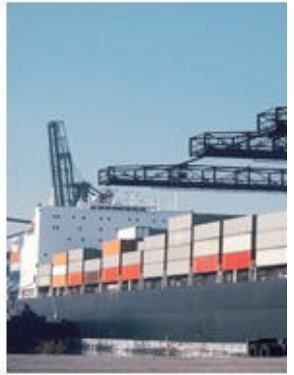


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MarshCargo Quick Reference Certificate Issuance Guide

Purpose of Quick Start Guide

This quick start guide provides the user with basic instructions for the [GENOA Cargo Insurance Management System]. The information should be sufficient for all normal user functionality such as shipment creation, certificate printing, referral handling and shipment maintenance.

Font Standards

In this quick start guide:

ALL CAPS	Name of screen
<u>Underlined</u>	Possible outcomes
<i>Italics</i>	Input data
Courier	Name of field (click on the text for terminology definition)
Highlighted	Button or menu item
Bold	Important point

Minimum System Requirements

Hardware:

- **Pentium class processor running at 166MHz or better**
- 800 x 600 minimum resolution monitor with 256 colours or better
- 56.6K connection to the Internet or better (DSL, T1, cable or other high-speed connection recommended)

One of the following versions of **Microsoft Windows** with system requirements as listed:

- **Windows 98:** 64MB of RAM and 100MB of available hard disk space
- **Windows 98 Second Edition:** 64MB of RAM and 100MB of available hard disk space
- **Windows NT with SP6a or higher:** 64MB of RAM and 200MB of available hard disk space
- **Windows 2000:** 128MB of RAM and 200MB of available hard disk space
- **Windows XP:** 128MB of RAM and 1.5GB of available hard disk space

Software:

- **Microsoft Internet Explorer 6.0 or newer** (the browser must have JavaScript enabled and support 40-bit SSL encryption)
 - **Adobe Acrobat Reader 5.0 or newer**
 - Any firewall between the client machine and the insurance application must be configured to allow outgoing HTTP (port 80) and SSL (port 443) requests
-

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Logging On

In order to access MarshCargo enter www.marshcargo.com (or your designated URL) into the address bar of your browser.

LOG ON	
USER ID	sabinaassured
PASSWORD	••••••••
<input type="button" value="Log On"/>	

You should have received an email containing a system-generated password. To log on, complete the User ID field and simply cut-and-paste the password from the email into the Password field. Click **Log On**.

The first time you log on, you will be required to change your system-generated password to one of your choice. Your new password must then be used for all subsequent logons.

CHANGE PASSWORD	
USER ID	sabinaassured
OLD PASSWORD	
NEW PASSWORD	
CONFIRM NEW PASSWORD	
<input type="button" value="CHANGE PASSWORD"/>	

You will also be prompted to change your password every 60 days (from the date a new password is set). You may alter your password at any time while logged on.

Note: you will be required to read and accept **TERMS OF USE** the first time you log on, OR to access certain functionalities. In order to access the system, check *I accept the terms of the license agreement* and click **Continue**.

Navigating The Client Side Home Page

After logon, the CLIENT SIDE HOME PAGE appears.

Policy	Shipments	Claims	Documents	OFAC	Profile	Help	Log Off
Imagine - Imagine001 - effective 10/8/2003							

The following options are available to the user through drop-down menus in the navigation bar. From left to right:

Policy	If you only have access to one policy, it is automatically enabled. If there is more than one policy available, select one from the options listed under this menu. This will then become your working policy while creating shipments, claims reports, etc. until such time as you enable another policy or log out.
Shipment	Issue a certificate for a new shipment; create a declaration; view and edit saved shipments and quotes; view or download shipment data.
Claims	Report a loss; view previously reported claims.
Documents	Access the text of policies and other stored documents.
Administration	Manage your user profiles and named assureds; search for vessels.
Help	Access help documentation.
Log Off	Exit the system.

How To Issue A Certificate

In order to issue a certificate, you may either enter all the details of your shipment into a new SHIPMENT INFORMATION form, or work from a previously saved quote. Quotes are templates of shipment details set up and saved to avoid having to re-key the same information for recurring shipments.

