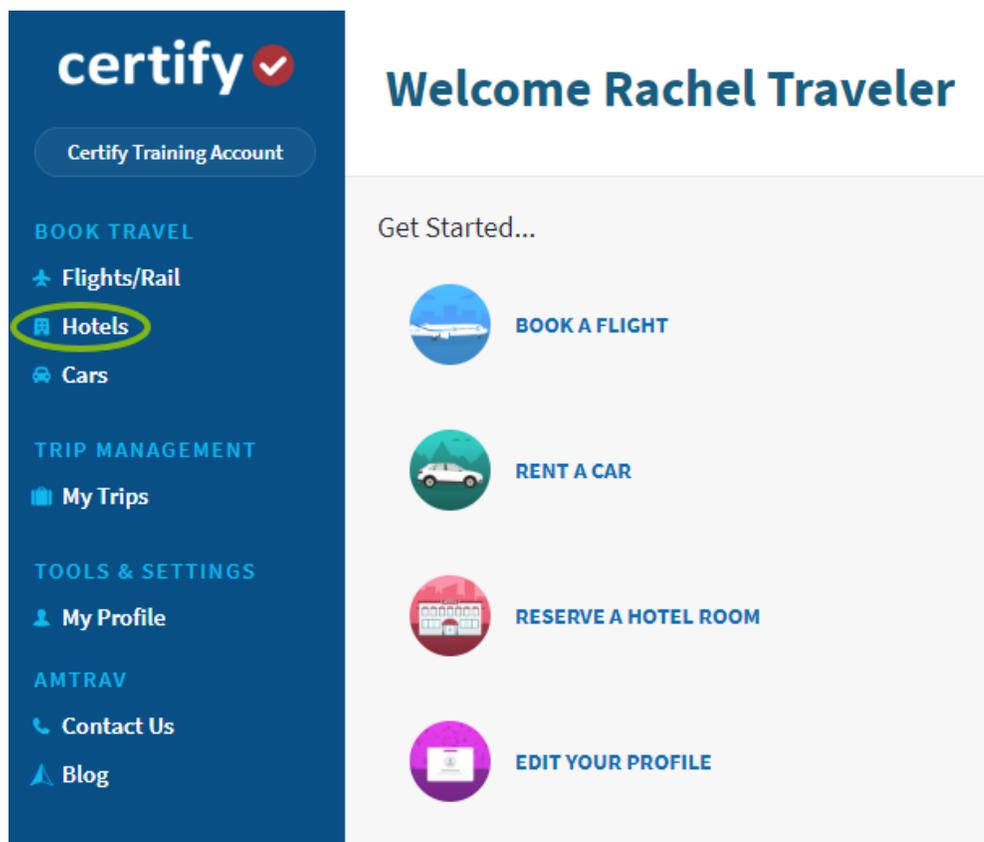
**Certify Travel** partners with **Amtrav** so users can book flights, hotels, and car reservations quickly and effortlessly within **Certify's** portal

This article shows you how to make a **hotel reservation**.

**Step 1:** On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



**Step 2:** Click **Hotels**.



**Step 3:** Enter a city, address, or airport in the location field provided. Enter a **check-in** and **check-out** date, then select the **number of rooms**, **number of adults**, **number of children**, and **hotel chain/class** from the drop-down menus. Click **Search Hotels**.

## Find a Hotel

**Destination**  
San Diego, CA

**Dates**  
Oct 2 - Oct 5

**September 2019** | **October 2019** | **November 2019** >

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
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Su	Mo	Tu	We	Th	Fr	Sa
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27	28	29	30	31		

Su	Mo	Tu	We	Th	Fr	Sa
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3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

1 Room | 1 Adult | No Children

Hotel Chain: (All) | Hotel Class: (All) | Name Contains:

**Search Hotels**

**Step 4:** Filter by Preferred Hotel, In-policy options, Hotel Chain, Class, Price per room, and Neighborhood. Select a hotel by clicking the price.

**San Diego, California**  
Wed, Oct 2 - Sat, Oct 5

Business | Personal

Map | Satellite

**Display Options**  
 Preferred Only  
 In Policy Only  
 Hide Sold Out Hotels

**Hotel Name**  
Search name or brand

**Hotel Chain**  
(All)

**Star class**  
 5 stars (6)  
 4 stars (41)  
 3 stars (66)  
 2 stars (36)  
 1 star (1)

**Price per room**  
 under \$126 (27)  
 \$126 to \$157 (27)  
 \$157 to \$186 (27)  
 \$186 to \$234 (27)  
 over \$234 (24)

**Neighborhoods**  
 La Playa (4)

150 hotels found | Best Match

**Harrah's Resort Southern California**  
777 Harrah's Rincon Way, Funnes, CA 92082  
\$155 per night

**Best Western Plus Island Palms Hotel & Marina**  
2051 Shelter Island Dr, San Diego, CA 92108  
\$179 per night

**Step 5:** Select the Room Type.

Select a Room

Business Personal



Harrah's Resort Southern California

3 nights (1 room) Wednesday, Oct 2 - Saturday, Oct 5

Avg. Nightly Rate*	Room Description
\$155 per night	Corporate Resort King Non Smoking Yes...
\$155 per night	Corporate Resort King Smoking Yes...
\$172 per night	Rack Resort King Non Smoking Yes...
\$172 per night	Rack Resort King Smoking Yes...

Step 6: Confirm the details of your selection. The Policy Status will alert you if your booking is outside of company policy. Click Continue.

Hotel Review

Business Personal

Price Details

Room — 1 Adult	Nightly Rate
Wednesday, October 2	\$126.00
Thursday, October 3	\$135.00
Friday, October 4	\$203.40
Taxes	\$123.77
Your average rate per night: \$154.80	TOTAL \$588.17

Hotel Details

**Harrah's Resort Southern California** Wed, Oct 2, 2019 - Sat, Oct 5, 2019 (3 nights)

**Address:** 777 Harrah's Rincon Way  
Funnin, CA 92082  
United States

**Description:** Corporate Rates Resort Fees 75.00 USD P/Stay Check In Time 1600 Check Out Time 1100 Our Spacious Non Smk Luxury One King Bed W/Features That Include A 37 Inch W/Digital Pay Per View Moviesin Room W/ Filaptop Safe Deskin Room Coffee And Condimentsrefrigeratoriron / Boardand A Lavish Bathroom Equipped W/Hair Dryer, Air Conditioning Individually C

# of Rooms: 1 # of Occupants: 1 Adult

Policy Status

This booking is in policy.

Terms

- A credit card is required to guarantee your reservation. Payment is due upon checkout. Should your plans change and you fail to cancel your reservation according to the hotel's cancellation deadline, your credit card will be charged.
- Cancel: Cancel 30days Prior To Arrival-Fee 1 Night-Incl Tax-Fees Cancel 72 Hours Prior To Arrival Date Or Forfeit Fee Of 1 Night Stay W-Tax

Please double-check your itinerary details before proceeding.

Continue >

Step 7: Enter the remaining trip details including Payment Information, Trip Title, Alternate Email addresses, and special instructions or extra details required by your company. Click Book Now to complete the reservation.

## Book Your Hotel

Business Personal

### Who's Traveling?

Traveler 1: Adult

Traveler Name: Rachel Traveler  
[Loyalty #s, TSA Pre ✓ / Known Traveler Number](#)

Harrah's Resort Southern California	
Wednesday, Oct 2 - Saturday, Oct 5	
AVG. NIGHTLY RATE	\$154.80 x 3
TAX	\$123.77
<b>TOTAL</b>	<b>\$588.17</b>
TOTAL: \$588.17	

### Select Your Form of Payment

Visa ends in 5011 Company Card

? Use a Different Credit Card

### (Optional) Alternate Emails

If you would like us to send an email to additional addresses (up to 4), please tell us the address below.

Alternate Email

### Special Instructions

(Optional) Add special instructions for your travel consultant (fees may apply)

### Optional Billing Fields

Notes: Fields marked with an asterisk (\*) are required.

Trip Title

Event

The total price for your purchase is \$588.17. Pricing is in U.S. dollars.  
To see more Terms and Conditions, [click here](#).

**Step 8:** From the **Trip Summary** page, email or print the itinerary, or add a rental car.

## Trip Details

### Trip Summary

BOOKING NUMBER	1949183726
BOOKING DATE	September 10, 2019
STATUS	<b>CONFIRMED</b>
BOOKED BY	Rachel Traveler
OFFICE	

### Travelers

RT Rachel Traveler
--------------------

### Itinerary

**Harrah's Resort Southern California** Cancel

Wednesday, October 2, 2019 - Saturday, October 5, 2019

CONFIRMATION # **13795SB002041**

**RATE**  
**\$154.80 USD / NIGHT + TAX**  
 \$588.17 USD ESTIMATED TOTAL FOR STAY

ADDRESS 777 Harrah's Rincon Way Funner, CA 92082 US	PHONE 760-751-3100	OCCUPANTS 1 Adult
GUEST Rachel Traveler	LOYALTY # (None Provided)	

**ROOM TYPE**  
 Corporate Rates Resort Fees 75.00 USD P/Stay Check In Time 1600 Check Out Time 1100 Our Spacious Non Smk Luxury One King Bed W/Features That Include A 37 Inch W/Digital Pay Per View Moviesin Room Wi Filaptop Safe Deskin Room Coffee And Condimentsrefrigeratoriron / Boardand A Lavish Bathroom Equipped W/Hair Dryer. Air Conditioning Individually C

**CANCEL POLICY**  
 Cancel: Cancel 3Days Prior To Arrival-Fee 1 Night-Incl Tax-Fees Cancel 72 Hours Prior To Arrival Date Or Forfeit Fee Of 1 Night Stay W-Tax

**PAYMENT**  
 Room payable upon check-out. Guaranteed to 5011

- [Email Itinerary](#)
- [Print Itinerary](#)
- [Add to Calendar](#)
- [Cancel Itinerary](#)



[ADD ANOTHER HOTEL](#)



[ADD A CAR](#)

If you need assistance with your itinerary, please contact our Traveler Services team. We're here 24 hours a day, 7 days a week.

**LIVE CHAT**  
[Chat Now](#)

**CALL**  
 (800) 795-8371 (WITHIN USA)  
 (312) 629-0590 (OUTSIDE USA)

**TEXT**  
 (800) 795-8371

**EMAIL**  
[Support@AmTrav.com](mailto:Support@AmTrav.com)

## Airfare Reservations

**Certify Travel** partners with **AmTrav** so users can book flights, hotels, and car reservations quickly and effortlessly within **Certify's** portal.

This article shows you how to book a flight.

**Please Note:** Your emailed itinerary will automatically forward into your **Certify Wallet**.

**Step 1:** On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.

**certify** ✓  
travel & expense made easy

Rachel Employee | My Account | Support | Logout

Home | **Travel** | Wallet | Analytics

**Travel**

**Online Travel**  
Book flights, hotels, rental cars and more, online now!  
**Search & Book Travel**

**Travel & Expense Policy**  
Be sure to read your company's Travel & Expense Policy.  
Download Policy

**Preferred Travel Vendors**  
Your company has special arrangements with these travel vendors:

Step 2: Click Flights/Rail.

**certify** ✓  
Certify Training Account

**BOOK TRAVEL**

- Flights/Rail**
- Hotels
- Cars

**TRIP MANAGEMENT**

- My Trips

**TOOLS & SETTINGS**

- My Profile

**AMTRAV**

- Contact Us
- Blog

## Welcome Rachel Traveler

Get Started...

- BOOK A FLIGHT**
- RENT A CAR**
- RESERVE A HOTEL ROOM**
- EDIT YOUR PROFILE**

Step 3: Select **Round-Trip**, **One-Way**, or **Multi-City** at the top. Enter your **From** and **To** locations, along with the **departure** and **return** dates and use additional filtering at the bottom if necessary. Click **Search**.

### Book a Flight or Train

**Round Trip** One Way Multi City

From:  To:

**Airports**  
 Carlsbad/Palomar (CLD)  
 San Diego (SAN)

**Dates**  
Oct 1  Anytime  Oct 5  Anytime

**September 2019** **October 2019** **November 2019**

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
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29	30					

Su	Mo	Tu	We	Th	Fr	Sa
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27	28	29	30	31		

Su	Mo	Tu	We	Th	Fr	Sa
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10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**Adults** [More options?](#)  **Cabin**

**Airlines**  **Stops**  **Refundable**

**Search**

**Step 4:** Prices reflected are categorized by ticket class and will note trip totals based on the lowest available fare. Select the flight by clicking the price.

*Please Note: If Round Trip was selected, Leg 1 and Leg 2 are selected individually.*

#### Portland, ME to San Diego, CA

Tue Oct 1 - Sat Oct 5 [Change Search](#)

**Business** Personal

**\$319** Mix & Match

**\$344** United **\$346** American **\$586** Delta **\$605** jetBlue **\$635** Southwest

**Select a Departure Flight** **Select a Return Flight** **Review Trip** [Compare](#) [Filter](#)

Quality	Departs	Aircraft	Duration	Price
Delta 1043 - 2187	PWM 5:30 am	SAN	0h 26m - 1 Stop 1h 12m in DTW	<b>Sold Out</b> MAIN CABIN: \$427 \$544 total DELTA COMFORT+: \$541 \$692 total DELTA FIRST: \$866 \$1,112 total
United 4902 - 229	PWM 5:30 am	SAN	0h 49m - 1 Stop 1h 43m in IAD	<b>\$187</b> BASIC ECONOMY: \$187 \$344 total <b>\$222</b> ECONOMY: \$222 \$408 total <b>\$272</b> ECONOMY FLEXIBLE: \$272 \$544 total <b>\$1,873</b> FIRST: \$1,873 \$2,319 total
Delta 3418 - 2288	PWM 6:00 am	SAN	0h 4m - 1 Stop 40m in JFK	<b>\$327</b> BASIC ECONOMY: \$327 \$484 total <b>\$362</b> MAIN CABIN: \$362 \$519 total <b>\$476</b> DELTA COMFORT+: \$476 \$627 total <b>\$1,562</b> DELTA BUSINESS: \$1,562 \$2,088 total

## Step 5: Confirm the details of your selection. The Policy Status alerts you if you are outside of company policy.

**Flights Review** Business Personal

Traveler, Rachel

### Trip Details

**Portland, ME → San Diego, CA** Tue - Oct 1st, 2019

**American # 4830**  
Basic Economy - Embraer RJ145  
From **PWM Portland, ME** 2:29 pm  
To **PHL Philadelphia, PA** 4:07 pm  
Operated by **PIEDMONT AIRLINES AS AMERICAN EAGLE**  
Layover in **PHL** 2h 20m

**American # 2066**  
Basic Economy - Airbus A321  
From **PHL Philadelphia, PA** 7:35 pm  
To **SAN San Diego, CA** 10:12 pm

**San Diego, CA → Portland, ME** Sat - Oct 5th, 2019

**United # 1916**  
Basic Economy - Boeing 737-900  
From **SAN San Diego, CA** 10:00 pm  
To **IAD Washington/Dulles, DC** 5:42 am  
Layover in **IAD** 2h 23m

**United # 4932**  
Basic Economy - Embraer RJ135  
From **IAD Washington/Dulles, DC** 8:15 am  
To **PWM Portland, ME** 10:00 am  
Operated by **COMMUTAIR DBA UNITED EXPRESS**

### Price Details

	Base Fare	Taxes & Fees	Total
Adult Traveler	\$253.05	\$65.05	\$319.00
<b>TOTAL</b>			<b>\$319.00</b>

\*All fares exclusive of baggage fees and in U.S. dollars.

### Airline Options

**Mixed** Selected!  
For PWM-SAN Basic Economy; for SAN-PWM Basic Economy.

**Economy** + \$64.78 per traveler  
United's standard economy fare. Includes the ability to select seats and bring a full-size carry-on bag for no extra charge.

### Fare Rules

**PWM-SAN**

- These tickets are non-refundable and cannot be transferred to a different person. Exception: a full refund can be requested within 24 hours of your purchase.
- Changes to cities, dates or travel times are not permitted.
- First Checked Bag (per passenger): \$30.00
- Second Checked Bag (per passenger): \$40.00
- Click [here](#) for more info on bags.

**SAN-PWM**

- You have selected Basic Economy, a low, but restricted fare.
- Tickets are non-refundable. No changes are permitted, including standby.
- A fee applies for advance seat selection; customers traveling together will likely not be able to sit together without paying extra to reserve your seats.
- Not eligible for Economy Plus seating or upgrades.
- You may travel with a personal item that fits under the seat in front of you, but no full-size carry-on bag (waived for MileagePlus Premier members).
- MileagePlus members, including Premier members, will not receive Premier qualifying credit or Premier benefits.
- These tickets are non-refundable and cannot be transferred to a different person. Exception: a full refund can be requested within 24 hours of your purchase.
- Changes to cities, dates or travel times are not permitted.
- First Checked Bag (per passenger): \$30.00
- Second Checked Bag (per passenger): \$40.00
- Click [here](#) for more info on bags.

Total price for your selection(s): **\$319.00**  
Please double-check your itinerary details before proceeding.

**Step 6:** Enter the remaining trip details including **Payment** information, **Trip Title**, **Alternate Email** addresses, and special instructions or extra details required by your company. Click **Purchase** to complete the reservation.

### Book Your Flight

**Business** **Personal**

#### Who's Traveling?

Traveler 1: Adult

Traveler Name: Rachel Traveler

Gender: Female | Date of Birth: December 20, 1985

[Apply Unused Ticket](#)  
[Loyalty #s, TSA Pre ✓ / Known Traveler Number, and Secure Traveler Information](#)

Portland, ME -- San Diego, CA  
Tue, Oct 1, 2019 (Basic Economy)  
2:29pm - 10:12pm

San Diego, CA -- Portland, ME  
Sat, Oct 5, 2019 (Basic Economy)  
10:00pm - 10:00am

AVG. PER TRAVELER: **\$319.00** × 1  
GRAND TOTAL: **\$319.00**

#### Select Your Form of Payment

**VISA** Visa ends in 5015 Company Card

? Use a Different Credit Card

#### (Optional) Alternate Emails

If you would like us to send an email to additional addresses (up to 4), please tell us the address below.

rtraveler@certrain.com

secretary@certrain.com

Alternate Email  **Add Email**

#### Special Instructions

(Optional) Add special instructions for your travel consultant (fees may apply)

#### Optional Billing Fields

Note: Fields marked with an asterisk (\*) are required.

Trip Title: San Diego

Event:

The total price for your purchase is **\$319.00**. Pricing is in U.S. dollars. Airline tickets are non-refundable, except within 24 hours of completing your purchase. Name changes are not permitted. By clicking "Purchase" you consent to these terms.  
To see more Terms and Conditions, [click here](#).

