certify

travel & expense made easy

Certify User Guide

AmTrav

Copyright © 2020

All Rights Reserved

This version is current as of January 1, 2020

For continuously updated instructions, please visit our Help Center within the Certify Support tab.

Table of Contents

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.*

Table of Contents

Booking Travel 4
Travel Reservations 4
My Profile 25
Editing your Profile 25
Reviewing Travel 34
Approving 34
Configuring Travel 37
Travel Users 37
Travel Policy 44
Workflow 55

Booking Travel

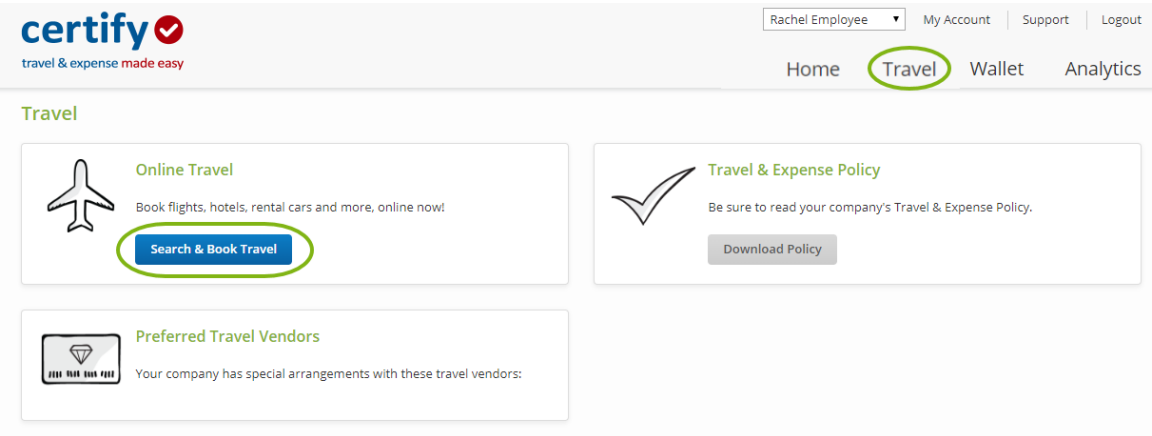
Travel Reservations

Hotel Reservations

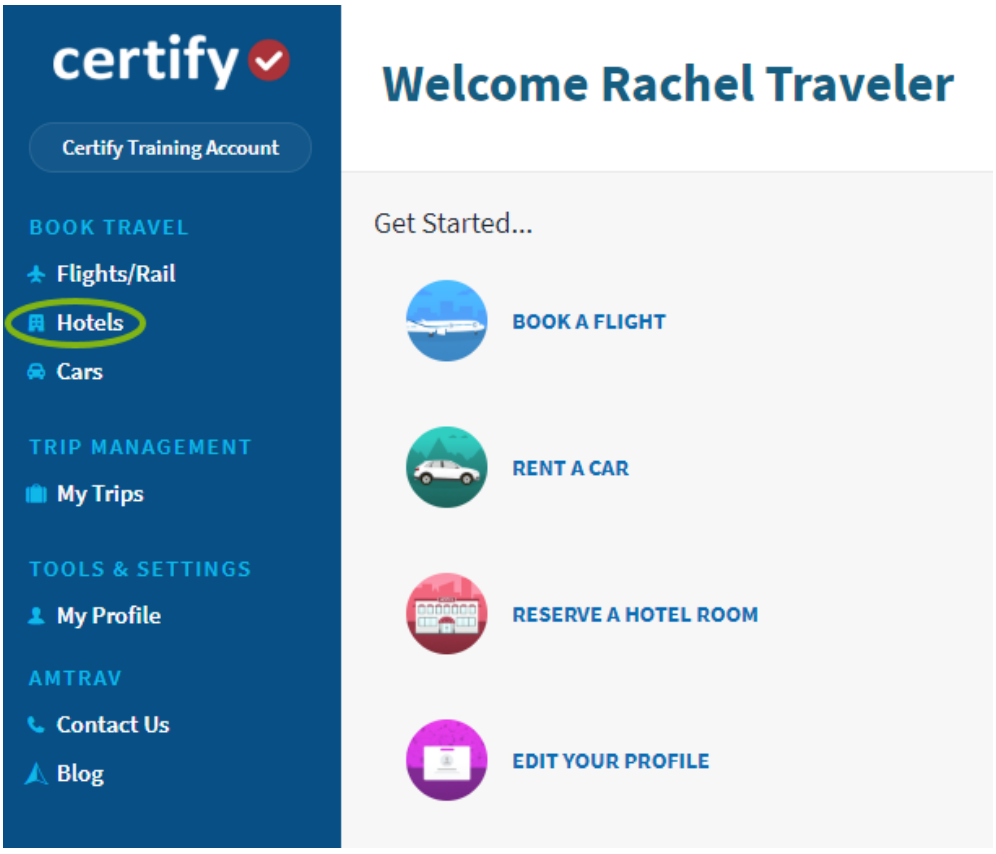
Certify Travel partners with **Amtrav** so users can book flights, hotels, and car reservations quickly and effortlessly within **Certify's** portal

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

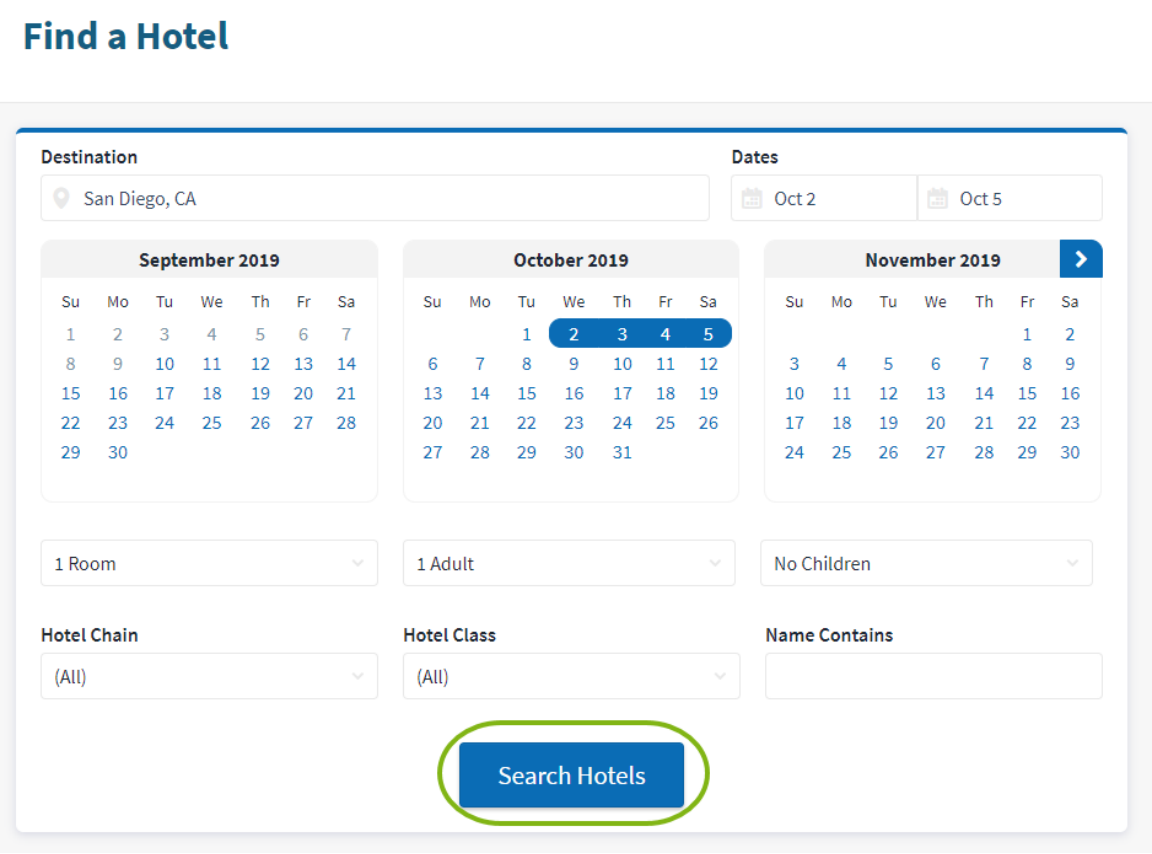
Step 1: On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



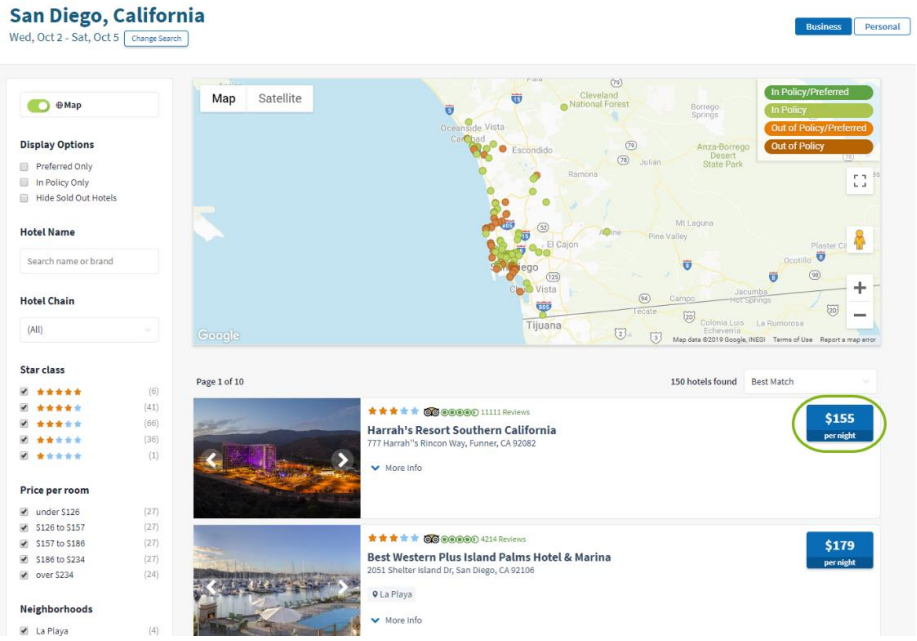
Step 2: Click **Hotels**.



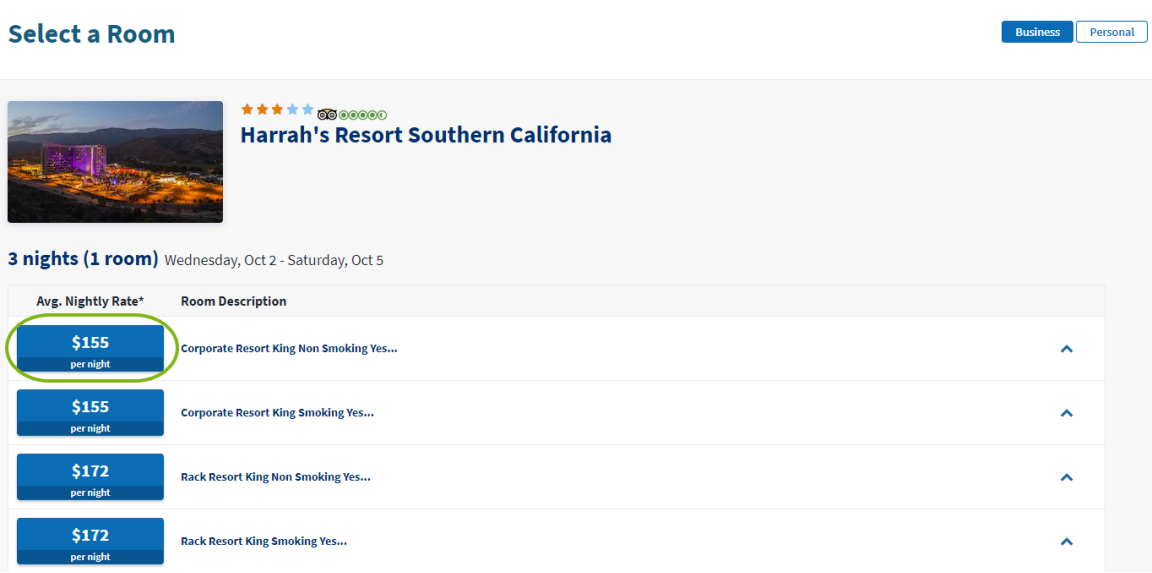
Step 3: Enter a city, address, or airport in the location field provided. Enter a **check-in** and **check-out** date, then select the **number of rooms**, **number of adults**, **number of children**, and **hotel chain/class** from the drop-down menus. Click **Search Hotels**.



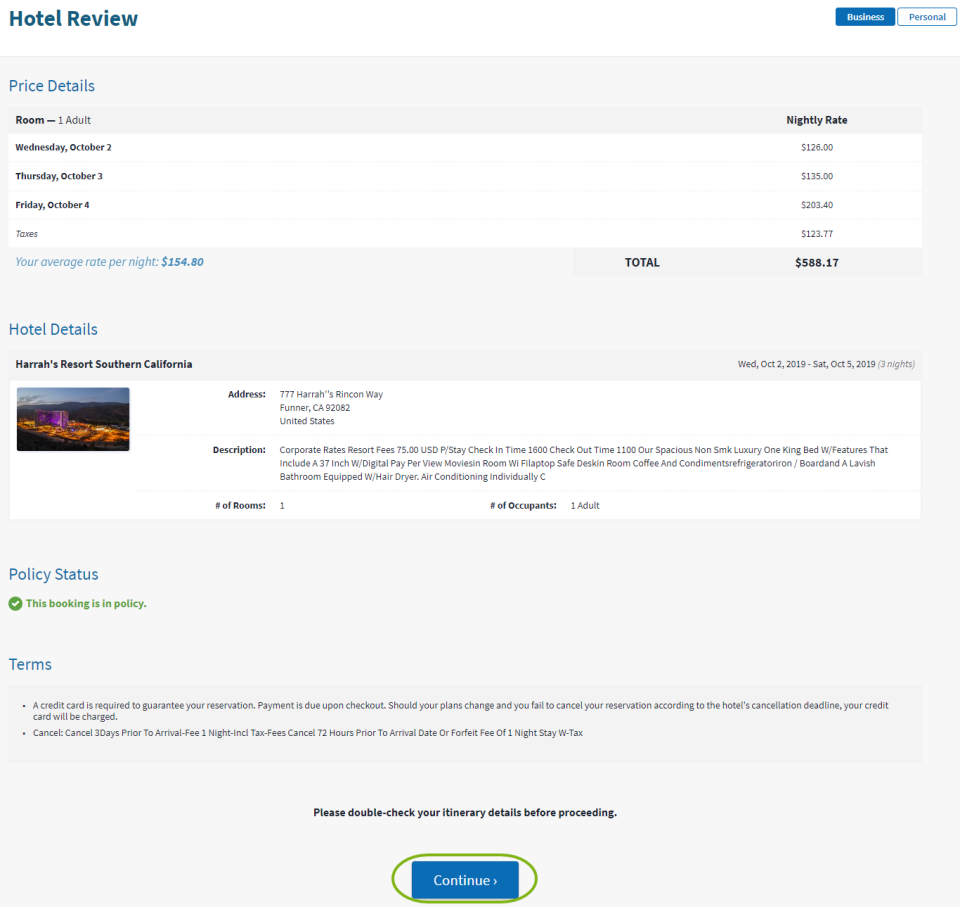
Step 4: Filter by **Preferred Hotel**, **In-policy options**, **Hotel Chain**, **Class**, **Price per room**, and **Neighborhood**. Select a hotel by clicking the price.



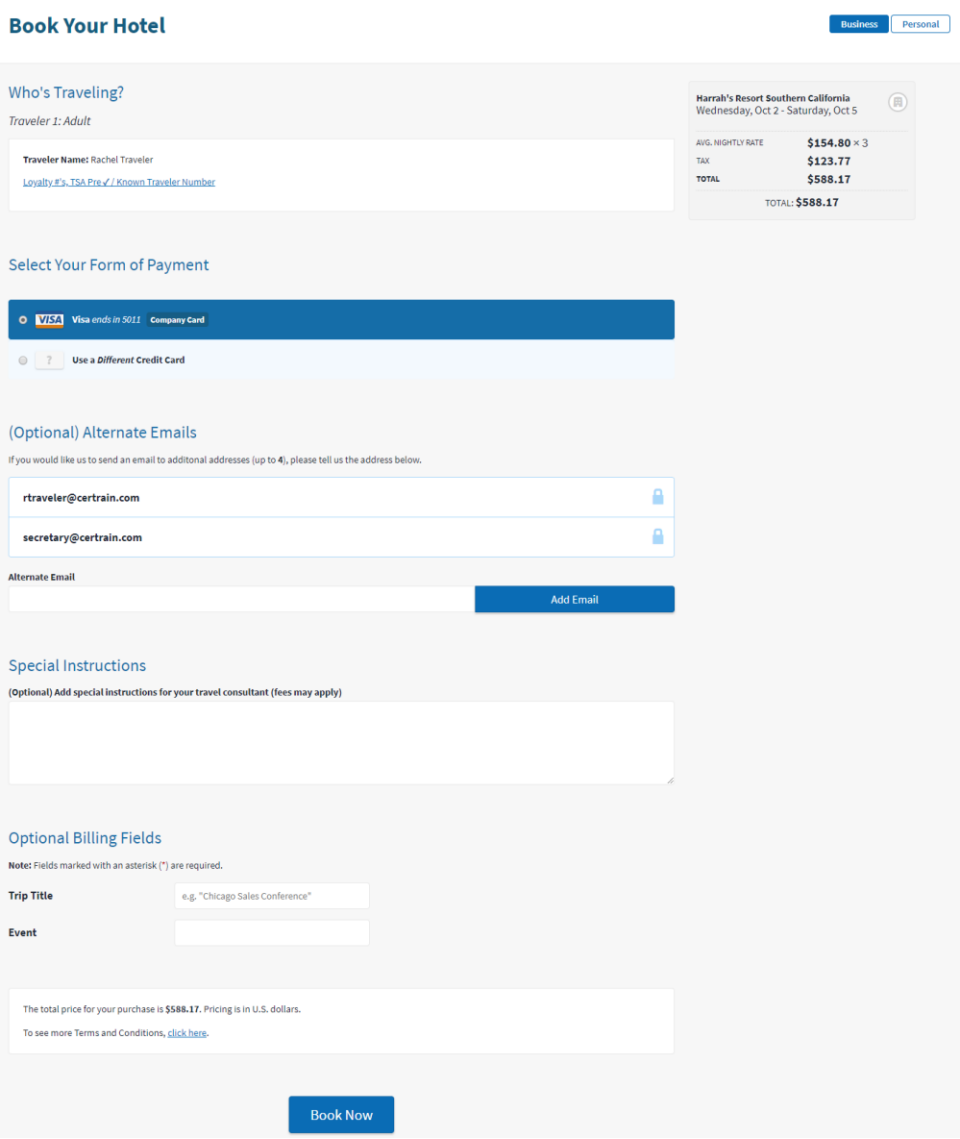
Step 5: Select the **Room Type**.



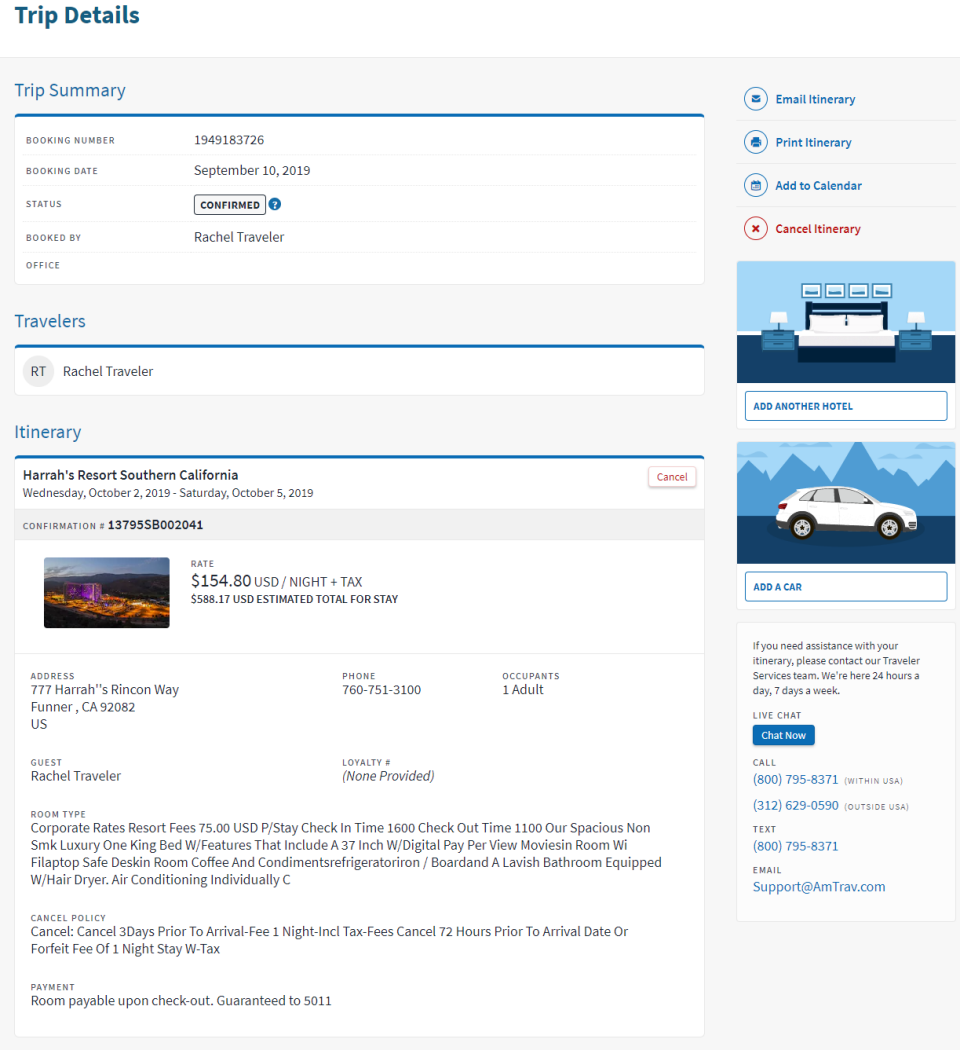
Step 6: Confirm the details of your selection. The **Policy Status** will alert you if your booking is outside of company policy. Click **Continue**.



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.



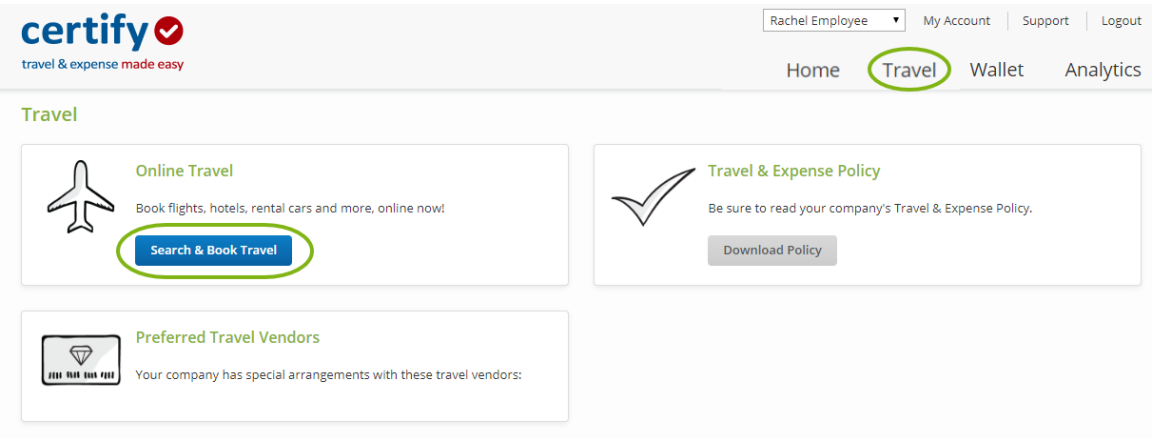
Airfare Reservations

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

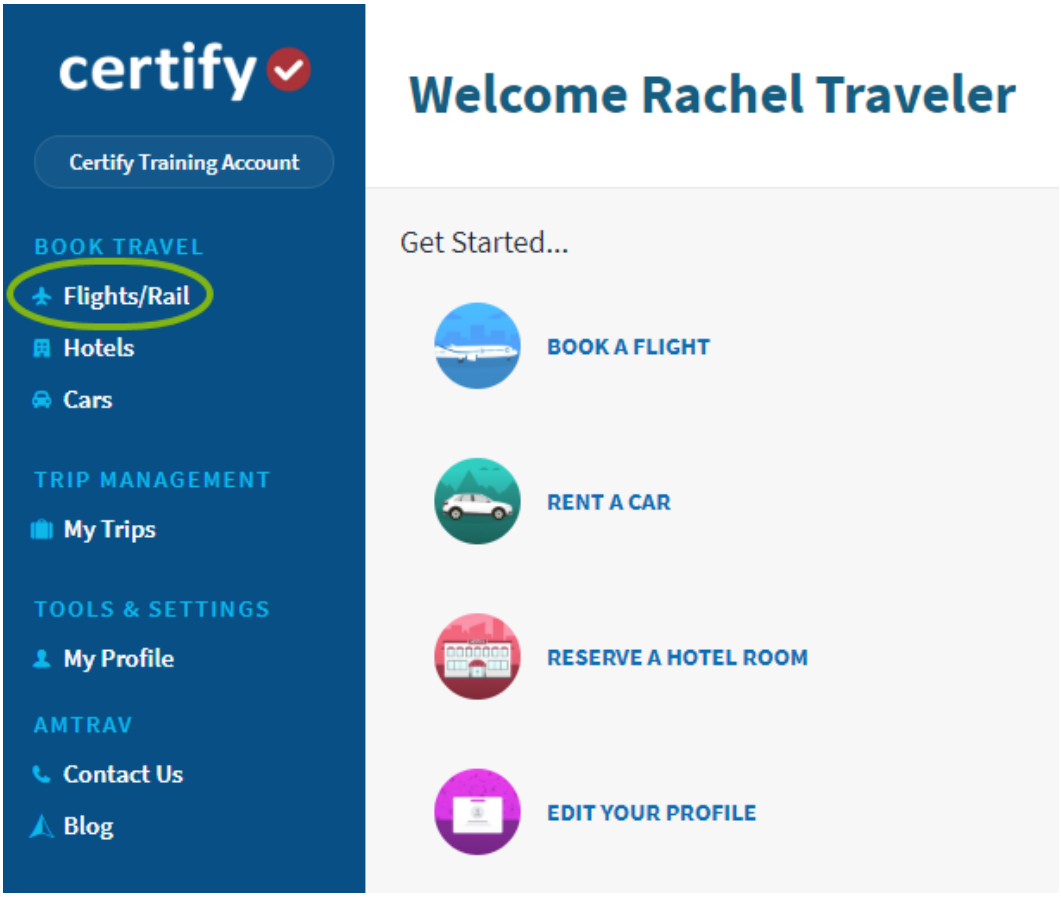
This article shows you how to book a flight.