Creating A New Shipment – Shipment Information

Select **Certificates** from the Shipment drop-down menu in the HOME PAGE navigation bar. The SHIPMENT INFORMATION screen will appear.

Shipment Information	
DATE OF DEPARTURE (ON OR ABOUT)	1/14/2004 add sundora LW - effective 11/3/2003
PRIMARY ASSURED	Derek Coffee
NAMED ASSURED	New Named Assured
BILL TO	Derek Coffee
REFERENCE NUMBER	555TEX
COMMODITY	Household Goods
PACKING/SHIPMENT METHOD	Cardboard and Packing Foam
COVERAGE OPTION	All Risk
INSURED VALUE	Currency: Canadian Dollars
VALUATION CLAUSE	Insured Value: 10000
CURRENCY CONVERTER	Duty Insured Value: <input type="text"/>
CONVEYANCE	Derek Wu test <input type="checkbox"/> With Transshipment
	Vessel: <input type="text"/> Carrier: <input type="text"/> Voyage: <input type="text"/>
	<input type="checkbox"/> Override Vessel Validation
ORIGIN	Country: CANADA State/Province/Other: <input type="text"/>
	City/Place: <input type="text"/> Text to Appear on Certificate: <input type="text"/>
PLACE OF LOADING	Country: Same As Country of Origin Loading Facility: <input type="text"/>
	<input type="checkbox"/> No Risk Prior to Loading
	Text to Appear on Certificate: <input type="text"/>
FINAL DESTINATION	Country: -- Select a Country -- State/Province/Other: <input type="text"/>
	City/Place: <input type="text"/> Text to Appear on Certificate: <input type="text"/>
PLACE OF DISCHARGE	Country: Same As Country of Destination Discharge Facility: <input type="text"/>
	<input type="checkbox"/> No Risk After Discharge
	Text to Appear on Certificate: <input type="text"/>
CLAIM SETTLING AGENT	<input type="text"/>
FULL DESCRIPTION OF CARGO	<input type="text"/>
MARK & NUMBERS	<input type="text"/>
LETTER OF CREDIT CONDITIONS	<input type="text"/>
NOTE	<input type="text"/>
Verify Coverage	

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<p>Date Of Departure: scheduled departure date of the insured shipment.</p>	<p>Type in the date on which the insured shipment is scheduled to depart, or select it from the CALENDAR lookup by clicking on the [cal] icon. This field defaults to the current date when the blank SHIPMENT INFORMATION screen first appears.</p> <p>If a new date is entered that falls within the effective dates of a different policy endorsement or renewal than the one active on the current site (see the description next to the Date Of Departure field on the screen), the page will be reloaded.</p>
<p>Named Assured: parties to be named as the beneficiary of the insurance.</p>	<p>Using the drop-down, select the party to be named as the beneficiary of the insurance. The drop-down displays companies within your organisation, additional named assureds, or other third party beneficiaries. The choices available in the list depend on your administrative scope.</p> <p>If the named assured you are looking for is not already in the list, or you wish to use a spelling variation (or To Order) to comply with letter of credit requirements, select <i>New Assured</i> and you will be prompted to enter the details later. (See Creating A New Named Assured)</p>
<p>Primary Assured: assured company party to the insurance policy (the insurance policy's named assured or policy holder).</p>	<p>Depending on your user rights, you may have a choice of companies to which to associate the shipment you are insuring. The primary assured associated to the shipment is the company "responsible" for the shipment.</p> <p>This field will be a drop-down list of options when:</p> <ul style="list-style-type: none"> • A third party (freight forwarder, broker, etc.) is insuring shipments on behalf of the insurance policy's actual assured. • A user is insuring a shipment on behalf of a primary assured within the user's administrative scope (i.e. a company within your organization on behalf of which you have the right to insure shipments). <p>If the branch/office of which you are set up as an employee is defined as a primary assured, and you do not have rights to insure shipments on behalf of other companies in your organization, your company will be selected automatically as the <i>Primary Assured</i>.</p>
<p>Bill To: company responsible for the premium.</p>	<p>The <i>Bill To</i> party depends on the <i>Primary Assured</i> associated to the shipment. For some primary assureds, it is possible that you will be given a choice of your policy's different <i>Bill To</i> parties.</p>
<p>Reference Number: your internal reference number for the shipment.</p>	<p>Enter your internal reference number for the shipment. The field accepts all types of characters.</p> <p>This field enables the quick and easy retrieval of previous shipment declarations that have been saved as quotes, or confirmed and filed as certificates.</p>
<p>Commodity: type</p>	<p>Select the commodity being shipped. This drop-down includes</p>