**Purchase**

**Step 7:** From the **Trip Summary** page, email or print the itinerary, as well as add a hotel or rental car.

## Trip Details

### Trip Summary

<b>San Diego</b>	
BOOKING NUMBER	1349175996
BOOKING DATE	September 10, 2019
STATUS	<b>PENDING</b>
BOOKED BY	Rachel Traveler
OFFICE	

- [Email Itinerary](#)
- [Print Itinerary](#)
- [Add to Calendar](#)
- [Cancel Itinerary](#)

### Travelers

RT Rachel Traveler

### Itinerary

Portland, ME → San Diego, CA  
Tuesday, October 1, 2019 [Cancel](#)

**CONFIRMATION #**

<b>DEPARTS</b> American #4820 2:29 PM Tue, Oct 1 PWM	<b>ARRIVES</b> 4:07 PM Tue, Oct 1 PHL, Terminal F
--	--

<b>STOPS</b> Nonstop	<b>CABIN</b> Basic Economy	<b>SEAT(S)</b> Unassigned
<b>AIRCRAFT</b> Embraer RJ145	<b>DURATION</b> 1h 38m	<b>MILES</b> 364

**LOYALTY #**  
(None Provided)

**AMENITIES\***  
Free Snack

**Flight Operated by PIEDMONT AIRLINES AS AMERICAN EAGLE**

Connection in Philadelphia, PA

<b>DEPARTS</b> American #2066 7:35 AM Tue, Oct 1 PHL	<b>ARRIVES</b> 10:12 PM Tue, Oct 1 SAN, Terminal 1
--	---

<b>STOPS</b> Nonstop	<b>CABIN</b> Basic Economy	<b>SEAT(S)</b> Unassigned
<b>AIRCRAFT</b> Airbus A321	<b>DURATION</b> 5h 37m	<b>MILES</b> 2382

**LOYALTY #**  
(None Provided)

**AMENITIES\***  
WiFi Fast LiveTV Personal Video on Demand Streaming Video



If you need assistance with your itinerary, please contact our Traveler Services team. We're here 24 hours a day, 7 days a week.

[Live Chat](#)

[Chat Now](#)

**CALL**  
(800) 795-8371 (in the USA)  
(312) 629-0590 (outside USA)

**TEXT**  
(800) 795-8371

**EMAIL**  
Support@AmTrav.com

San Diego, CA → Portland, ME  
Saturday, October 5, 2019 [Cancel](#)

**CONFIRMATION #**

<b>DEPARTS</b> United #1916 10:00 PM Sat, Oct 5 SAN, Terminal 2	<b>ARRIVES</b> 5:42 AM Sun, Oct 6 MCO
---	--

<b>STOPS</b> Nonstop	<b>CABIN</b> Basic Economy	<b>SEAT(S)</b> Unassigned
<b>AIRCRAFT</b> Boeing 737-900	<b>DURATION</b> 4h 42m	<b>MILES</b> 2246

**LOYALTY #**  
(None Provided)

**AMENITIES\***  
WiFi Fast Maybe LiveTV Maybe Video on Demand Maybe Streaming Video Maybe Power

Connection in Washington/Dulles, DC

<b>DEPARTS</b> United #4932 8:15 AM Sun, Oct 6 IAD	<b>ARRIVES</b> 10:00 AM Sun, Oct 6 PWM
--	---

<b>STOPS</b> Nonstop	<b>CABIN</b> Basic Economy	<b>SEAT(S)</b> Unassigned
<b>AIRCRAFT</b> Embraer RJ135	<b>DURATION</b> 1h 45m	<b>MILES</b> 492

**LOYALTY #**  
(None Provided)

**AMENITIES\***  
Free Snack

**Flight Operated by CONNOR/DUA UNITED EXPRESS**

\*We do our best to present accurate in-flight service details, but amenities are subject to change and cannot be guaranteed.

### Charges

Details	Base	Tax	Amount
TRAVELER Rachel Traveler			
ROUTING PWM-SAN	\$129.50	\$82.70	\$162.00
ROUTING SAN-PWM	\$124.65	\$32.35	\$157.00
<b>TOTAL</b>			<b>\$319.00</b>

Note: All prices are in U.S. dollars.

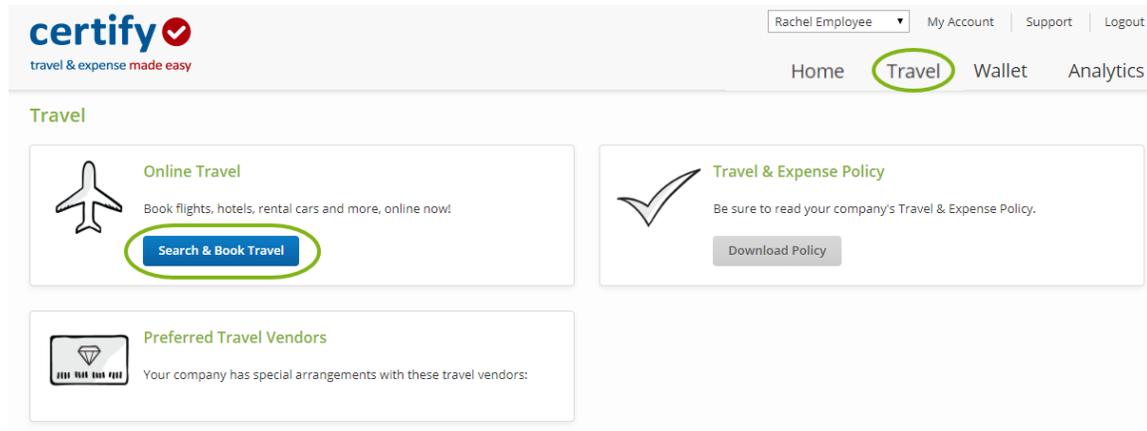
**Step 8:** You will receive a confirmation email when the reservation has been approved.

## Rental Car Reservations

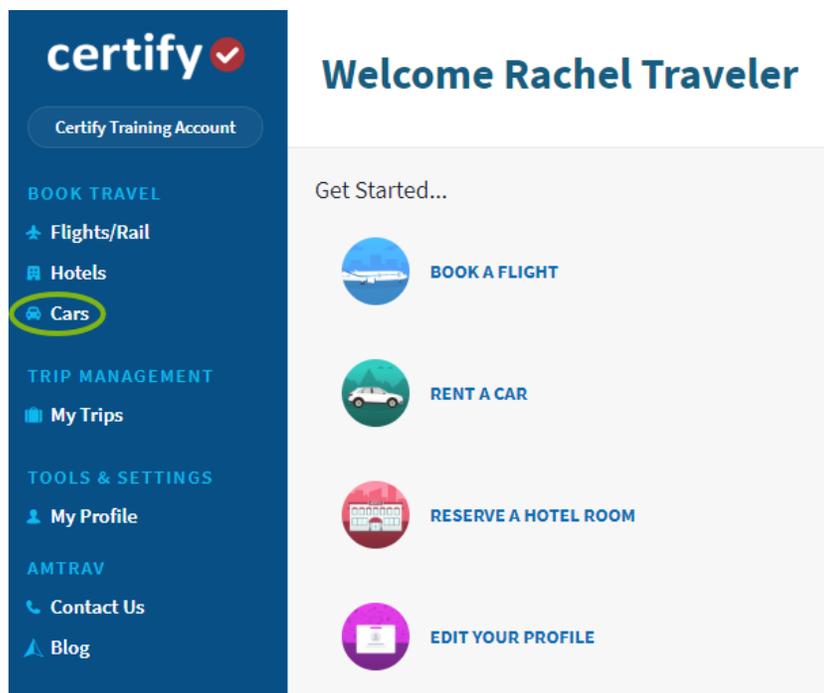
Certify Travel partners with Amtrav, so users can book flights, hotels, and car reservations quickly and effortlessly within Certify's portal.

This article shows you how to make a **rental car reservation**.

**Step 1:** On your Certify homepage, click **Travel**. Then, click **Search & Book Travel**.



**Step 2:** Click **Cars**.



**Step 3:** Enter your **pick-up** and **drop-off locations**, as well as the **dates**, **times**, and a **preferred vendor**, if applicable. Click **Search Cars**.

# Rent a Car

**Pick-up Location**  
San Diego Intl. Airport (SAN) San Diego, CA

**Drop-off Location**  
Same as Pick-up

**Pick-up Date**  
Oct 2 9:00am

**Drop-off Date**  
Oct 5 9:00am

**September 2019**      **October 2019**      **November 2019**

Su	Mo	Tu	We	Th	Fr	Sa
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Su	Mo	Tu	We	Th	Fr	Sa
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20	21	22	23	24	25	26
27	28	29	30	31		

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

**Car Type** (All)      **Vendor(s)** (All)

**Search Cars**

Step 4: Select your car by clicking the price.

## San Diego Intl. Airport (SAN) San Di...

Wed Oct 2, 9:00 am - Sat Oct 5, 9:00 am [Change Search](#)

**Out of Policy**  
 Hide Out of Policy Cars

**Vehicle Type**

- All Types
- Economy
- Compact
- Midsize
- Standard
- Full
- Premium
- Luxury
- SUV
- Convertible
- Van
- Special

**Vendors**

- All Vendors
- AVR Van Rental
- Ace
- Advantage
- Alamo
- Avis
- Budget
- Dollar
- E-Z Rent
- Enterprise
- Fox
- Hertz
- MX Rent-a-Car
- National
- Nu Car Rentals

 Advantage	<b>Economy Car</b> Toyota Yaris (or similar) — 3 doors 4 Passengers 2 Bags A/C Automatic Transmission Unlimited Miles Counter in terminal, shuttle to car	 <b>\$22</b> Per Day \$117* total
 E-Z Rent	<b>Economy Car</b> Toyota Yaris (or similar) — 2 doors 4 Passengers 2 Bags A/C Automatic Transmission Unlimited Miles Counter in terminal, shuttle to car	 <b>\$22</b> Per Day \$117* total
 Advantage	<b>Compact Car</b> Nissan Versa (or similar) — 4 doors 5 Passengers 3 Bags A/C Automatic Transmission Unlimited Miles Counter in terminal, shuttle to car	 <b>\$22</b> Per Day \$118* total
 E-Z Rent	<b>Compact Car</b> Nissan Versa (or similar) — 4 doors 5 Passengers 3 Bags A/C Automatic Transmission Unlimited Miles Counter in terminal, shuttle to car	 <b>\$22</b> Per Day \$118* total

Step 5: Confirm the details of your selection. The Policy Status alerts you if you are outside of company policy. Click Continue.

## Review Your Car

Business Personal

### Price Details

	Base Rate for Rental Period	Taxes/Fees	Total
 \$21.16/day	\$63.48	\$52.7	<b>\$116.18</b>

Note: Rate includes — Unlimited Miles.

### Car Rental Details

Economy Car — Toyota Yaris (or similar)		Wed, Oct 2, 2019 - Sat, Oct 5, 2019	
 Advantage	<b>Pick Up:</b> Wednesday, Oct 2 — 9:00am San Diego Intl. Airport (SAN) San Diego	<b>Drop Off:</b> Saturday, Oct 5 — 9:00am San Diego Intl. Airport (SAN) San Diego	
Doors: 3   Passengers: 4   Bags: 2	✓ Counter in terminal, shuttle to car   ✓ Air Conditioning   ✓ Automatic Transmission		

### Add Ons

Car Navigation Unit — Add navigation unit (extra fee generally applies, payable to rental car vendor)

### Policy Status

✔ This booking is in policy.

### Terms

- Rate shown is an approximate total rate including an estimate of taxes and fees. Precise tax/fee amounts are subject to change.
- Rental charges are payable directly to the vendor once the rental period is complete.
- Unless other arrangements have been made with the car vendor, rental car drivers must present a valid credit card in his or her name at time of pick-up.
- Car rental valid only for licensed drivers at least 25 years old. Vendors will typically not permit younger drivers to rent, or will charge a young driver surcharge. For more information, contact us or the vendor.

Please double-check your itinerary details before proceeding.

[Continue >](#)

**Step 6:** Enter the remaining trip details and include **alternate email** addresses and special instructions or extra details required by your company. Click **Book Now** to complete the reservation.

## Reserve Your Car

Business Personal

### Who's Traveling?

Traveler 1: Adult

Traveler Name: Rachel Traveler  
Loyalty #s: TSA Pre / Known Traveler Number

### (Optional) Alternate Emails

If you would like us to send an email to additional addresses (up to 4), please tell us the address below.

rtraveler@certrain.com  
secretary@certrain.com

Alternate Email

### Special Instructions

(Optional) Add special instructions for your travel consultant (fees may apply)

### Optional Billing Fields

Note: Fields marked with an asterisk (\*) are required.

Trip Title   
Event

The total price for your purchase is \$116.18. Pricing is in U.S. dollars.

To see more Terms and Conditions, [click here](#).

PICK UP: **Wednesday, October 2 9:00am**  
San Diego Intl. Airport (SAN) San Diego  
DROP OFF: **Saturday, October 5 9:00am**  
San Diego Intl. Airport (SAN) San Diego

AVG. DAILY RATE	\$21.16 × 3
TAX	\$52.70
<b>TOTAL</b>	<b>\$116.18</b>

TOTAL: **\$116.18\***  
\* Includes an estimate of taxes and fees

**Step 7:** From the Trip Summary page, email or print the itinerary, or add a hotel or another rental car reservation.

## Trip Details

### Trip Summary

BOOKING NUMBER	1949184439
BOOKING DATE	September 10, 2019
STATUS	<b>CONFIRMED</b>
BOOKED BY	Rachel Traveler
OFFICE	

### Travelers

RT Rachel Traveler

### Itinerary

**Advantage Car Rental**

Wednesday, October 2, 2019 - Saturday, October 5, 2019

CONFIRMATION # **GTSDOF4019AD**

**ADVANTAGE** RATE **\$21.16/day**  
**\$116.18 USD TOTAL**  
(Includes estimate of taxes & fees)

PICK UP <b>9:00 AM</b> Wednesday, October 2 San Diego Intl. Airport (SAN) San Diego (Counter in Terminal)	DROP OFF <b>9:00 AM</b> Saturday, October 5 San Diego Intl. Airport (SAN) San Diego (Counter in Terminal)
---	---

CAR TYPE Economy Car Toyota Yaris (or similar)	MILEAGE Unlimited Miles	AIR CONDITIONING Yes	AUTOMATIC TRANSMISSION Yes
--	----------------------------	-------------------------	-------------------------------

DRIVER: Rachel Traveler      LOYALTY NUMBER: (None Provided)

*Rental rate payable upon pickup*



If you need assistance with your itinerary, please contact our Traveler Services team. We're here 24 hours a day, 7 days a week.

LIVE CHAT

CALL  
(800) 795-8371 (WITHIN USA)  
(312) 629-0590 (OUTSIDE USA)

TEXT  
(800) 795-8371

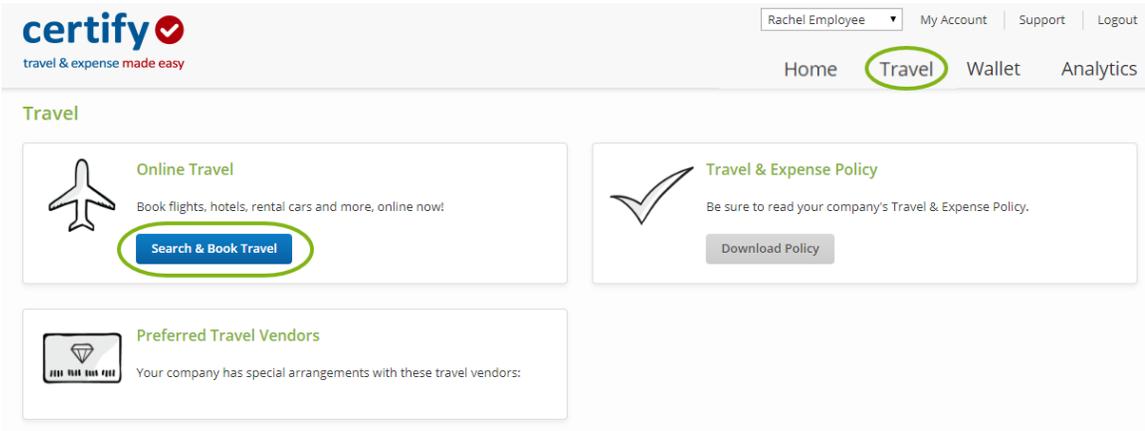
EMAIL  
Support@AmTrav.com

## Rail Reservations

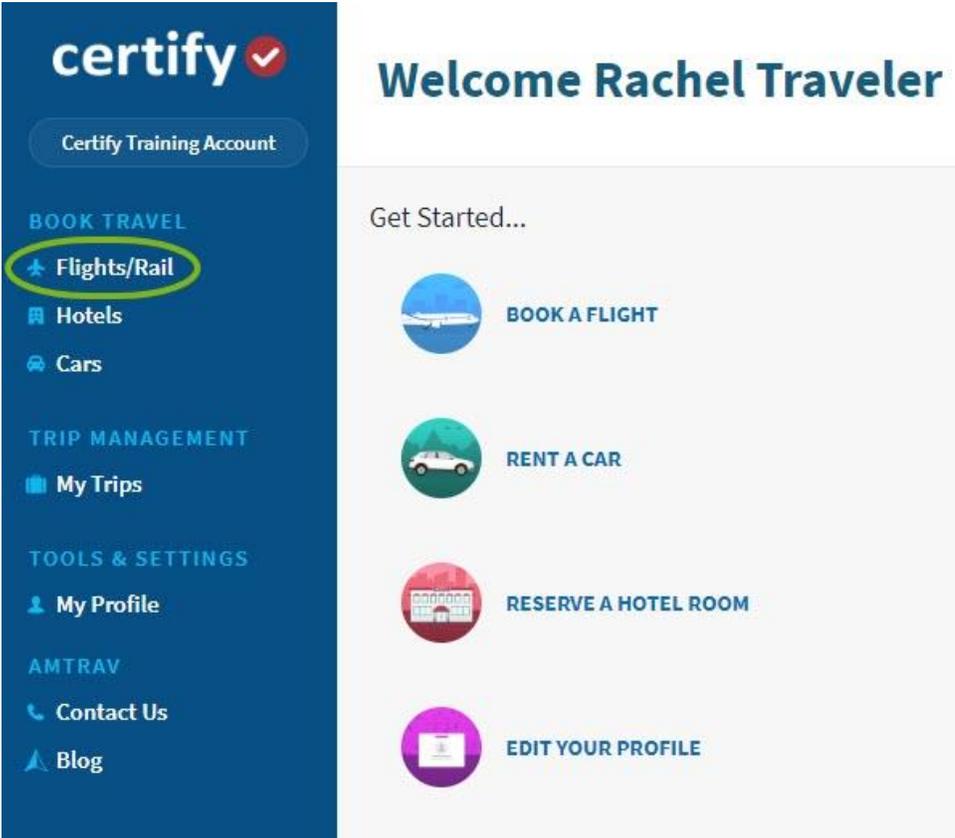
Certify Travel partners with Amtrav so users can book flights, hotels, and car reservations quickly and effortlessly within Certify's portal.

This article shows you how to make a rail reservation.

**Step 1:** On your Certify homepage, click **Travel**. Then, click **Search & Book Travel**.



**Step 2:** Click **Flights/Rail**.



**Step 3:** Enter a city, town, or station in the **From** and **To** fields, along with the departure and return dates. Using the **Airline** drop-down menu, click **Amtrak**.