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

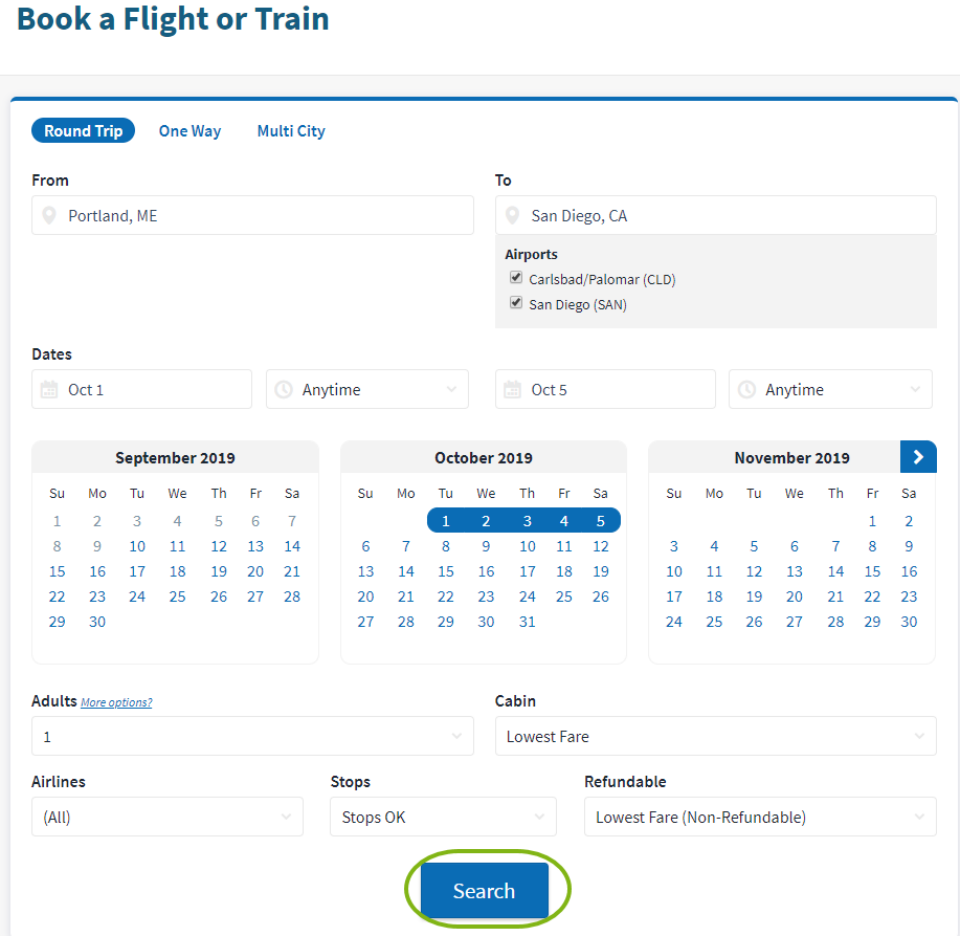
Step 1: On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



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

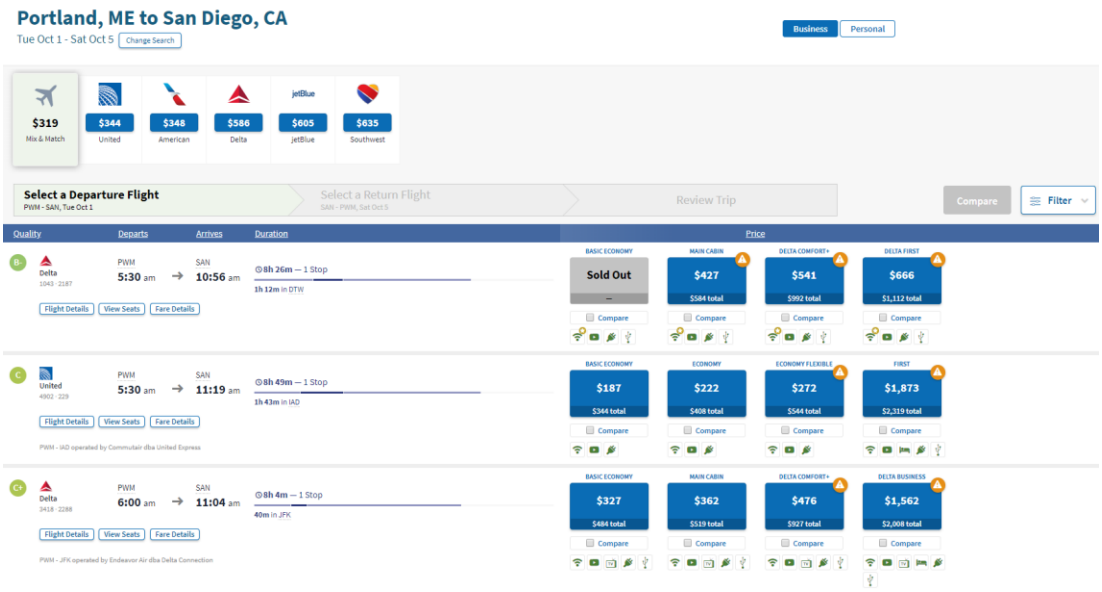


Step 3: Select **Round-Trip**, **One-Way**, or **Multi-City** at the top. Enter your **From** and **To** locations, along with the **departure** and **return** dates and use additional filtering at the bottom if necessary. Click **Search**.

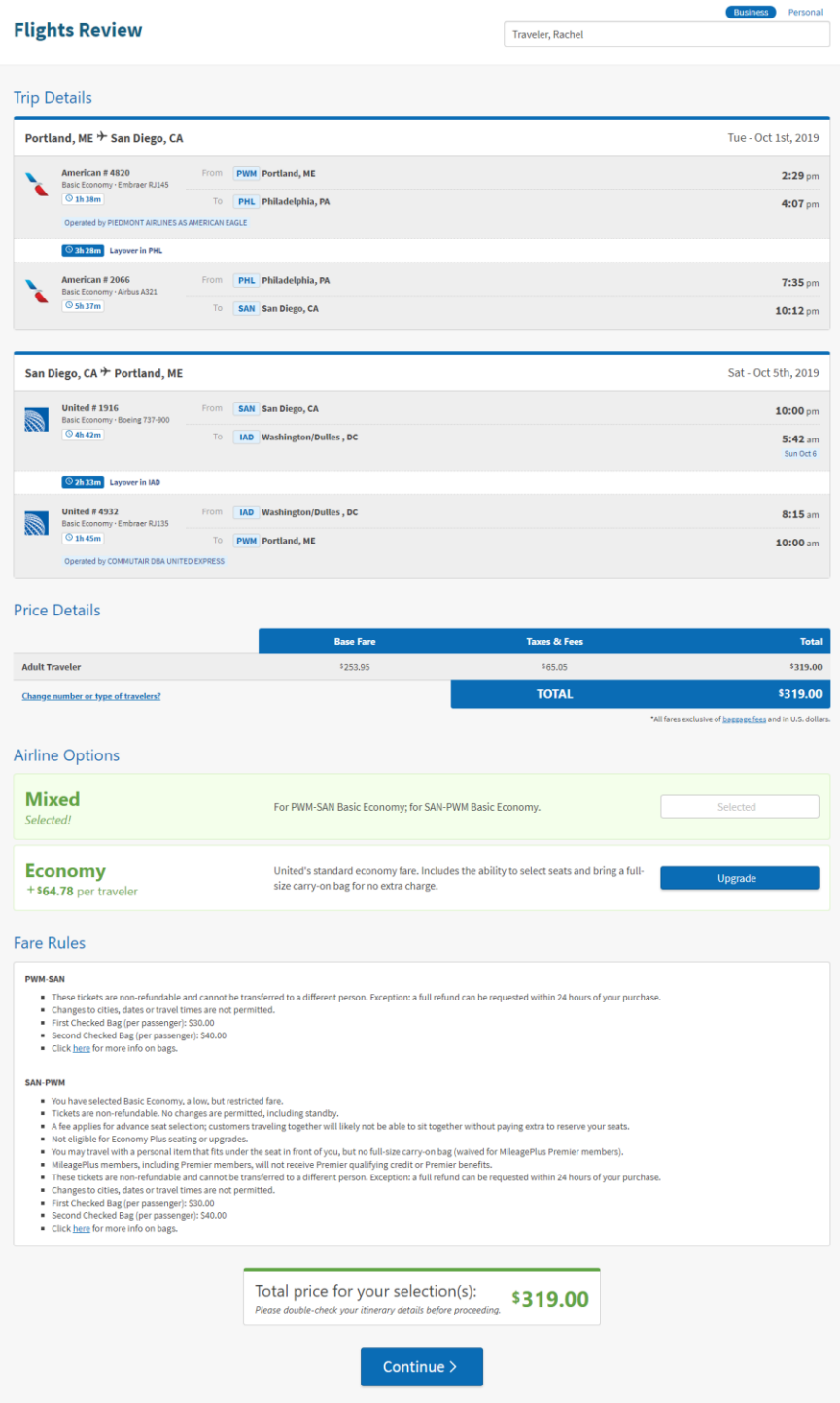


Step 4: Prices reflected are categorized by ticket class and will note trip totals based on the lowest available fare. **Select** the flight by clicking the price.

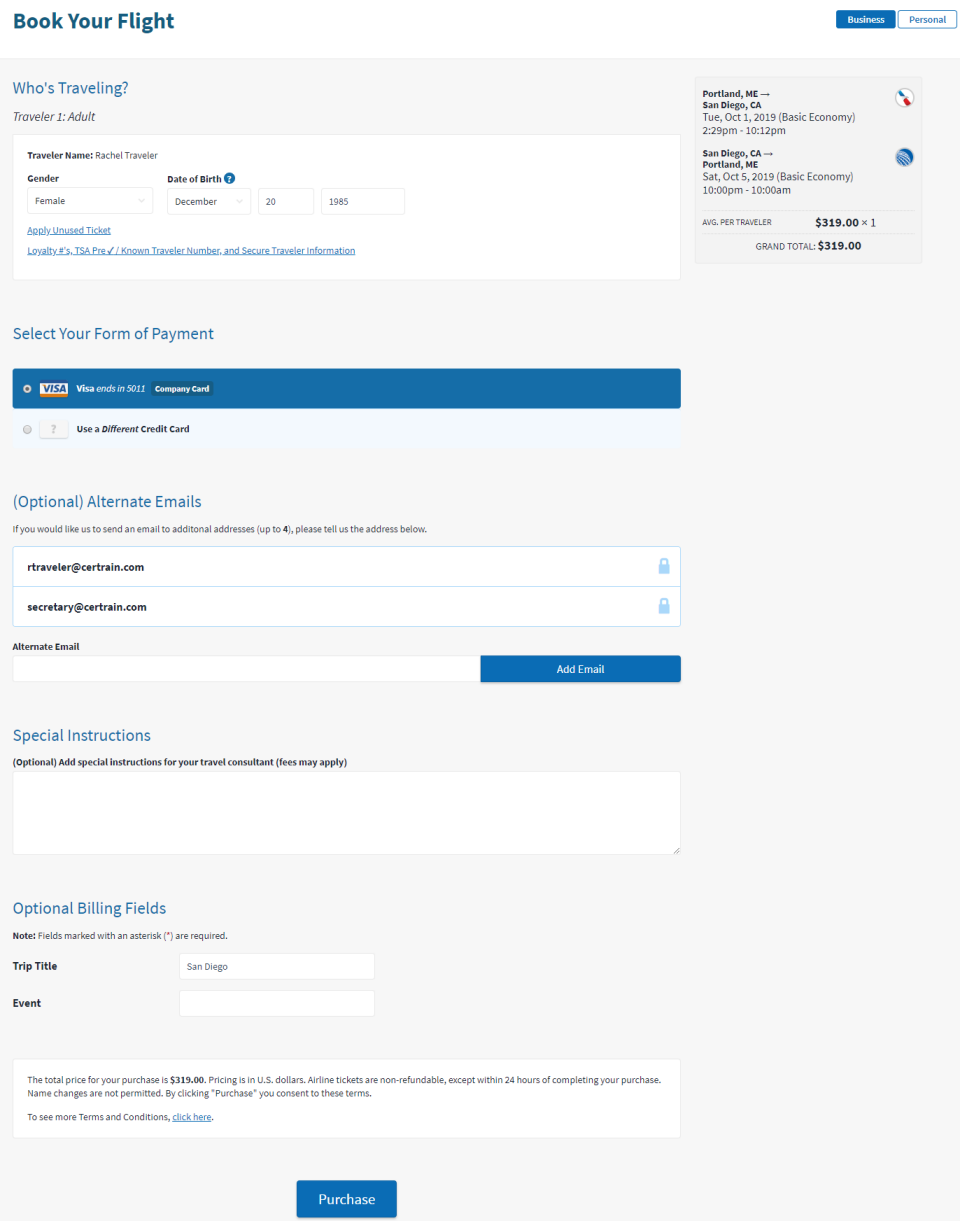
Please Note: *If* ***Round Trip*** *was selected,* ***Leg 1*** *and* ***Leg 2*** *are selected individually.*



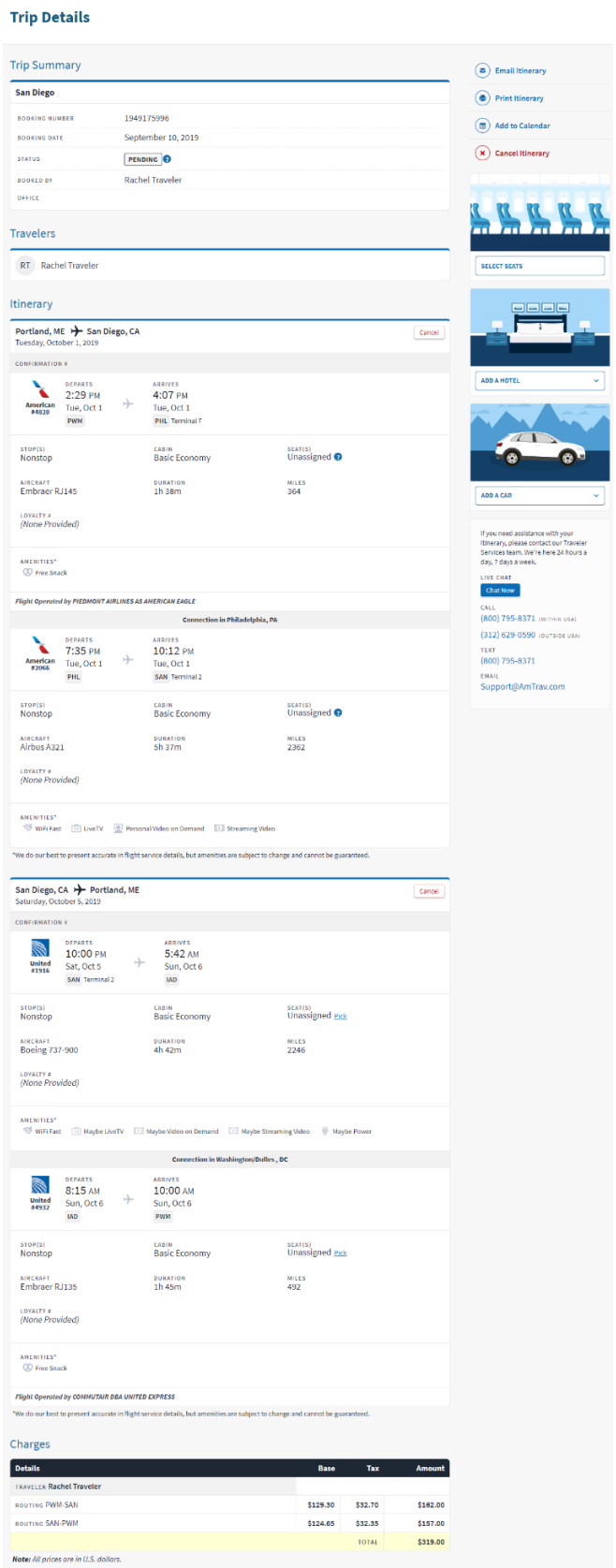
Step 5: Confirm the details of your selection. The **Policy Status** alerts you if you are outside of company policy.



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.



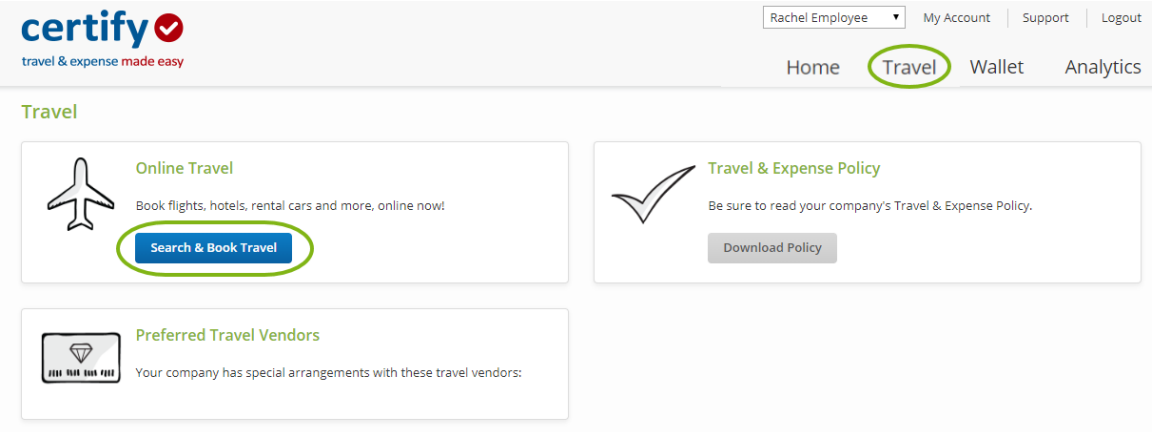
Step 8: You will receive a confirmation email when the reservation has been approved.

Rental Car Reservations

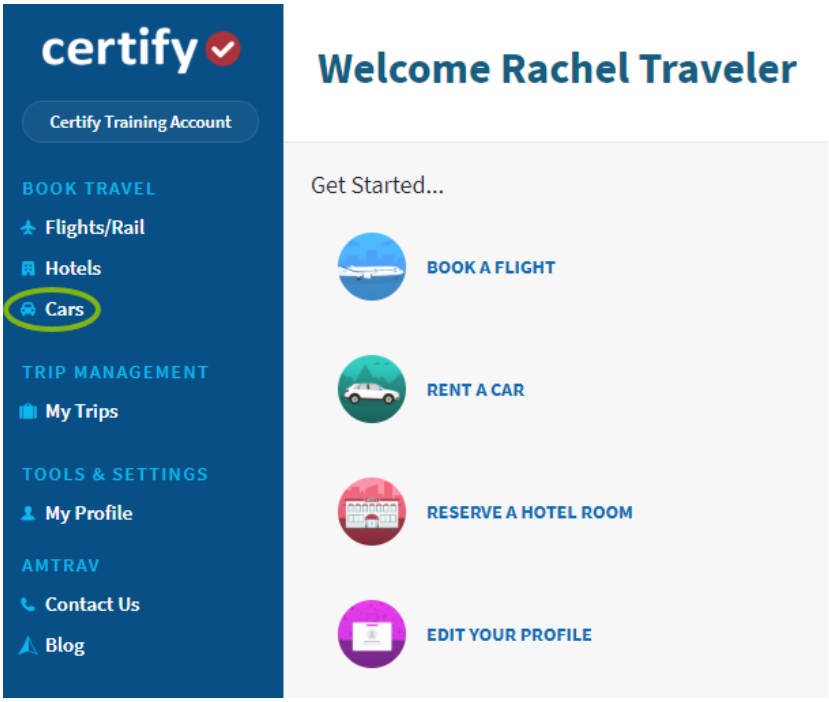
Certify Travel partners with **Amtrav**, so users can book flights, hotels, and car reservations quickly and effortlessly within **Certify's** portal.

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

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

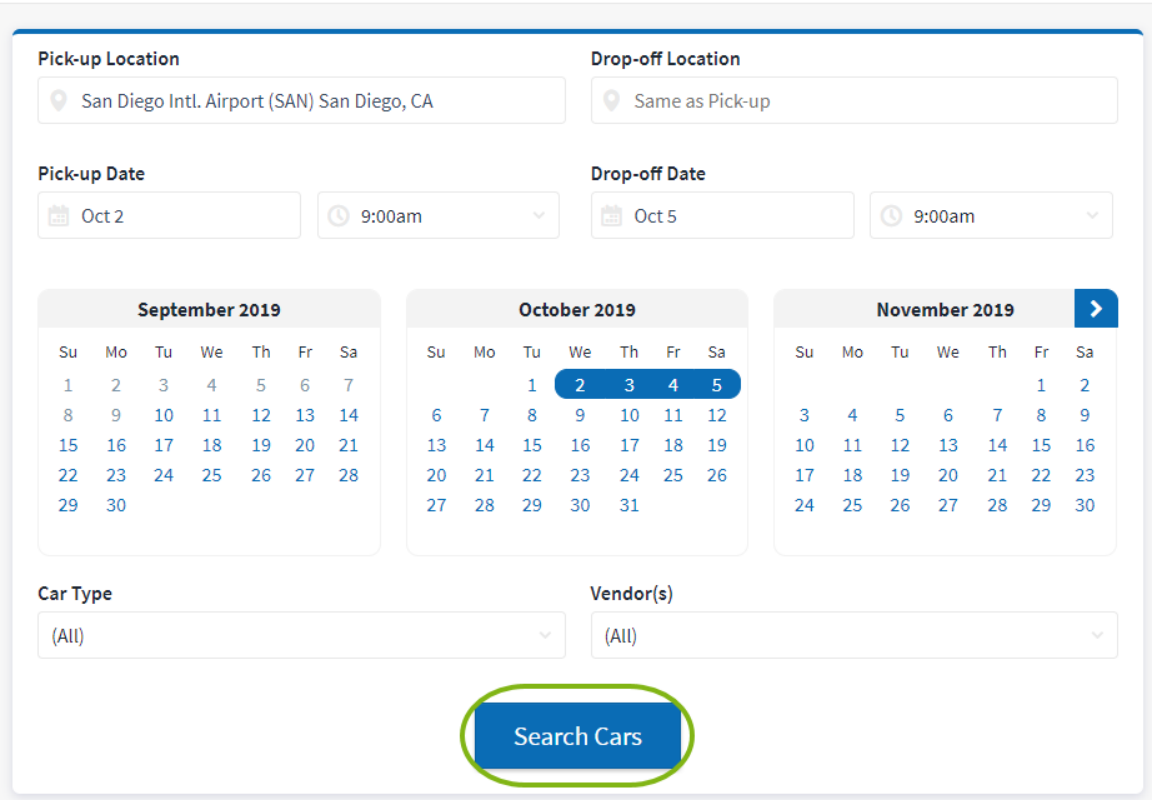


Step 2: Click **Cars**.

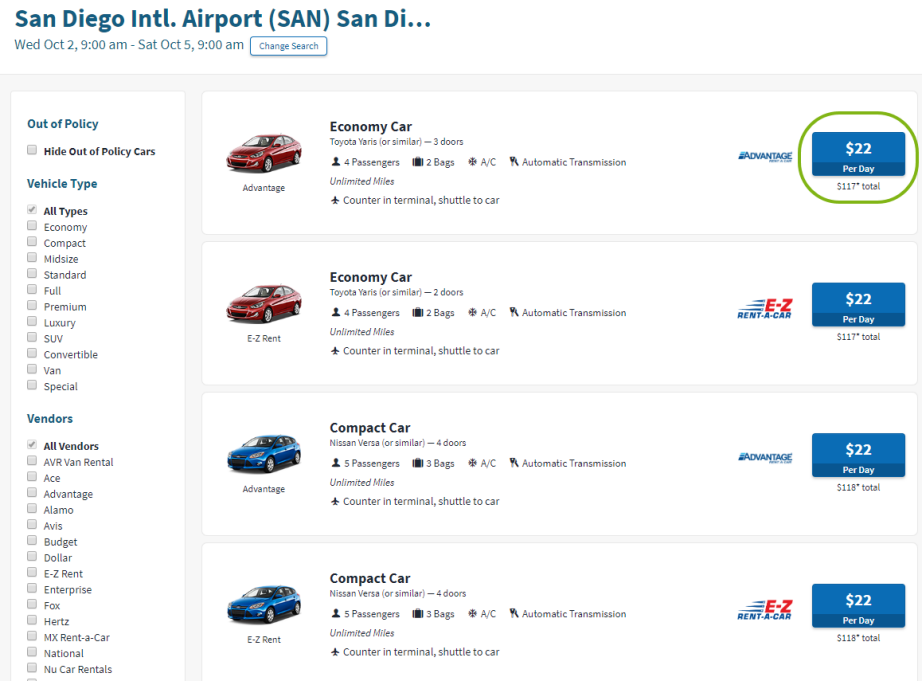


Step 3: Enter your **pick-up** and **drop-off locations**, as well as the **dates**, **times**, and a **preferred vendor**, if applicable. Click **Search Cars**.

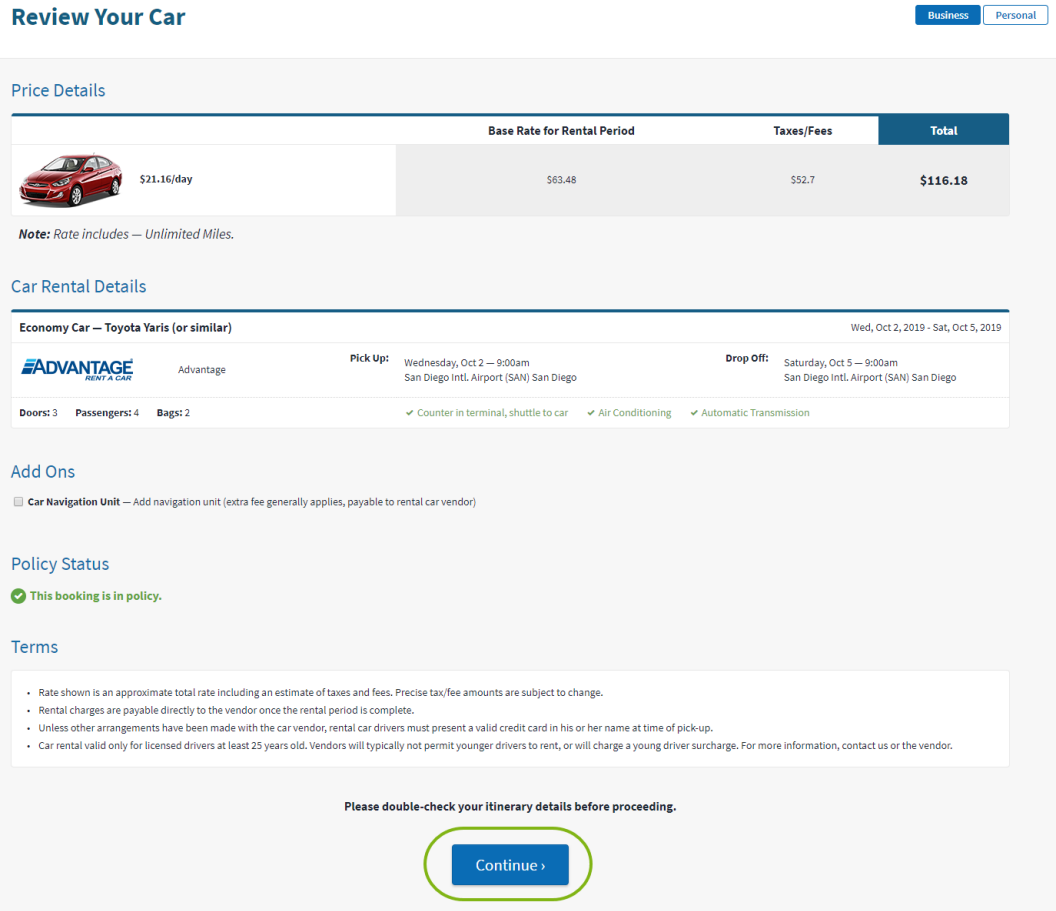
Rent a Car



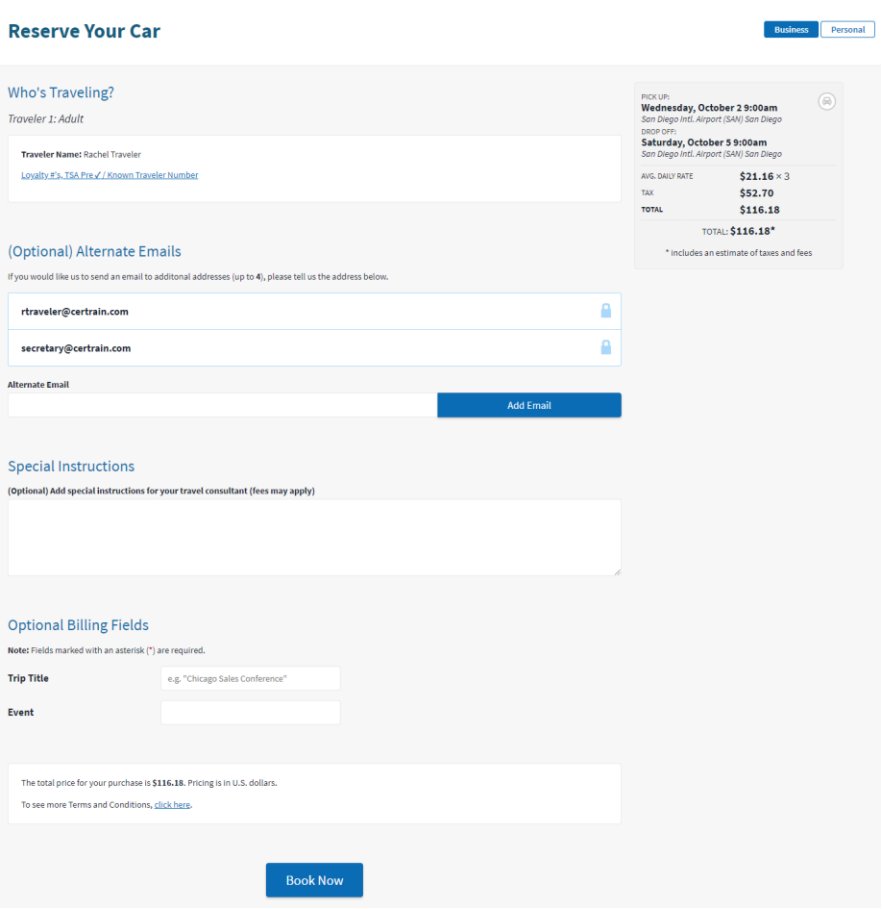
Step 4: **Select** your car by clicking the **price.**



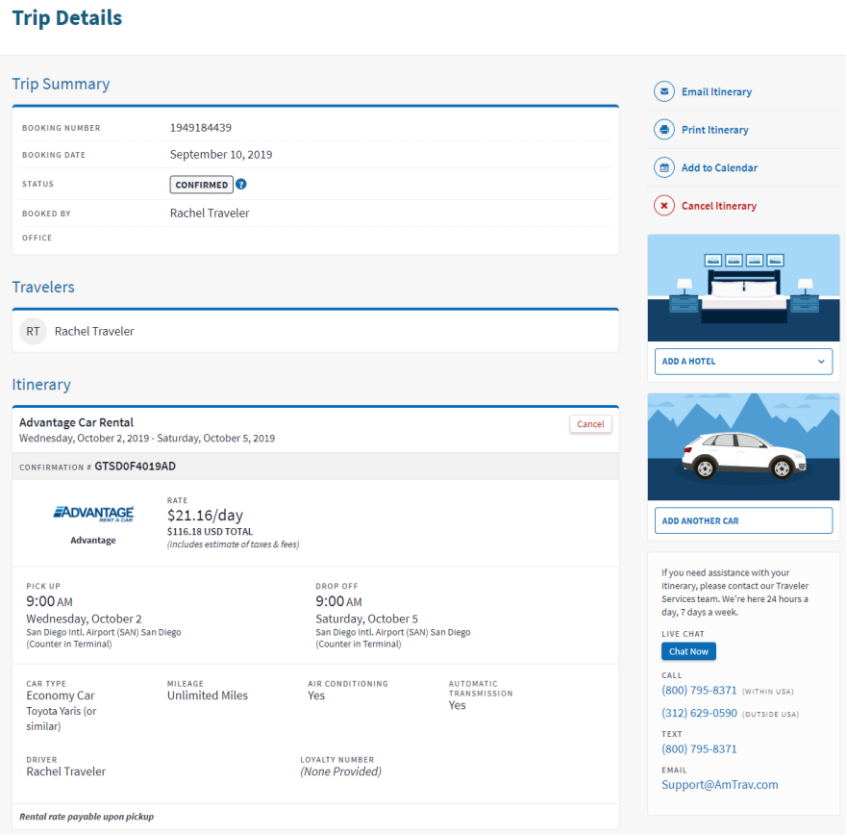
Step 5: Confirm the details of your selection. The **Policy Status** alerts you if you are outside of company policy. Click **Continue**.