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<p>of merchandise or nature of the goods being shipped.</p>	<p>all the options of insured interests available in the enabled policy.</p>
<p>Packing/Shipment Method: type of care to be taken or packaging to be used when transporting the goods.</p>	<p>Some commodities require a certain type of packaging (ex. frozen goods require a refrigerated container). Using the drop-down menu, select the packing/shipment method used for your shipment.</p> <p>If only one packing/shipment method is available, it will be selected automatically. The drop-down will provide options only if the insurance coverage, premium charged or other conditions or exclusions vary based on the packing/shipment methods available for the previously selected <i>Commodity</i>.</p>
<p>Coverage Option: choice of insuring terms or coverage options for a commodity.</p>	<p>The insurance policy may provide a choice of insuring terms or coverage options for the selected commodity. The insuring conditions will vary according to coverage option; in some cases, the premium charged will also vary. Using the drop-down menu, select the coverage option to be associated to the selected commodity.</p> <p>If only one coverage option is available, it will be selected automatically. The drop-down will provide options only if the insurance coverage, premium charged or other conditions or exclusions vary based on the coverage options for the previously selected <i>Commodity</i>.</p>
<p>Insured Value: sum of money for which the cargo is to be insured.</p>	<p>This section of the shipment form allows you to declare the sum for which the cargo is to be insured.</p> <p>Depending on how your enabled policy is set up, you will be asked to enter some or all of the following:</p> <ul style="list-style-type: none"> • Invoice Amount: the actual value of the goods or the value of the goods as per the commercial invoice. • Duty & Tax Amount: the amount of duties and taxes levied on the shipment, if you wish this amount to be insured. • Freight & Other: the total of all freight and other expenses related to the shipment to be insured (include the insurance premium cost to insure CIF value). • CIF Markup: the percentage of markup to be applied on the total of the items above (excluding the duty and tax amount). • Insured Value: if this is the only field provided, enter the total sum to be insured. <p>Please refer to your insurance policy's valuation clause or contact your insurance representative if you have any questions about what amounts are insurable by your policy or how to calculate any of the above.</p>