## Book a Flight or Train

The screenshot shows the Amtrak booking interface. At the top, there are three tabs: "Round Trip" (selected), "One Way", and "Multi City". Below this, there are two columns for "From" and "To". The "From" field contains "BOS (Boston, MA)" and lists nearby airports: Boston (BOS) - 1 mi, Worcester (ORH) - 43 mi, Manchester (MHT) - 44 mi, South Station - 1 mi, and Back Bay Station - 2 mi. The "To" field contains "New York, NY" and lists nearby airports: Kennedy (JFK), Laganardia (LGA), Newark (EWR), and Penn Station. Below the location fields are "Dates" fields for departure and return, both set to "Oct 1" and "Anytime". There are three calendar views for "September 2019", "October 2019", and "November 2019". The "October 2019" calendar has dates 1 through 5 highlighted in blue. Below the calendars are "Adults" (set to 1), "Cabin" (set to "Lowest Fare"), "Airlines" (set to "Amtrak"), "Stops" (set to "Stops OK"), and "Refundable" (set to "Lowest Fare (Non-Refundable)"). A blue "Search" button is located at the bottom center.

**Step 4:** Choose a train from the search results.

**Please Note:** If **Round Trip** is selected, **Leg 1** and **Leg 2** are selected individually.

## BOS (Boston,MA) to New York, NY

Tue Oct 1 - Sat Oct 5 [Change Search](#)

**Business** Personal

Flight selection interface showing various airlines and fares. The Amtrak \$132 fare is highlighted.

**Quality**   **Departs**   **Arrives**   **Duration**   **Coach Class**   **Business Class**   **First Class**

Quality	Departs	Arrives	Duration	Coach Class	Business Class	First Class
Amtrak 235	BOS 4:55 am	NYP 8:50 am	3h 55m	—	\$125 \$131 total	\$230 \$244 total
Amtrak 95	BOS 6:10 am	NYP 10:22 am	4h 12m	\$66 \$132 total	\$112 \$224 total	—

**Step 5:** Confirm the details of your selections. The **Policy Status** alerts you if you are outside of company policy.

## Flights Review

**Business** Personal

Traveler, Rachel

### Trip Details

**Boston/South Station, MA → New York/Penn Station, NY**   Tue - Oct 1st, 2019

Amtrak # 95  
Coach Class - Train  
4h 12m

From **bos** Boston/South Station, MA   **6:10 am**

To **nyp** New York/Penn Station, NY   **10:22 am**

**New York/Penn Station, NY → Boston/Back Bay Station, MA**   Sat - Oct 5th, 2019

Amtrak # 66  
Coach Class - Train  
5h 13m

From **nyp** New York/Penn Station, NY   **2:40 am**

To **bby** Boston/Back Bay Station, MA   **7:53 am**

### Price Details

	Base Fare	Taxes & Fees	Total
Adult Traveler	\$132.00	\$0.00	\$132.00
<b>TOTAL</b>			<b>\$132.00</b>

[Change number or type of travelers?](#)   \*All fares exclusive of baggage fees and in U.S. dollars.

### Airline Options

**Coach Class**  
*Selected!*   Enjoy wide, comfortable reclining seats with ample legroom for your comfort.  

**Business Class**  
+ \$92.00 per traveler   Even more legroom, in an extra car dedicated to Business Class travelers.  

### Fare Rules

**BOS-NYP**

- These tickets are non-refundable and cannot be transferred to a different person. Exception: a full refund can be requested within 24 hours of your purchase.
- First Checked Bag (per passenger): FREE
- Second Checked Bag (per passenger): FREE
- Click [here](#) for more info on bags.

**NYP-BBY**

- These tickets are non-refundable and cannot be transferred to a different person. Exception: a full refund can be requested within 24 hours of your purchase.
- First Checked Bag (per passenger): FREE
- Second Checked Bag (per passenger): FREE
- Click [here](#) for more info on bags.

Total price for your selection(s): **\$132.00**  
Please double-check your itinerary details before proceeding.

**Step 6:** Enter the remaining trip details including **Payment Information, Trip Title, Alternate Email Addresses,** and special instructions or extra details required by your company. Click **Purchase** to complete the reservation.

## Book Your Flight

Business Personal

### Who's Traveling?

Traveler 1: Adult

Traveler Name: Rachel Traveler

Gender: Female

Date of Birth: December 20, 1985

[Apply Unused Ticket](#)

[Loyalty #'s, TSA Pre ✓ / Known Traveler Number, and Secure Traveler Information](#)

Boston/South Station, MA → New York/Penn Station, NY Tue, Oct 1, 2019 (Coach Class) 6:10am - 10:22am	▼
New York/Penn Station, NY → Boston/Back Bay Station, MA Sat, Oct 5, 2019 (Coach Class) 2:40am - 7:53am	▼
AVG. PER TRAVELER	\$132.00 × 1
GRAND TOTAL: \$132.00	

### Select Your Form of Payment

VISA Visa ends in 5011 Company Card

? Use a Different Credit Card

### (Optional) Alternate Emails

If you would like us to send an email to additional addresses (up to 4), please tell us the address below.

rtaveler@certrain.com

secretary@certrain.com

Alternate Email

### Special Instructions

(Optional) Add special instructions for your travel consultant (fees may apply)

### Optional Billing Fields

Note: Fields marked with an asterisk (\*) are required.

Trip Title: New York

Event:

Trip Reason: Please select

The total price for your purchase is \$132.00. Pricing is in U.S. dollars. Airline tickets are non-refundable, except within 24 hours of completing your purchase. Name changes are not permitted. By clicking "Purchase" you consent to these terms. To see more Terms and Conditions, [click here](#).

**Step 7:** From the Trip Summary page, email/print the itinerary, or add a hotel or rental car reservation.

### Trip Details

#### Trip Summary

<b>New York</b>	
BOOKING NUMBER	1949275318
BOOKING DATE	September 16, 2019
STATUS	<b>PENDING</b>
BOOKED BY	Rachel Traveler
COST CENTER	
OFFICE	

#### Travelers

RT Rachel Traveler
--------------------

#### Itinerary

**Boston/South Station, MA** → **New York/Penn Station, NY**  
 Tuesday, October 1, 2019 Cancel

CONFIRMATION #

	DEPARTS <b>6:10 AM</b> Tue, Oct 1 bos	ARRIVES <b>10:22 AM</b> Tue, Oct 1 nyp
STOP(S) Nonstop	CABIN Coach Class (Economy)	SEAT(S) Unassigned
AIRCRAFT Train	DURATION 4h 12m	MILES 187
LOYALTY # (None Provided)		

**New York/Penn Station, NY** → **Boston/Back Bay Station, MA**  
 Saturday, October 5, 2019 Cancel

CONFIRMATION #

	DEPARTS <b>2:40 AM</b> Sat, Oct 5 nyp	ARRIVES <b>7:53 AM</b> Sat, Oct 5 bby
STOP(S) Nonstop	CABIN Coach Class (Economy)	SEAT(S) Unassigned
AIRCRAFT Train	DURATION 5h 13m	MILES 186
LOYALTY # (None Provided)		

#### Charges

Details	Base	Tax	Amount
TRAVELER Rachel Traveler			
ROUTING BOS-NYP	\$66.00	\$0.00	\$66.00
ROUTING NYP-BBY	\$66.00	\$0.00	\$66.00
<b>TOTAL</b>			<b>\$132.00</b>

*Note: All prices are in U.S. dollars.*

- Email Itinerary
- Print Itinerary
- Add to Calendar
- Cancel Itinerary

ADD A HOTEL

ADD A CAR

If you need assistance with your Itinerary, please contact our Traveler Services team. We're here 24 hours a day, 7 days a week.

LIVE CHAT  
[Chat Now](#)

CALL  
 (800) 795-8371 (WITHIN USA)  
 (312) 629-0590 (OUTSIDE USA)

TEXT  
 (800) 795-8371

EMAIL  
 Support@AmTrav.com

**Step 8:** You will receive a confirmation email when the reservation has been approved.

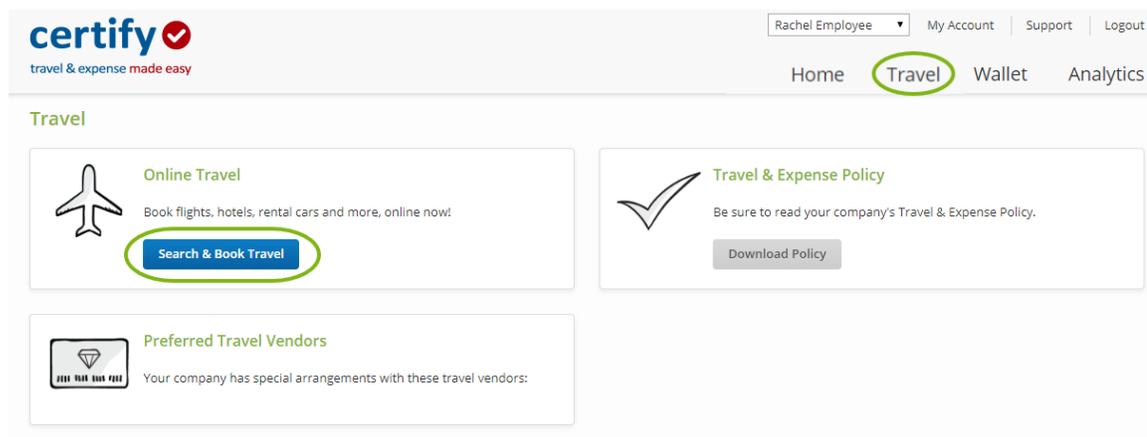
## Canceling an Itinerary

Certify Travel by Amtrav allows you to change or cancel our booked itinerary free of charge within 24 hours of initial purchase.

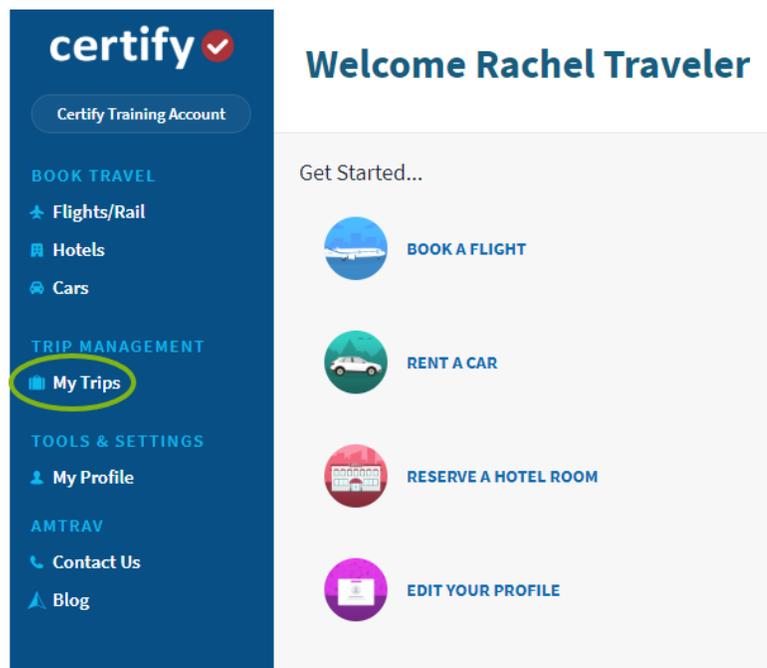
This article shows you how to cancel your itinerary.

**Please Note:** Itineraries cancelled 24 hours after initial booking may incur cancellation/change fees issued by the vendor.

**Step 1:** On your Certify homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



**Step 2:** Click **My Trips**.



**Step 3:** Locate the itinerary and select **View/Modify**.

### Trips

Booking #	Title	Dates	Traveler(s)	Status	
1949195838	New York	10/1/2019 - 10/5/2019	Traveler, Rachel	PENDING	<a href="#">View/Modify</a>

**Step 4:** In the **Trip Summary** section, click **Cancel Itinerary**.

### Trip Details

#### Trip Summary

<b>New York</b>	
BOOKING NUMBER	1949195838
BOOKING DATE	September 11, 2019
STATUS	<b>PENDING</b>

- Email Itinerary
- Print Itinerary
- Add to Calendar
- Cancel Itinerary**

**Step 5:** Confirm the portion of the itinerary to cancel, and select **Yes, Cancel Selected Item(s)**.

### Select itinerary item(s) to cancel

**Once items are cancelled, this process cannot be undone!**

- October 1**  
Boston/South Station, MA to New York/Penn Station, NY
- October 5**  
New York/Penn Station, NY to Boston/Back Bay Station, MA

[Go Back](#) [Cancel Selected Item\(s\)](#)

## My Profile

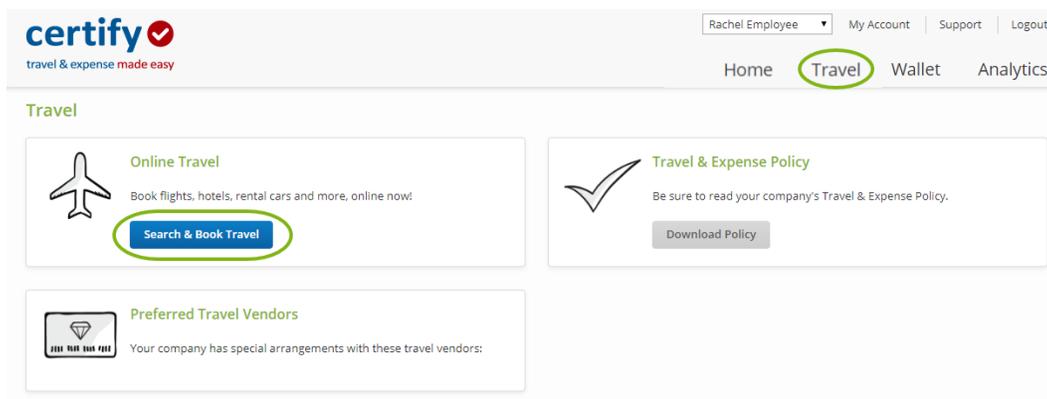
### Editing your Profile

#### Loyalty Program Numbers

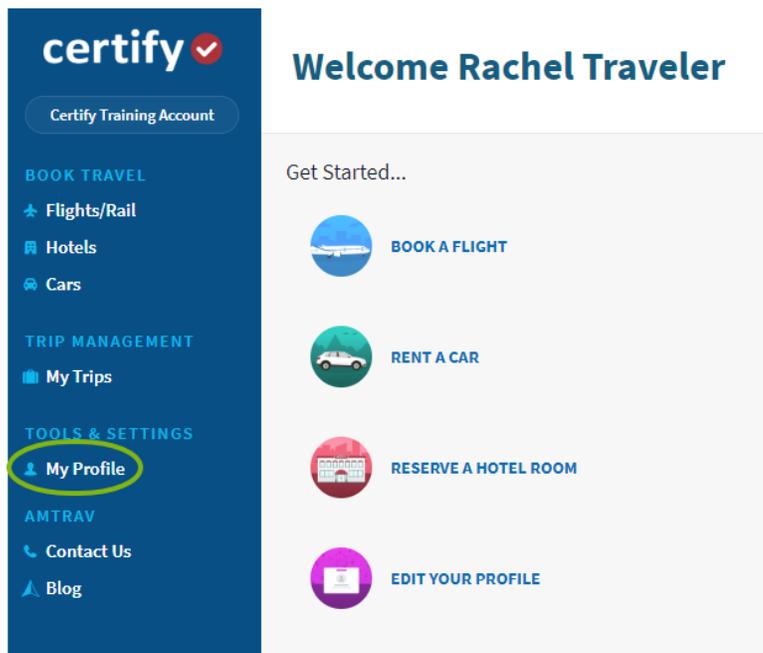
**Certify Travel** by **Amtrav** allows you to save your own **loyalty program numbers** (such as frequent flyer numbers) to your account. When you book a trip, **Certify Travel** will send the loyalty program number to the travel vendor to continue the reward accrual process.

This article shows you how to add **loyalty program numbers** to your **Certify** account.

**Step 1:** On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



**Step 2:** Click **My Profile**.



**Step 3:** Scroll to **Loyalty Programs**. Select the applicable program and enter loyalty numbers for **Hotel, Airline,** or **Rental Car** vendors. Click **Add New**.

AIR/RAIL LOYALTY PROGRAMS		+ Add New Frequent Flyer Number
AIRLINE	FREQUENT FLYER NUMBER	
<a href="#">Delta</a>	7383728	✕

**HOTEL LOYALTY PROGRAMS**  
*You haven't added any frequent guest number.*  
+ Add New Frequent Guest Number

**CAR RENTAL LOYALTY PROGRAMS**  
*You haven't added any frequent renter number.*  
+ Add New Frequent Renter Number

**Step 4:** Add the loyalty program number, and click **Add**.

## Add New Frequent Guest Number

Select a Hotel: Loews Hotels

Frequent Guest Number: 48658712

Cancel Add

### *Credit Card Details*

**Certify Travel** by **Amtrav** allows you to save a credit card to your account. Saving a credit card enables you to select a payment method with a single click without having to re-enter your card information.

This article shows you how to add your credit card to your **Certify Travel** account.

**Step 1:** On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.

**certify** ✓  
travel & expense made easy

Rachel Employee | My Account | Support | Logout

Home | **Travel** | Wallet | Analytics

### Travel



**Online Travel**  
Book flights, hotels, rental cars and more, online now:  
[Search & Book Travel](#)



**Travel & Expense Policy**  
Be sure to read your company's Travel & Expense Policy.  
[Download Policy](#)



**Preferred Travel Vendors**  
Your company has special arrangements with these travel vendors:

**Step 2: Click My Profile.**

**certify** ✓

Certify Training Account

## Welcome Rachel Traveler

Get Started...

-  **BOOK A FLIGHT**
-  **RENT A CAR**
-  **RESERVE A HOTEL ROOM**
-  **EDIT YOUR PROFILE**

**BOOK TRAVEL**

- ✈ Flights/Rail
- 🏨 Hotels
- 🚗 Cars

**TRIP MANAGEMENT**

- 📅 My Trips

**TOOLS & SETTINGS**

- 👤 My Profile**

**AMTRAV**

- 📞 Contact Us
- 📄 Blog

**Step 3: Scroll to Credit Card Information and click Add New Credit Card.**

Credit Cards [+ Add New Credit Card](#)

CARD	DESCRIPTION	BILLS TO	PRIMARY AIR	PRIMARY HOTEL
 ends in 5011	Phoebe Travel Admin (Company Card)	Company	<input type="checkbox"/>	<input type="checkbox"/>

**Step 4:** Enter the credit card information in the fields provided:

- **Description:** Your own internal reference to this card.
- **Use For:** Decide which types of bookings this card should be used for. Only the types added here will provide this card for selection.

Click **Add** to save the card to your account.

### Add New Credit Card

#### Credit Card

Credit Card Number

Expiration Month / Year

Name on Card

Description

Use For

Bills To

#### Billing Address

Country

Billing Address

City

State

Zip Code

## Passport Details

**Certify Travel** by **Amtrav** makes it easy for you to store your passport information in your account for future travel.

This article shows you how to add your **passport information** to your **Certify Travel** profile.

**Step 1:** From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.

certify travel & expense made easy

Rachel Employee My Account Support Logout

Home **Travel** Wallet Analytics

**Travel**

**Online Travel**  
Book flights, hotels, rental cars and more, online now!  
**Search & Book Travel**

**Travel & Expense Policy**  
Be sure to read your company's Travel & Expense Policy.  
Download Policy

**Preferred Travel Vendors**  
Your company has special arrangements with these travel vendors:

Step 2: Click My Profile.

certify Certify Training Account

**Welcome Rachel Traveler**

Get Started...

