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**

![Hotel search interface](image)

**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 hotel search results](image)

**Step 5**: Select the **Room Type**.
Step 6: Confirm the details of your selection. The **Policy Status** will alert you if your booking is outside of company policy. Click **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.
**Step 8:** From the **Trip Summary** page, email or print the itinerary, or add a rental car.
**Booking Travel**

**Trip Details**

**Trip Summary**
- Booking User: 2949183726
- Booking Date: September 10, 2019
- Status: CONFIRMED
- Booked By: Rachel Traveler

**Travels**
- RT: Rachel Traveler

**Itinerary**
- Harrah's Resort Southern California
  - Wednesday, October 2, 2019 - Saturday, October 5, 2019
  - Room Type: Corporate Rates Resort Fees $75.00 USD P/Stay Check In Time 1600 Check Out Time 1100 Our Spacious Non-Smok Luxury One King Bed/W/Features That Include A 37" FlatScreen Digital Pay Per View Motion Picture/ Flipping Safe/Desk/Room Coffee-And-Condiments-Well/Superb/Boeheim & Loaves Of Bread/ Bathroom Equipped W/Hot & Cold Show Air Conditioning Individually C
  - Occupants: 1 Adult
  - Email: Support@AmTrav.com
  - Phone: 760-752-3100
  - Address: 777 Harrah's Rincon Way
  - City: Pala, CA 92054

**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**.
Booking Travel

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

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

**Step 7:** From the **Trip Summary** page, email or print the itinerary, as well as add a hotel or rental car.
Step 8: You will receive a confirmation email when the reservation has been approved.
Booking Travel

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.
**Step 4:** Select your car by clicking the price.

**Step 5:** Confirm the details of your selection. The **Policy Status** alerts you if you are outside of company policy. Click **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.
Step 7: From the Trip Summary page, email or print the itinerary, or add a hotel or another rental car reservation.
**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**

```
<table>
<thead>
<tr>
<th>Round Trip</th>
<th>One Way</th>
<th>Multi City</th>
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<tbody>
<tr>
<td>From</td>
<td>To</td>
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<tr>
<td>BOS (Boston, MA)</td>
<td>New York, NY</td>
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Airports
- Boston (BOS) - 1 mi
- Worcester (ORH) - 43 mi
- Manchester (MHT) - 44 mi
- South Station - 1 mi
- Back Bay Station - 2 mi

Dates
- From: Oct 1
- To: Oct 5

September 2019

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October 2019

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November 2019

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```

Step 4: Choose a train from the search results.

**Please Note:** If Round Trip is selected, Leg 1 and Leg 2 are selected individually.
Step 5: Confirm the details of your selections. The Policy Status alerts you if you are outside of company policy.
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.
Step 7: From the Trip Summary page, email/print the itinerary, or add a hotel or rental car reservation.

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

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

<table>
<thead>
<tr>
<th>trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking #</td>
</tr>
<tr>
<td>1943158539</td>
</tr>
</tbody>
</table>

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

**Trip Details**

**Trip Summary**

**New York**

- **Booking Number:** 1949195838
- **Booking Date:** September 11, 2019
- **Status:** PENDING

**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**.

![Loyalty Programs](image)

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

![Add New Frequent Guest Number](image)

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

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

**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**.
My Profile

Step 2: Click My Profile.

Welcome Rachel Traveler

Get Started...

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

Step 3: In the Passport section, enter your passport details. Click Save Changes to add to your profile.
**TSA Known Traveler Numbers**

Certify Travel by Amtrak 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.
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.

**Step 2:** Click My Profile.
Step 3: In **Options/Preferences**, enter your preferences for flights, hotels, and car rentals. Click **Save Changes** to add to your account.
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**.

![Add New Email Notifications]

The person who books a trip will automatically receive an email confirmation. You can list here other addresses that should also receive confirmations and/or invoices automatically.

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.

![Add New Email Notifications]

**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.
Reviewing Travel

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.

![Certify Homepage](image)

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

![Welcome Phoebe Travel Admin](image)

**Step 3:** Click Add New User.
Users & Travelers

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

If you are granting the Coordinator role, you can select the users this person can book for at the bottom of their profile.
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.
Step 4: Enter the card details. Click **Add** when complete.
**Configuring Travel**

**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.

![Credit Cards Table]

**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 Website]

**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.
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](image)

**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](image)

**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**.

![Certify homepage](image)

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

Step 3: Click the policy to edit.

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.

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**

**Who’s Traveling?**

**Traveller 1: Adult**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>December 2018</td>
</tr>
</tbody>
</table>

**Select Your Form of Payment**

- **Visa**
- **Company Card**
- **Use a Different Credit Card**
**Configuring Travel**

**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.
Configuring Travel

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

- 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.
Configuring 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.

- **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.

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

- **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 Amtrak 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 **Expire Date/Time**. When complete, click **Add**.
Configuring Travel

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.

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.
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.
Configuring Travel

- **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.

The location is added to the Company Settings page.
It will also be available in search boxes.

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**.
Configuring Travel

Step 5: The field is now saved.

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.
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