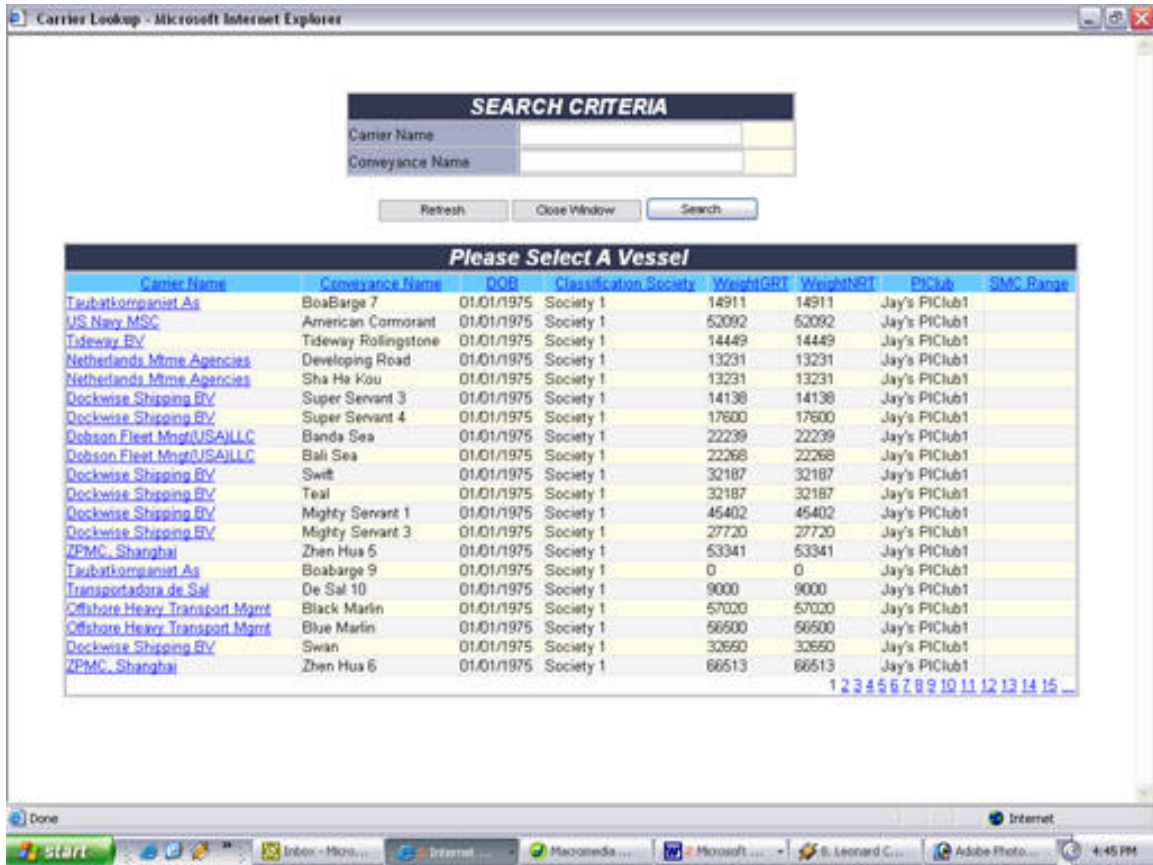
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	You must select the currency in which the values are declared from the <code>Currency</code> drop-down. Click on the link for <code>CURRENCY CONVERTER</code> if you wish to calculate an accurate value for your shipment in a different currency – this is for your information only and will not affect the values shown in the <code>SHIPMENT INFORMATION</code> screen.
VALUATION CLAUSE: insurance policy clause that explains how interests are to be valued.	This hyperlink takes the user to the valuation clause of the enabled policy or endorsement/renewal effective on the shipment's date of departure.
Conveyance: mode of transportation employed to ship the cargo from origin to destination.	Select one of the conveyances from the drop-down menu. Check the <code>With Transshipment</code> [the shipment involves more than one connecting conveyance] box if the shipment involves more than one connecting conveyance. This field only appears if your policy calls for an additional premium to be levied on transshipments.

Depending on the conveyance, one or more of the following may be required:

Carrier: name of the company transporting the goods.	<p>Type in the carrier name, or click on the [binoc] icon after typing in the first letter(s) of the desired carrier to access the <code>CARRIER LOOKUP</code> functionality. This will provide you with matching results from the database associated with the enabled policy (a message will be shown if no lookup list is specified for the conveyance you selected).</p> <p>Your policy may be set up to force you to select the carrier from the <code>CARRIER LOOKUP</code>. If this is the case, in order to search for a specific carrier or vessel, a user may enter a partial match in either field and click on either [binoc] icon to get a list of all possible matching carrier/vessel names. The lookup is automatically invoked whenever the user exits either field.</p> <p>If you cannot find the carrier or vessel you require in the lookup list, you may check the <code>Override Vessel Validation</code> box, which will bypass the forced lookup and generate a referral to your insurance representative.</p>
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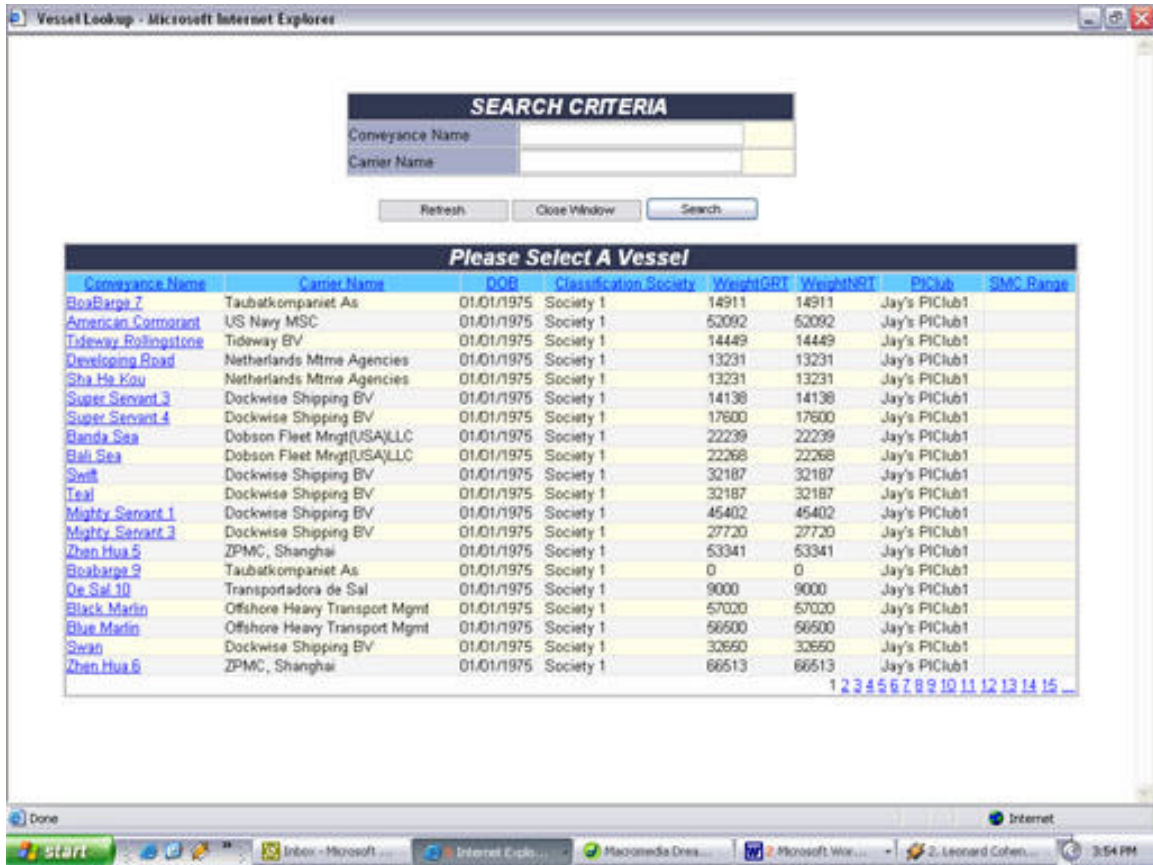
Vessel: name of the vessel transporting the goods, in the case of maritime transit.

Type in the vessel name, or click on the [binoc] icon after typing in the first letter(s) of the desired vessel to access the VESSEL LOOKUP functionality. This will provide you with matching results from the database associated with the enabled policy (a message will be shown if no lookup list is specified for the conveyance you selected).

Your policy may be set up to force you to select the vessel from the VESSEL LOOKUP. If this is the case, in order to search for a specific carrier or vessel, a user may enter a partial match in either field and click on either [binoc] icon to get a list of all possible matching carrier/vessel names. The lookup is automatically invoked whenever the user exits either field.

If you cannot find the carrier or vessel you require in the lookup list, you may check the `Override Vessel Validation` box, which will bypass the forced lookup and generate a referral to your insurance representative.

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Voyage (or Flight No.)	Enter any string as a voyage/flight number, or any other transit reference number, if necessary.
Origin: geographic origin of the shipment (country, state or province, and city).	<p>Country: select the country where the insurance coverage starts. As most certificates are issued for exports, the drop-down defaults to your country of location but lists all active countries in the world, including aliases (ex. England for United Kingdom).</p> <p>State/Province/Other: some countries may require you to select a State, Province or other sub-division if your policy is set up to exclude certain parts of the country from being insured. When the user exits the field or clicks on the [binoc] icon, the STATE/PROVINCE LOOKUP list is called for validation.</p> <p>City/Place: enter the place or city where the insurance takes effect.</p> <p>Text To Appear On Certificate: if you have been given the right to do so, this field allows you to modify the spelling of the actual "Place of Origin" text to appear on the certificate. Automatically populated with the information entered in the other fields above unless modified.</p>
Place Of	Country: select the country in which the port or airport of