- BOOK A FLIGHT
- RENT A CAR
- RESERVE A HOTEL ROOM
- EDIT YOUR PROFILE

**BOOK TRAVEL**

- Flights/Rail
- Hotels
- Cars

**TRIP MANAGEMENT**

- My Trips

**TOOLS & SETTINGS**

- My Profile**

**AMTRAV**

- Contact Us
- Blog

Step 3: In the Passport section, enter your passport details. Click Save Changes to add to your profile.

Passport

Nationality  
United States

Passport # 458978541 Issue Date 08/12/2019 Place of Issue Country United States Expiration Date 11/15/2025

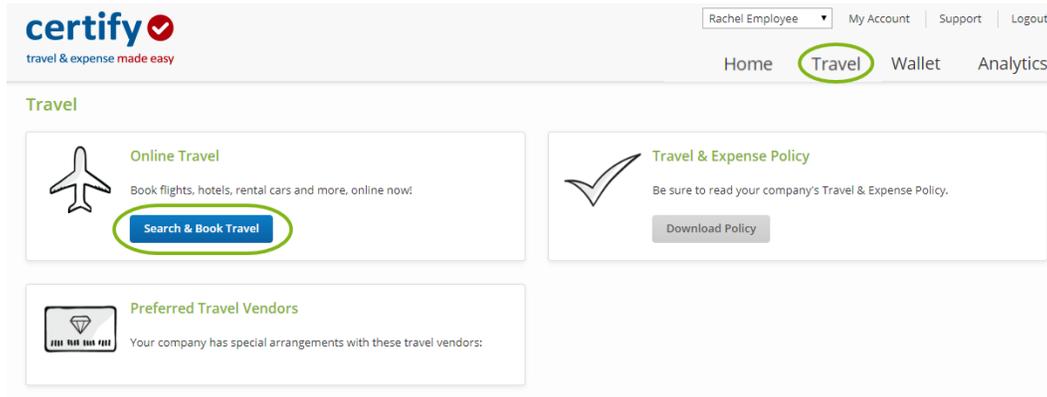
**Save Changes**

## TSA Known Traveler Numbers

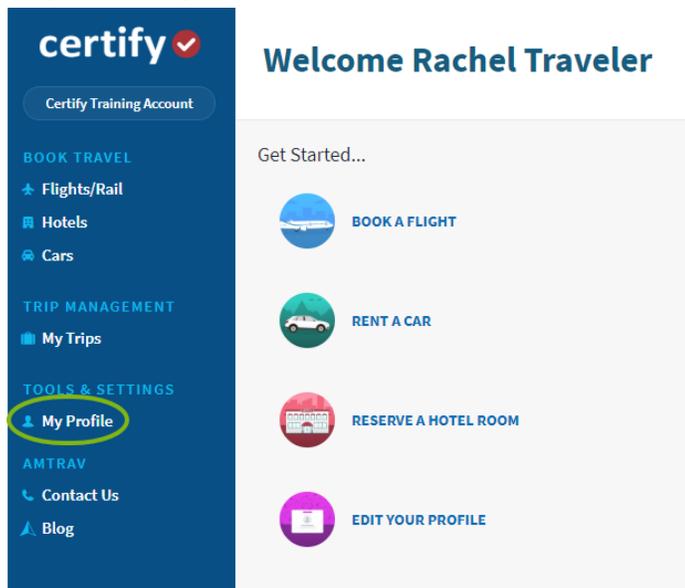
Certify Travel by Amtrav allows you to save your known traveler numbers for TSA Pre-Check.

This article shows you how to add your known traveler number to your **Certify Travel** profile.

**Step 1:** On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



**Step 2:** Click **My Profile**.



**Step 3:** In **Basic Information**, enter your **Known Traveler Number** in the fields provided. If applicable, enter your **Redress #**. Click **Save Changes**.

Basic Information

 [Add Photo](#)

First Name	Middle Name	Last Name	Suffix
<input type="text" value="Rachel"/>	<input type="text"/>	<input type="text" value="Traveler"/>	<input type="text"/>

Gender:  Date of Birth:

Known Traveler #:  Redress #:

Job Title:

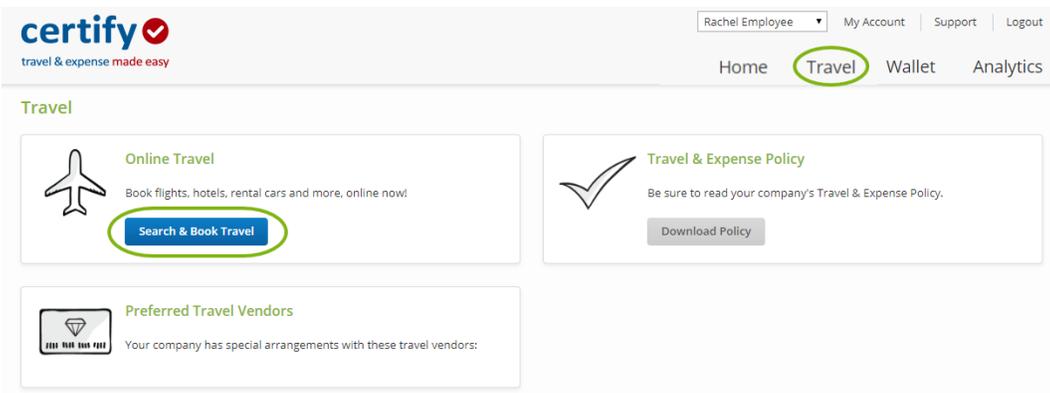
[Save Changes](#)

## Travel Preferences

**Certify Travel** by **Amtrav** allows you to store personal travel preferences in your account to help find the best options for you when searching.

This article shows you how to add your **travel preferences**.

**Step 1:** On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



The screenshot shows the Certify homepage. At the top left is the Certify logo with the tagline "travel & expense made easy". To the right of the logo is a user profile dropdown menu showing "Rachel Employee" and links for "My Account", "Support", and "Logout". Below the logo is a navigation bar with "Home", "Travel", "Wallet", and "Analytics". The "Travel" link is circled in green. Under the "Travel" section, there are three main cards: "Online Travel" with an airplane icon and a "Search & Book Travel" button (circled in green), "Travel & Expense Policy" with a checkmark icon and a "Download Policy" button, and "Preferred Travel Vendors" with a diamond icon and a description of special arrangements.

**Step 2:** Click **My Profile**.

**certify** ✓  
Certify Training Account

**BOOK TRAVEL**  
✈ Flights/Rail  
🏨 Hotels  
🚗 Cars

**TRIP MANAGEMENT**  
📅 My Trips

**TOOLS & SETTINGS**  
👤 **My Profile**

**AMTRAV**  
📞 Contact Us  
📝 Blog

## Welcome Rachel Traveler

Get Started...

- ✈ **BOOK A FLIGHT**
- 🚗 **RENT A CAR**
- 🏨 **RESERVE A HOTEL ROOM**
- 👤 **EDIT YOUR PROFILE**

**Step 3:** In **Options/Preferences**, enter your preferences for flights, hotels, and car rentals. Click **Save Changes** to add to your account.

Options/Preferences

---

**AIR**

Home Location

Preferred Seat Type: (No Preference) | Default Cabin: Economy | Default Airlines: (No Preference) | Default Nonstop Only:  Yes  No

[Save Changes](#)

---

**HOTEL**

Default Hotels: (No Preference) | Default Star Rating: (No Preference)

Include AAA Rates:  Yes  No | Include AARP Rates:  Yes  No | Include Government Rates:  Yes  No | Include Amex Platinum Rates:  Yes  No

[Save Changes](#)

---

**CAR**

Include Navigation Unit with Car Rentals?:  Yes  No | Default Vendor: (No Preference) | Default Car Type: (Any)

Tript Integration: (Not linked) [Link Now](#)

[Save Changes](#)

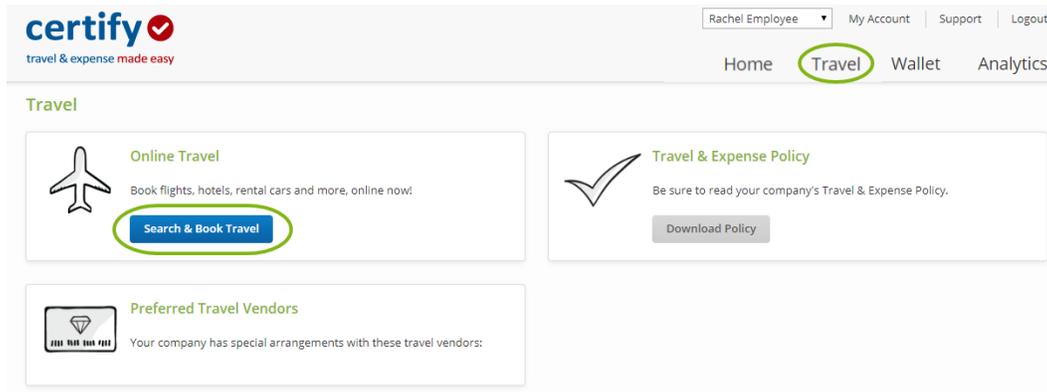
## Enabling Email Notifications

When a trip is booked, **Certify Travel** by **Amtrav** automatically sends email notifications to the address you use for your travel account.

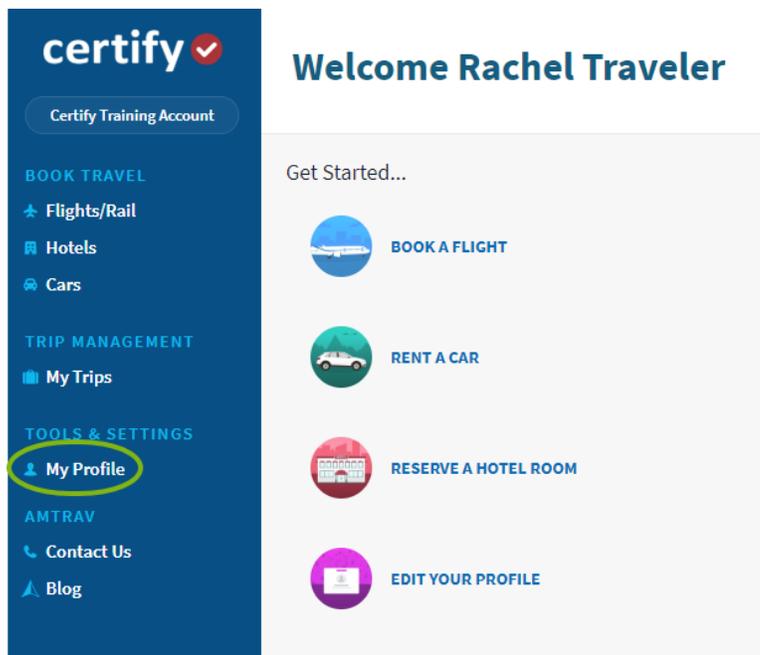
You can sign up for additional notifications, as well as add other emails (in addition to the default address on file for you). For example, you may want to have specific notifications sent to your manager.

This article shows you how to sign up for further notifications and how to add additional emails.

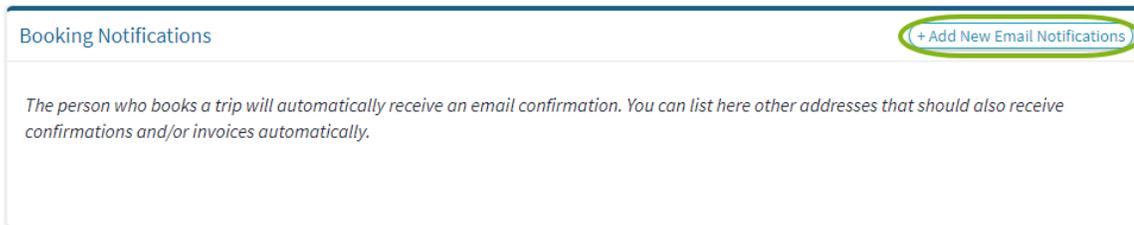
**Step 1:** From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



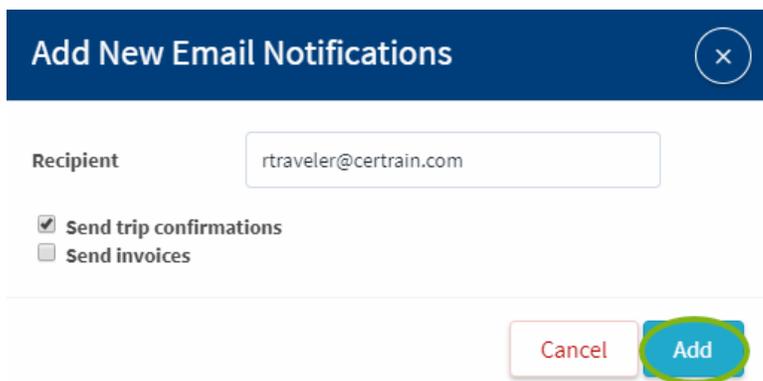
**Step 2:** Click **My Profile**.



**Step 3:** In the **Notifications** subsection, click **Add New Email Notifications**.



**Step 4:** Enter the recipient address and the types of notifications to receive. Choose between **Invoices** and/or **Trip Confirmations**. Click **Add** to save to your profile.



## Reviewing Travel

### Approving

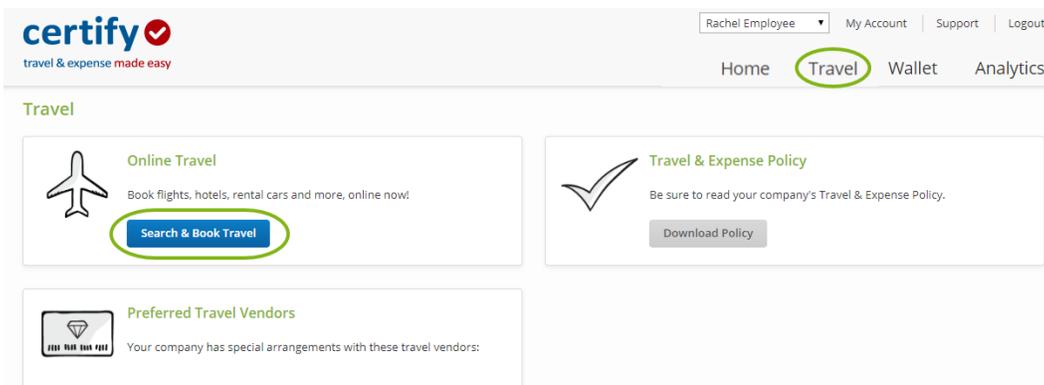
#### *Approving an Itinerary*

Based on your company's travel configurations, certain itineraries may require approval before they are confirmed. **Coordinators** and **Administrators** have 24 hours from the time of booking to approve the trip.

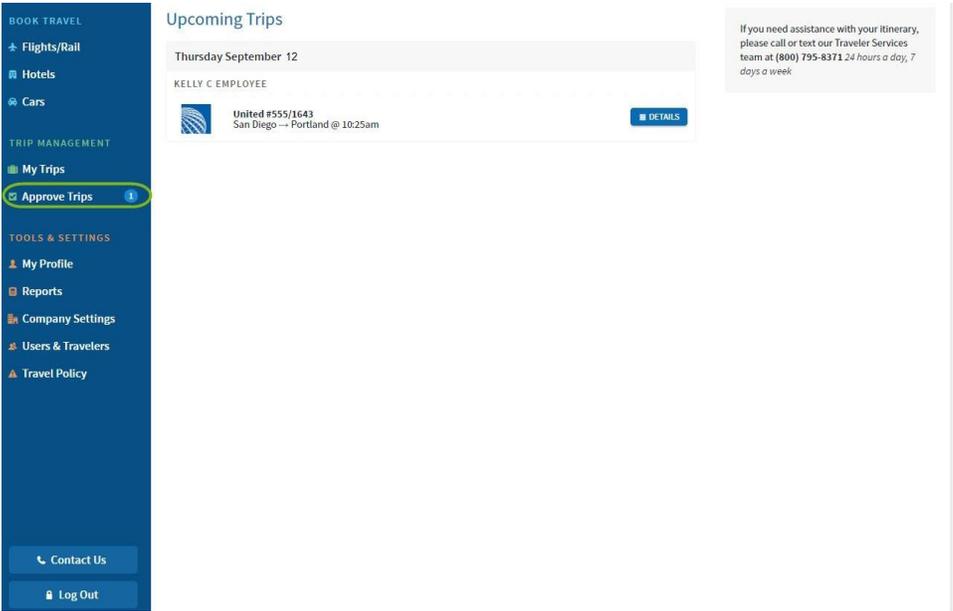
*Please Note: If the booking is not approved within that time frame, the itinerary is cancelled.*

This article shows you how to approve an itinerary in **Certify Travel** by Amtrav.

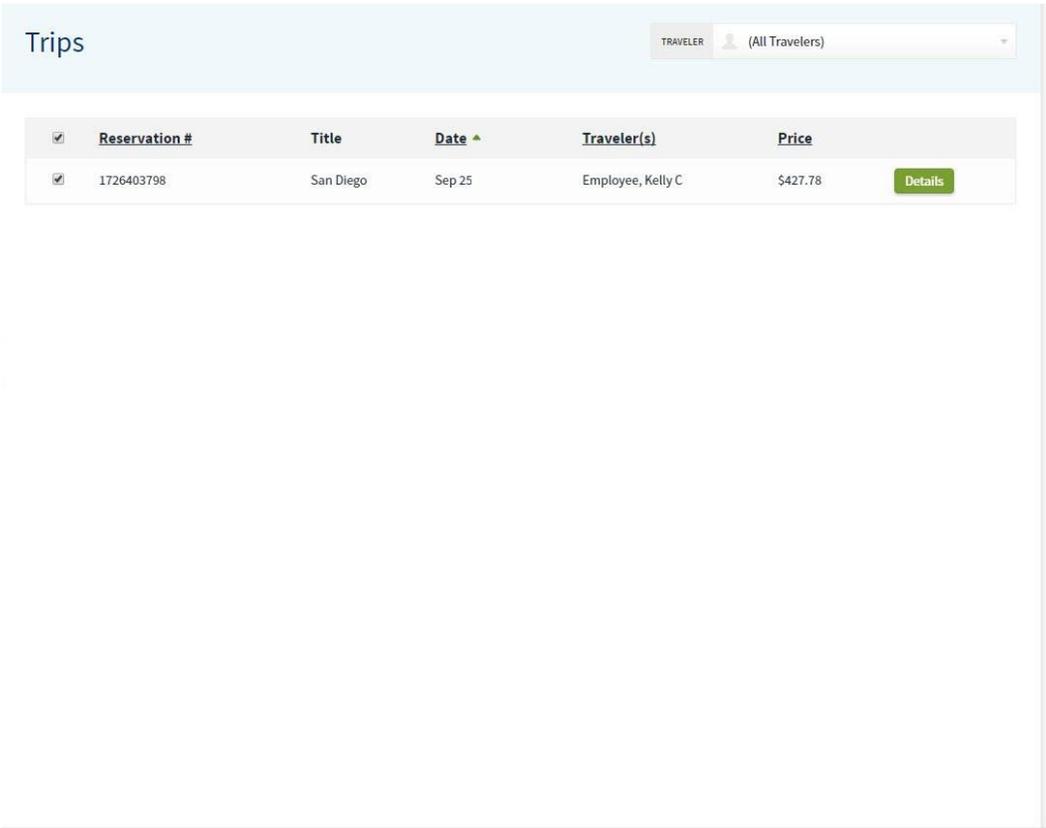
**Step 1:** On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



## Step 2: Click Approve Trips.



## Step 3: To instantly approve or reject, select the itinerary and click **Approve** or **Reject**.



To review the itinerary details first, click the **Details** button next to the itinerary.