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.

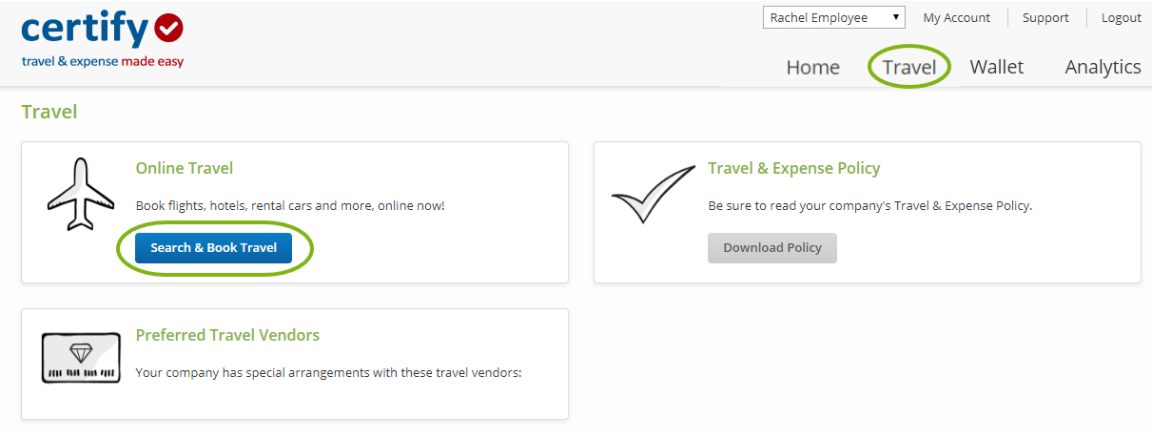


Rail Reservations

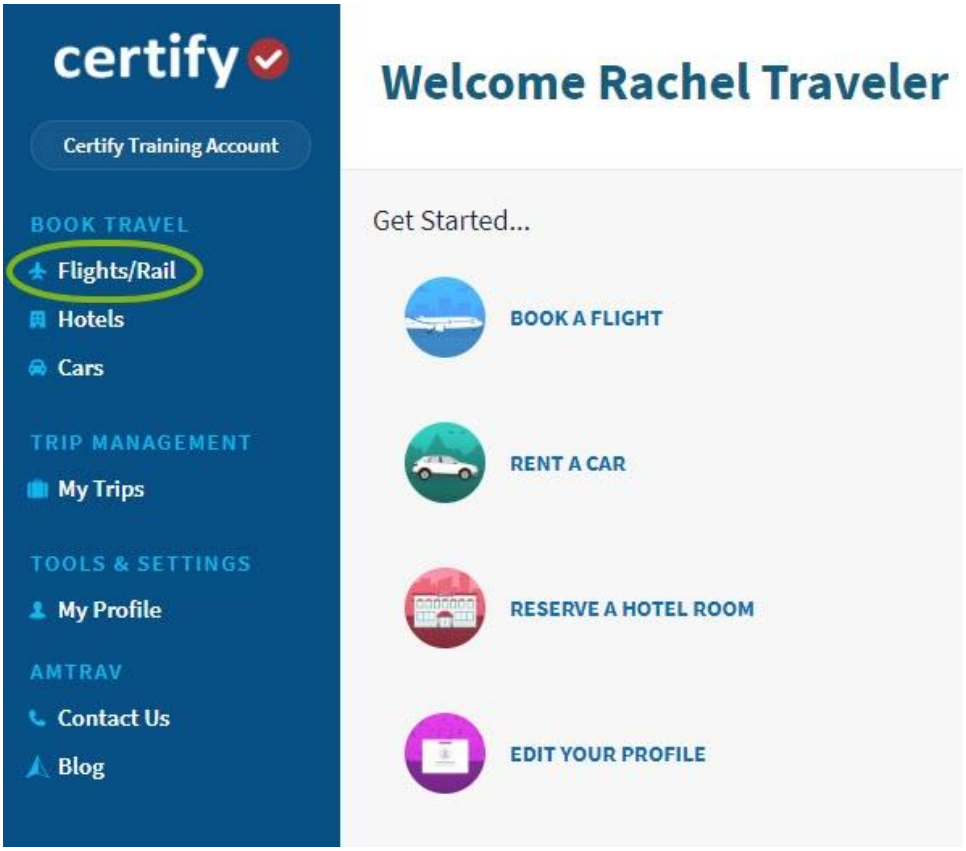
Certify Travel partners with **Amtrav** so users can book flights, hotels, and car reservations quickly and effortlessly within Certify's portal.

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

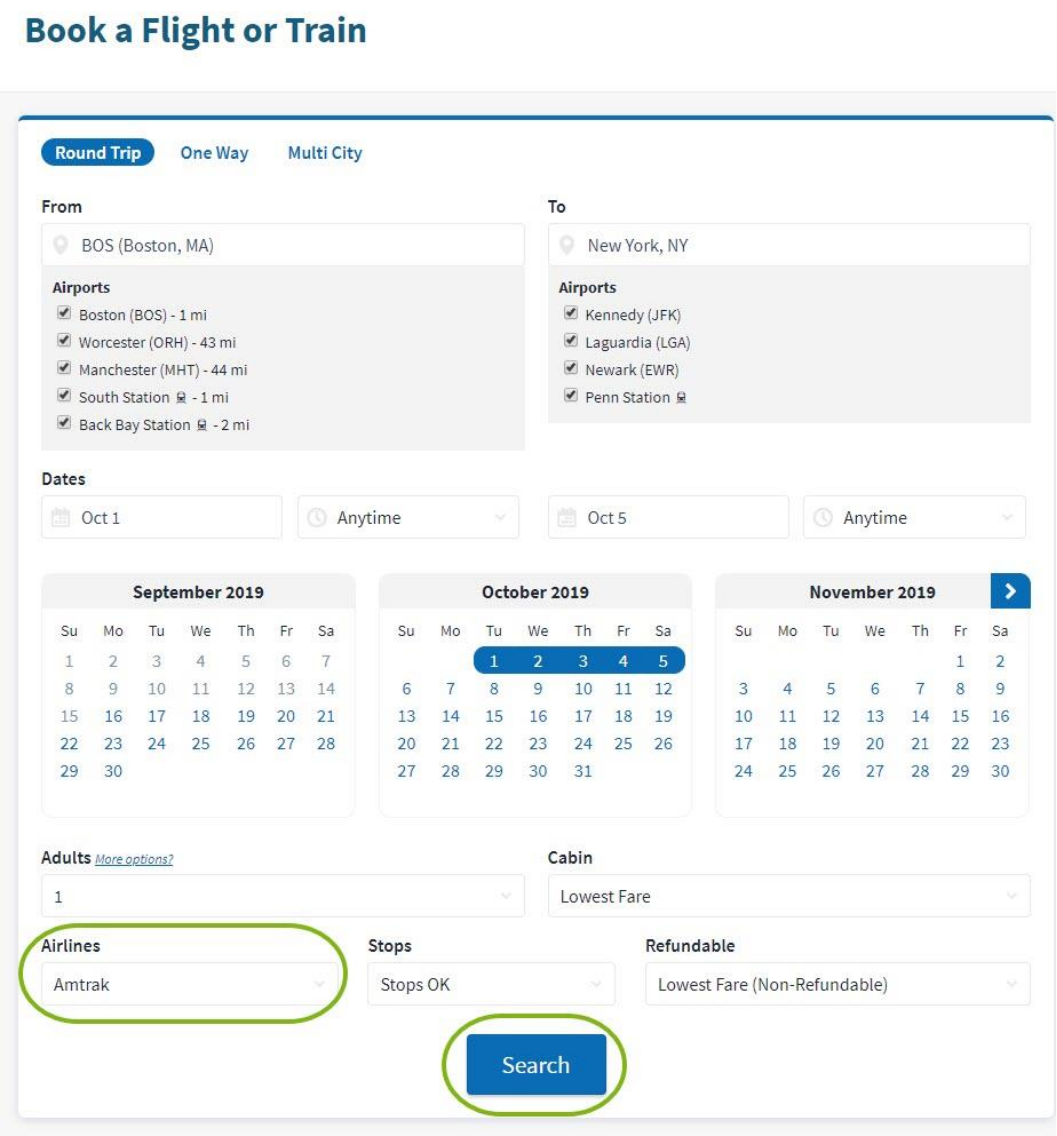
Step 1: On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



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

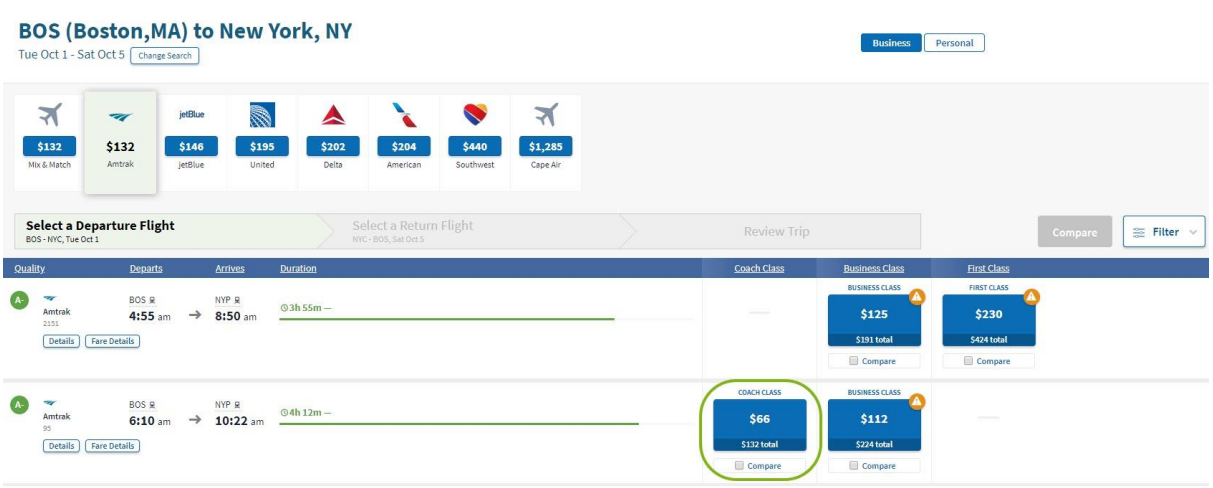


Step 3: Enter a city, town, or station in the **From** and **To** fields, along with the departure and return dates. Using the **Airline** drop-down menu, click **Amtrak**.

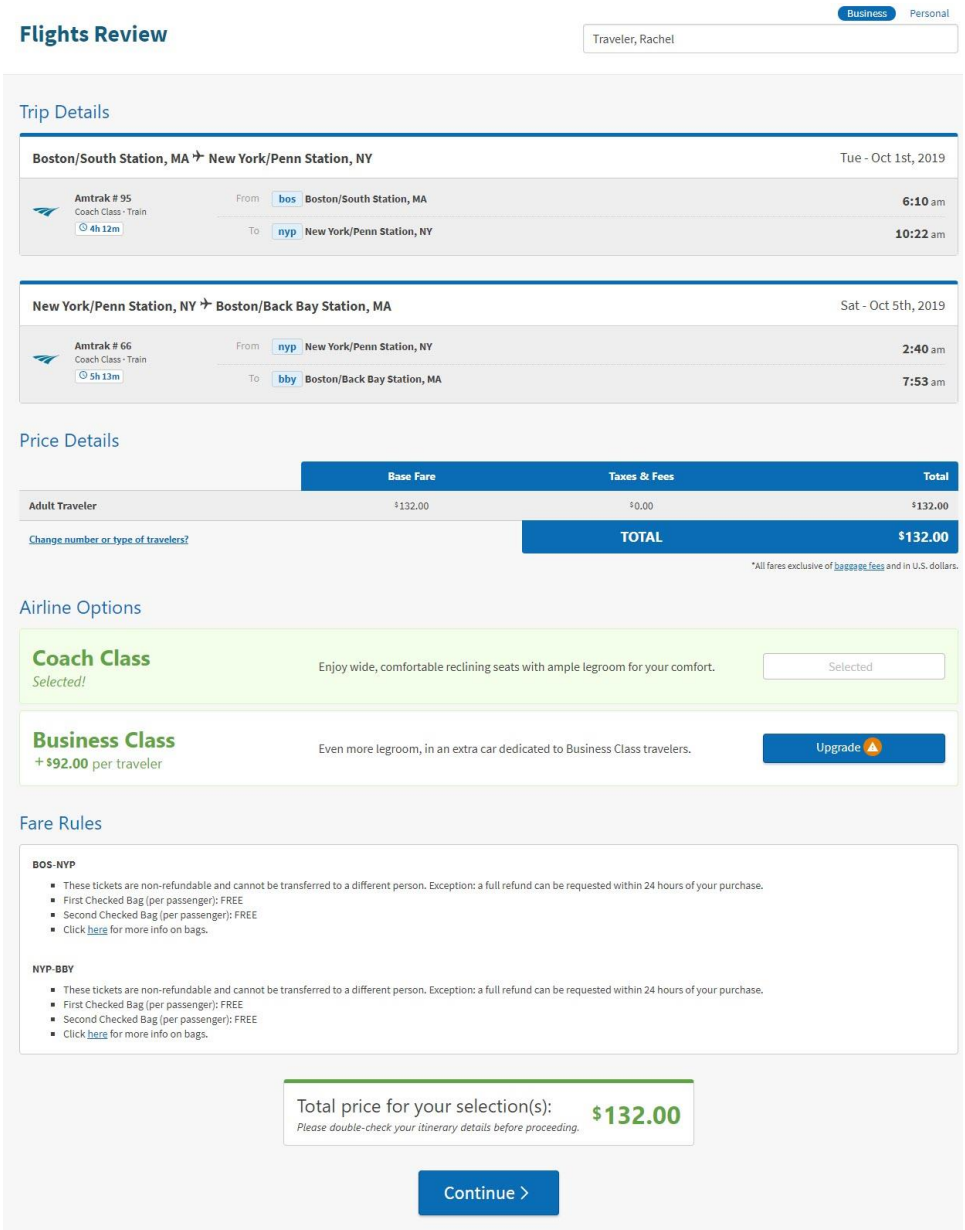


Step 4: Choose a train from the search results.

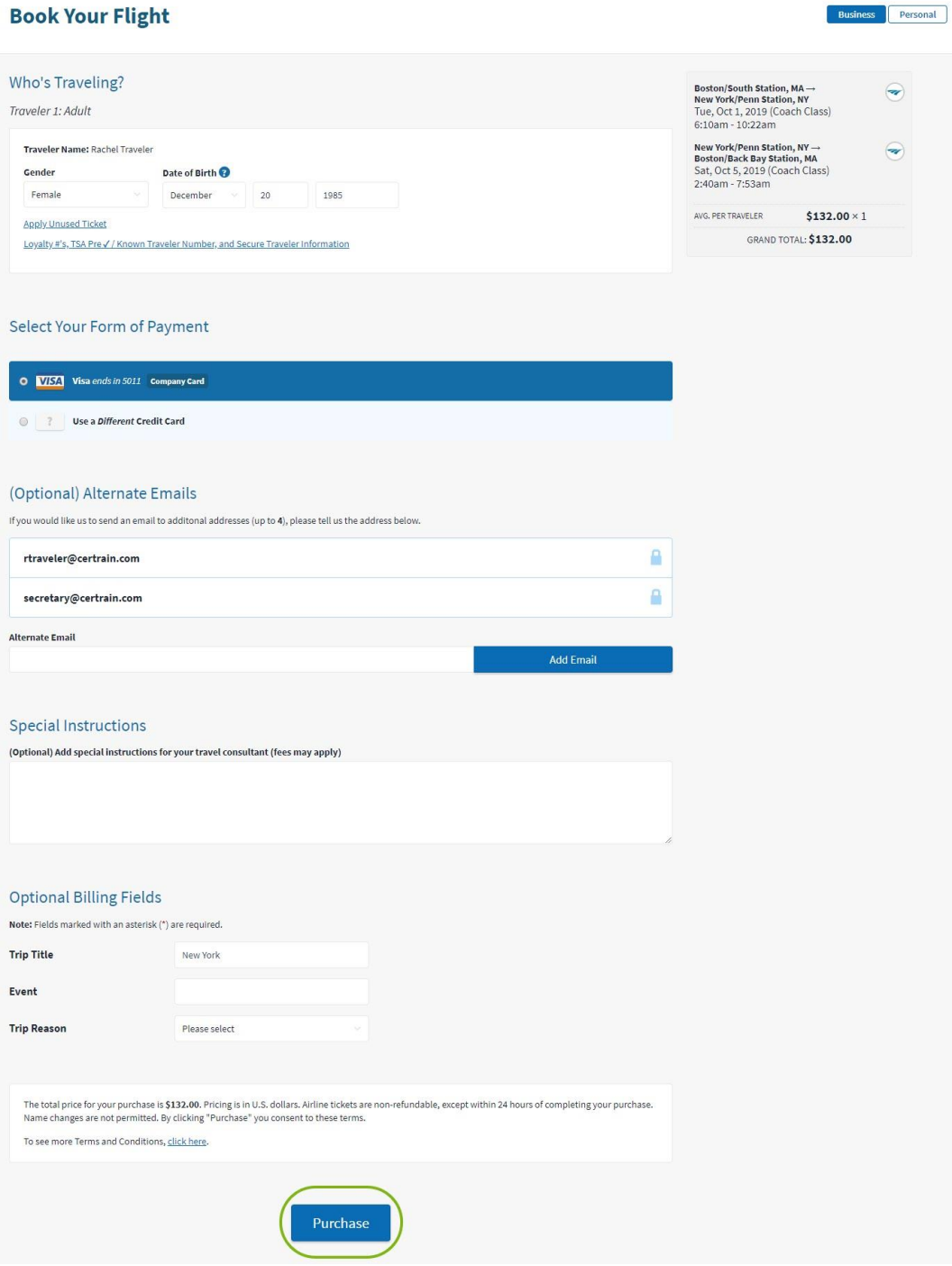
Please Note: *If* ***Round Trip*** *is selected,* ***Leg 1*** *and* ***Leg 2*** *are selected individually.*



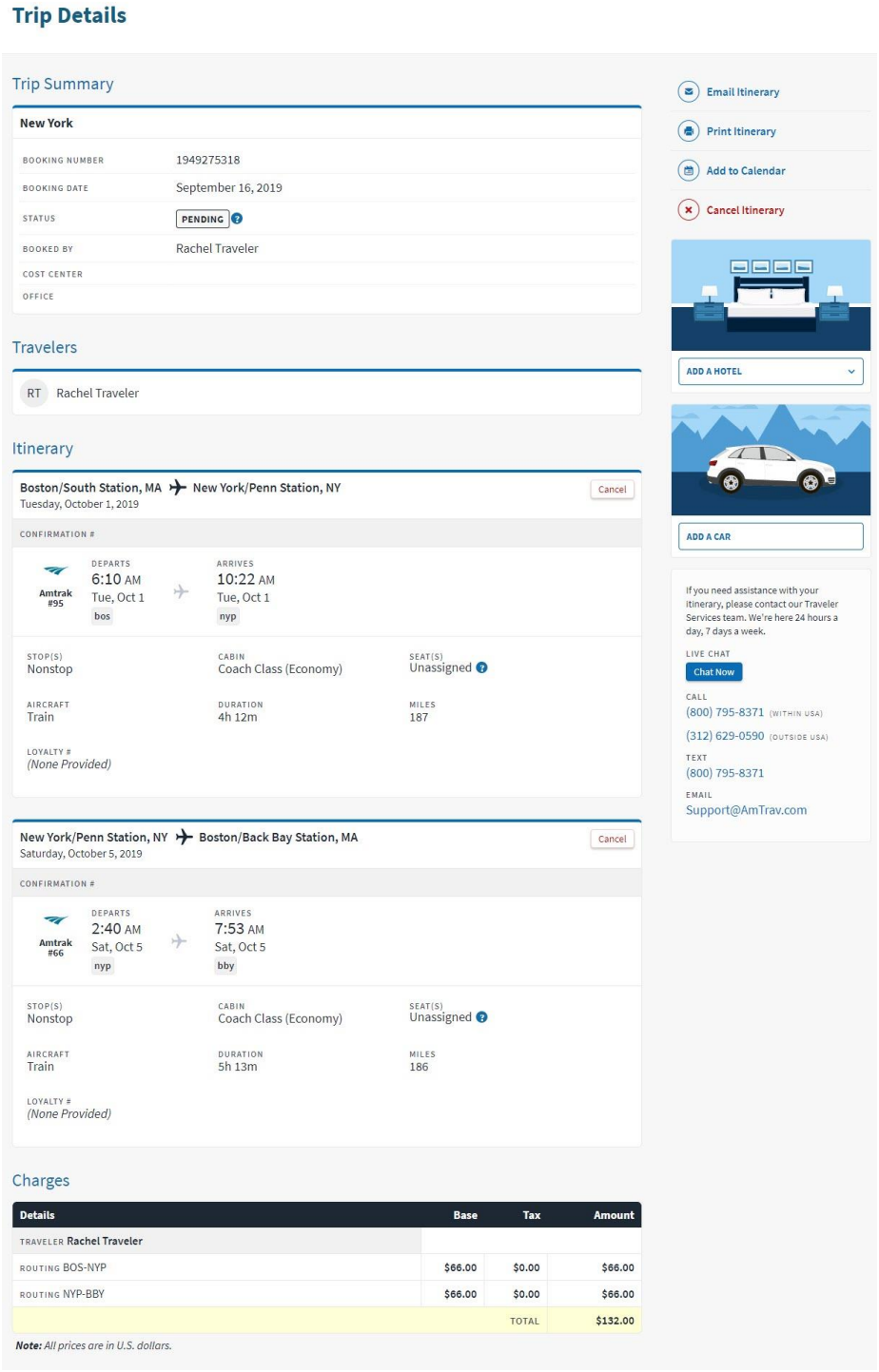
Step 5: Confirm the details of your selections. The **Policy Status** alerts you if you are outside of company policy.



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.

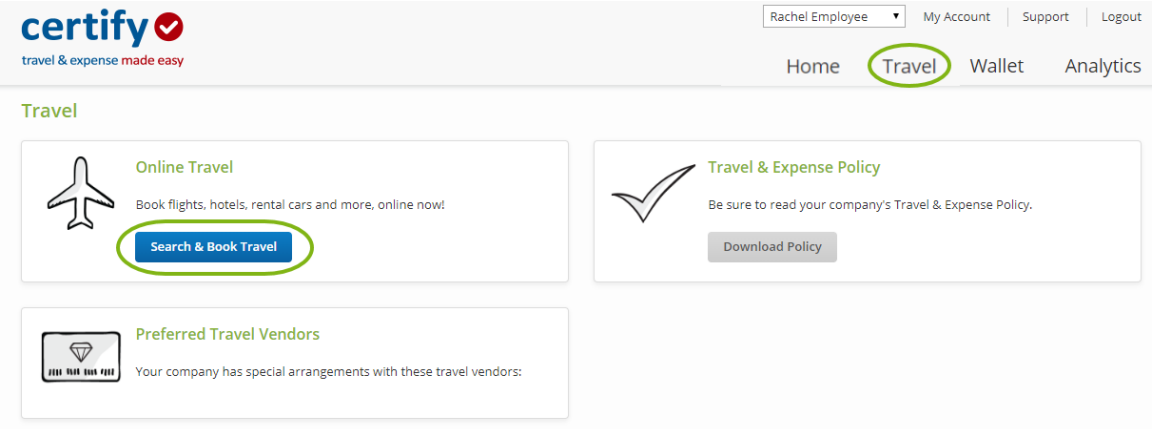
Cancelling an Itinerary

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

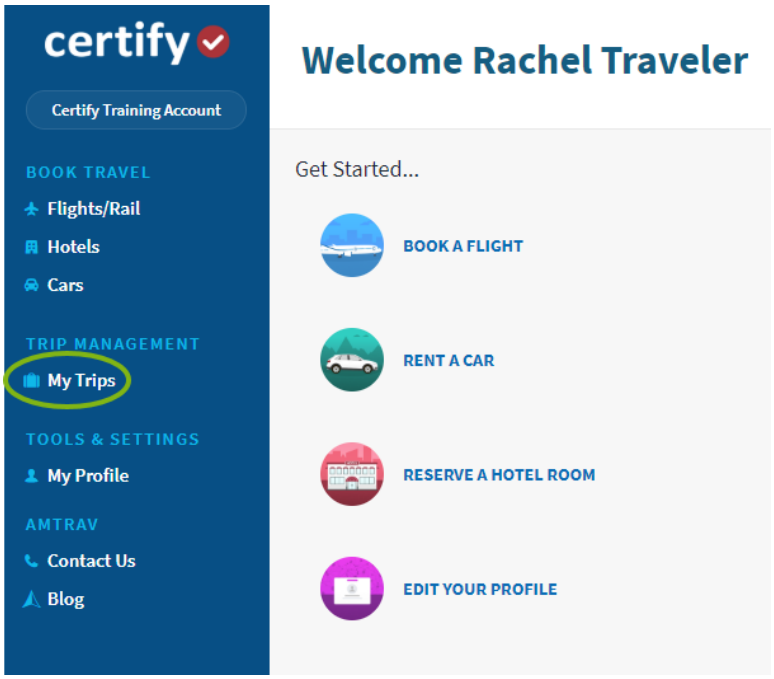
This article shows you how to cancel your itinerary.

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

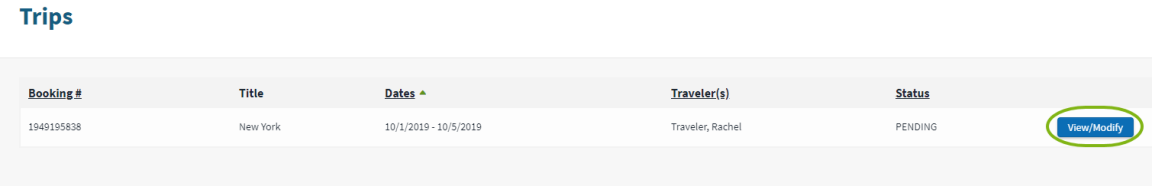
Step 1: On your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



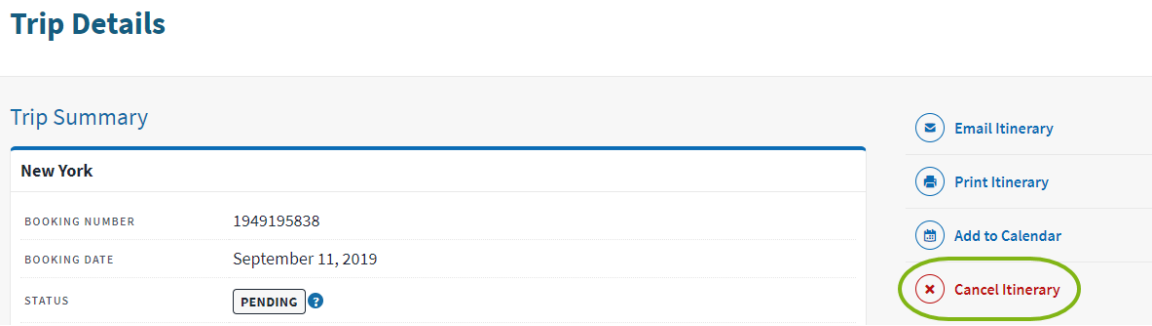
Step 2: Click **My Trips**.



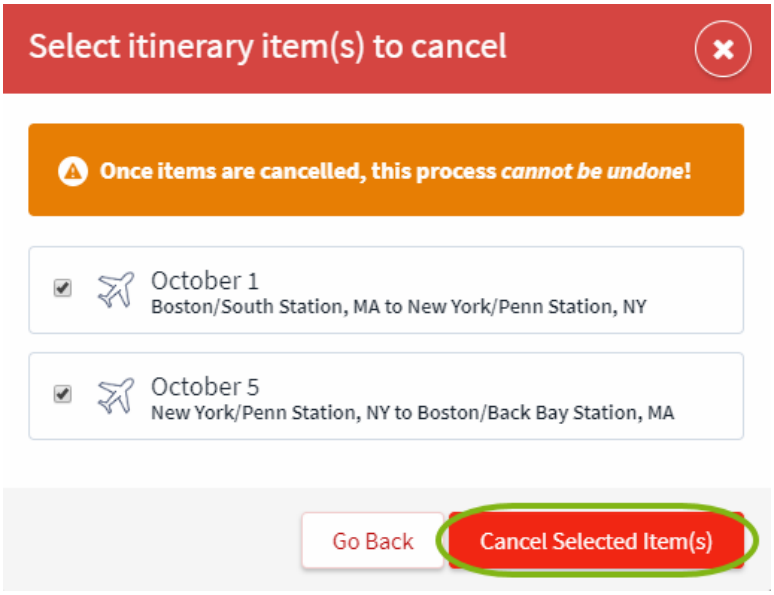
Step 3: Locate the itinerary and select **View/Modify**.