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<p>Loading: port or airport where the cargo is to be loaded onto the primary conveyance for shipping.</p>	<p>loading is located. The drop-down lists all active countries including aliases; the default selection is <i>Same as Country of Origin</i>.</p> <p>Loading Facility [location where the cargo is loaded onto the primary conveyance for transport]: depending on the conveyance selected you may be required to select a port or airport from the database by clicking the [binoc] icon. You may filter the results by typing in the code or first letter(s) of the location name you are searching for.</p> <p>No Risk Prior To Loading: check this box if the coverage is to begin only when the cargo is loaded onto the specified conveyance.</p> <p>Text To Appear On Certificate: if you have been given the right to do so, this field allows you to modify the spelling of the actual "Place/Port/Airport of Loading" text to appear on the certificate.</p>
<p>Final Destination: geographic destination of the cargo (country, state or province, and city).</p>	<p>Country: select the country where the insurance coverage ends. The drop-down lists all active countries in the world, including aliases (ex. England for United Kingdom).</p> <p>State/Province/Other: Some countries may require you to select a State, Province or other sub-division if your policy is set up to exclude certain parts of the country from being insured. When the user exits the field or clicks on the [binoc] icon, the STATE/PROVINCE LOOKUP list is called for validation.</p> <p>City/Place: enter the place or city where the insurance takes effect.</p> <p>Text To Appear On Certificate: If you have been given the right to do so, this field allows you to modify the spelling of the actual "Final Destination" text to appear on the certificate. Automatically populated with the information entered in the other fields above unless modified.</p>
<p>Place Of Discharge: port or airport where the cargo is unloaded from the primary conveyance.</p>	<p>Country: select the country in which the port or airport of unloading is located. The drop-down lists all active countries including aliases; the default selection is <i>Same as Country of Destination</i>.</p> <p>Discharge Facility [location where the cargo is unloaded from the primary conveyance]: Depending on the conveyance selected you may be required to select a port or airport from the database by clicking the [binoc] icon. You may filter the results by typing in the code or first letter(s) of the location name you are searching for.</p> <p>No Risk After Discharge: check this box if the coverage is to cease at the time the cargo is unloaded from the primary</p>

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	<p>conveyance.</p> <p>Text To Appear On Certificate: if you have been given the right to do so, this field allows you to modify the spelling of the actual "Place/Port/Airport of Discharge" text to appear on the certificate.</p>
<p>Claim Settling Agent: a representative of the insuring underwriters, usually located overseas, who has been authorised to accept the papers and documents required to prove a claim.</p>	<p>Use the lookup to assign a claims settling agent to the shipment. Click on the [binoc] icon to display all settling agents for your policy that are located in one of the countries involved in your shipment.</p>
<p>Full Description Of Cargo</p>	<p>Provide a complete description of the cargo.</p>
<p>Marks And Numbers: any identifying marks or numbers placed on the cargo.</p>	<p>Enter specifics of the cargo being shipped (ex. 1 x 40 ft container, said to contain 25 pallets of new goods, serial #, seal).</p>
<p>Letter Of Credit Conditions: additional wording required by letter of credit.</p>	<p>Enter any special terminology required by letter of credit. Terms and conditions entered in this section must not be broader than those offered by your policy.</p>
<p>Notes</p>	<p>Enter any comments you may wish to record with this shipment. These will not appear on the final certificate.</p>

When satisfied that all above fields have been correctly completed, click **Verify Coverage**. The system will first verify that the shipment is insurable, in which case it will proceed to determine the applicable premiums and conditions based on your insurance policy.

Creating A New Shipment – Verifying Coverage

After correctly completing all the fields of the shipment information form, click **Verify Coverage**. The system will first verify that the shipment is insurable, in which case it will proceed to determine the applicable premiums and conditions based on your insurance policy.

If the shipment falls within the terms of your insurance policy, and no referral is necessary:

The screen is refreshed to include premium information and insuring conditions.

Premium Information	
CARGO PREMIUM	34.50
DUTY PREMIUM	0.00
WAR PREMIUM	0.00
VESSEL PENALTIES	0.00
TOTAL PREMIUM	\$34.50CAD
CONDITIONS OF INSURANCE	Subject to Institute War Clause (Cargo)and (Air) 1.1.82 including loss of or damage to caused by war, civil war, rebellion, revolution, insurrection, or civil strife arising therefrom, or any hostile act by or against a belligerent power, and consequences thereof or any attempt thereof as per Institute Clause.
SPECIAL AND/OR ADDITIONAL CONDITIONS	Against all risks of physical loss or damage from any external cause, except those risks as may be excluded by the F.C. & S. warranty, S.R. & C.C. warranty and/or other warranties or exclusions specified in this policy unless covered elsewhere herein, irrespective of percentage.