**Trip Details**

**Trip Summary**

Booking Number:	1726403798
Trip Title:	San Diego
Airline Confirmation Numbers:	JBWWE4 (UA)
Status:	NEEDS APPROVAL

**Traveler Names**

1 Kelly C Employee

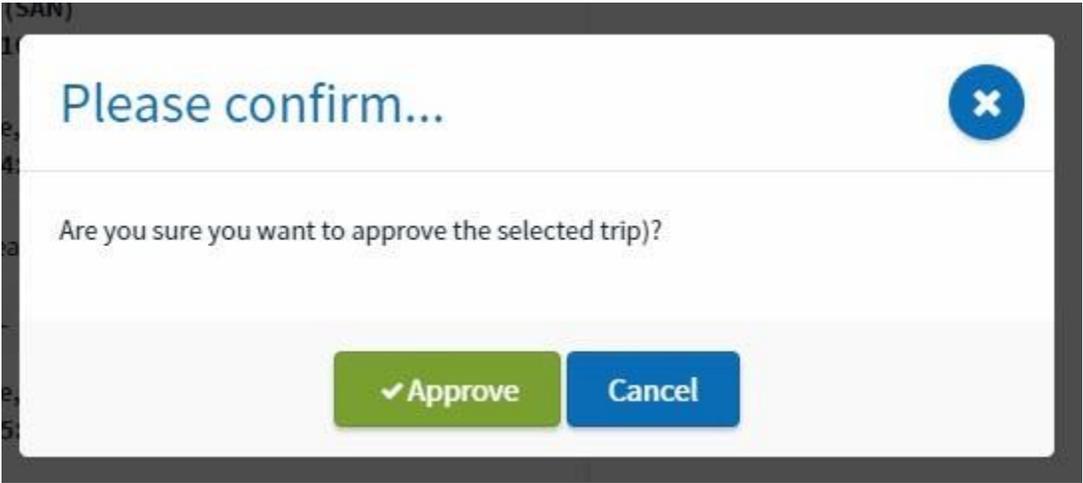
**Itinerary**

Portland, ME → San Diego, CA      September 25, 2017      [Cancel](#)

 Southwest #563 Boeing 737-700 Duration: 2h 30m	Departs: Portland, ME (PWM) Mon, Sep 25 — 5:45am
	Arrives: Baltimore, MD (BWI) Mon, Sep 25 — 7:15am
	Seat(s): Economy — <a href="#">Seat Info</a>
Connection in Baltimore, MD	
 Southwest #1581 Boeing 737-800 Duration: 3h 20m	Departs: Baltimore, MD (BWI) Mon, Sep 25 — 8:25am
	Arrives: San Diego, CA (SAN) Mon, Sep 25 — 10:45am (Terminal 1)

Would you like to **Approve** or **Reject** this trip?      [Approve](#)      [Reject](#)

Review the itinerary details. When prompted, choose to **Approve** or **Reject** the itinerary.



- If the itinerary is **Approved**, the itinerary is ticketed.
- If **Rejected**, the itinerary is cancelled at no cost (if it is within the 24 hour window).

## Configuring Travel

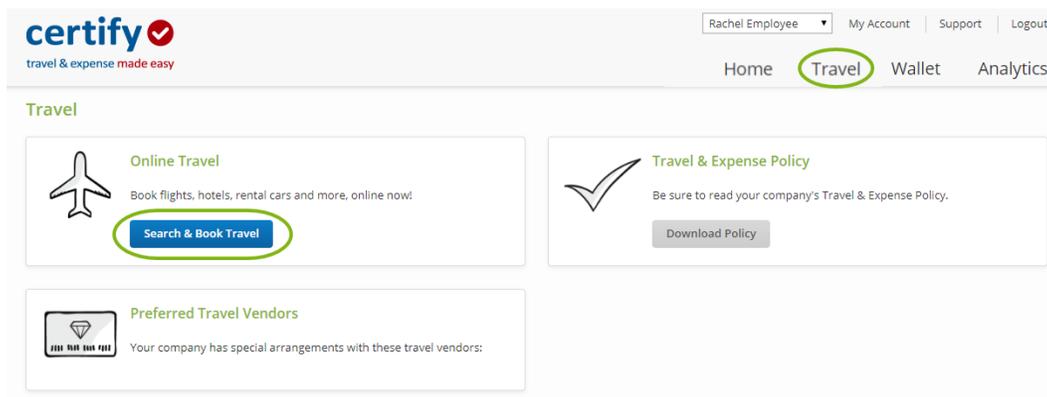
### Travel Users

#### *Adding a New Travel User*

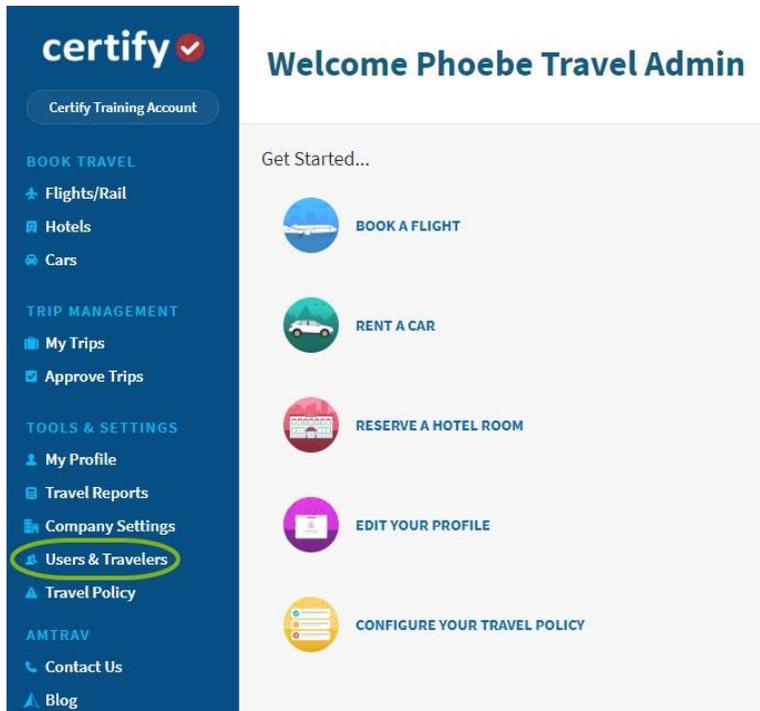
**Certify Travel** by Amtrav administrators can quickly and easily create a new user in **Certify Travel** and link it to a user's existing **Certify Expense** account.

This article shows you, a **Certify Travel Administrator**, how to add a new user to **Certify Travel**.

**Step 1:** On your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



**Step 2:** Select **Users & Travelers**.



**Step 3:** Click **Add New User**.

## Users & Travelers

Search for user

NAME	ROLE
MA Approver, Monica	TRAVELER
JC Coordinator, Janice	COORDINATOR
RE Executive, Ross	TRAVELER
JT Travel Admin, Jon	ADMINISTRATOR
PT Travel Admin, Phoebe	ADMINISTRATOR
JT Traveler, Jennifer	TRAVELER
RT Traveler, Rachel	TRAVELER

Send Invitation

Add New User

Step 4: Enter in the details for the new user. Click Add when complete.

**Please Note:** The email address used in *Certify Travel* must exactly match the email address for this user in *Certify Expense*.

Add New User

First Name: Chandler

Middle Name:

Last Name: Employee

Suffix: None

Gender: Male

Date of Birth (optional): 11/08/1986

Work Email: cemployee@certrian.com

Password: .....

Password Confirmation: .....

Travel Policy: Sales Policy

Cancel Add

**Step 5:** After adding the new user, you are prompted to edit their profile. Select their **Role** and **Travel Policy**.

## Chandler Employee

Basic Information

  
[Add Photo](#)

<b>First Name</b>	<b>Middle Name</b>	<b>Last Name</b>	<b>Suffix</b>
<input type="text" value="Chandler"/>	<input type="text"/>	<input type="text" value="Employee"/>	<input type="text"/>
<b>Gender</b>	<b>Date of Birth</b>		
<input type="text" value="Male"/>	<input type="text" value="11/08/1986"/>		
<b>Known Traveler #</b>	<b>Redress #</b>		
<input type="text"/>	<input type="text"/>		
<b>Job Title</b>	<b>Executive</b>		
<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No		
<b>User Role</b>	<b>Policy Group</b>		
<input type="text" value="Traveler"/>	<input type="text" value="Sales Policy"/>		

[View policy](#)

[Save Changes](#)

If you are granting the **Coordinator** role, you can select the users this person can book for at the bottom of their profile.

Booking Permissions

PEOPLE WHO CAN BOOK FOR CHANDLER EMPLOYEE

<input type="checkbox"/> Coordinator, Janice	<input checked="" type="checkbox"/> Travel Admin, Jon
<input checked="" type="checkbox"/> Employee, Chandler	<input checked="" type="checkbox"/> Travel Admin, Phoebe

[Check All / Uncheck All](#)

[Save Changes](#)

PEOPLE WHO CHANDLER EMPLOYEE CAN BOOK FOR

**All Company Travelers**      **Unregistered/New Travelers**

Yes  No       Yes  No

<input checked="" type="checkbox"/> Employee, Chandler	<input type="checkbox"/> Executive, Ross	<input type="checkbox"/> Traveler, Jennifer
<input type="checkbox"/> Approver, Monica	<input type="checkbox"/> Travel Admin, Jon	<input type="checkbox"/> Traveler, Rachel
<input type="checkbox"/> Coordinator, Janice	<input type="checkbox"/> Travel Admin, Phoebe	

[Check All / Uncheck All](#)

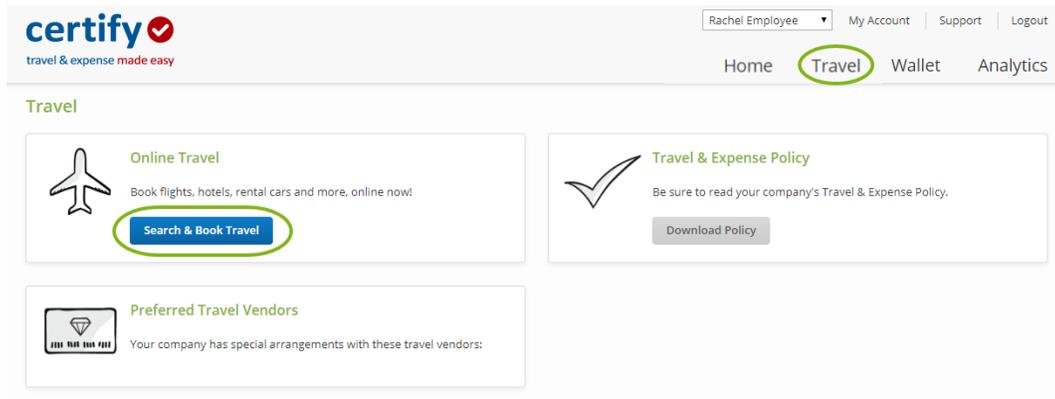
[Save Changes](#)

## Adding Company Credit Cards for Travel Bookings

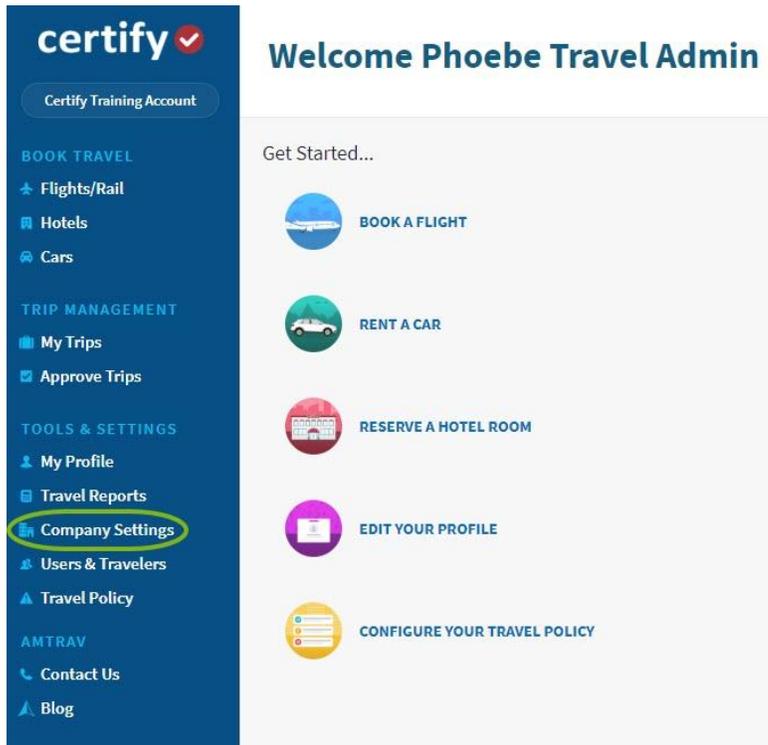
Within **Certify Travel** by **Amtrav**, an administrator may upload company credit cards for travelers to use when booking trips.

This article shows you, a **Certify Travel Administrator**, how and where to upload company credit cards.

**Step 1:** From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book** travel.



**Step 2:** Click **Company Settings**.



**Step 3:** Scroll to the **Credit Card** section. Click **Add New Credit Card**.

Credit Cards		(+ Add New Credit Card)
CARD	DESCRIPTION	
 ends in <a href="#">5011</a>	Phoebe Travel Admin (Company Card)	✕
 ends in <a href="#">5216</a>	Ross Executive (Executive Card)	✕

**Step 4:** Enter the card details. Click **Add** when complete.

**Add Credit Card**✕

Please note that by default any credit cards added will be available for use for all travelers, for both air and hotel. If you would like to restrict the use of this card, please contact our account management team.

### Credit Card

**Credit Card Number**

**Expiration Month / Year**

**Cardholder Name**

**Description**

### Billing Address

**Country**

**Street**

**City**

**State**

**Zip Code**

**Step 5:** The company card(s) are stored here. To assign cards to specific travelers, add company cards to travel policies within the **Travel Policy** section.

CARD	DESCRIPTION
 ends in <a href="#">5011</a>	Phoebe Travel Admin (Company Card) <span>✕</span>
 ends in <a href="#">5216</a>	Ross Executive (Executive Card) <span>✕</span>
 ends in <a href="#">0004</a>	Chandler Employee <span>✕</span>

## Adding Employee ID Fields

**Certify Travel** by **Amtrav** provides **Employee ID Fields** for specific information that needs to be tied to a traveler. These fields are designed for information assigned to the person and does not change per trip. For example, their own employee ID or cost center.

This article shows you, a **Certify Travel Administrator**, how to add **Employee ID Fields**.

**Please Note:** The maximum amount of fields is six, which combines both **Employee ID fields** and the **Optional Billing Fields**.

**Step 1:** From your account homepage, click the **Travel** tab. Then, click **Search & Book Travel**.

certify   
travel & expense made easy

Rachel Employee | My Account | Support | Logout

Home **Travel** | Wallet | Analytics

**Travel**



### Online Travel

Book flights, hotels, rental cars and more, online now!

**Search & Book Travel**



### Travel & Expense Policy

Be sure to read your company's Travel & Expense Policy.

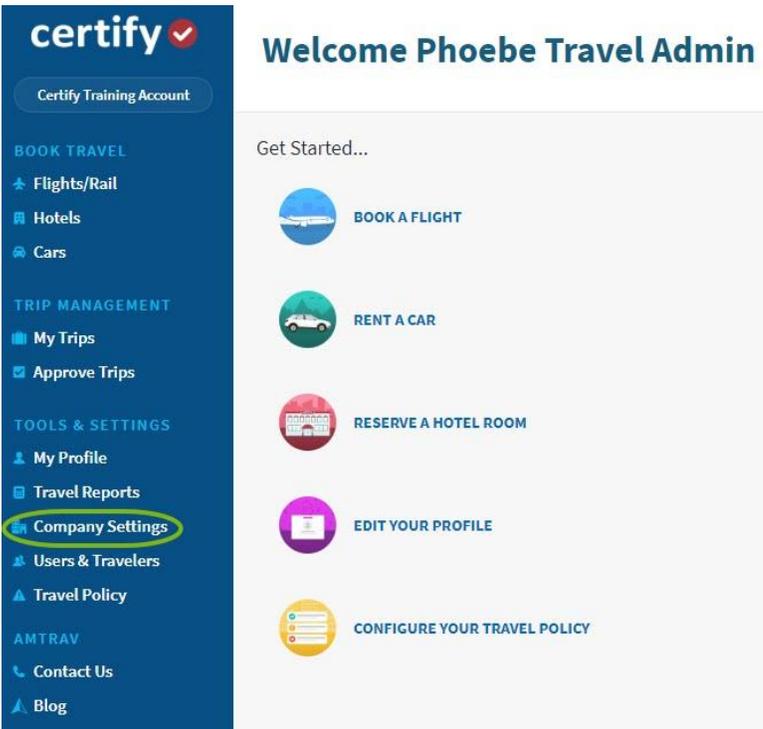
Download Policy



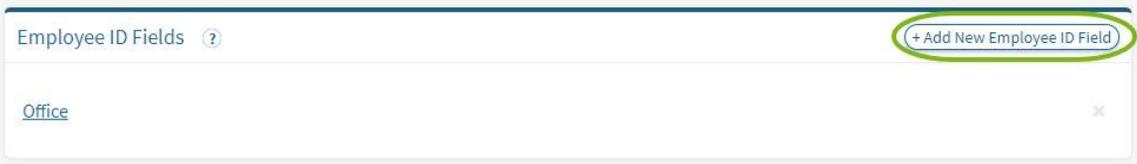
### Preferred Travel Vendors

Your company has special arrangements with these travel vendors:

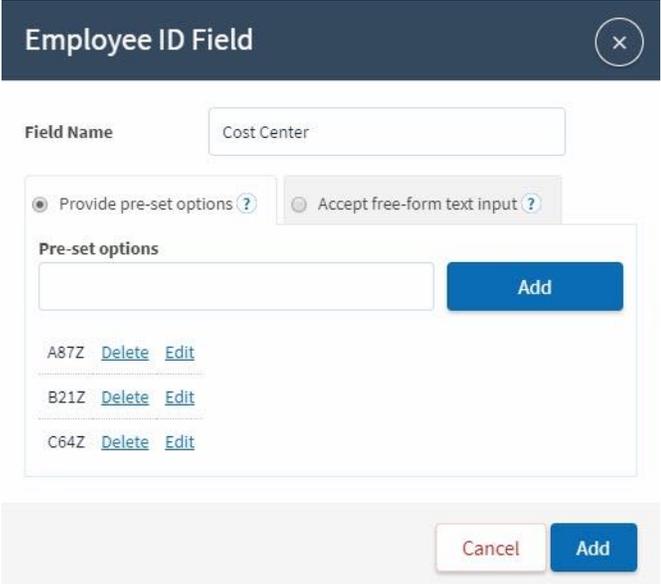
**Step 2:** Click **Company Settings**.



Step 3: Scroll to the Employee ID Fields section. Click Add New Employee ID Field.



Step 4: Add the Field Name and decide if the options should be pre-set (a drop-down menu) or free-text. Click Add.