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



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



My Profile

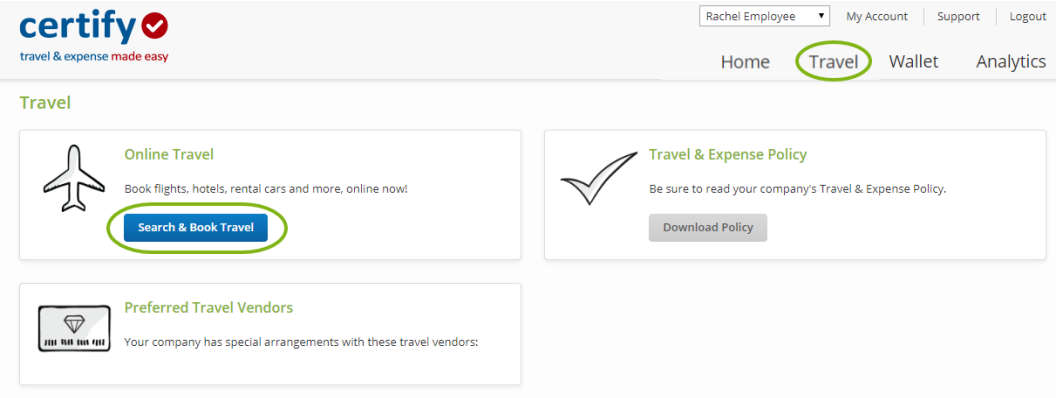
Editing your Profile

Loyalty Program Numbers

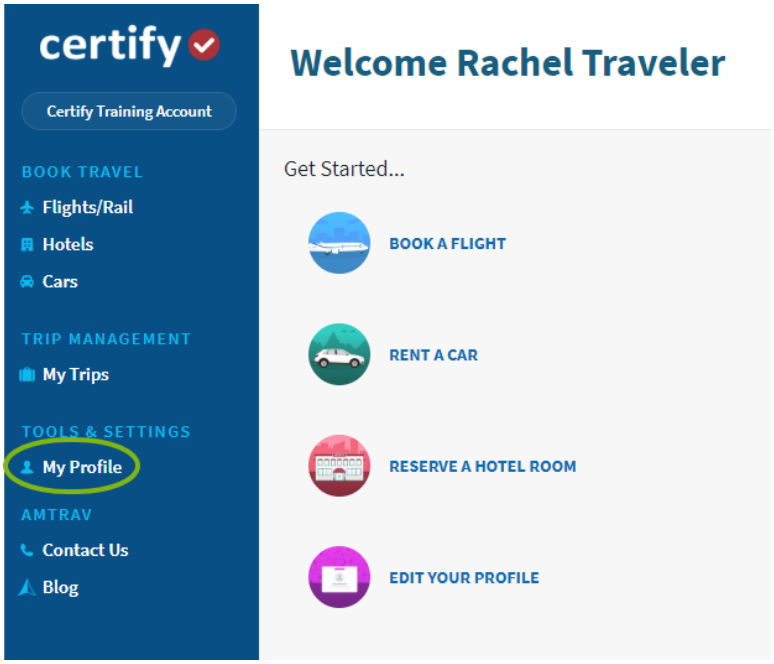
Certify Travel by **Amtrav** allows you to save your own **loyalty program numbers** (such as frequent flyer numbers) to your account. When you book a trip, **Certify Travel** will send the loyalty program number to the travel vendor to continue the reward accrual process.

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.**

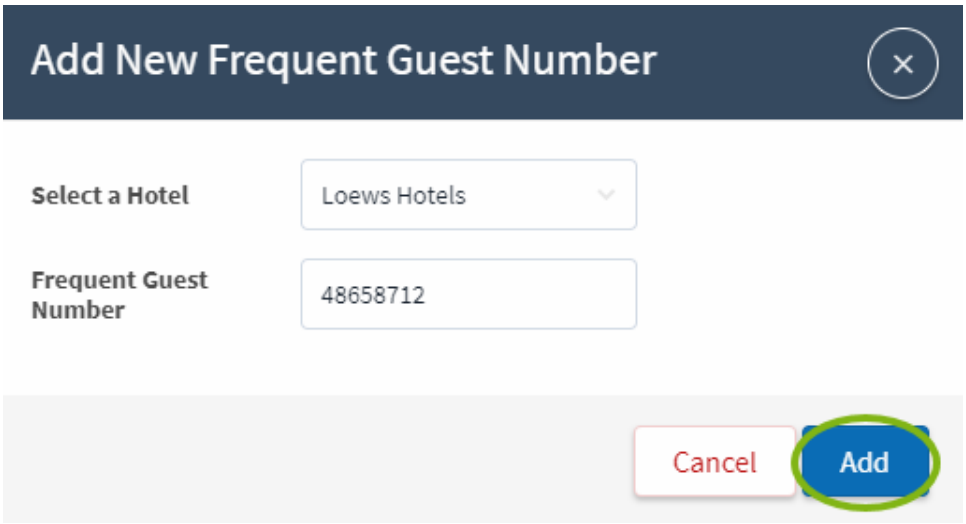


Step 2: Click **My Profile**.



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

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

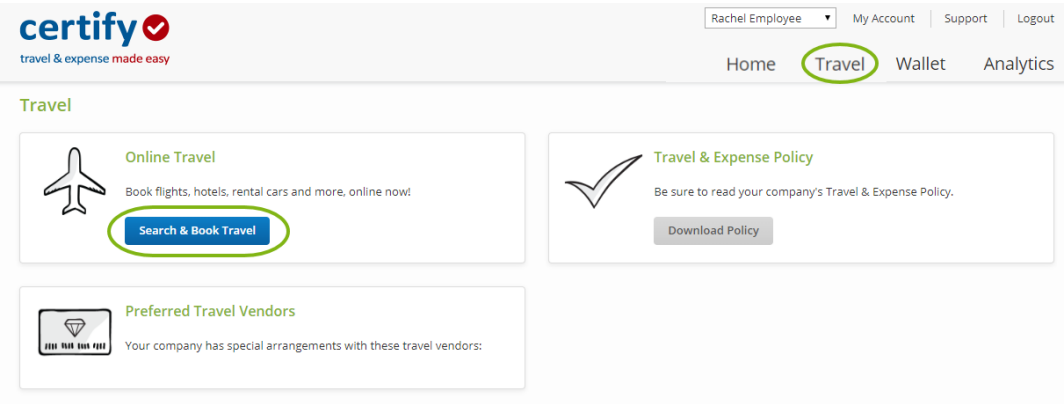


Credit Card Details

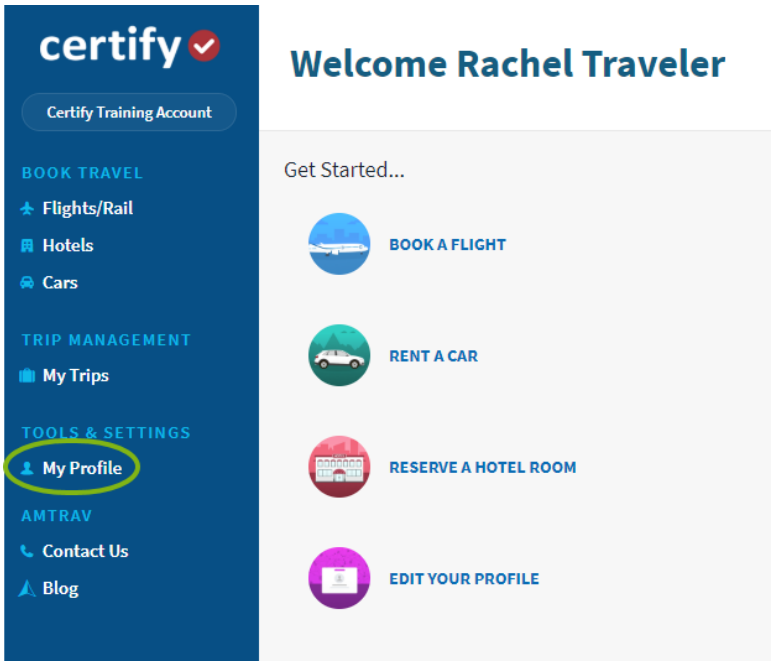
Certify Travel by **Amtrav** allows you to save a credit card to your account. Saving a credit card enables you to select a payment method with a single click without having to re-enter your card information.

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

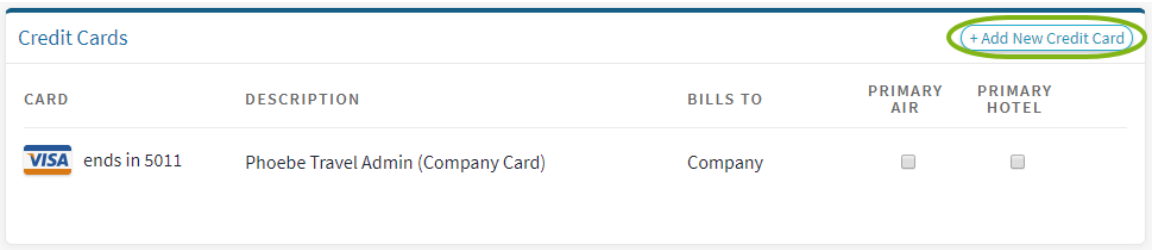
Step 1: On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



Step 2: Click **My Profile**.



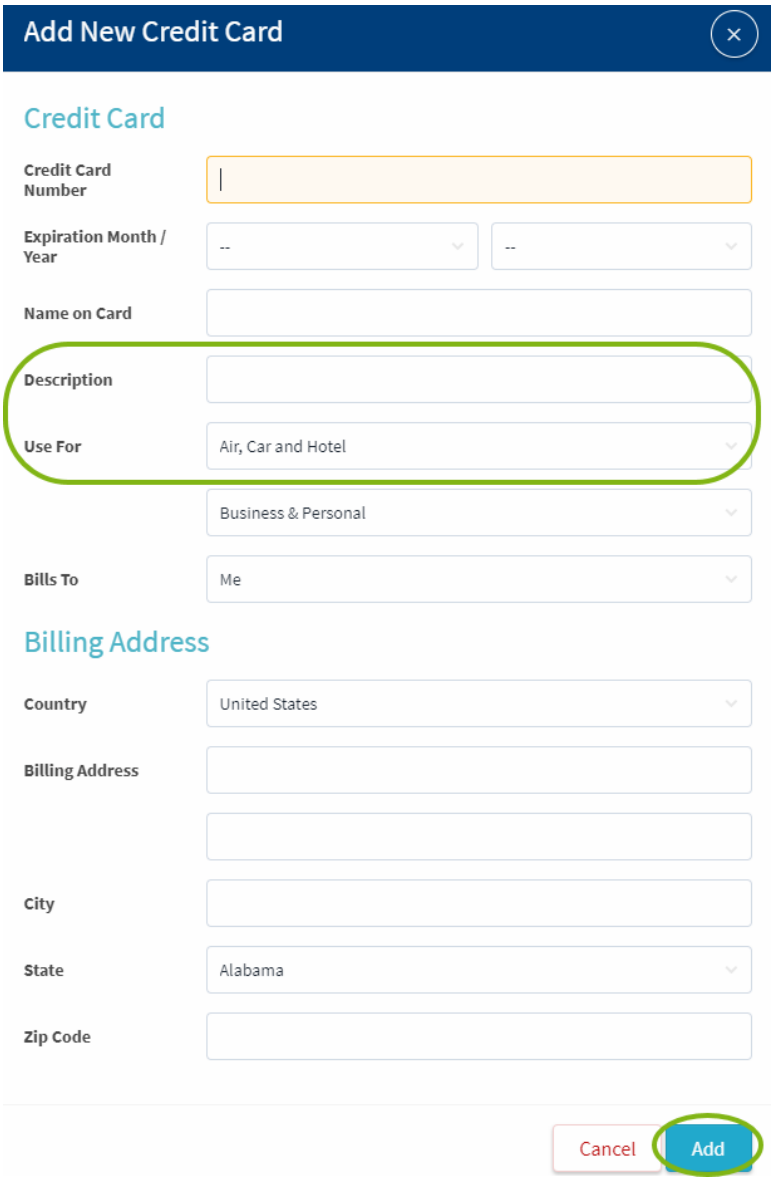
Step 3: Scroll to **Credit Card Information** and click **Add New Credit Card**.



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.

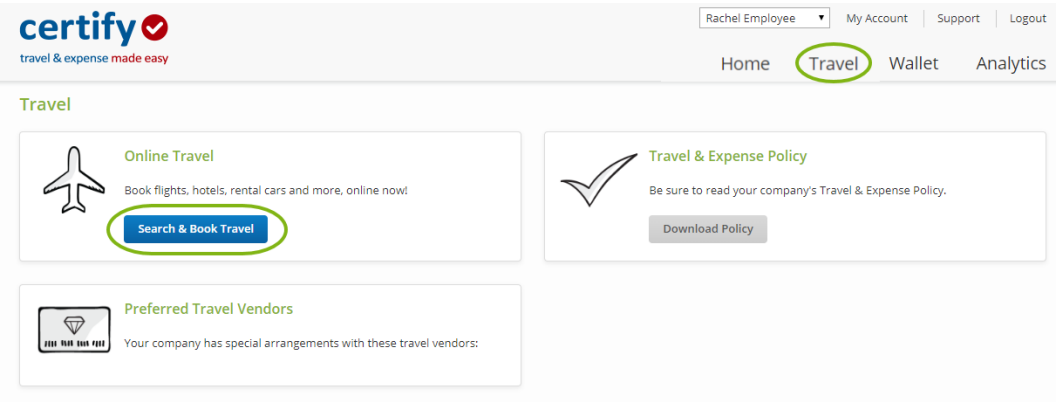


Passport Details

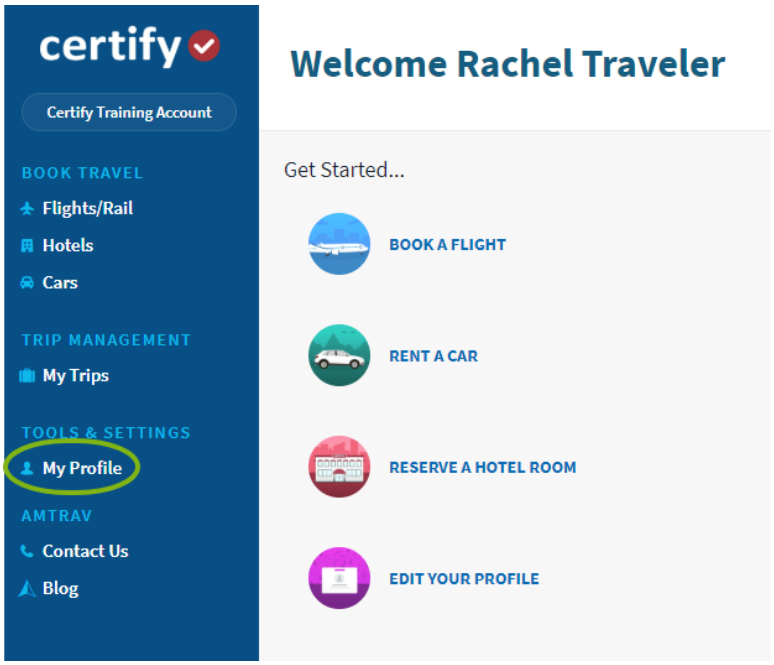
Certify Travel by **Amtrav** makes it easy for you to store your passport information in your account for future travel.

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

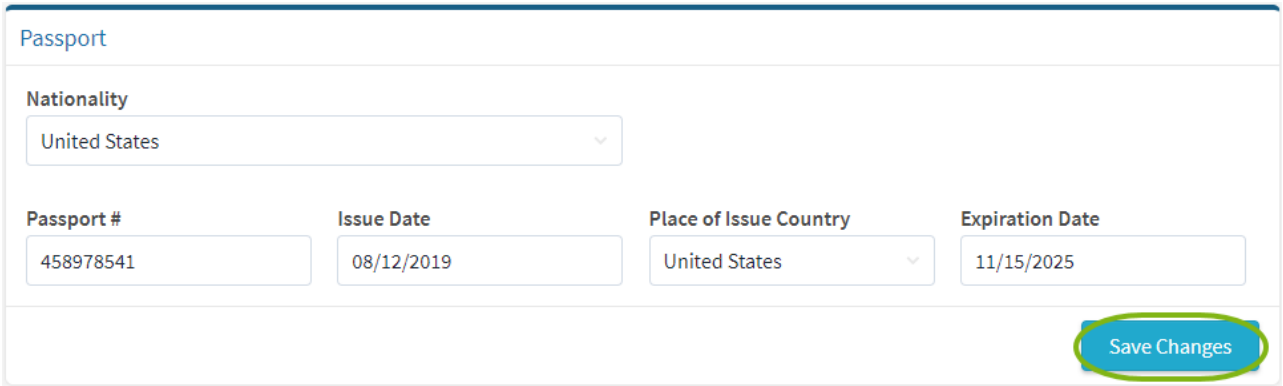
Step 1: From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



Step 2: Click **My Profile**.



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

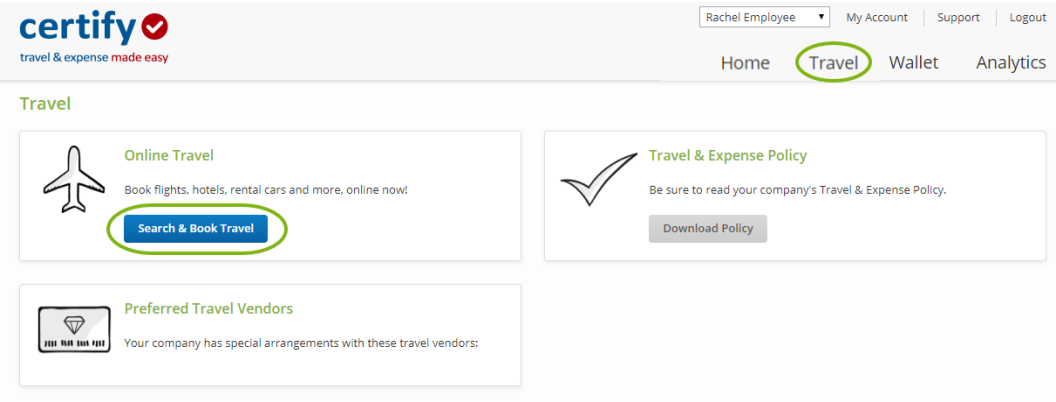


TSA Known Traveler Numbers

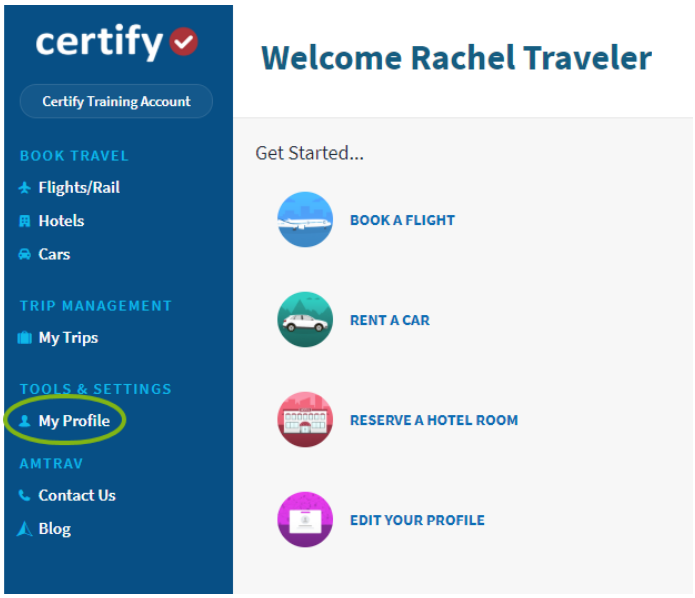
Certify Travel by **Amtrav** allows you to save your **known traveler numbers** for **TSA Pre-Check**.

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

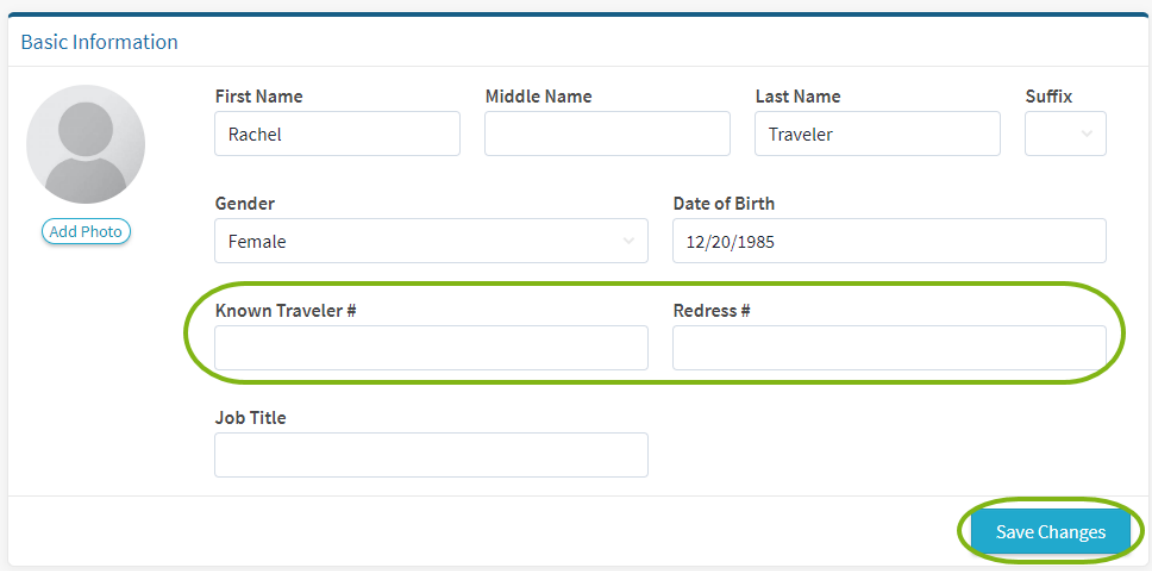
Step 1: On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



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**.

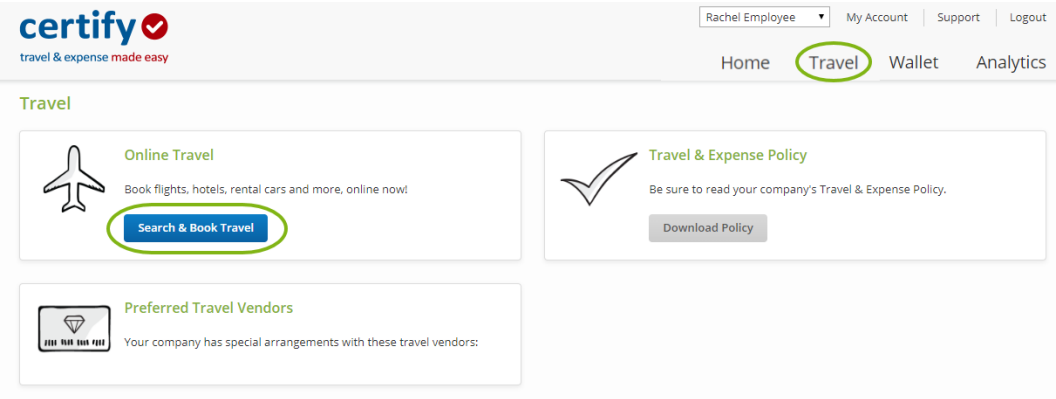


Travel Preferences

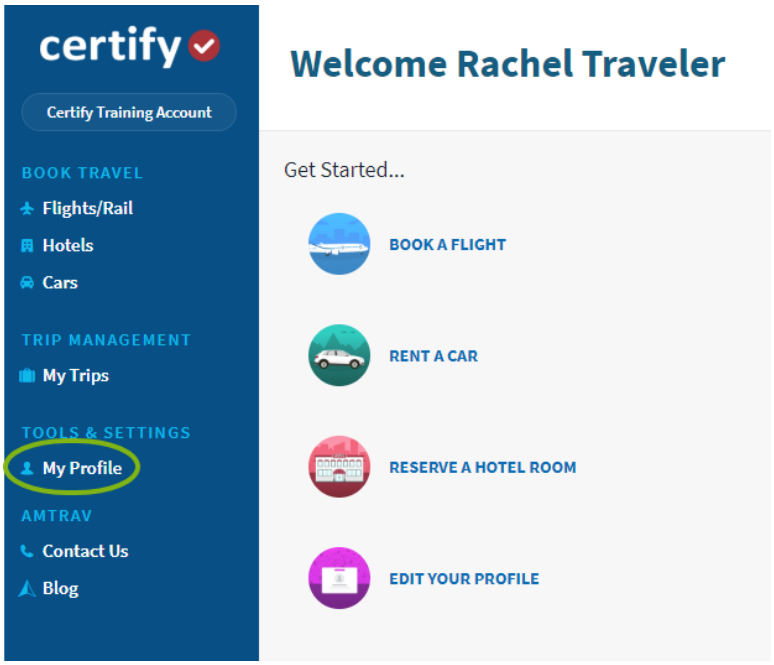
Certify Travel by **Amtrav** allows you to store personal travel preferences in your account to help find the best options for you when searching.

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

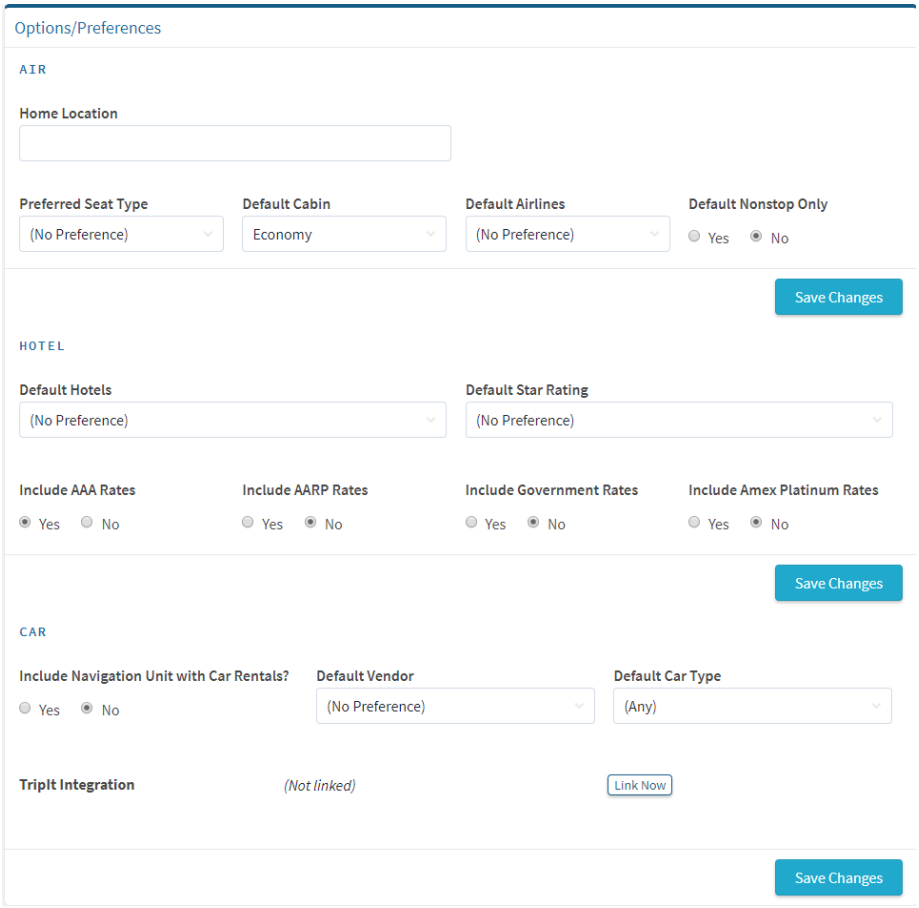
Step 1: On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



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.



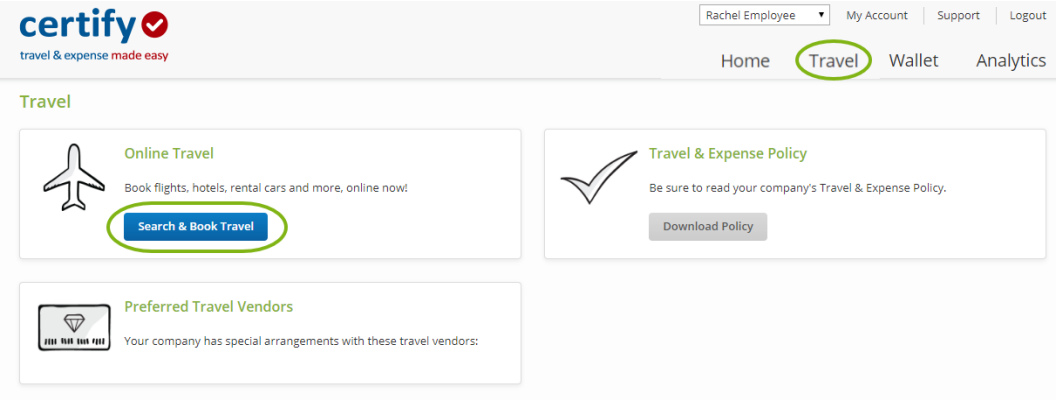
Enabling Email Notifications

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

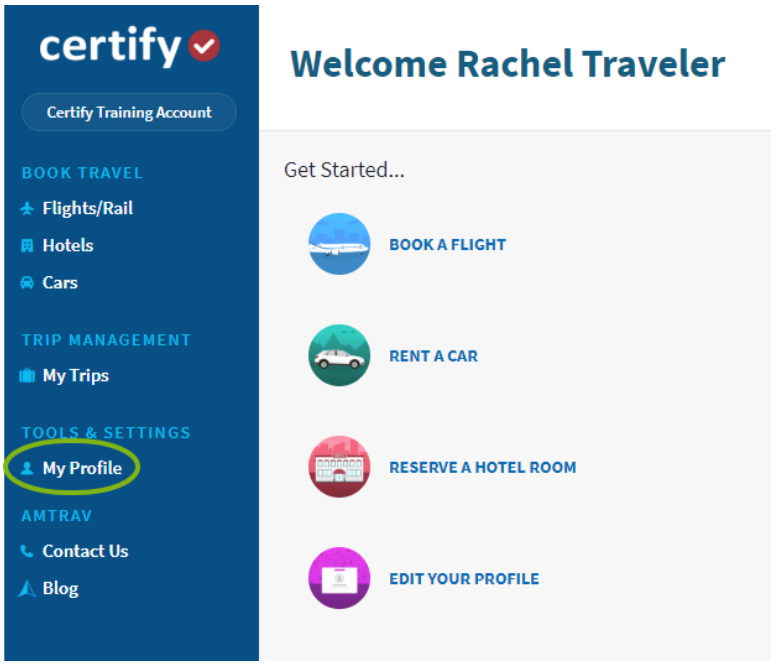
You can sign up for additional notifications, as well as add other emails (in addition to the default address on file for you). For example, you may want to have specific notifications sent to your manager.