Named Assured

If you selected *New Assured* in the *Named Assured* field while entering your shipment information, the NAMED ASSURED form will appear empty at the bottom of the refreshed page. Complete the form with the required information, and check the **Add New Assured** box if you wish to save the named assured to the database. The assured will be saved to the database as the shipment is processed (booked, referred or saved as a quote), and will automatically appear in the *Named Assured* drop-down to speed future transactions. (See [Creating A New Named Assured](#))

Named Assured	
NAME	Sabina Tang
ADDRESS	87 Prince St. 6th Floor
CITY/PLACE	Montreal
COUNTRY	CANADA
PROVINCE/STATE/OTHER	Quebec
POSTAL CODE/ZIP	H3C 2M7
PHONE	(514) 289-9090
FAX	(514) 289-1909
E-MAIL	sabina.t@oceanwide.com
<input type="checkbox"/> ADD NEW ASSURED	<input type="checkbox"/> ALLOW OTHER ASSURED'S ACCESS TO THIS NAMED INSURED
<input type="button" value="Verify Coverage"/> <input type="button" value="Save Quote"/> <input type="button" value="Confirm Referral"/>	

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If you selected a named assured already stored in the database, the form will be pre-populated. You may update any of the fields as necessary. To save these changes to the database, check the `Update Information` box before proceeding.

Printing A Draft Certificate

You may print a draft of your certificate at any time after verification of coverage. Select the `Certificate Format` from the available choices in the drop-down, and click the `Print Draft` button.

The document will be generated in Adobe Acrobat format; select `Open` to view in an Adobe Acrobat window, and use the Adobe Toolbar print icon to obtain a printout. **Do NOT use the print icon from the Internet Explorer Toolbar.**

Saving The Shipment Information As A Quote

You may save your shipment as a quote (i.e. a template to avoid having to re-key information for recurring shipments), by clicking the `Save Quote` button after verification of coverage but before confirmation of booking. Your shipment information form will be saved under the string you entered in the `Reference Number` field.

The screen will reload with a message to this effect.

Confirming Booking

- **Confirm your booking by clicking on the `Confirm Booking` button.**

The final shipment information will display in the `REVIEW SHIPMENT` screen, with the `Certificate Number` and `Shipment Status`. **Note that coverage is re-verified when the `Confirm Booking` button is clicked.**

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CERTIFICATE NUMBER	1932619000014
STATUS	Shipment Booked and Confirmed Invoice Number:
This is to certify that Sabina Tana is insured subject to the conditions of Policy No. Imagine001 against which the interest insured hereunder has been declared Confirmed on 1/14/2004. Issued By Oceanwide Administration Company	
Premium Information	
CARGO PREMIUM	34.50
DUTY PREMIUM	0.00
WAR PREMIUM	0.00
VESSEL PENALTIES	0.00
TOTAL PREMIUM	\$34.50CAD
CONDITIONS OF INSURANCE	Subject to Institute War Clause (Cargo)and (Air) 1.1-82 including loss of or damage to caused by war, civil war, rebellion, revolution, insurrection, or civil strife arising therefrom, or any hostile act by or against a belligerent power, and consequences thereof or any attempt thereof, as per Institute Clause.
SPECIAL AND/OR ADDITIONAL CONDITIONS	Against all risks of physical loss or damage from any external cause, except those risks as may be excluded by the F.C. & S. warranty, S.R. & C.C. warranty and/or other warranties or exclusions specified in this policy unless covered elsewhere herein, irrespective of percentage.

Attaching Documents To A Shipment

You may attach documents to the certificate using the Attachments fields at the bottom of the page. (See [Attaching Documents To A Shipment](#))

Attachments						
DESCRIPTION	TYPE OF FILE	NAME OF FILE	ATTACHER	COMPANY	DATE	DELETE
Attach File						
DESCRIPTION	TYPE OF FILE	FILE				
	Document		<input type="button" value="Browse"/>			
			<input type="button" value="Add Notes"/>	<input type="button" value="Remove"/>	<input type="button" value="Attach"/>	

Description	Enter a description of the document.
Type Of File	Select the type of document from the drop-down.
File Path	Click the Browse button to select the document to upload from your computer or network drives.