The new field is now saved and can be viewed when reporting.

Employee ID Fields ? + Add New Employee ID Field

Office ✕

Cost Center ✕

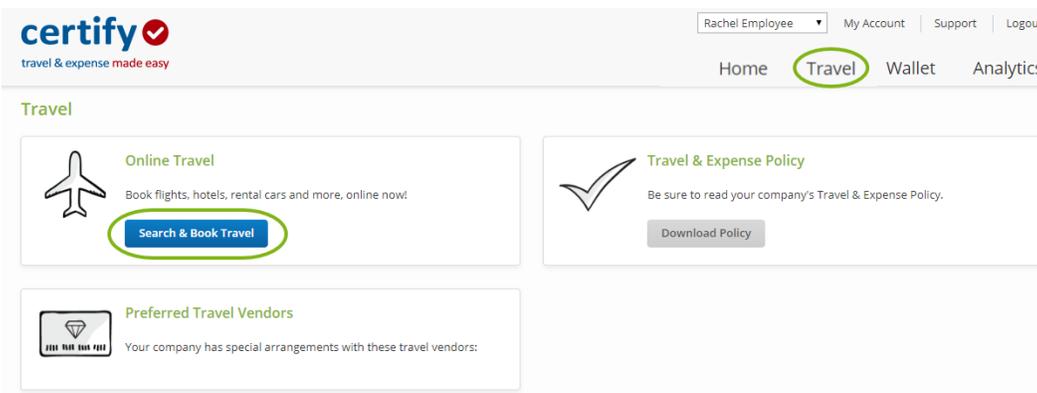
## Travel Policy

### Creating a Travel Policy

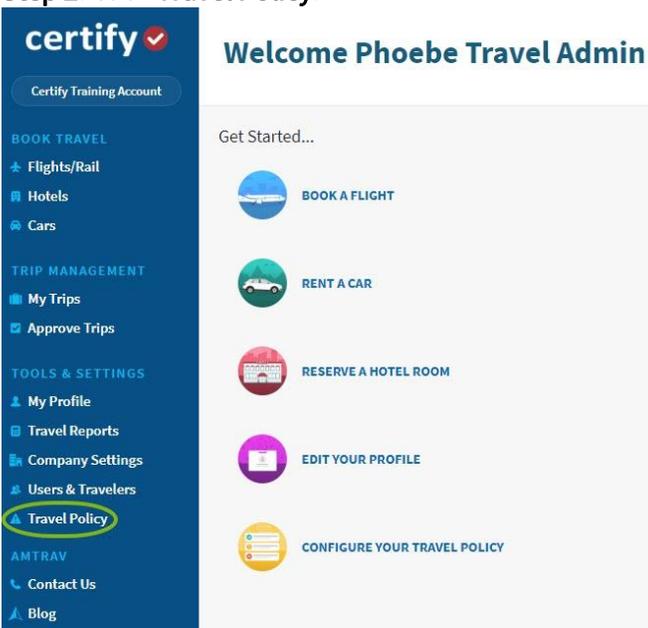
Within **Certify Travel** by **Amtrav**, administrators can create and manage travel policies. Travel policies define specific approval rules and booking limits for a group of travelers. For example, your company may have one policy for executives, another policy for basic travelers, and so on. There are no limits to how many policies a company can have, but it is recommended to keep it at a manageable number.

This article shows you, a **Certify Travel Administrator**, how to create a travel policy.

**Step 1:** From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.

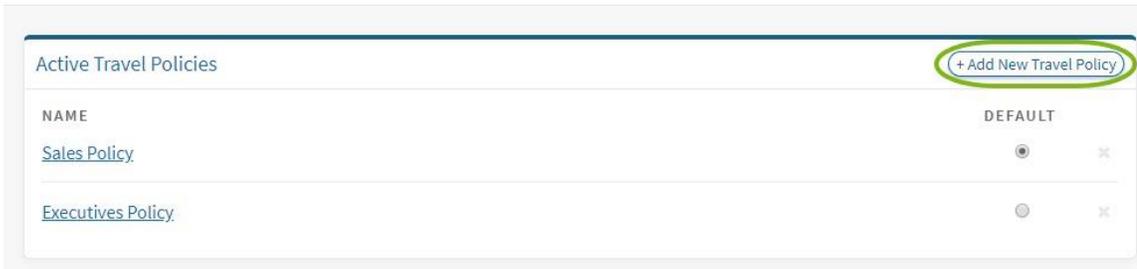


**Step 2:** Click **Travel Policy**.



**Step 3:** Existing policies can be seen here if you need to adjust the settings. To create a new policy, click **Add New Travel Policy**.

## Travel Policy



**Step 4:** Enter the name of the policy, and select if it should be the default policy for the company. Click **Add**.

### Add New Travel Policy

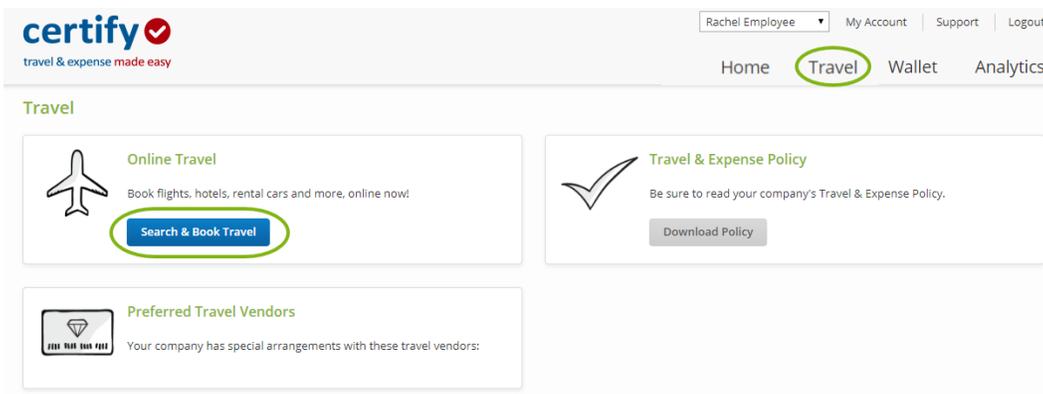
  
 This will be the company's default policy

## Assigning Travelers to a Travel Policy

Within **Certify Travel** by **Amtrav**, you can enforce travel limits by assigning travelers to travel policies.

This article shows you, a **Certify Travel Administrator**, how to assign travelers to a specific **Travel Policy**.

**Step 1:** From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



**Step 2:** Click **Travel Policy**.

**certify** ✓  
Certify Training Account

**BOOK TRAVEL**  
✦ Flights/Rail  
✦ Hotels  
✦ Cars

**TRIP MANAGEMENT**  
✦ My Trips  
✦ Approve Trips

**TOOLS & SETTINGS**  
✦ My Profile  
✦ Travel Reports  
✦ Company Settings  
✦ Users & Travelers  
**✦ Travel Policy**  
AMTRAV  
✦ Contact Us  
✦ Blog

## Welcome Phoebe Travel Admin

Get Started...

- ✦ BOOK A FLIGHT
- ✦ RENT A CAR
- ✦ RESERVE A HOTEL ROOM
- ✦ EDIT YOUR PROFILE
- ✦ CONFIGURE YOUR TRAVEL POLICY

**Step 3:** Click the policy to edit.

Active Travel Policies + Add New Travel Policy

NAME	DEFAULT
<a href="#">Sales Policy</a>	<input checked="" type="radio"/> ✕
<a href="#">Executives Policy</a>	<input type="radio"/> ✕
<a href="#">Coordinators Policy</a>	<input type="radio"/> ✕

**Step 4:** Scroll to the **Members** section at the bottom. Select travelers from the company-wide list to add to the policy. Click **Save Changes**.

Members

<input type="checkbox"/> Approver, Monica	<input type="checkbox"/> Executive, Ross	<input type="checkbox"/> Traveler, Jennifer
<input checked="" type="checkbox"/> Coordinator, Janice	<input type="checkbox"/> Travel Admin, Jon	<input type="checkbox"/> Traveler, Rachel
<input type="checkbox"/> Employee, Chandler	<input type="checkbox"/> Travel Admin, Phoebe	

Save Changes

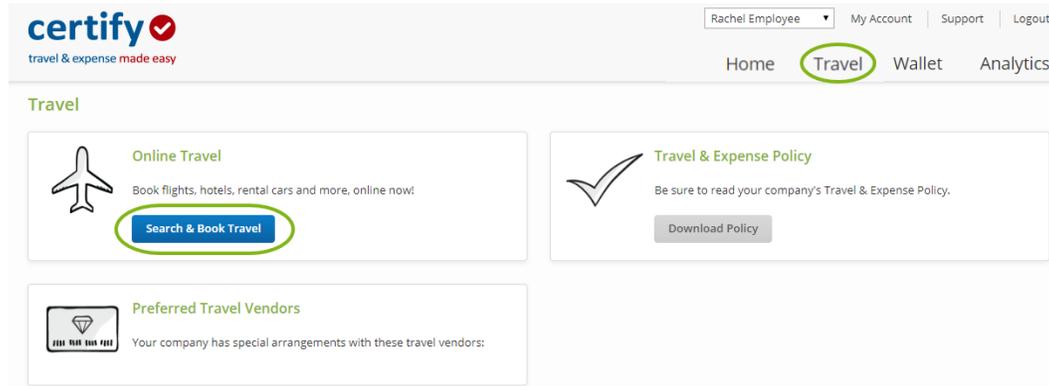
Travelers in this policy are held to the limits and approval rules of this specific policy.

## Assigning Company Credit Cards to a Travel Policy

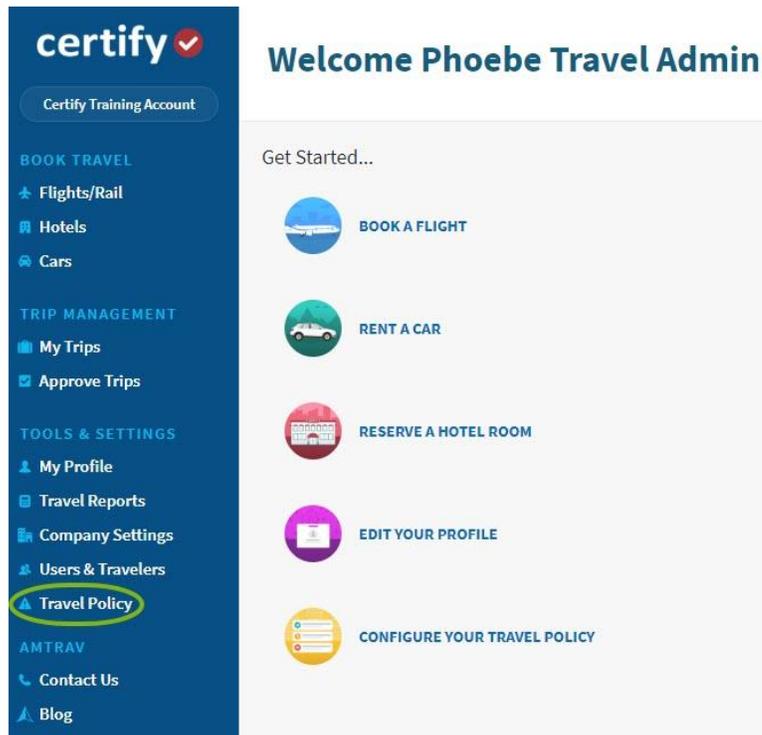
Within **Certify Travel** by **Amtrav**, you can assign credit cards to specific travel policies.

This article shows you, a **Certify Travel Administrator**, how to assign a specific credit card policy to travelers.

**Step 1:** From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



**Step 2:** Click **Travel Policy**.

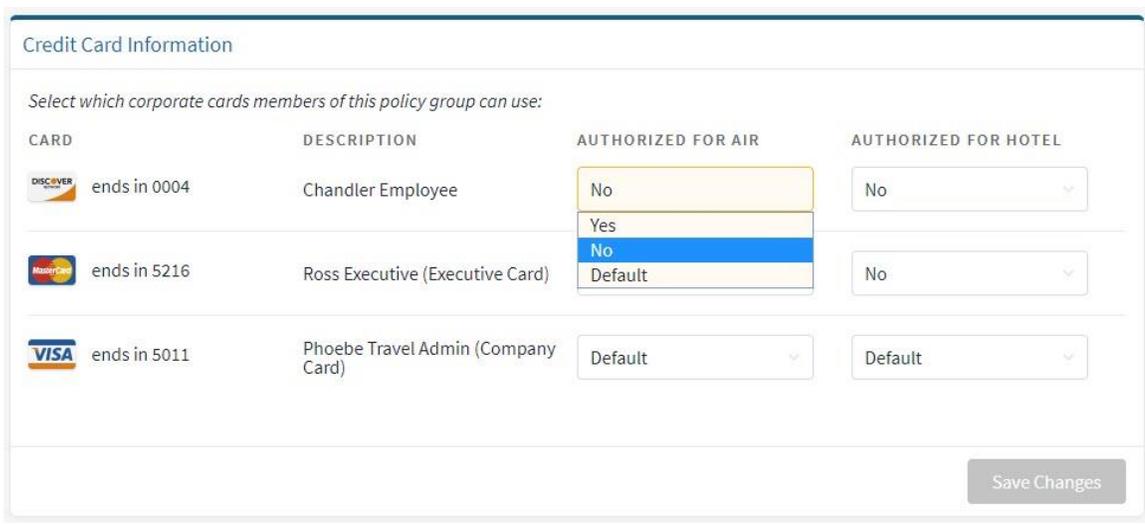


**Step 3:** Click the applicable policy to edit.



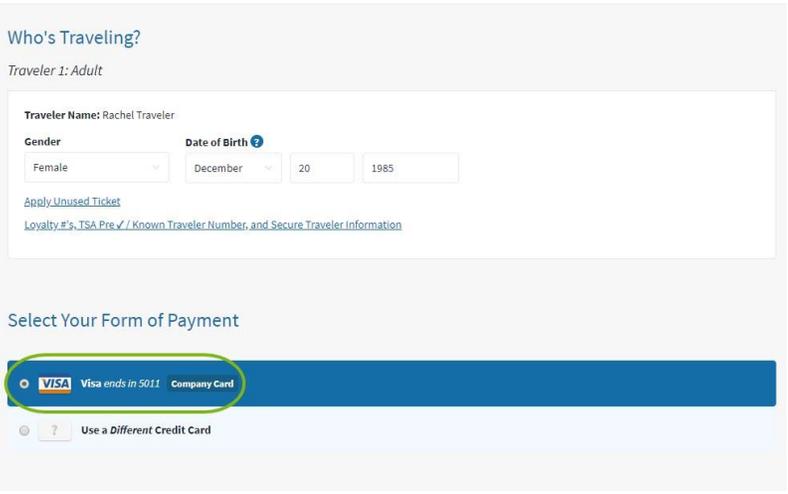
**Step 4:** Scroll to the **Credit Card Information** section. Company credit cards, entered in the Company Settings section shows here.

Select the card(s) that should be available for travelers in this policy by using the **Authorized for Air** and **Authorized for Hotel** drop-down menus. Click **Save Changes**.



**Step 5:** When booking, travelers within the policy can select this card from their payment options.

## Book Your Flight

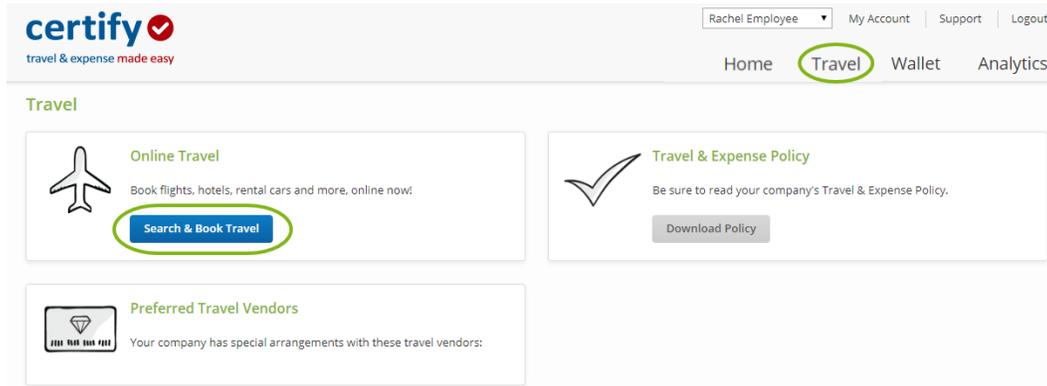


## Rental Car Policies

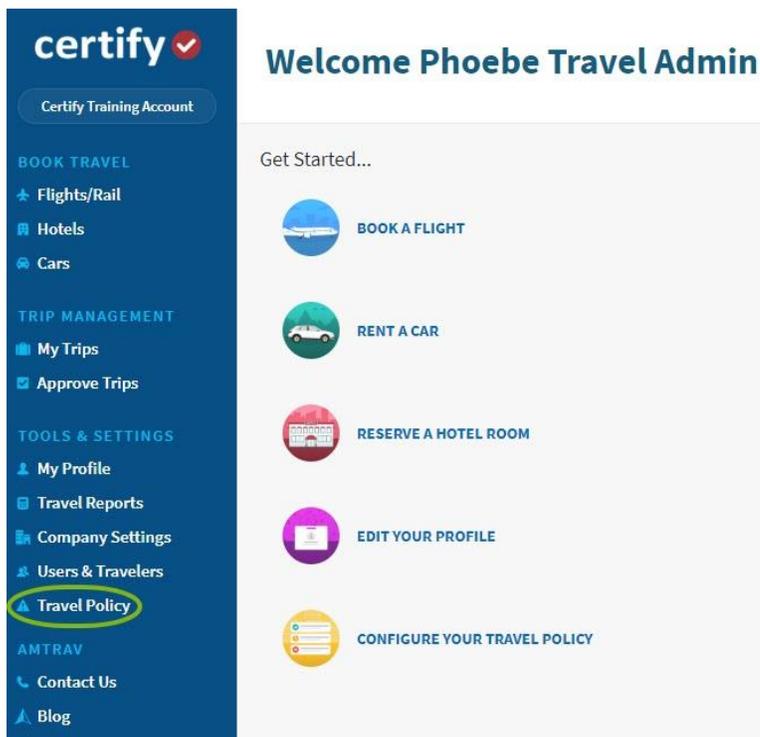
Within **Certify Travel** by **Amtrav**, you can establish rental car travel policy settings for your company's travelers.

This article shows you, a **Certify Travel Administrator**, the different car policy options and how to edit your settings.