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

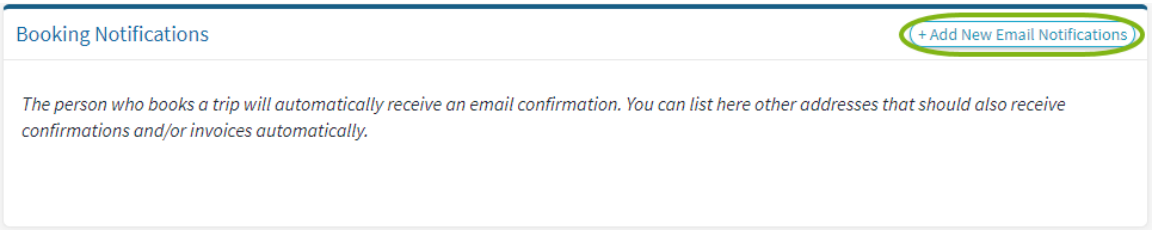
Step 1: From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



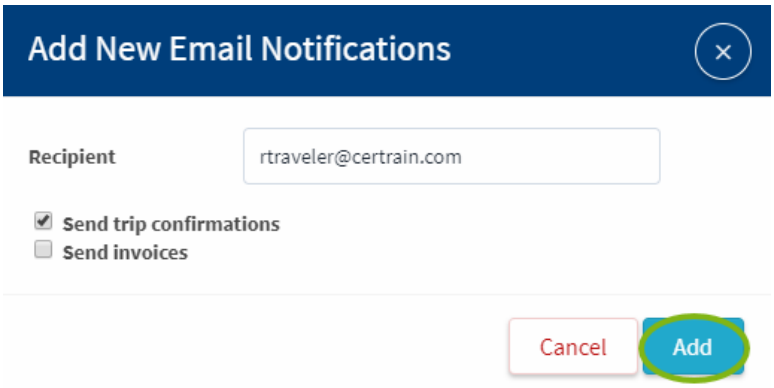
Step 2: Click **My Profile**.



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



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

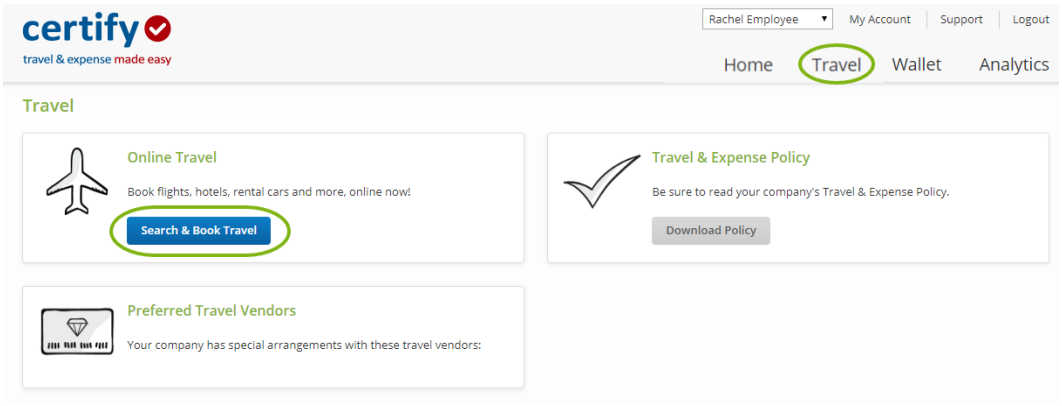
Approving an Itinerary

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.

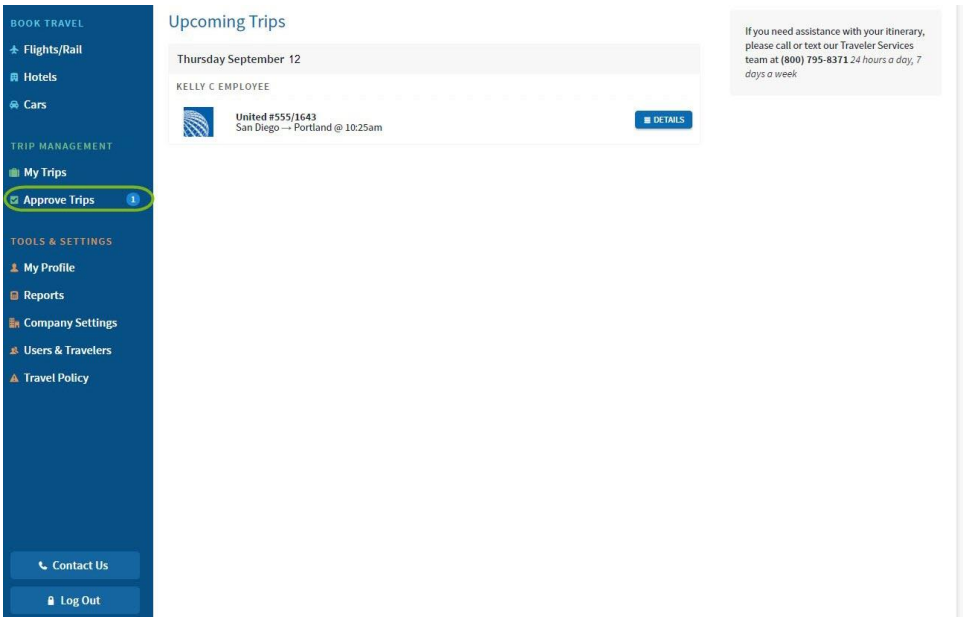
Please Note: *If the booking is not approved within that time frame, the itinerary is cancelled.*

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

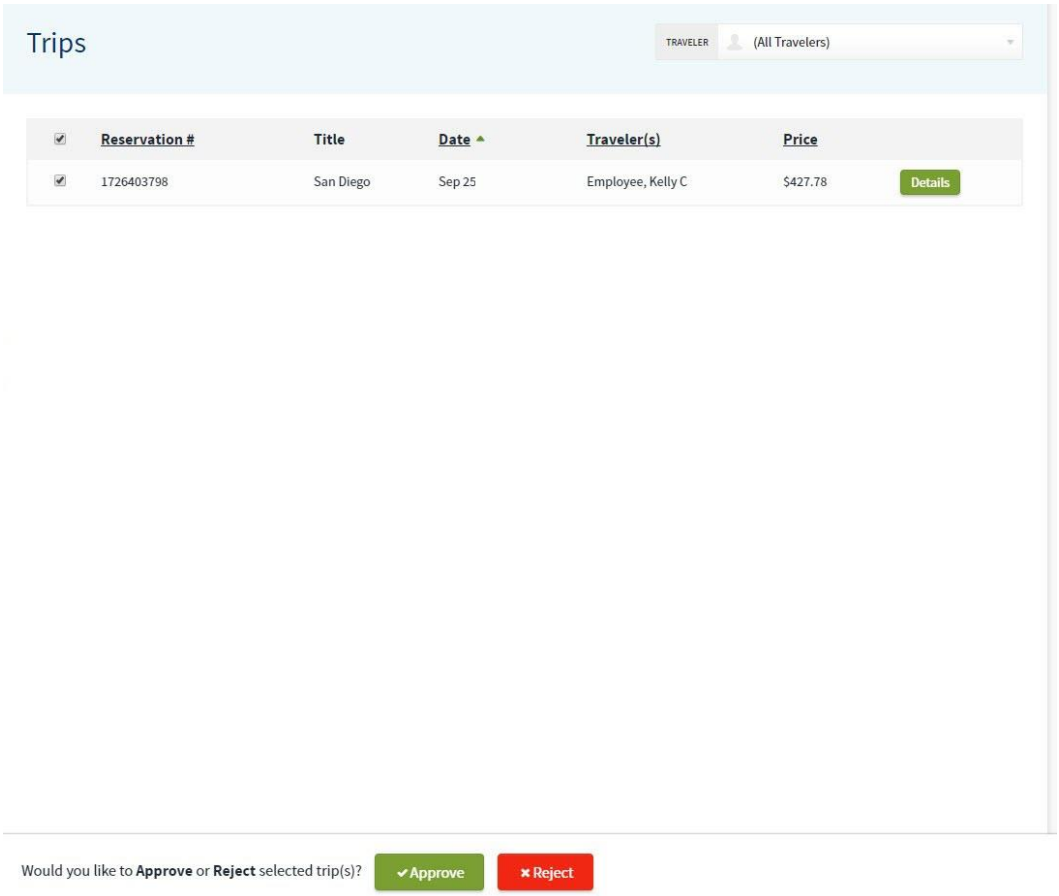
Step 1: On your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel.**



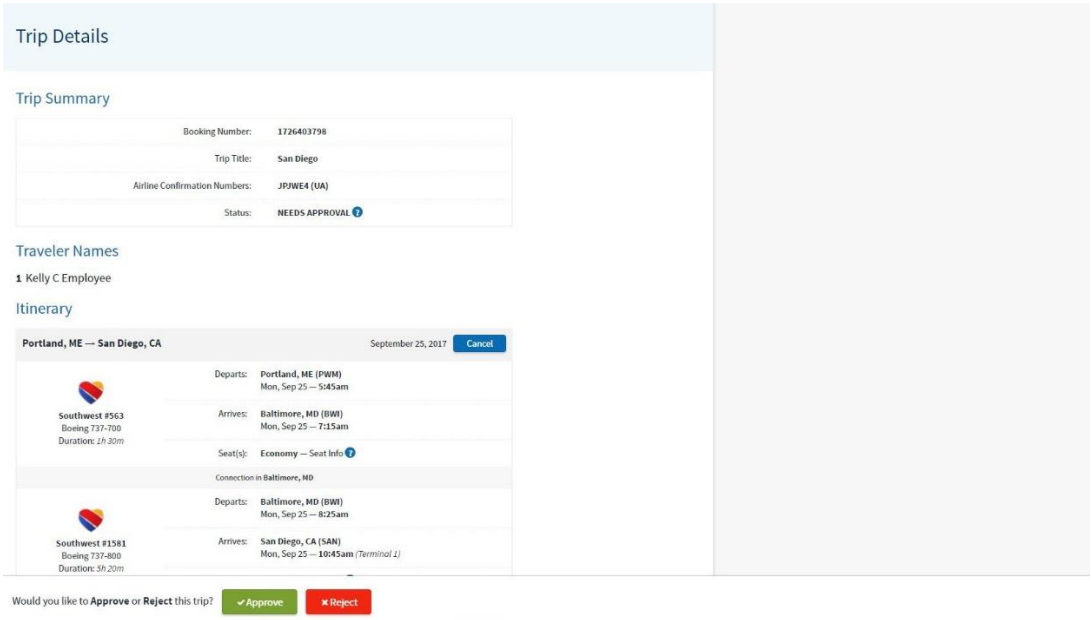
Step 2: Click **Approve Trips**.



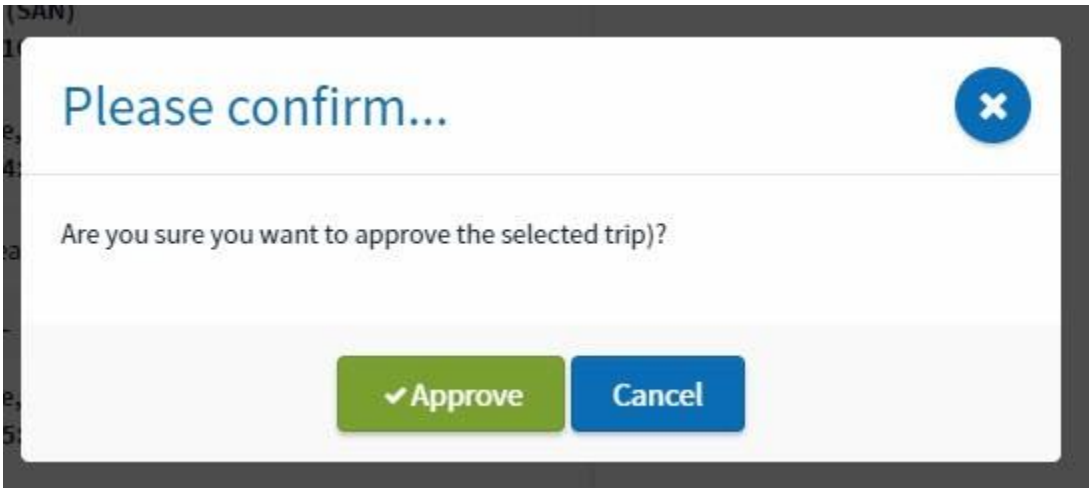
Step 3: To instantly approve or reject, select the itinerary and click **Approve** or **Reject**.



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



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

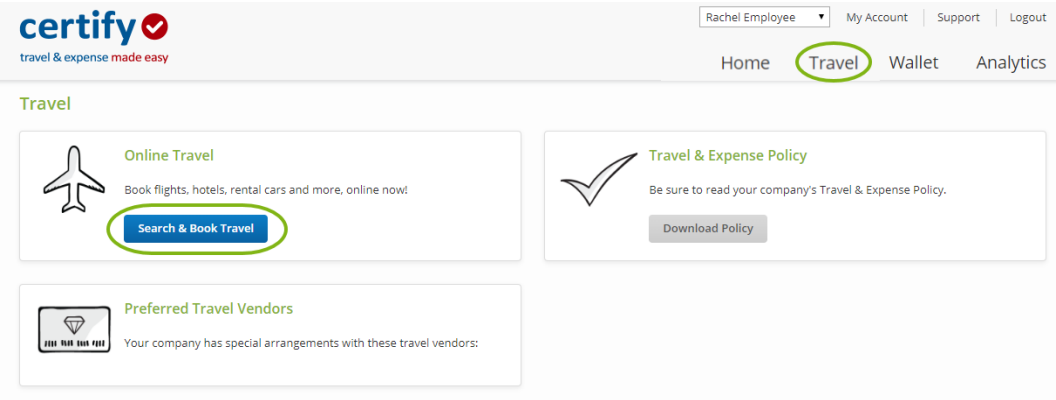
Travel Users

Adding a New Travel User

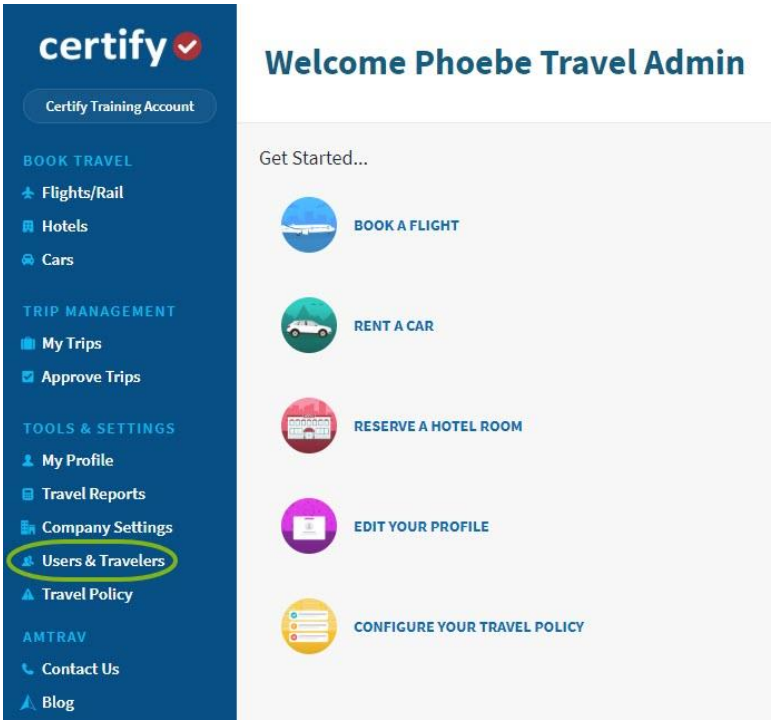
Certify Travel by **Amtrav** administrators can quickly and easily create a new user in **Certify Travel** and link it to a user's existing **Certify Expense** account.

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

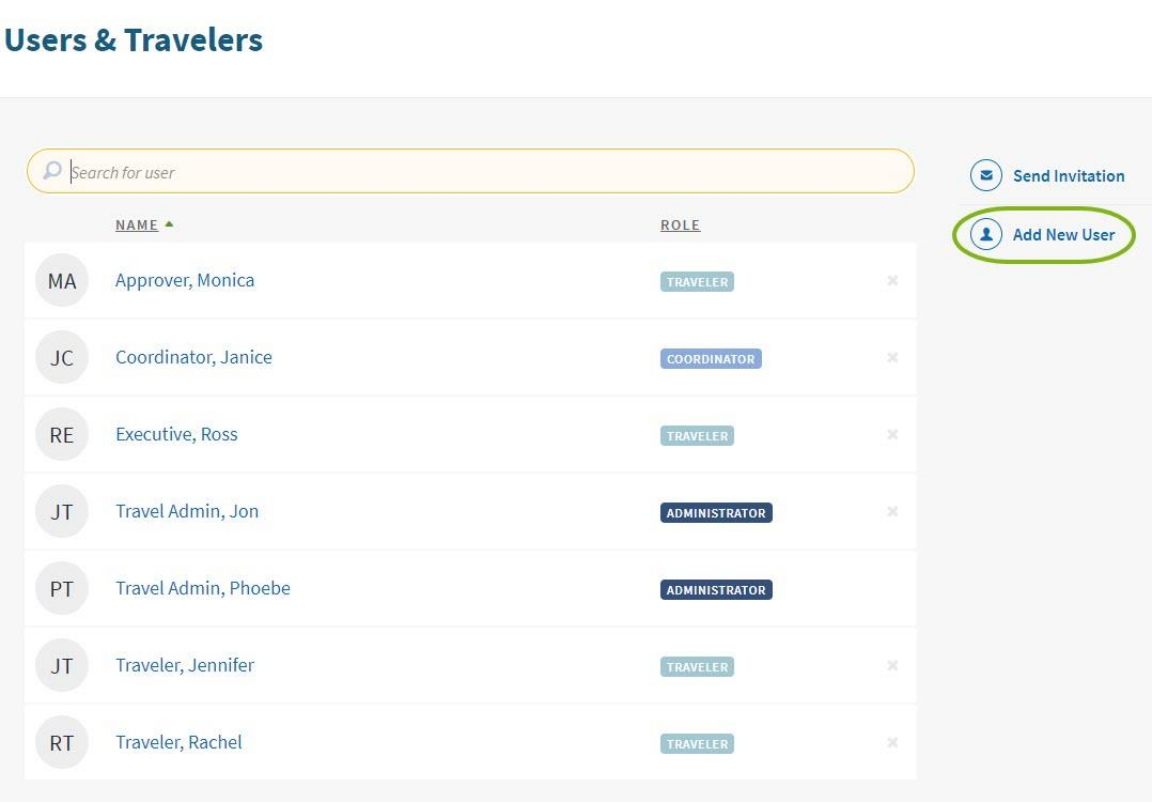
Step 1: On your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



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

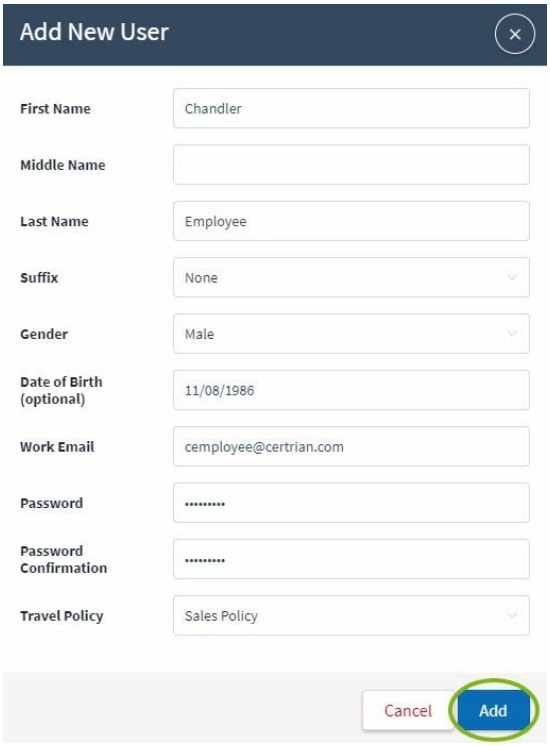


Step 3: Click **Add New User**.

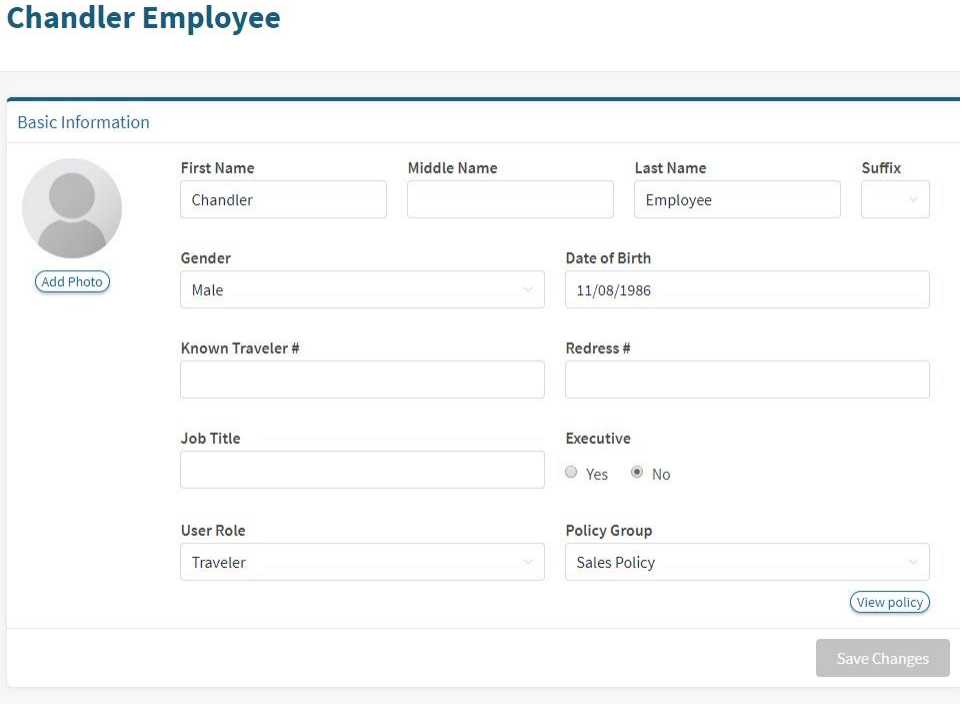


Step 4: Enter in the details for the new user. Click **Add** when complete.

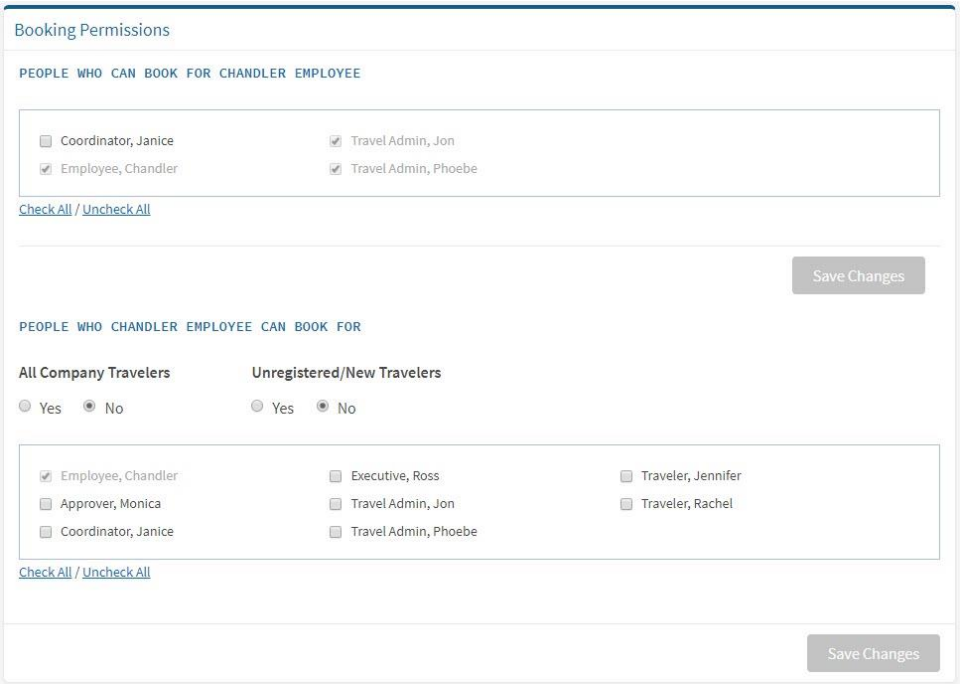
Please Note: *The email address used in* ***Certify Travel*** *must exactly match the email address for this user in* ***Certify Expense****.*



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.

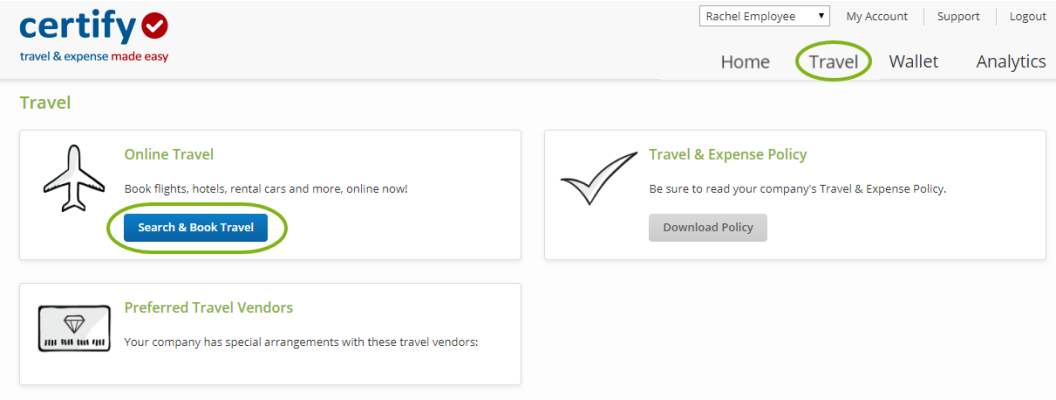


Adding Company Credit Cards for Travel Bookings

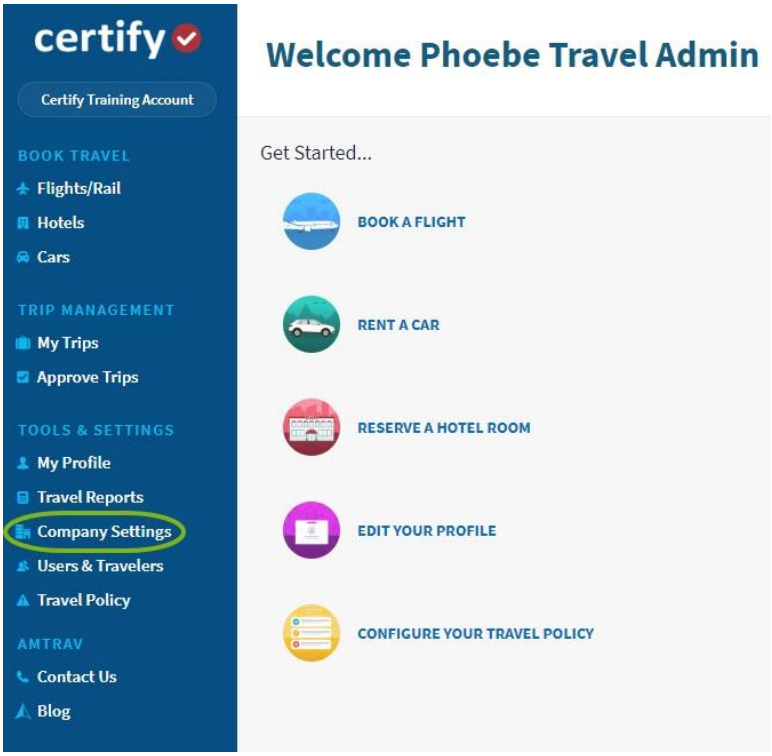
Within **Certify Travel** by **Amtrav**, an administrator may upload company credit cards for travelers to use when booking trips.

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

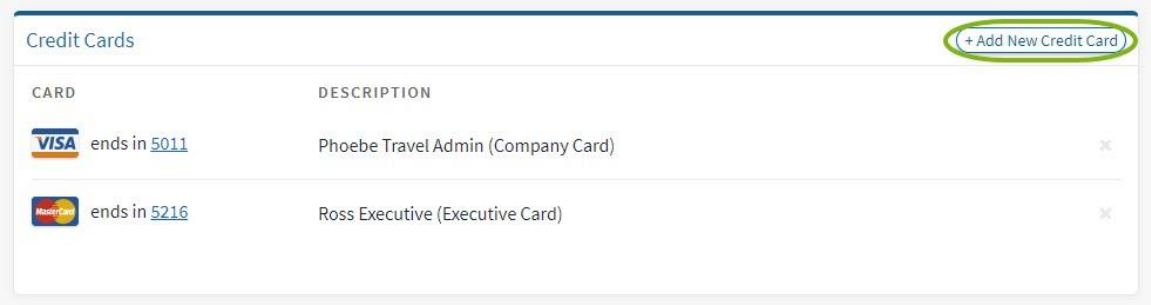
Step 1: From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book** travel.



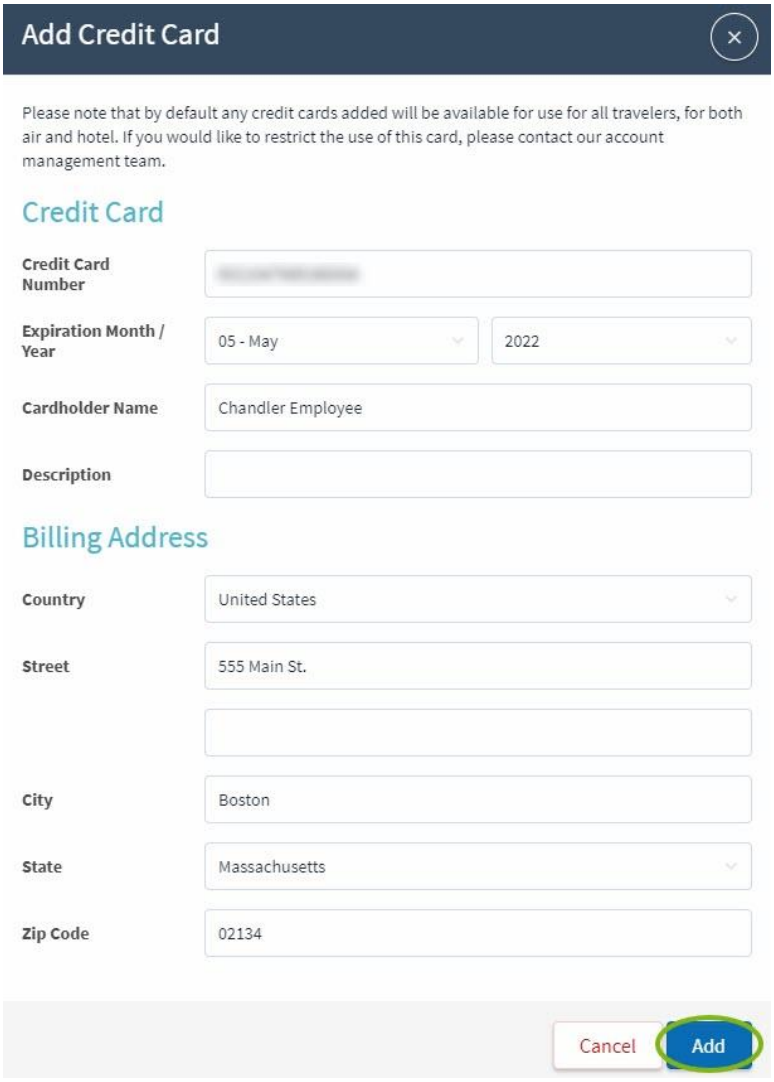
Step 2: Click **Company Settings**.



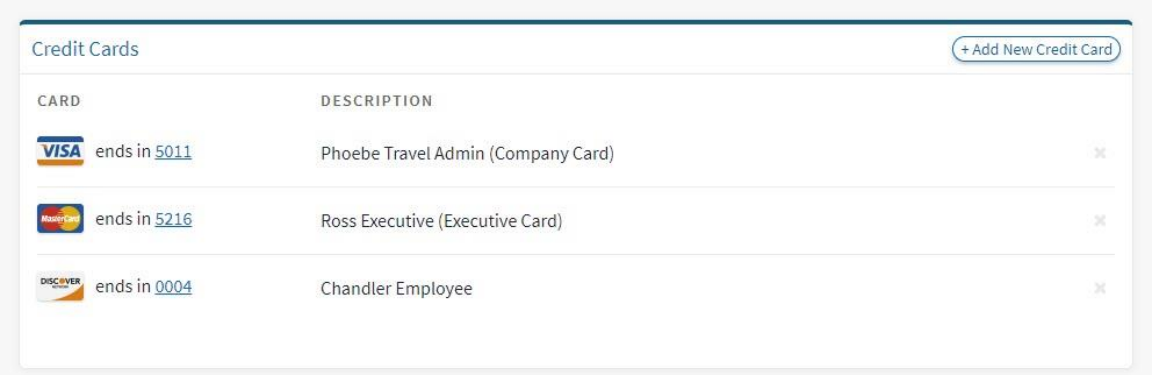
Step 3: Scroll to the **Credit Card** section. Click **Add New Credit Card**.



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



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.



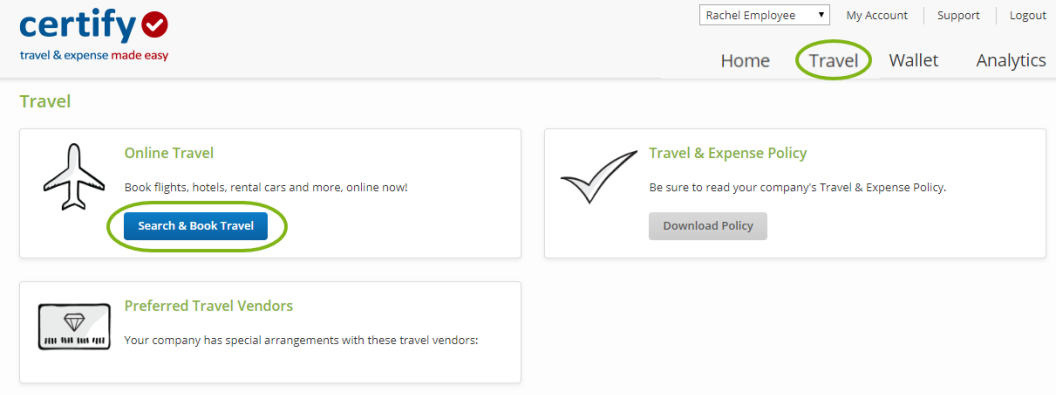
Adding Employee ID Fields

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.

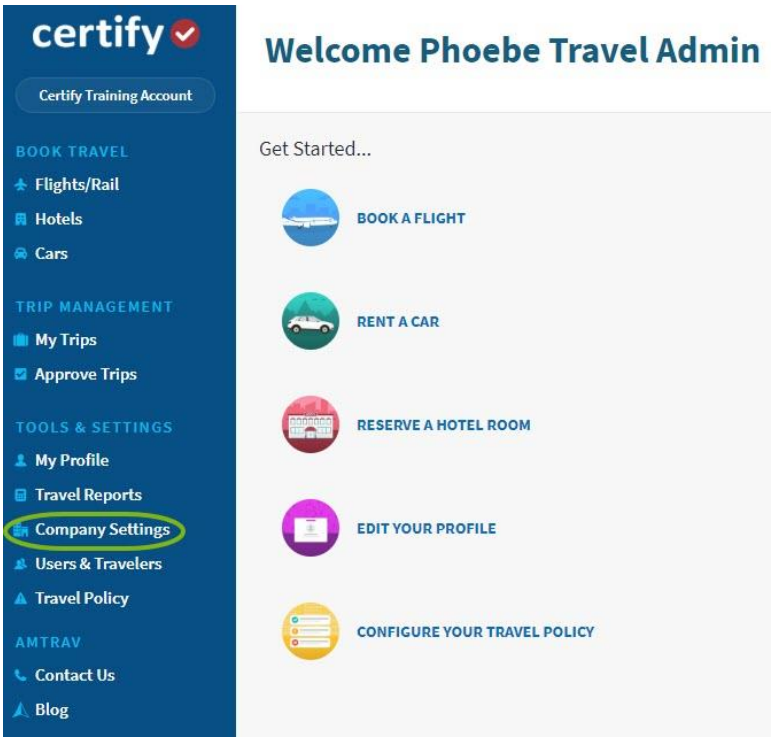
This article shows you, a **Certify Travel Administrator**, how to add **Employee ID Fields**.

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

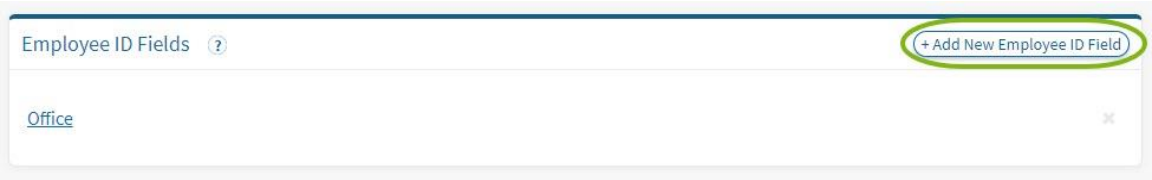
Step 1: From your account homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



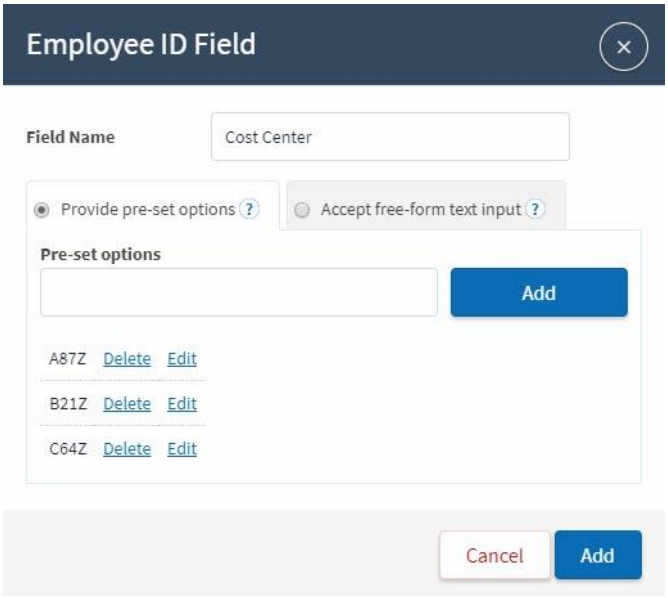
Step 2: Click **Company Settings**.



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.

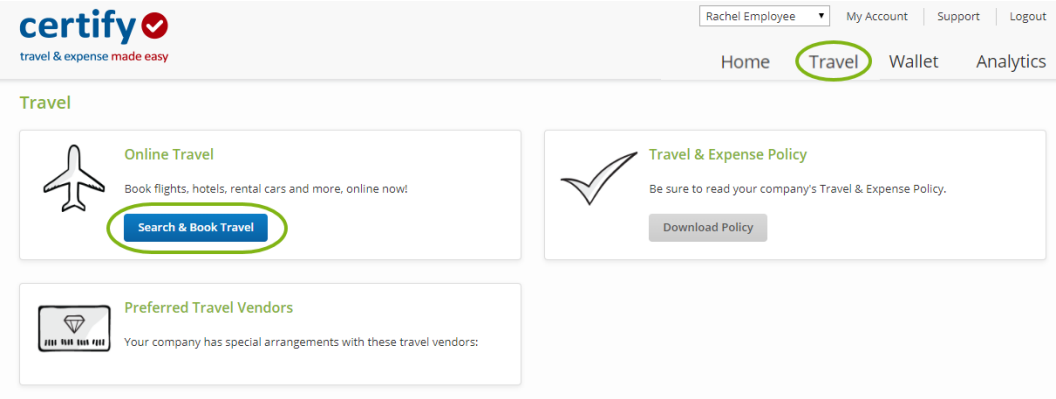
Travel Policy

Creating a Travel Policy

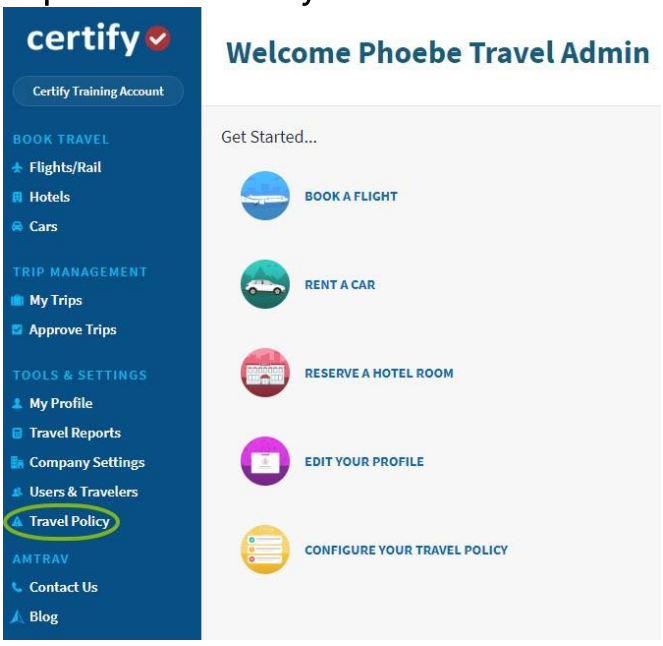
Within **Certify Travel** by **Amtrav**, administrators can create and manage travel policies. Travel policies define specific approval rules and booking limits for a group of travelers. For example, your company may have one policy for executives, another policy for basic travelers, and so on. There 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**.

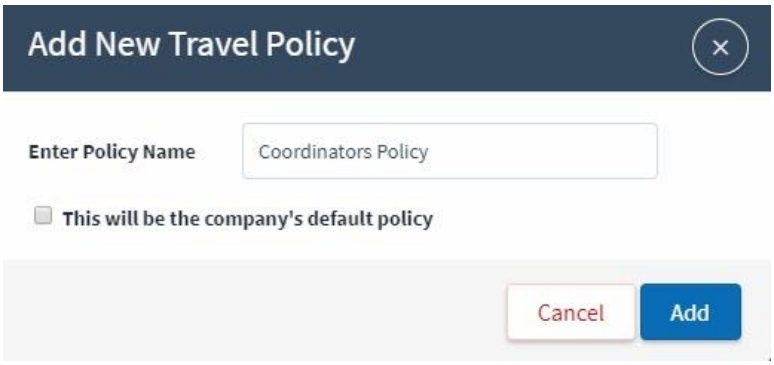


Step 2: Click **Travel Policy**.



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**.

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

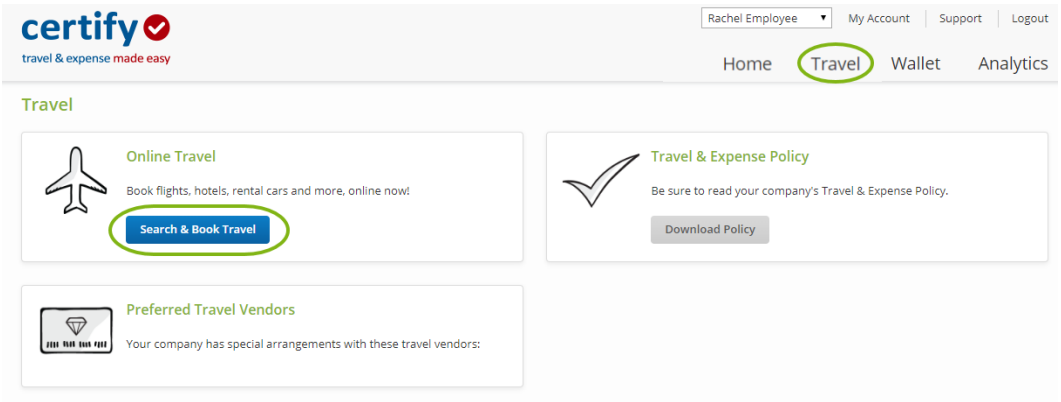


Assigning Travelers to a Travel Policy

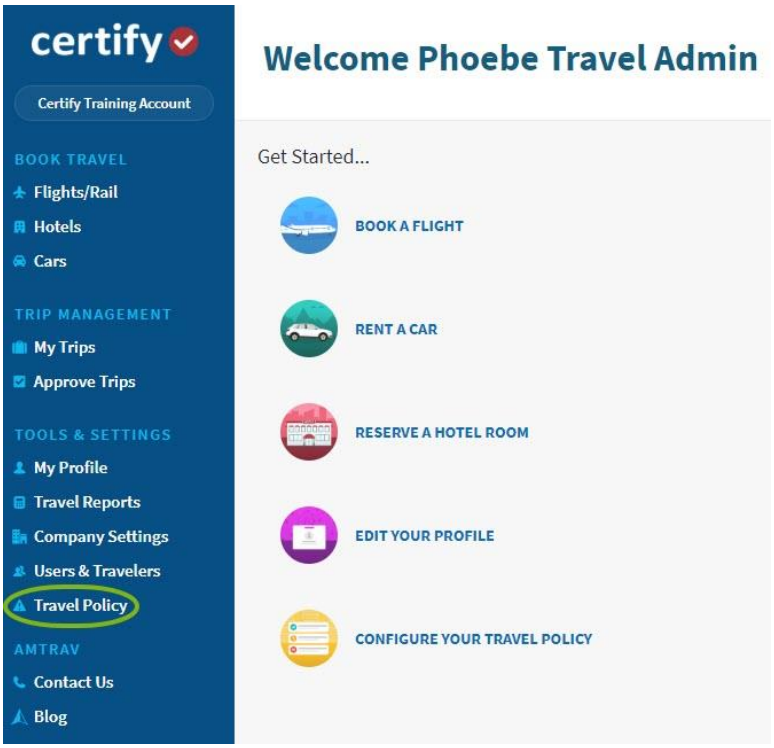
Within **Certify Travel** by **Amtrav**, you can enforce travel limits by assigning travelers to travel policies.

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

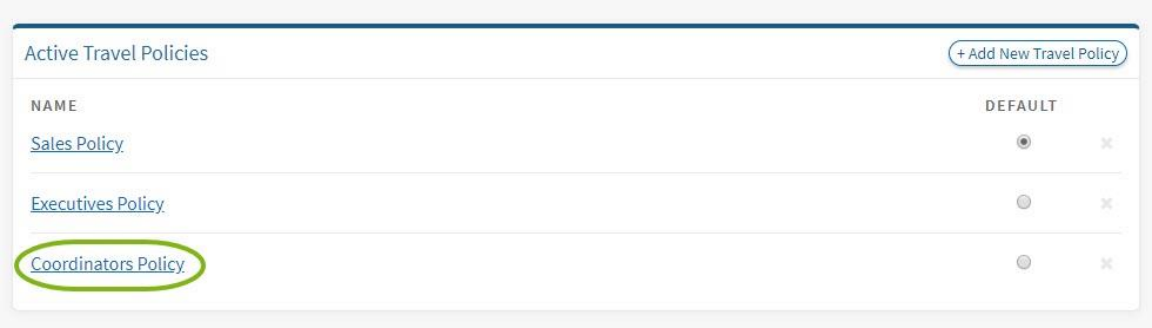
Step 1: From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



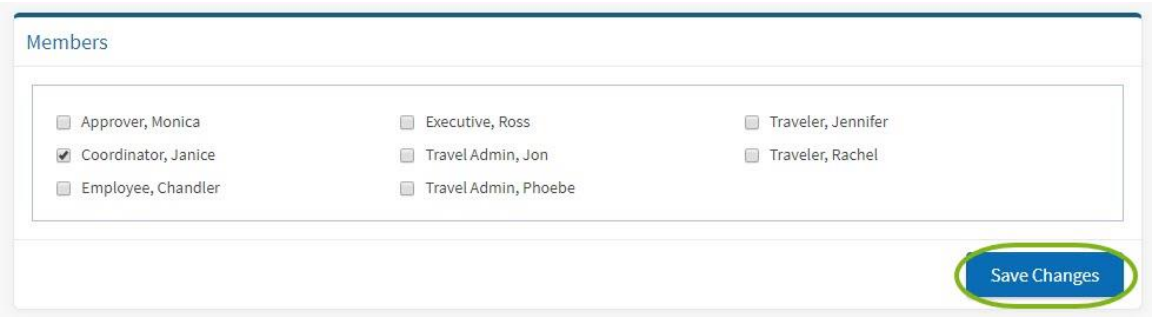
Step 2: Click **Travel Policy**.



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**.



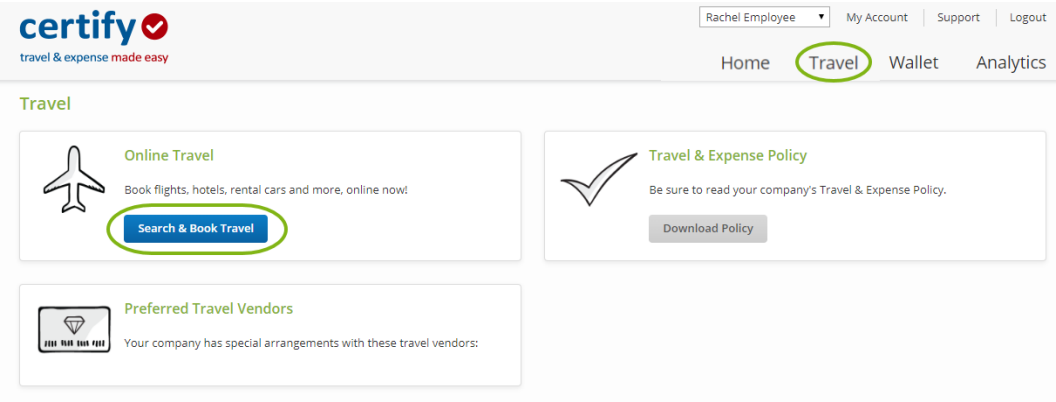
Travelers in this policy are held to the limits and approval rules of this specific policy.

Assigning Company Credit Cards to a Travel Policy

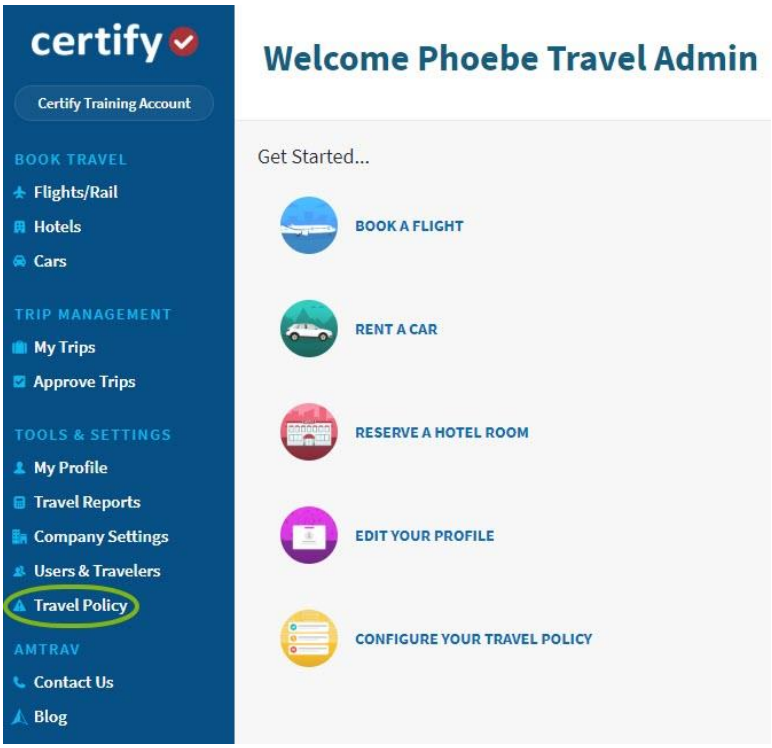
Within **Certify Travel** by **Amtrav**, you can assign credit cards to specific travel policies.

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

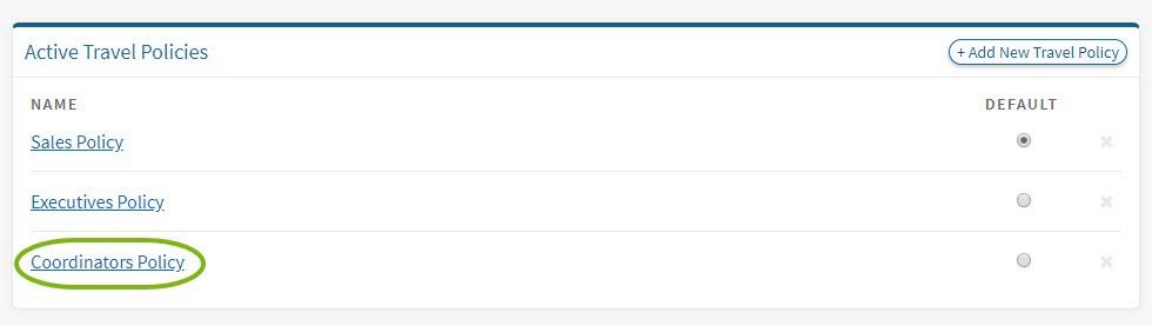
Step 1: From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



Step 2: Click **Travel Policy**.

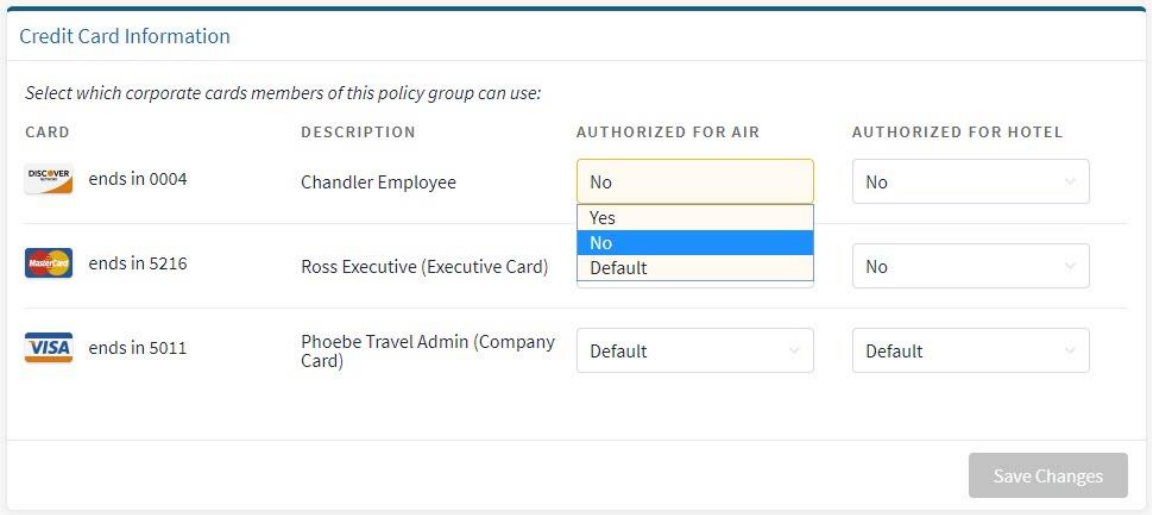


Step 3: Click the applicable policy to edit.

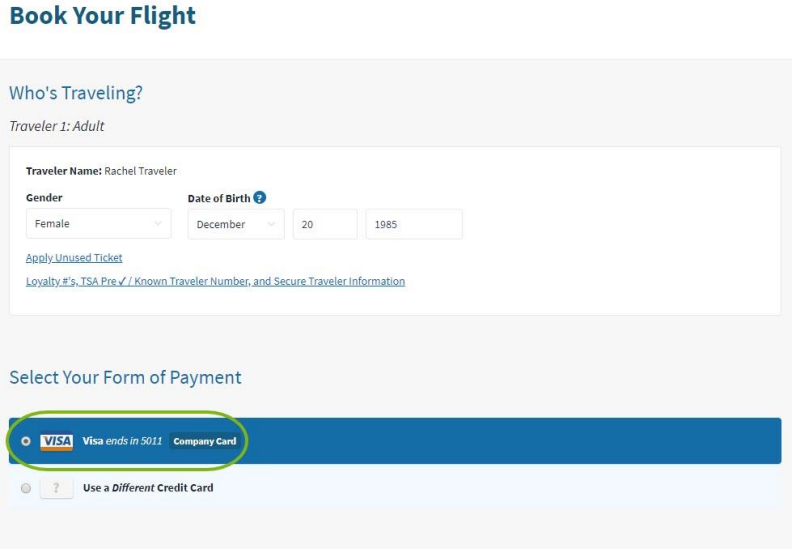


Step 4: Scroll to the **Credit Card Information** section. Company credit cards, entered in the Company Settings section shows here.

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.