**Step 1:** From your account homepage, click **Travel**. Then, click **Search & Book Travel**.



**Step 2:** Click **Travel Policy**.



**Step 3:** Click the policy to edit.

NAME	DEFAULT
<a href="#">Sales Policy</a>	<input checked="" type="radio"/> <input type="checkbox"/>
<a href="#">Executives Policy</a>	<input type="radio"/> <input type="checkbox"/>
<a href="#">Coordinators Policy</a>	<input type="radio"/> <input type="checkbox"/>

**Step 4:** Scroll to the **Car Rental Policy** section and enter your settings. Click **Save** at the bottom.

Car Rental Policy

CAR OPTIONS

Maximum Daily Rate <sup>?</sup>  Largest Permitted Car Type <sup>?</sup>  Preferred Vendors Only? <sup>?</sup>  Yes  No

LOWEST LOGICAL RATE

Maximum Rate Above Lowest Logical <sup>?</sup>  Minimum Car Size to Consider <sup>?</sup>

EXTRAS

Navigation Units <sup>?</sup>

Save Changes

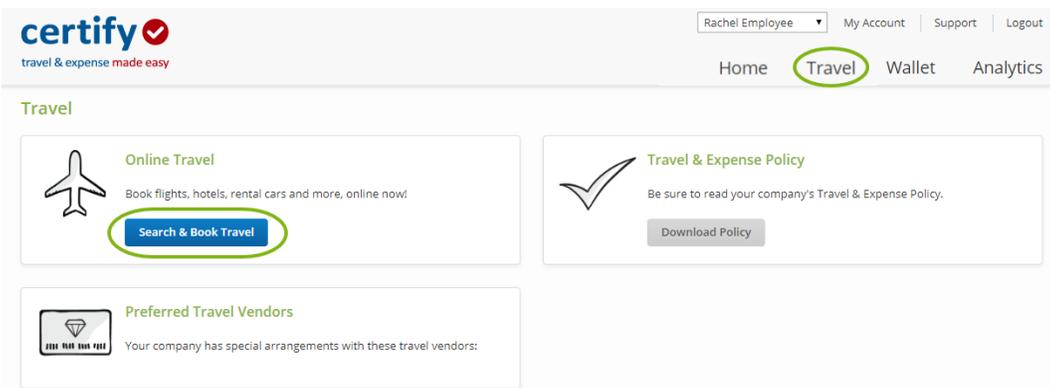
- **Maximum Daily Rate:** Dollar limit for a rental car, per day.
- **Largest Permitted Car Type:** Highest car class that can be booked.
- **Preferred Vendors Only:** Whether travelers should only book with your preferred rental car vendors.
- **Maximum Rate Above Lowest Logical:** The "lowest logical" rate is the most logical rate for that specific rental - taking into account the locations, car types, and time of year. This is how much you would allow a traveler to book **over** that amount.
- **Minimum Car Size to Consider:** Restricts the lowest class of car a traveler can book.
- **Navigation Units:** Whether you permit travelers to add GPS Devices when picking up their car.

## Hotel Policies

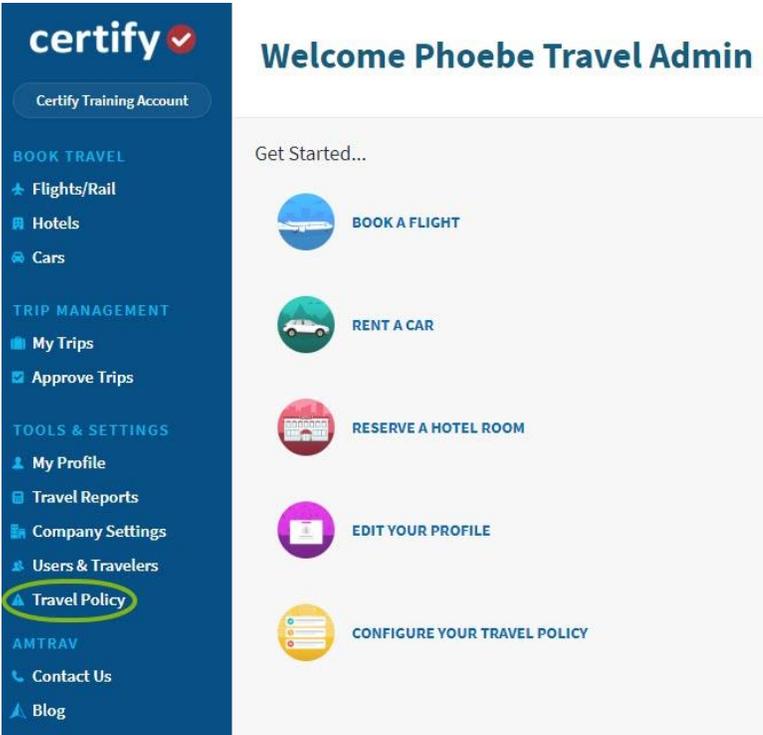
Within **Certify Travel** by **Amtrav**, you can establish hotel policy settings for your company's travelers.

This article shows you, a **Certify Travel Administrator**, the different hotel travel policy options and how to edit your settings.

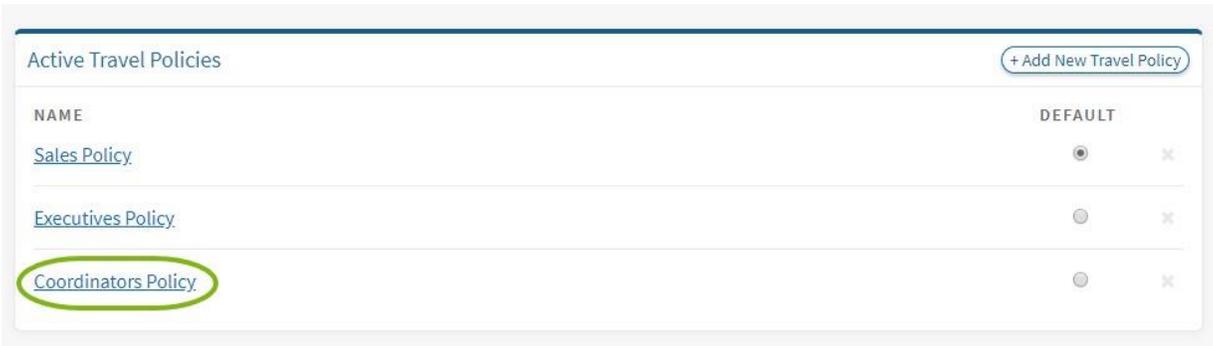
**Step 1:** From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



Step 2: Click Travel Policy.



Step 3: Click the policy to edit.



**Step 4:** Scroll to the **Hotel Policy** section and enter your settings. Click **Save** at the bottom.

The screenshot shows a web form titled "Hotel Policy" with three main sections: "MAXIMUM NIGHTLY RATES", "LOWEST LOGICAL RATE", and "HOTEL PROPERTIES".

- MAXIMUM NIGHTLY RATES:** Includes a "Maximum Nightly Rate" field set to "\$ 250", an "Exception City" field with "New York, NY" and a "+ Add a New Exception City" button, and a "Max. Rate" field set to "\$ 350".
- LOWEST LOGICAL RATE:** Includes a "Maximum Rate Above Lowest Logical" field set to "\$ 100", a "Min. Star Rating to Consider" dropdown menu set to "Three Star", and a "Max. Distance for Alt. Properties (miles)" field set to "10".
- HOTEL PROPERTIES:** Includes a "Maximum Permitted Star Rating" dropdown menu set to "4 Star" and a "Preferred Properties Only?" section with radio buttons for "Yes" and "No", where "No" is selected.

A "Save Changes" button is located at the bottom right of the form.

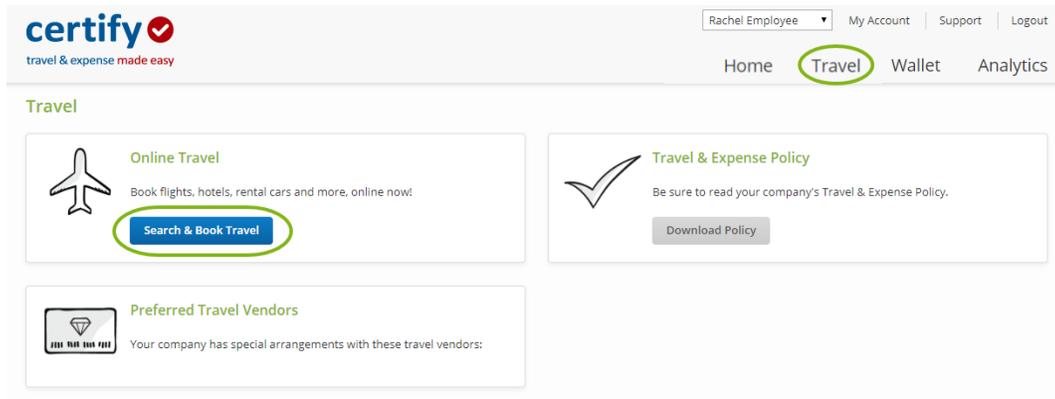
- **Maximum Nightly Rate:** Dollar limit for a hotel room, per night.
- **Exception Cities:** Some cities are more expensive than others, and travelers may have trouble staying within your room limits based on the location. Here, you can enter specific cities to allow different limits.
- **Preferred Properties Only:** Whether travelers should only book with your preferred hotel vendors.
- **Maximum Permitted Star Rating:** The maximum star-rating for a hotel you will allow to be booked.
- **Maximum Rate Above Lowest Logical:** The "lowest-logical" rate is the most logical rate for that specific room - taking into account the locations, hotel, and days of the year. This is how much you would allow a traveler to book **over** that amount.
- **Minimum Star Rating to Consider:** Give the lowest logical rate. This may affect the star ratings you allow.
- **Maximum Distance for Alternate Properties:** Given the lowest logical rate, this may affect the radius search results should cover.
- **Prepay All Hotels:** Most often, hotels simply reserve a room upon booking and do not charge until check-out. This setting requires the traveler provide a physical credit card upon reserving the room. Use this setting if your travelers are reserving on a card this is not a card they physically carry, and to prepay instead of simply reserve.

## Adding Air Travel Policies

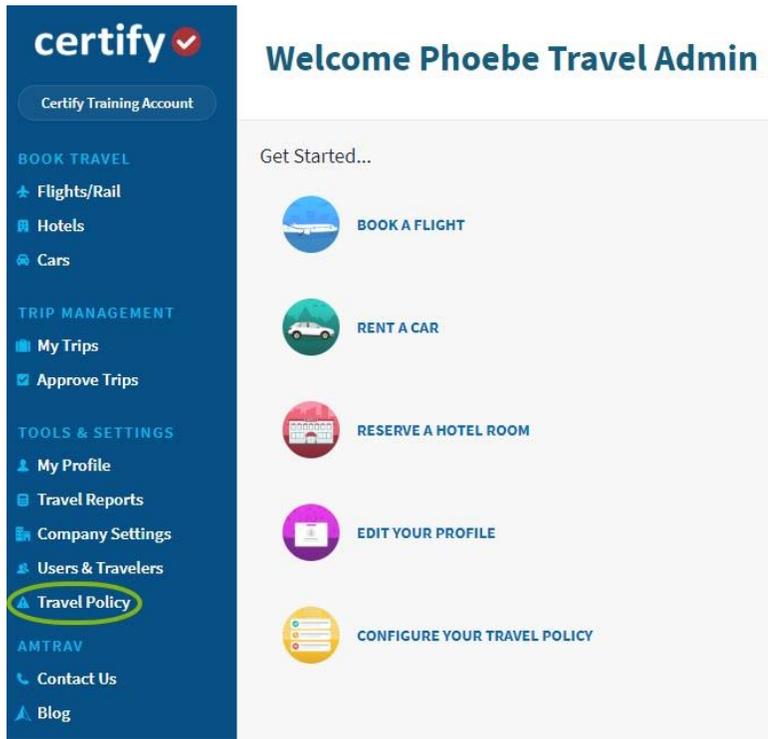
Within **Certify Travel** by **Amtrav**, you can establish air travel policy settings for travelers in your company.

This article shows you, a **Certify Travel Administrator**, the different **Air Policy** options as well as how to edit your settings.

**Step 1:** From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



**Step 2:** Click **Travel Policy**.



**Step 3:** Click the policy to edit.

NAME	DEFAULT
<a href="#">Sales Policy</a>	<input checked="" type="radio"/> ✕
<a href="#">Executives Policy</a>	<input type="radio"/> ✕
<a href="#">Coordinators Policy</a>	<input type="radio"/> ✕

**Step 4:** Scroll to the **Air Policy** section and enter your settings. Click **Save** at the bottom.

**Air Policy**

**MAXIMUM AIRFARE**

Maximum Airfare (domestic) ? \$ 500    Maximum Airfare (international) ? \$ 900    Maximum Airfare Application Apply for Whole Trip

**AUTHORIZED CABIN**

Authorized Cabin (domestic) ? Economy    Authorized Cabin (international) Premium Economy

**AIRLINES**

Preferred Carriers Only? ?  Yes  No    Ultra Low Cost Carriers ? Offer

**LOWEST LOGICAL FARES**

Maximum Fare Above Lowest Logical ? \$ 200    Additional # of Stops to Consider ? 1 Extra Stop    Time Flexibility (Hours) ? (Any Time Same Day)

**PREMIUM SEATING**

Maximum Premium Seat Price ? \$    Allow Southwest EarlyBird  Yes  No

**FARE TYPES**

Basic Economy Fares ? Offer    Refundable Only Searches ? Permit But Consider Non-Refundable Fares for Policy Check

**TRAVELERS FLYING TOGETHER**

Maximum Travelers on Same Flight 10    Maximum Execs on Same Flight 2

**PURCHASE WINDOW**

Minimum Advance Purchase ? 14

Save Changes

- **Maximum Advance Purchase:** Number of days you allow users to book prior to the travel date.
- **Maximum Airfare Domestic/International:** Dollar limit for airfare.
- **Authorized Cabin Domestic/International:** Highest level cabin you allow to be booked.
- **Preferred Carriers Only:** Whether travelers should only book with your preferred air vendors.
- **Basic Economy Fares:** If travelers are allowed to book these, per carrier.
- **Ultra Low Cost Carriers:** If travelers are allowed to book these, per carrier.
- **Maximum Fare Above Lowest Logical:** The "**lowest logical**" fare is the most logical fare for that specific trip - taking into account the locations, times of day, and days of the year. This is how much you would allow a traveler to book **over** that amount.
- **Maximum Premium Seat Price:** Maximum amount you allow travelers to spend on premium seats.
- **Allow Southwest EarlyBird:** Your search results pull in Southwest flight options when applicable. This option enables users to use the EarlyBird check-in option.
- **Refundable Only Searches:** Whether you'd like search results to show only refundable options.
- **Maximum Travelers on Same Flight:** If you have limits as to how many people from your company can be on the same flight.
- **Maximum Execs on Same Flight:** If you have limits as to how many executives from your company can be on the same flight.

## Workflow

### *Enabling Travel Alert Messaging*

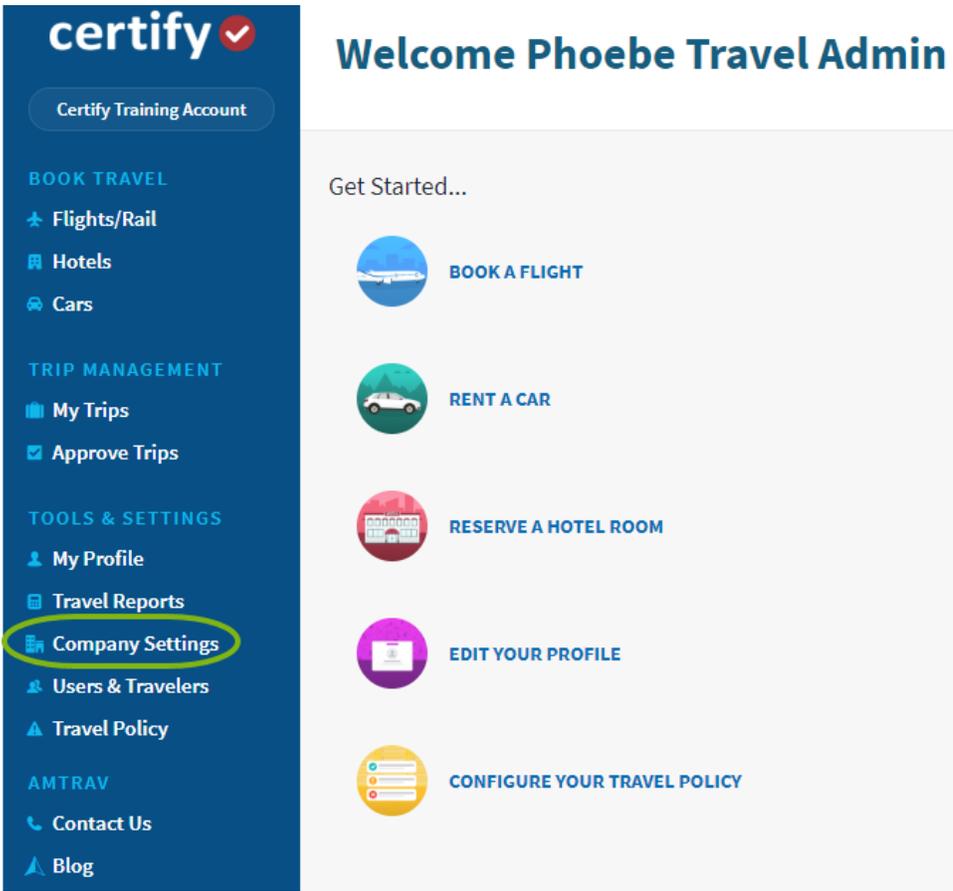
**Travel Alert Messaging** allows you to create custom alerts for your travelers. Alerts are available for each of the following areas:

- Default homepage (after logging in)
- Flight search
- Hotel search
- Car search

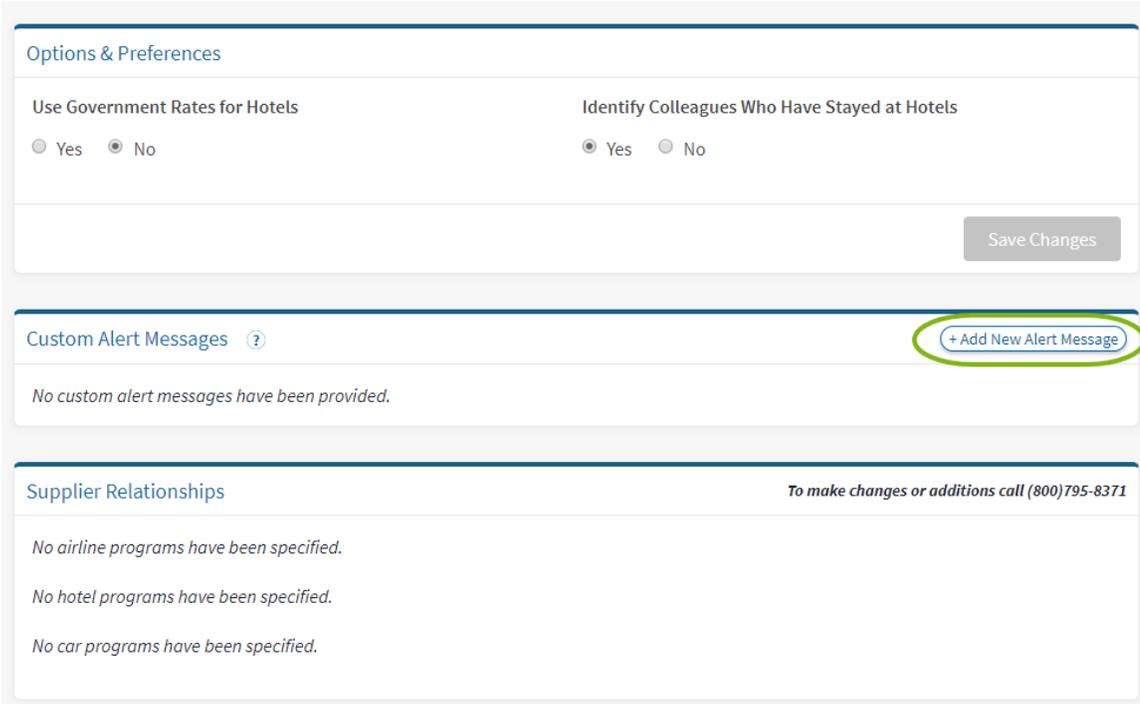
For example, you might want to set an alert to remind travelers they won't be reimbursed unless they keep copies of their itemized receipts.