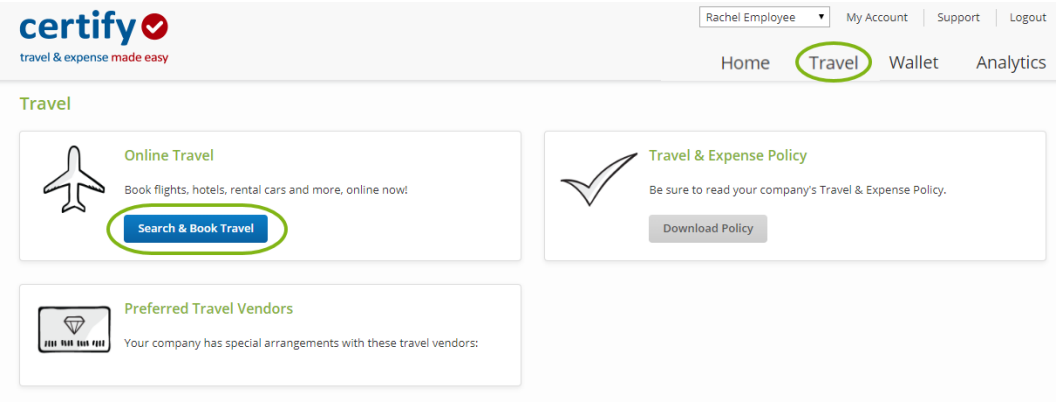


Rental Car Policies

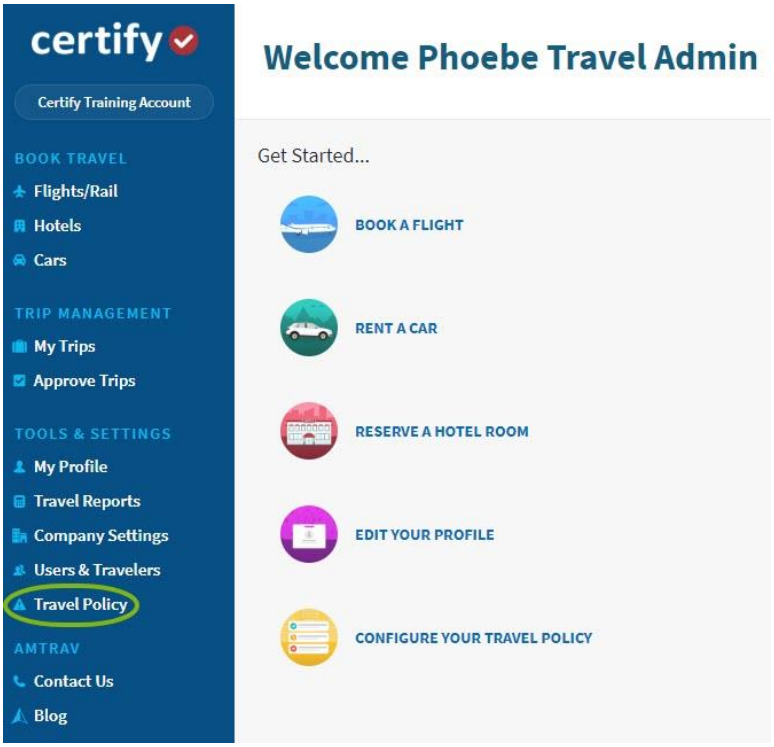
Within **Certify Travel** by **Amtrav**, you can establish rental car travel policy settings for your company's travelers.

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

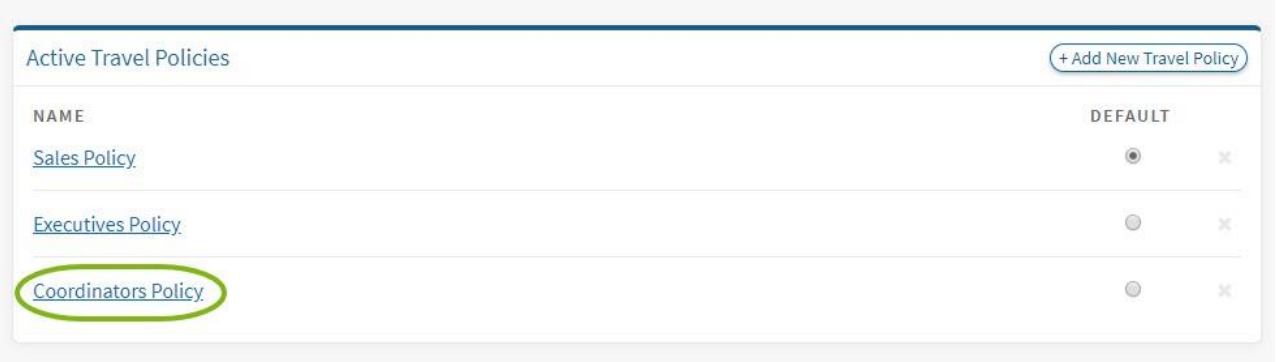
Step 1: From your account homepage, click **Travel**. Then, click **Search & Book Travel**.



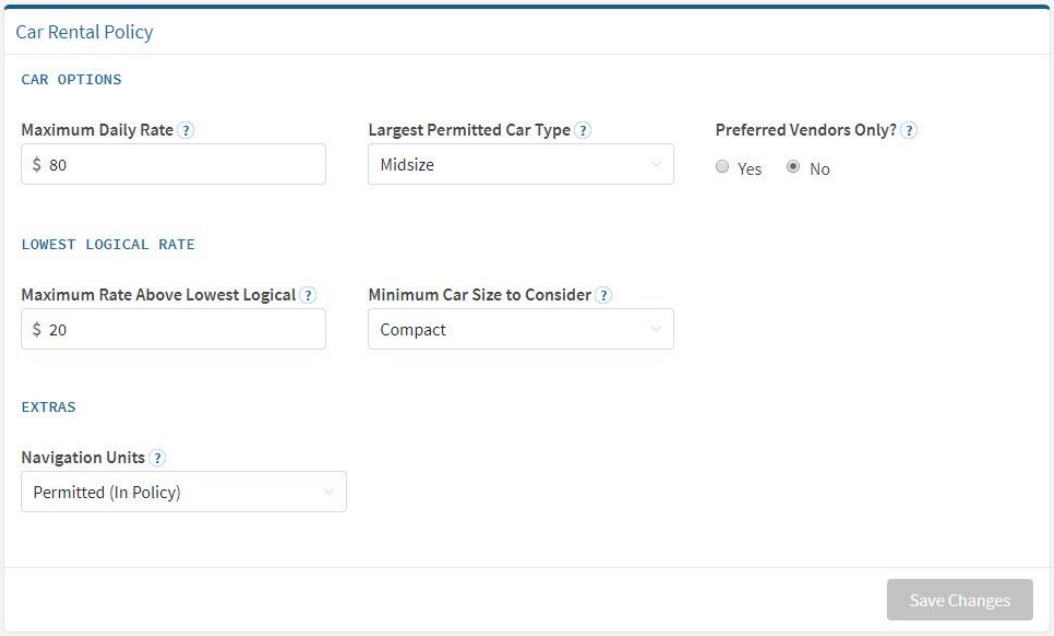
Step 2: Click **Travel Policy**.



Step 3: Click the policy to edit.



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



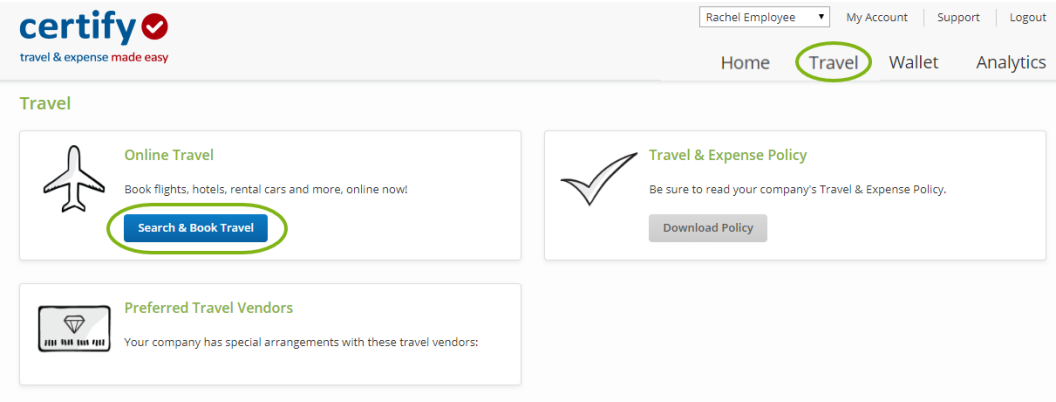
- **Maximum Daily Rate**: Dollar limit for a rental car, per day.
- **Largest Permitted Car Type**: Highest car class that can be booked.
- **Preferred Vendors Only**: Whether travelers should only book with your preferred rental car vendors.
- **Maximum Rate Above Lowest Logical**: The **"lowest logical"** 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

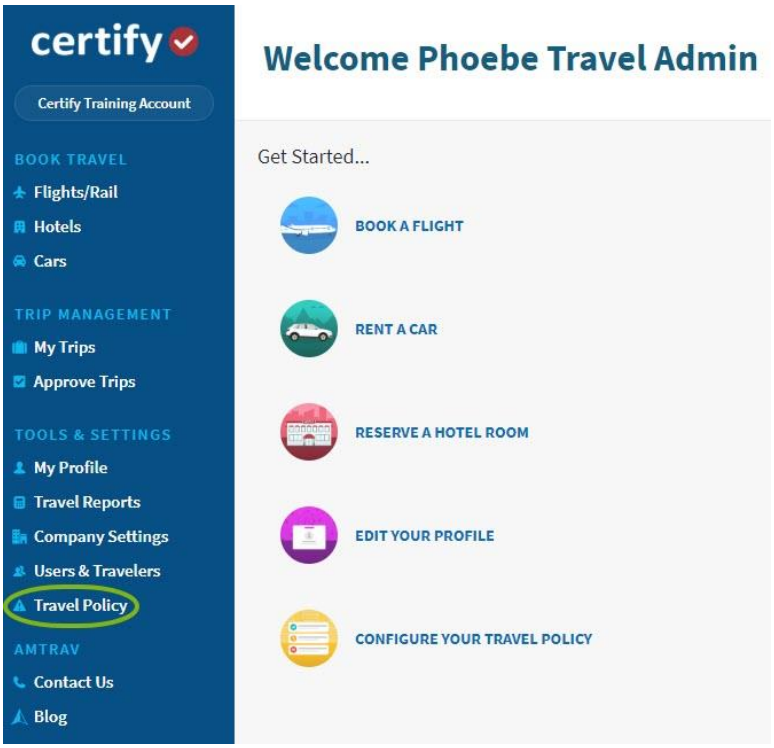
Within **Certify Travel** by **Amtrav**, you can establish hotel policy settings for your company's travelers.

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

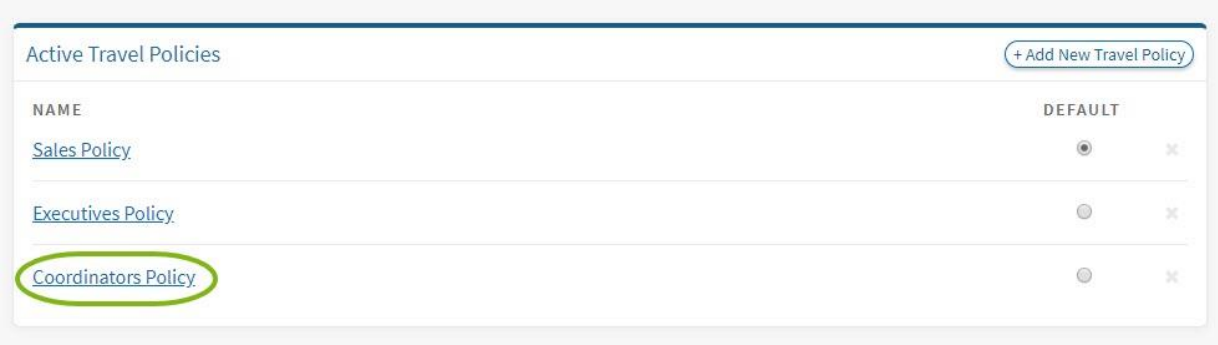
Step 1: From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



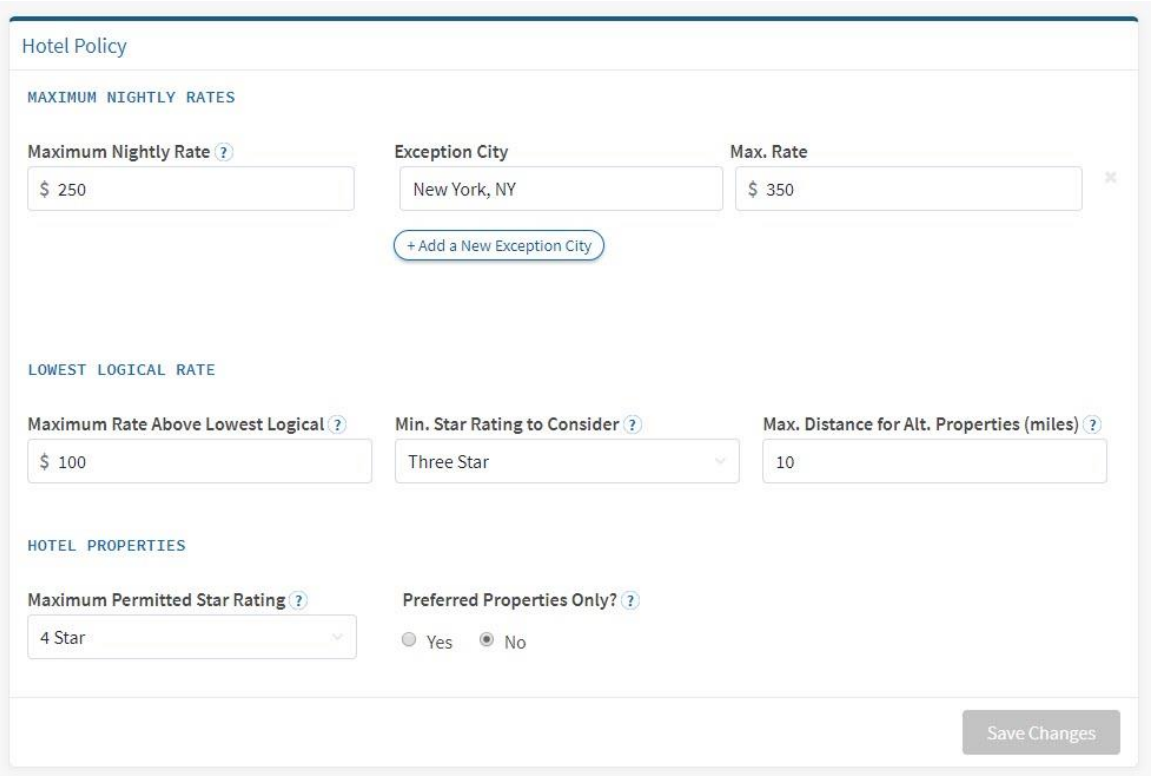
Step 2: Click **Travel Policy**.



Step 3: Click the policy to edit.



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



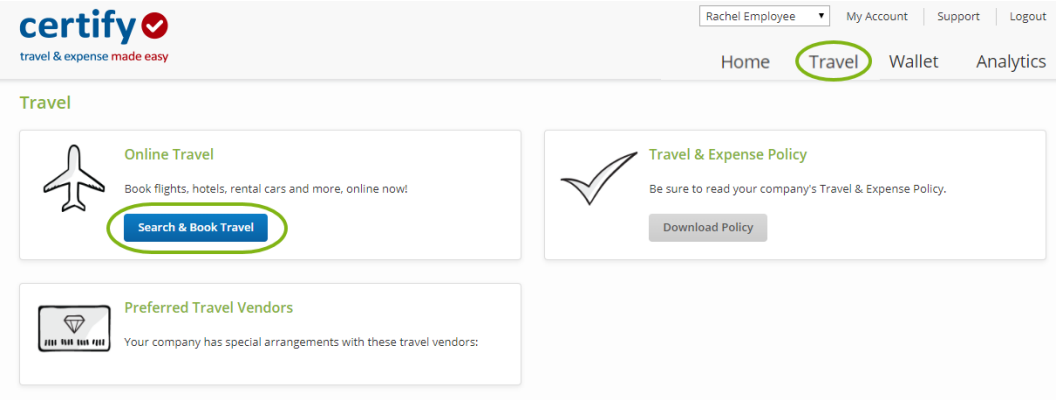
- **Maximum Nightly Rate**: Dollar limit for a hotel room, per night.
- **Exception Cities**: Some cities are more expensive than others, and travelers may have trouble staying within your room limits based on the location. Here, you can enter specific cities to allow different limits.
- **Preferred 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

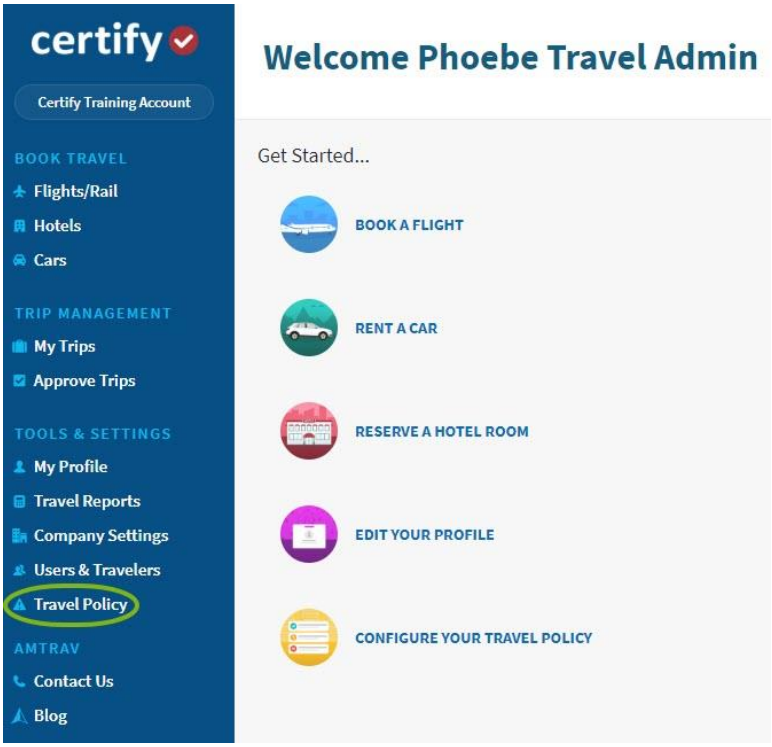
Within **Certify Travel** by **Amtrav**, you can establish air travel policy settings for travelers in your company.

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

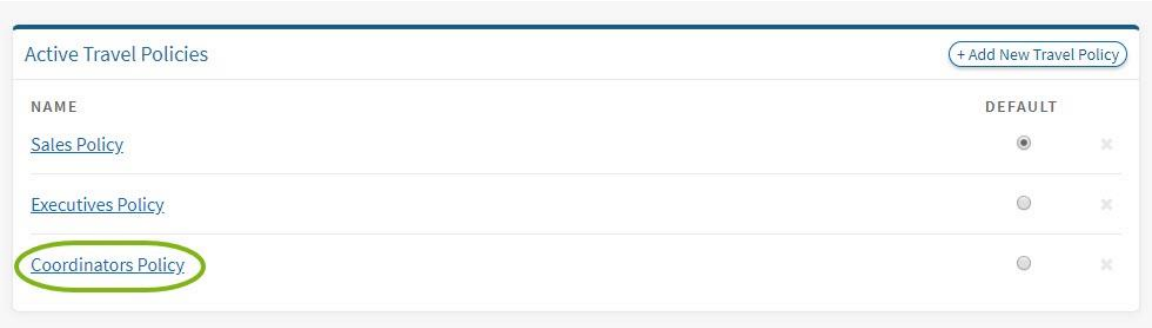
Step 1: From your **Certify** homepage, click **Travel**. Then, click **Search & Book Travel**.



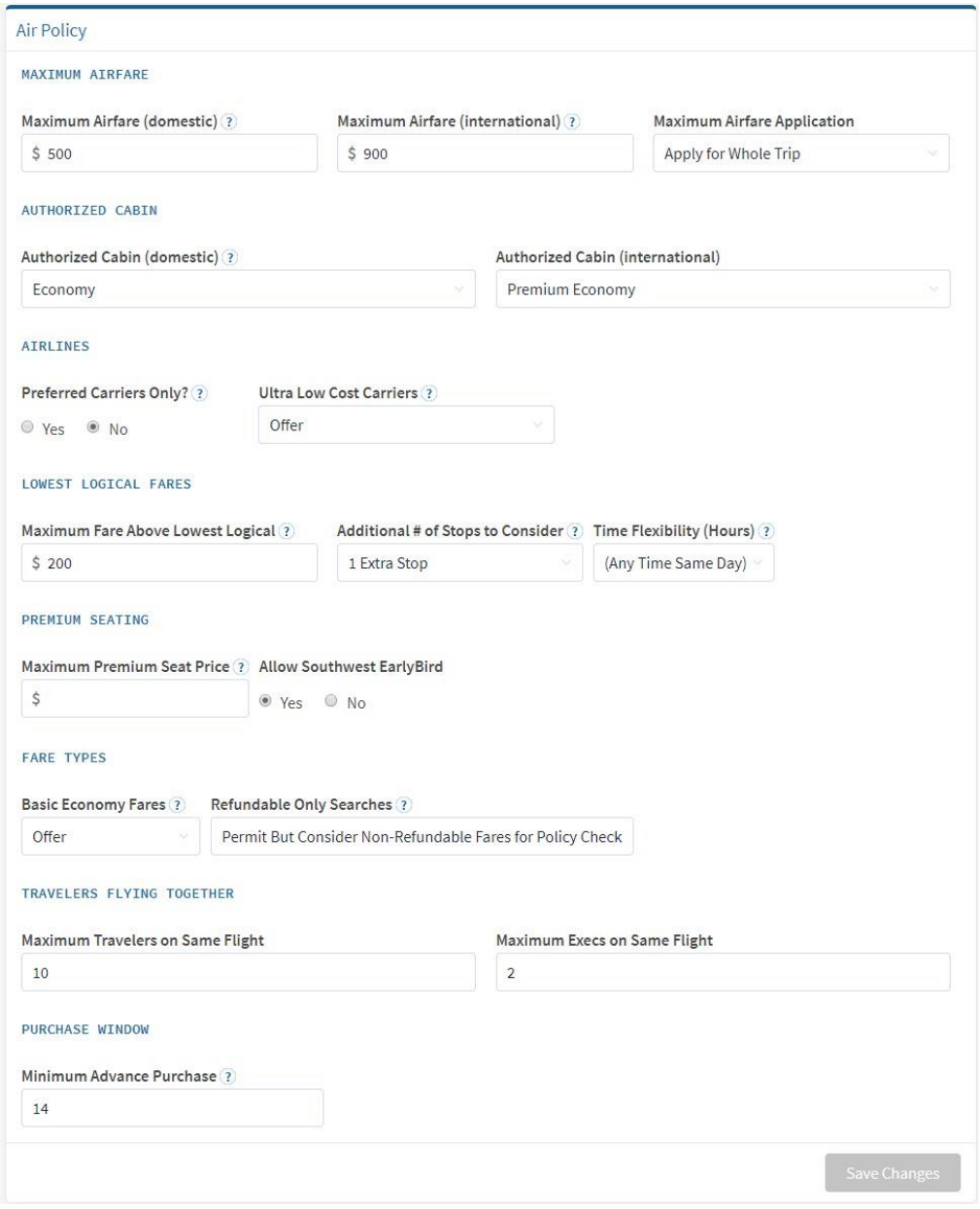
Step 2: Click **Travel Policy**.



Step 3: Click the policy to edit.



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



- **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

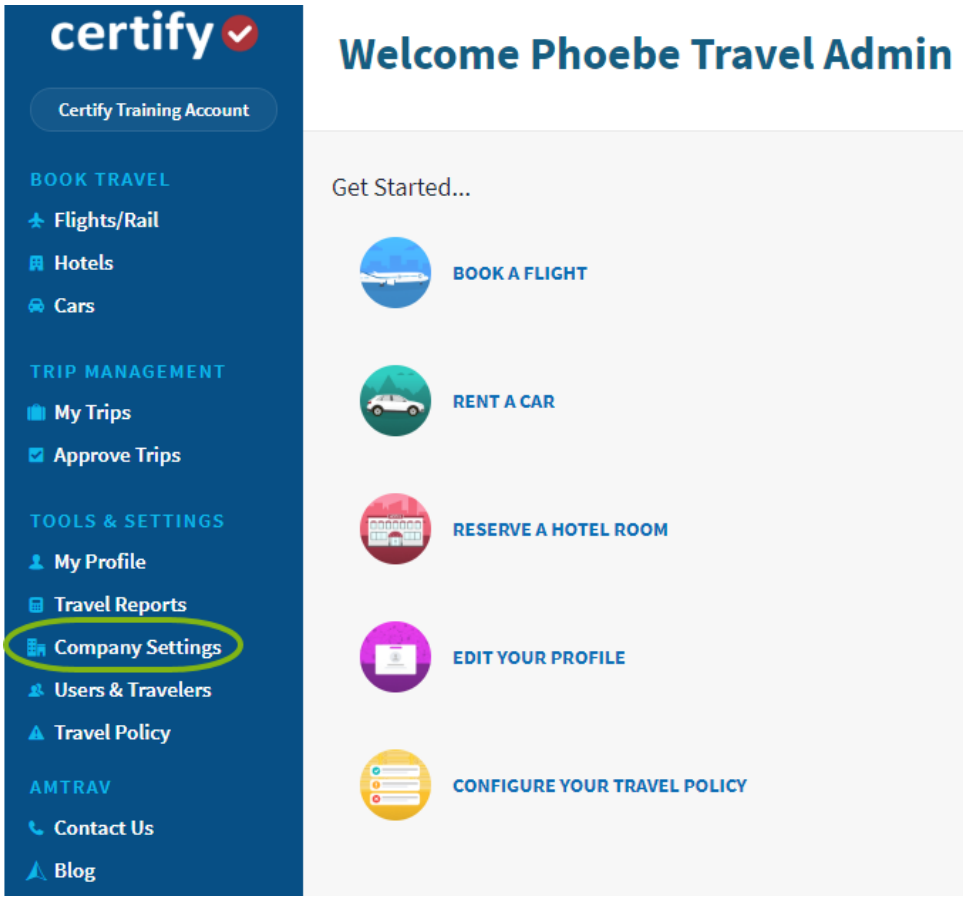
Travel Alert Messaging allows you to create custom alerts for your travelers. Alerts are available for each of the following areas:

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

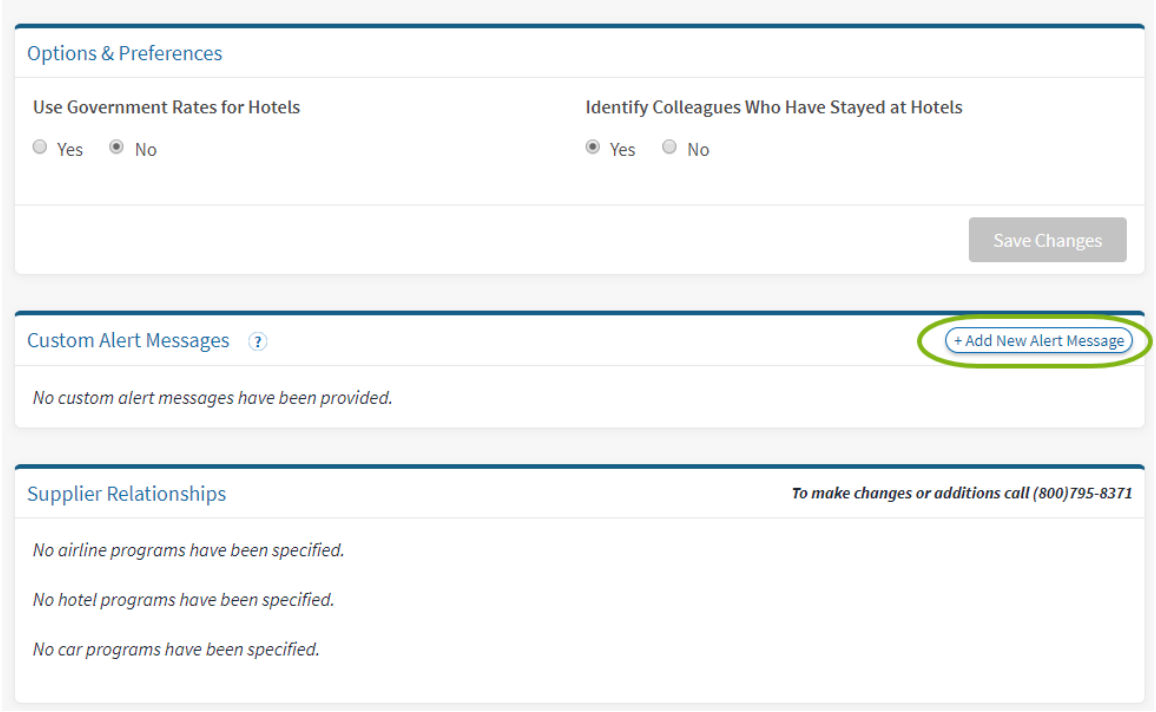
For example, you might want to set an alert to remind travelers they won't be reimbursed unless they keep copies of their itemized receipts.

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

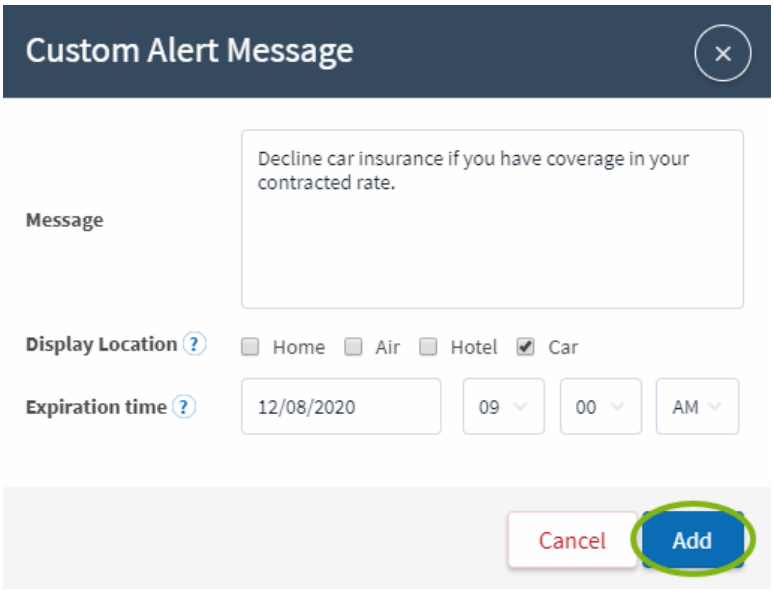
Step 1: On your **Certify Travel** homepage, click **Company Settings**.



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

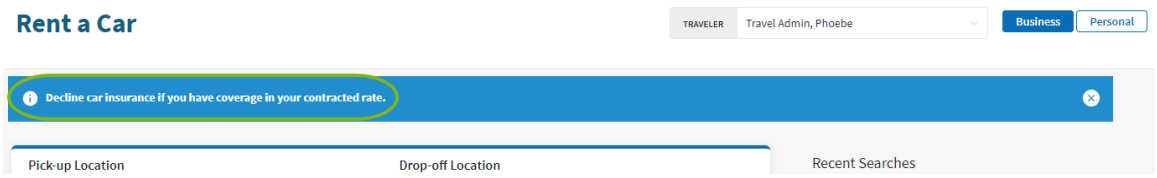


Step 3: Enter your **travel alert** message, choose a **Display Location**, and choose an **Expirate Date/Time**. When complete, click **Add**.



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**.

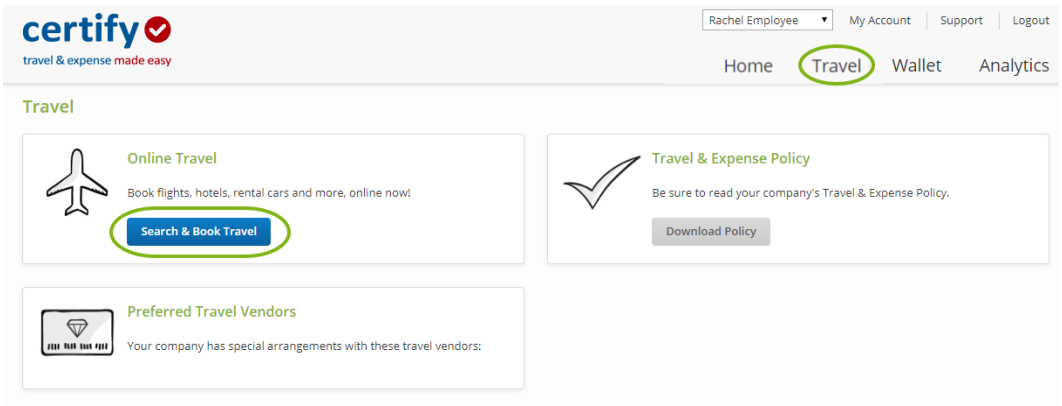


Booking and Workflow Travel Policy Details

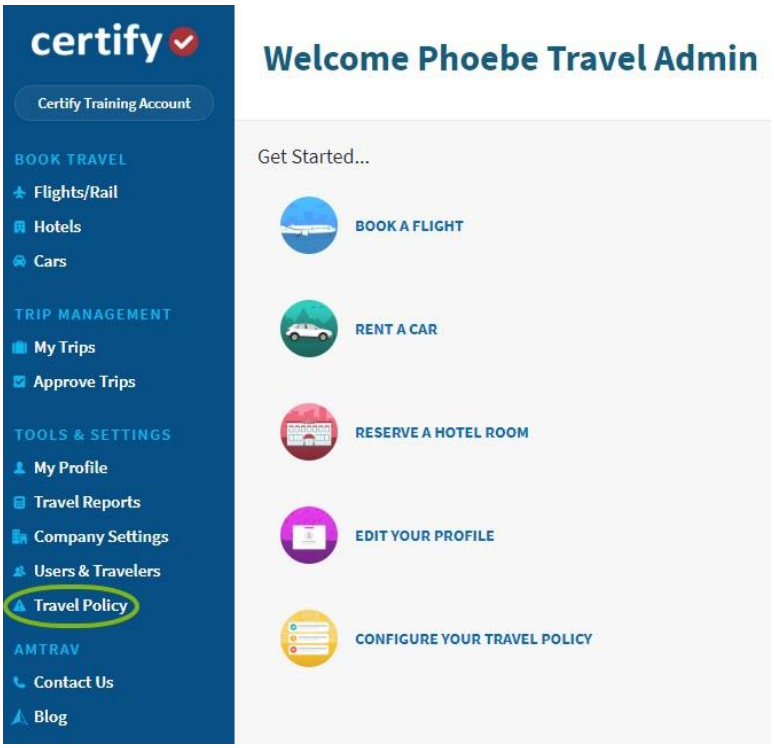
Within **Certify Travel** by **Amtrav**, you can establish your company's approval workflow and manage booking notifications.

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

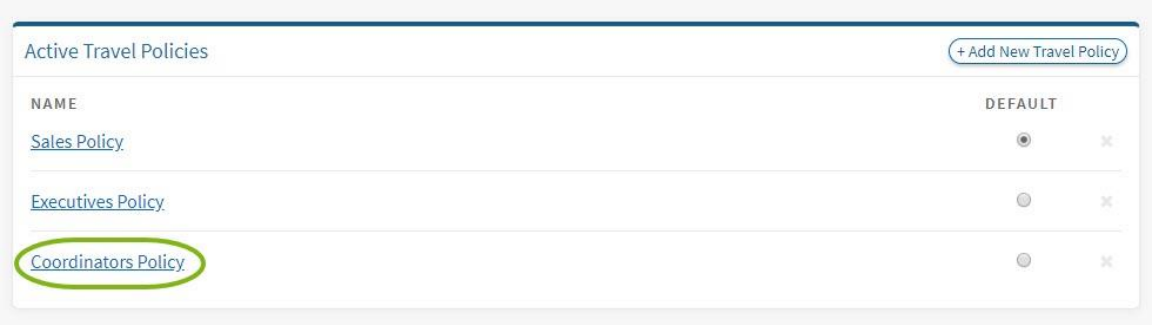
Step 1: From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



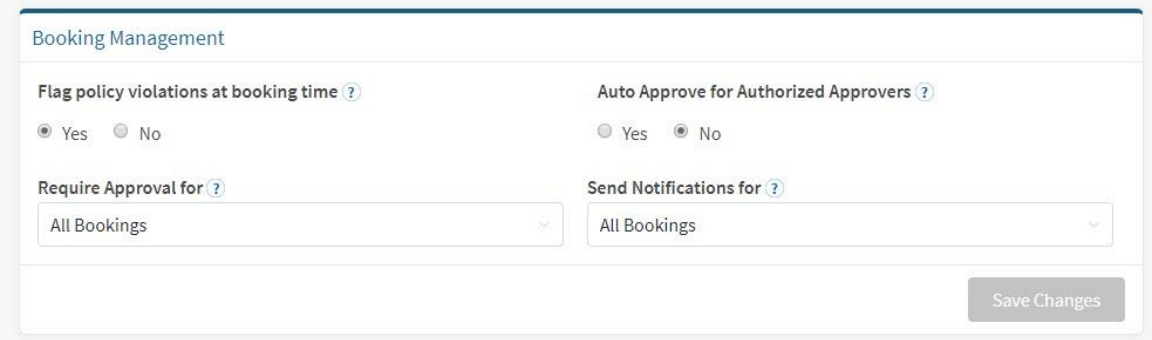
Step 2: Click **Travel Policy**.



Step 3: Click the policy to edit.



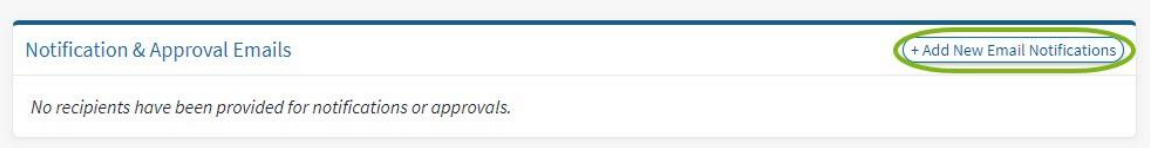
Step 4: Scroll to the **Booking Management** section and enter your settings.



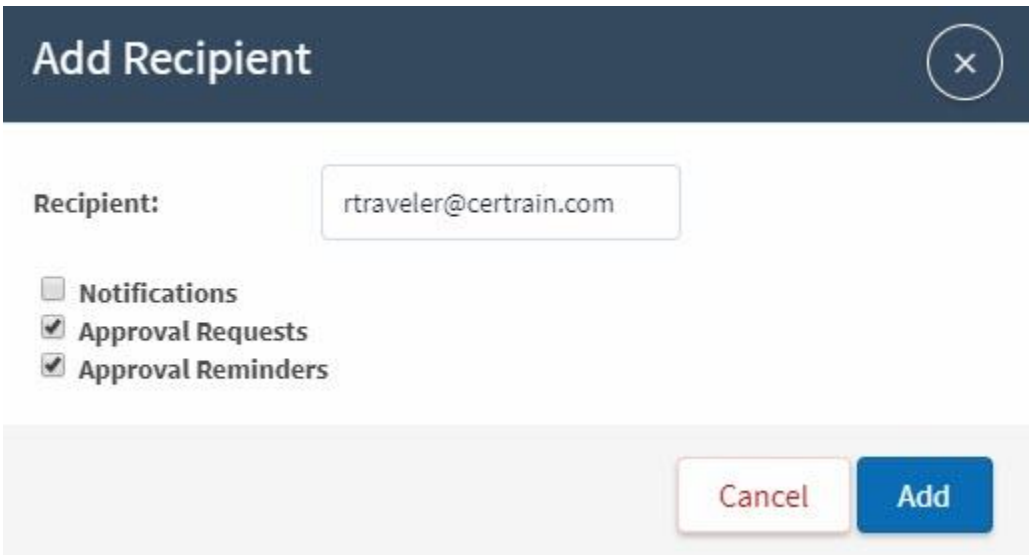
- **Flag policy violations at booking time**: Whether to notify travelers of policy violations prior to booking.

- **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.

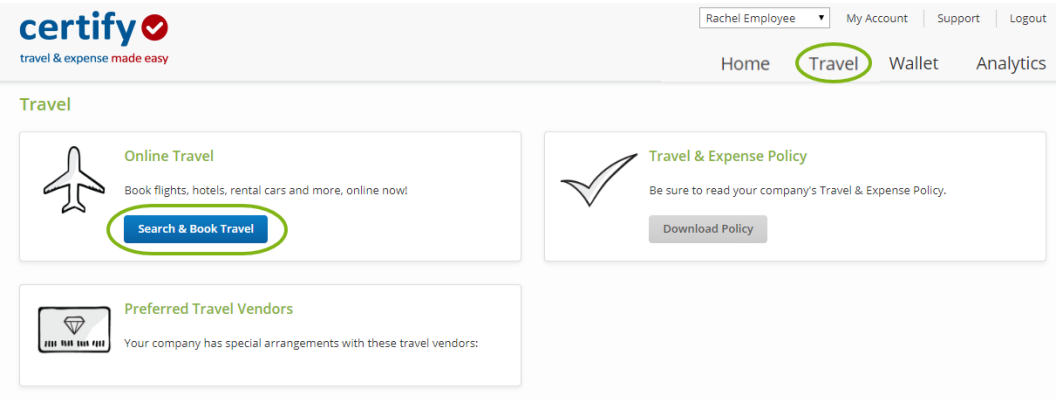
Please Note: *Approval within* ***Certify Travel*** *is one-level. If you enter more than one* ***Approver****, the trip still only needs to be approved by just one person. Trips must be approved within 24 hours of booking.*

Custom Search Locations for Frequent Travel Use

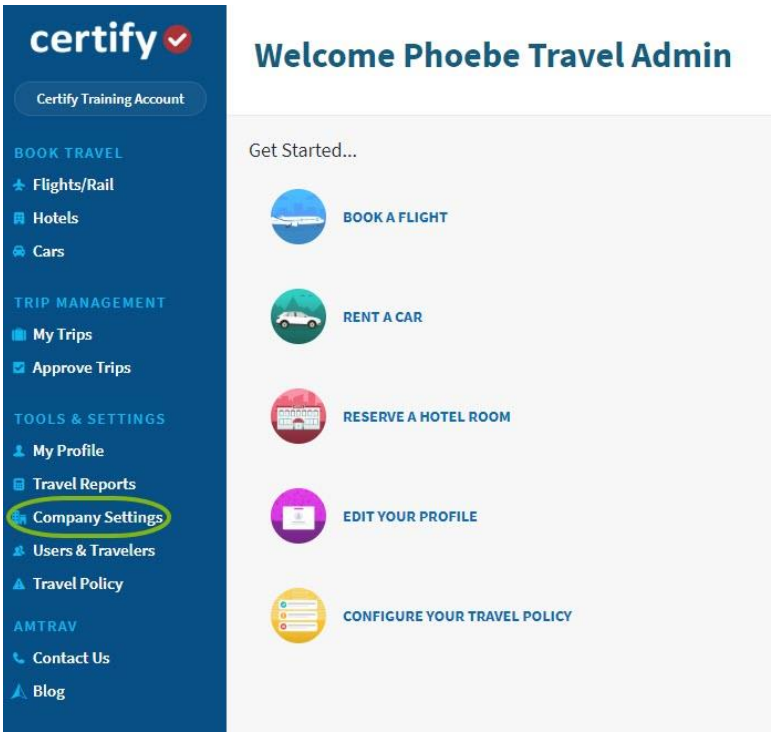
Within **Certify Travel** by **Amtrav**, an administrator can pre-load frequently used locations for flights, hotels, and car rentals.

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

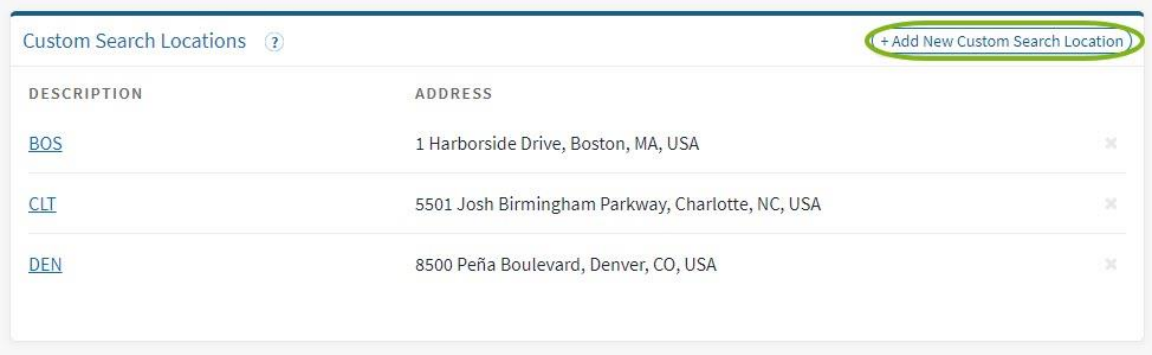
Step 1: On your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



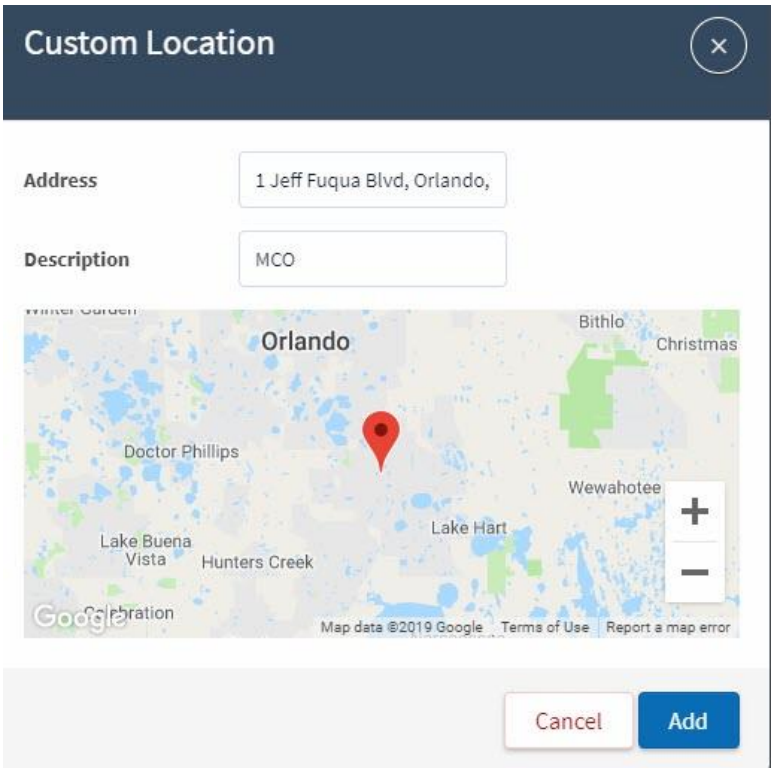
Step 2: Click **Company Settings**.



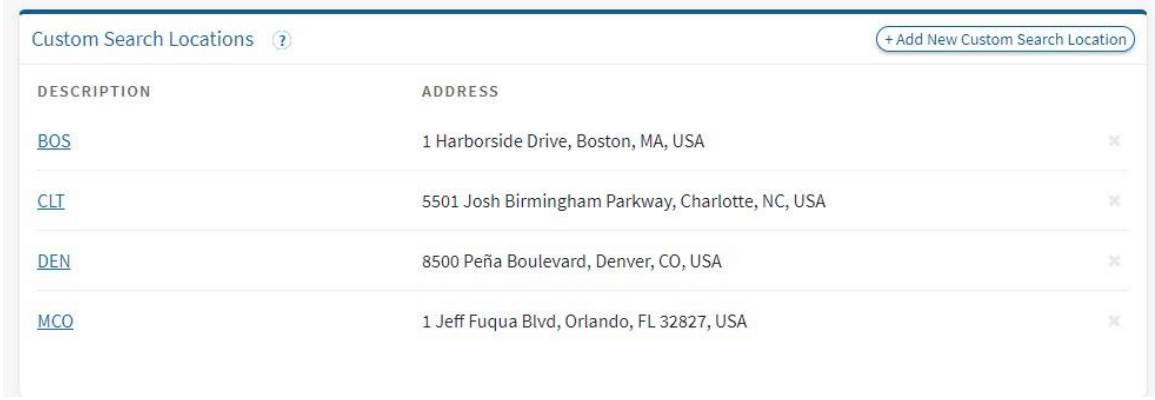
Step 3: Scroll to the **Custom Search Locations** section. Click **Add New Custom Search Location**.



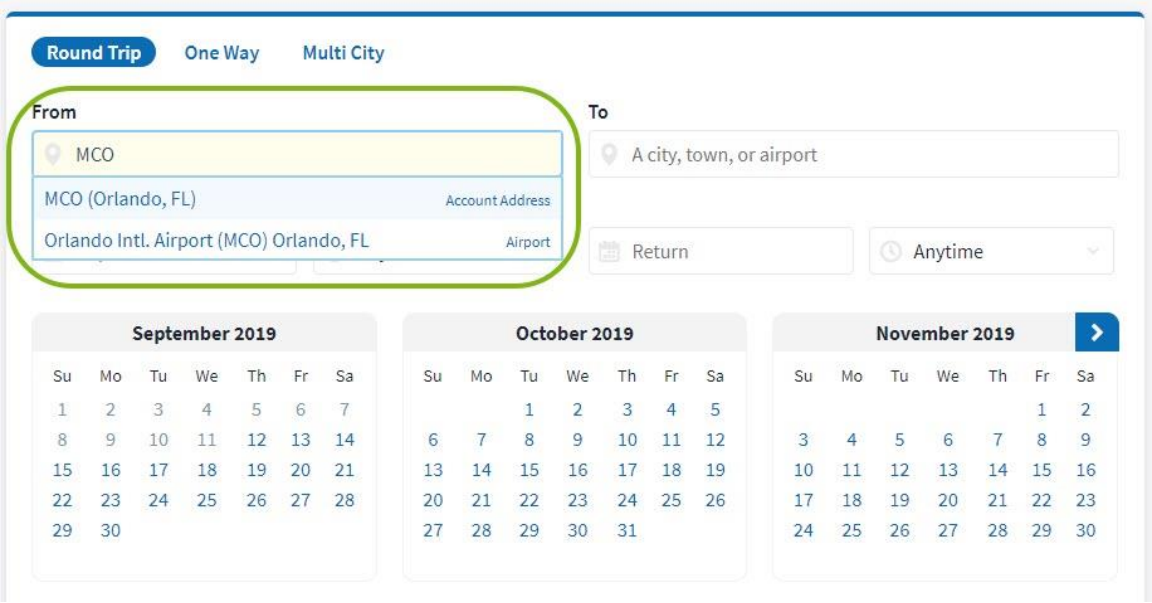
Step 4: Enter the details for the location, and click **Add**.



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



It will also be available in search boxes.



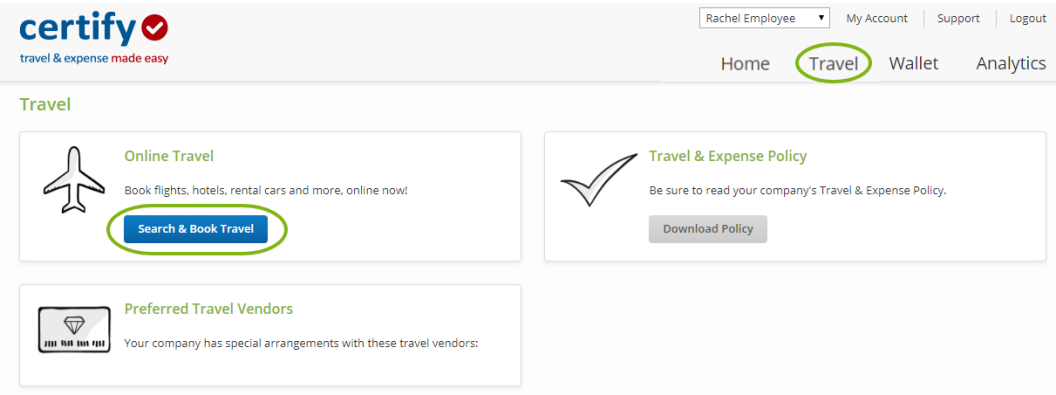
Optional Billing Fields for Travel Bookings

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.

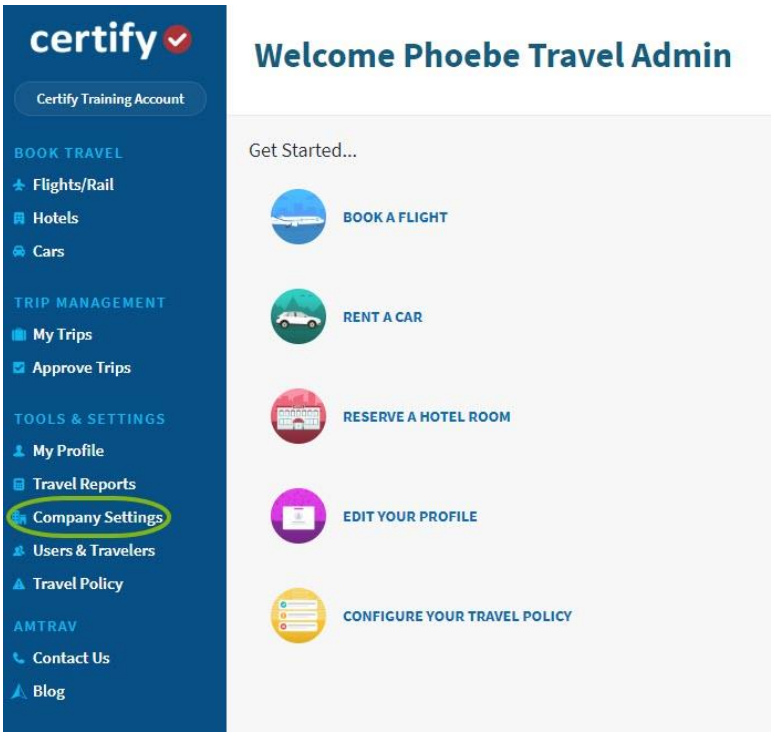
This article shows you, a **Certify Travel Administrator**, how to add **Optional Billing Fields**.

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

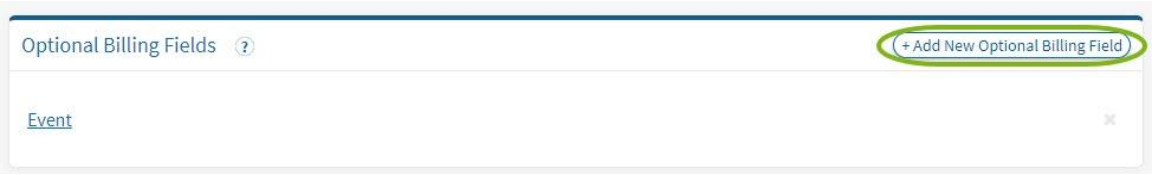
Step 1: From your **Certify** homepage, click the **Travel** tab. Then, click **Search & Book Travel**.



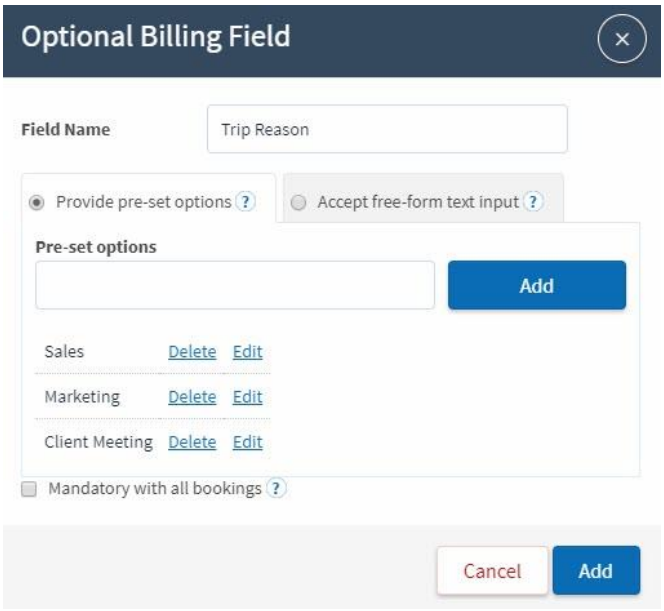
Step 2: Click **Company Settings**.



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



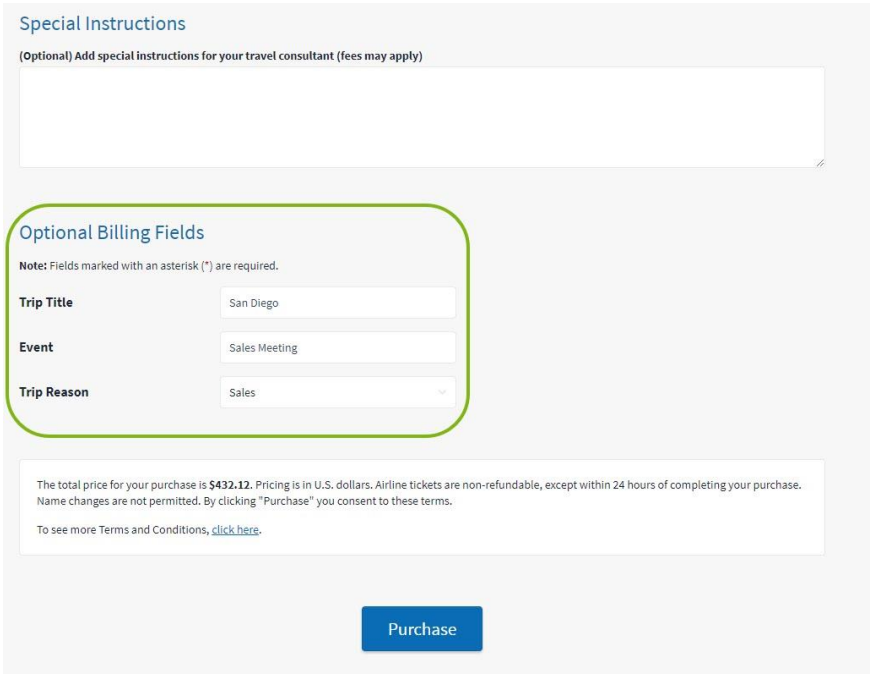
Step 4: Add the **Field Name**, decide if the options should be pre-set (a drop-down menu) or free-text, and if the field is mandatory or optional. Click **Add**.



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.*



Index

Adding a New Travel User....37
Adding Company Credit Cards for Travel Bookings....40
Adding Employee ID Fields....42
Airfare Reservations....8
Approving....34
Approving an Itinerary....34
Assigning Company Credit Cards to a Travel Policy....47
Assigning Travelers to a Travel Policy....45
Booking and Workflow Travel Policy Details....57
Booking Travel....4
Cancelling an Itinerary....23
Configuring Travel....37
Creating a Travel Policy....44
Credit Card Details....26
Custom Search Locations for Frequent Travel Use....60
Editing your Profile....25
Enabling Email Notifications....33
Enabling Travel Alert Messaging....55
Hotel Policies....50
Loyalty Program Numbers....25
Making Hotel Reservations....4
My Profile....25
Optional Billing Fields for Travel Bookings....63
Passport Details....28
Rail Reservations....18
Rental Car Policies....49
Rental Car Reservations....14
Reviewing Travel....34
Travel Policy....44
Travel Preferences....31
Travel Reservations....4
Travel Users....37
TSA Known Traveler Numbers....30
Workflow....55