This article shows you, a **Certify Travel by Amtrav Administrator**, how to enable **travel alert messaging**.

**Step 1:** On your **Certify Travel** homepage, click **Company Settings**.



Step 2: Scroll to Custom Alert Messages and click Add New Alert Message.



Step 3: Enter your travel alert message, choose a Display Location, and choose an Expirate Date/Time. When complete, click Add.

## Custom Alert Message ✕

**Message**

Decline car insurance if you have coverage in your contracted rate.

**Display Location** ?  Home  Air  Hotel  Car

**Expiration time** ?

[Cancel](#) [Add](#)

**Please Note:** If your company has several administrators, we recommend signing your initials to identify you as the author of the alert message.

Your alert message now appears in the chosen **Display Location**.

### Rent a Car

TRAVELER

ⓘ Decline car insurance if you have coverage in your contracted rate. ✕

Pick-up Location  Drop-off Location  Recent Searches

## Booking and Workflow Travel Policy Details

Within **Certify Travel** by Amtrav, you can establish your company's approval workflow and manage booking notifications.

This article shows you, a **Certify Travel Administrator**, how to edit booking and workflow management and explains the available options.

**Step 1:** From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.

**certify** travel & expense made easy

Rachel Employee | My Account | Support | Logout

Home **Travel** Wallet Analytics

### Travel

**Online Travel**  
Book flights, hotels, rental cars and more, online now!

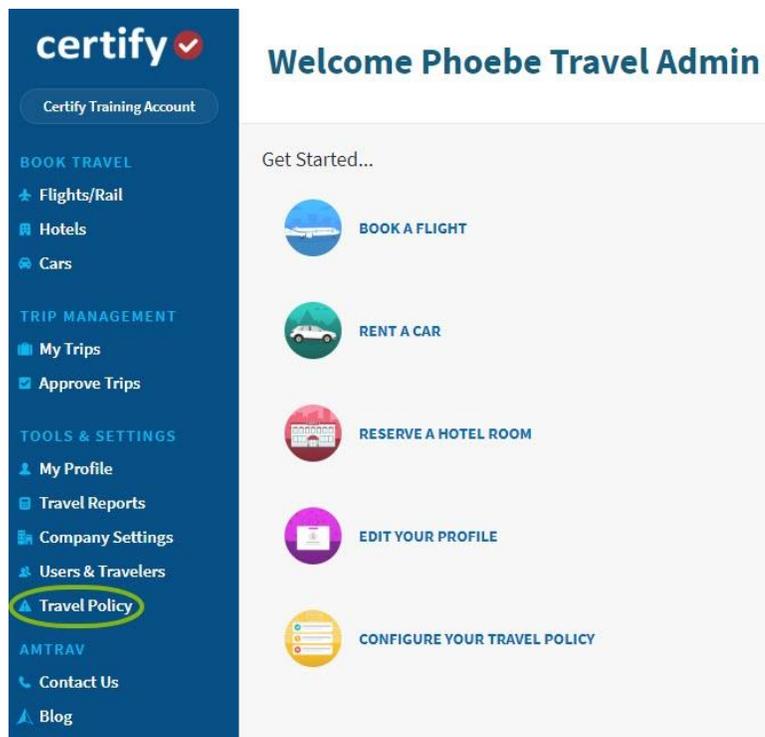
[Search & Book Travel](#)

**Travel & Expense Policy**  
Be sure to read your company's Travel & Expense Policy.

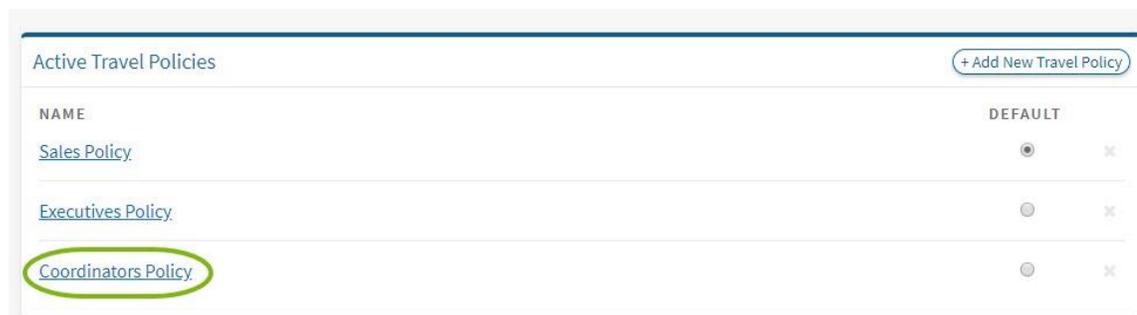
[Download Policy](#)

**Preferred Travel Vendors**  
Your company has special arrangements with these travel vendors:

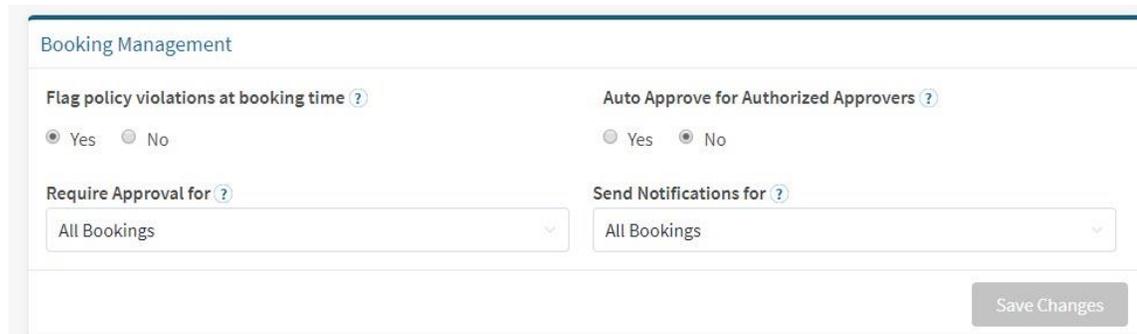
**Step 2:** Click Travel Policy.



**Step 3:** Click the policy to edit.



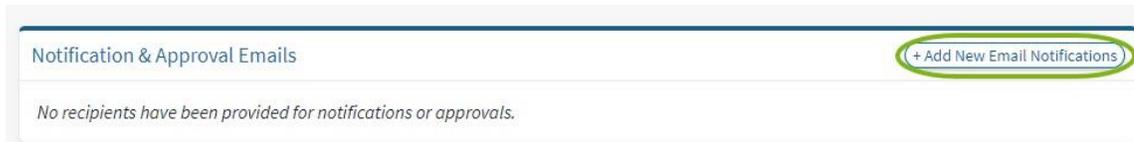
**Step 4:** Scroll to the **Booking Management** section and enter your settings.



- **Flag policy violations at booking time:** Whether to notify travelers of policy violations prior to booking.

- **Send Notifications for:** If an email notification should be sent to someone at your company at the time booking; for out of policy bookings only; or for no bookings. For example, sending notifications to a secretary who keeps track of all travel.
- **Require Approval for:** If trip approval is required for all bookings; out of policy bookings only; or for no bookings.
- **Auto-Approve for Authorized Approvers:** If someone with approval rights needs to be able to approve their own bookings.

**Step 5:** Scroll to **Notification and Approval Emails** and designate the **Approver** (or someone who should simply receipt email notifications when a booking takes place). Click **Add New Email Notification**.



**Step 6:** Enter the designated approver (or person who should receive an email notifying them that a booking took place) for the travelers in this specific policy, and which notifications they should receive. Click **Add**.

**Step 7:** The person(s) designated in the **Notification and Approval Emails** section now receives approval requests based on the requirements for trip approval.

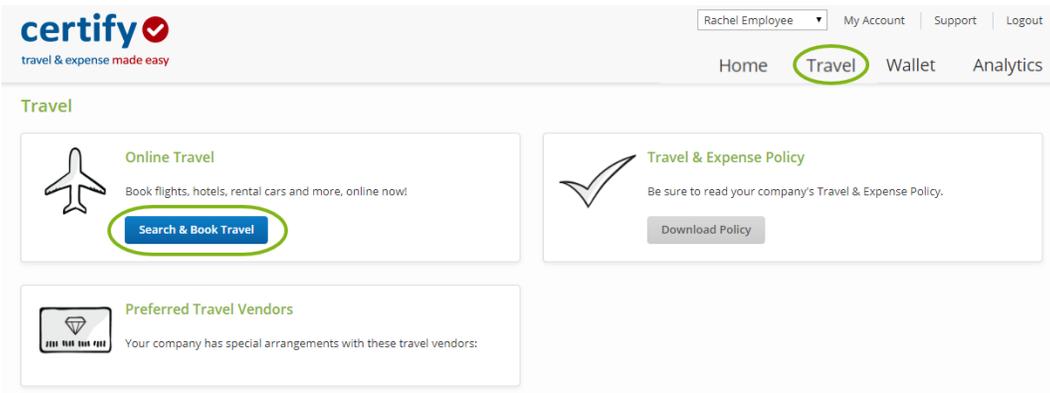
***Please Note:** Approval within **Certify Travel** is one-level. If you enter more than one **Approver**, the trip still only needs to be approved by just one person. Trips must be approved within 24 hours of booking.*

## Custom Search Locations for Frequent Travel Use

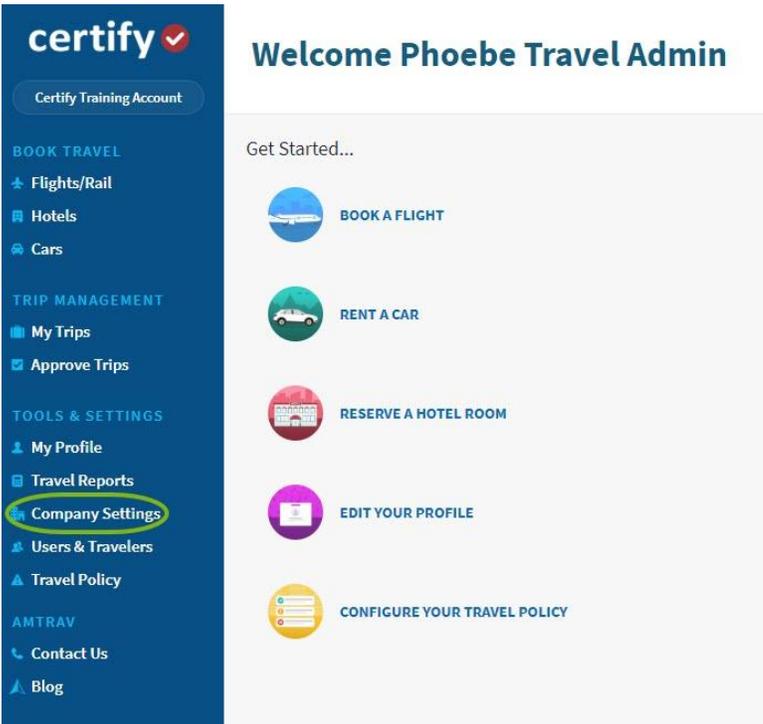
Within **Certify Travel** by **Amtrav**, an administrator can pre-load frequently used locations for flights, hotels, and car rentals.

This article shows you, a **Certify Travel Administrator**, how to add custom locations for use across the company.

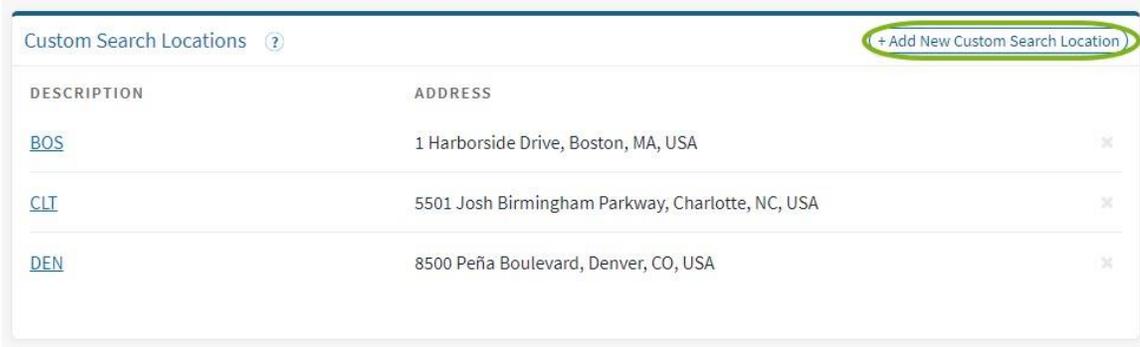
**Step 1:** On your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



Step 2: Click Company Settings.



Step 3: Scroll to the Custom Search Locations section. Click Add New Custom Search Location.



**Step 4:** Enter the details for the location, and click **Add**.

### Custom Location ✕

**Address**

**Description**



Cancel Add

The location is added to the **Company Settings** page.

Custom Search Locations <span>?</span>		<a href="#">+ Add New Custom Search Location</a>
DESCRIPTION	ADDRESS	
<a href="#">BOS</a>	1 Harborside Drive, Boston, MA, USA	✕
<a href="#">CLT</a>	5501 Josh Birmingham Parkway, Charlotte, NC, USA	✕
<a href="#">DEN</a>	8500 Peña Boulevard, Denver, CO, USA	✕
<a href="#">MCO</a>	1 Jeff Fuqua Blvd, Orlando, FL 32827, USA	✕

It will also be available in search boxes.

The screenshot shows a travel booking interface with the following elements:

- Buttons for **Round Trip**, **One Way**, and **Multi City**.
- From** field: A dropdown menu is open, showing options: **MCO** (highlighted), **MCO (Orlando, FL)** (Account Address), and **Orlando Intl. Airport (MCO) Orlando, FL** (Airport).
- To** field: A text input box with the placeholder "A city, town, or airport".
- Return** field: A date picker.
- Anytime** field: A dropdown menu.
- Three calendar views for **September 2019**, **October 2019**, and **November 2019**.

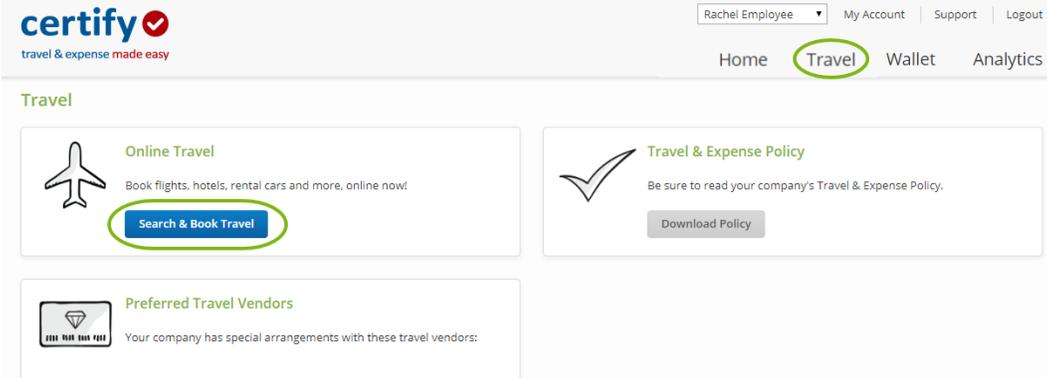
### Optional Billing Fields for Travel Bookings

Within **Certify Travel by Amtrav**, **Optional Billing Fields** can be used to require travelers to enter further details. For example, identifying a cost center, reason for the trip, or project code.

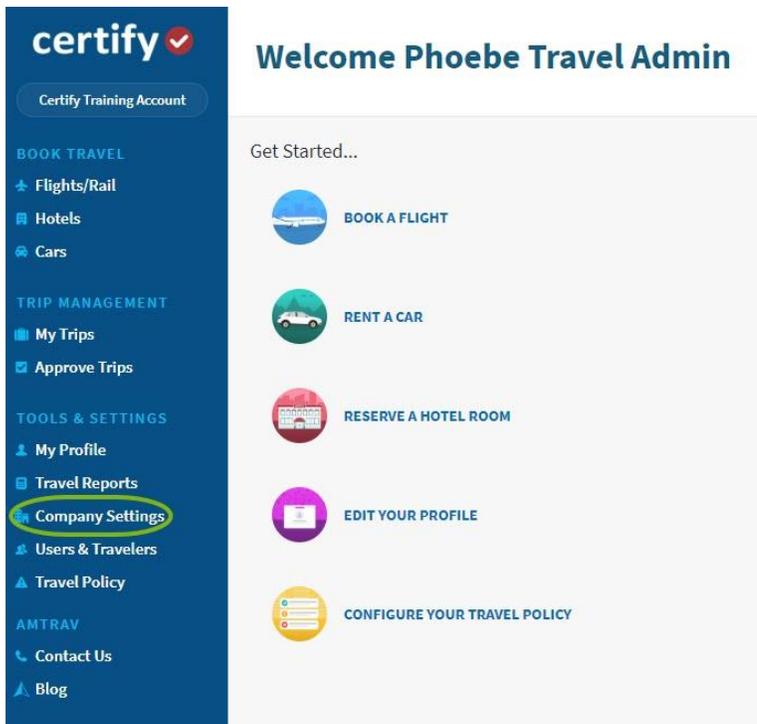
This article shows you, a **Certify Travel Administrator**, how to add **Optional Billing Fields**.

**Please Note:** The maximum amount of fields is six, which combines both **Optional Billing Fields** and **Employee ID Fields**.

**Step 1:** From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



**Step 2:** Click **Company Settings**.



**Step 3:** Scroll to the **Optional Billing Fields** section. Click **Add New Optional Billing Field**.



**Step 4:** Add the **Field Name**, decide if the options should be pre-set (a drop-down menu) or free-text, and if the field is mandatory or optional. Click **Add**.

### Optional Billing Field ✕

Field Name

Provide pre-set options ?  Accept free-form text input ?

**Pre-set options**

Sales	<a href="#">Delete</a>	<a href="#">Edit</a>
Marketing	<a href="#">Delete</a>	<a href="#">Edit</a>
Client Meeting	<a href="#">Delete</a>	<a href="#">Edit</a>

Mandatory with all bookings ?

**Step 5:** The field is now saved.

### Optional Billing Fields ? + Add New Optional Billing Field

<a href="#">Event</a>	<span>✕</span>
<a href="#">Trip Reason</a>	<span>✕</span>

It will show on the **Book Your Flight** screen, right before the traveler books their trip.

**Please Note:** Optional Billing Fields can also be set per travel policy within the **Travel Policy** section in the left panel.

### Special Instructions

(Optional) Add special instructions for your travel consultant (fees may apply)

#### Optional Billing Fields

**Note:** Fields marked with an asterisk (\*) are required.

**Trip Title**

**Event**

**Trip Reason**

The total price for your purchase is **\$432.12**. Pricing is in U.S. dollars. Airline tickets are non-refundable, except within 24 hours of completing your purchase. Name changes are not permitted. By clicking "Purchase" you consent to these terms.

To see more Terms and Conditions, [click here](#).

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