Click on the **Attach** button to upload the document and link it to the shipment. You may delete it afterward by checking the **Delete** box next to the document and clicking the **Remove** button.

Adding A Note To A Shipment

Click on the **Add Notes** button in order to add a text note to the shipment. (See [Adding A Note To A Shipment](#))

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SHIPMENT NOTE ENTRY

Note

FOLLOW-UP DATE: 1/30/2004

NOTE: Other information will follow.

SCOPE: Open

EDITABLE:

E-mail

RECIPIENT(S) (SEPERATE ADDRESSES WITH COMMAS): test@oceanwide.com

SUBJECT: Note on shipment 555TEX

Update Cancel

Follow-Up Date	Type in a follow-up date, or select it from the CALENDAR lookup by clicking on the [cal] icon to have this note flagged or sent by e-mail (see below) to users allowed to view it on the specified date.
Note	Type in the note or follow-up text.
Scope	Select from the drop-down menu the parties allowed to view the note.
Editable	Check this box if the parties viewing the note are allowed to edit it. Otherwise, only you can edit the note's details.
Recipient(s)	If you wish to have the note sent by e-mail, enter the email addresses of the parties to whom the note is addressed; separate with commas.
Subject	Enter the subject line of the email.

Click **Update** to add the note to the shipment, or **Cancel** to exit the screen without doing so.

Printing The Certificate

To print the final certificate, select the desired certificate template from the drop-down menu at the bottom of the REVIEW SHIPMENT screen and click the **Print Certificate** button. (See [Printing The Certificate](#))

The certificate will open in an Adobe Acrobat window; use the Adobe Toolbar print icon to obtain a printout. **Do NOT use the print icon from the Internet Explorer Toolbar.**

If the shipment necessitates a referral:

A "referral" indicates that some aspect(s) of the shipment may require further review by your insurance representative. The reason(s) for the referral will appear at the top of the screen when it is refreshed.

- **Confirm the referral by clicking on the **Confirm Referral** button.**

- **If the referral was triggered in error, you may make changes to the problematic details of your shipment and click on [Verify Coverage](#).**

The final shipment information will display in the REVIEW SHIPMENT screen.

An e-mail notification will automatically be sent to your insurance representative. You will receive an email notifying you when the referral is confirmed or declined.

You may also verify the status of your pending shipments through the shipment query function. (See [Verifying The Status Of A Referral](#))

Printing The Certificate

To print the final certificate, select the desired certificate template from the drop-down menu at the bottom of the REVIEW SHIPMENT SCREEN and Click the [Print Certificate](#) button.

The certificate will open in an Adobe Acrobat window; use the Adobe Toolbar print icon to obtain a printout. **Do NOT use the print icon from the Internet Explorer Toolbar.**

Printing A Draft Certificate

You may print a draft of your shipment certificate at any time after verification of coverage. Select the [Certificate Format](#) from the available choices in the drop-down on the REVIEW SHIPMENT screen, and click the [Print Draft](#) button.

The document will be generated in Adobe Acrobat format; select Open to view in an Adobe Acrobat window, and use the Adobe Toolbar print icon to obtain a printout. **Do NOT use the print icon from the Internet Explorer Toolbar.**

Saving The Shipment Information As A Quote

You may save your shipment as a quote (i.e. a template to avoid having to re-key information for recurring shipments), by clicking the [Save Quote](#) button after verification of coverage but before confirmation of booking. Your shipment information form will be saved under the string you entered in the [Reference Number](#) field.

The screen will reload with a message to this effect.

Creating A New Named Assured

If you selected *New Assured* in the *Named Assured* field while entering your shipment information, the NAMED ASSURED form will appear at the bottom of the refreshed REVIEWED SHIPMENT screen.

Complete the form with the required information, and check the **Add New Assured** box if you wish to save the named assured to the database. The assured will be saved to the database as the shipment is processed (booked, referred or saved as a quote), and will automatically appear in the Named Assured drop-down to speed future transactions.

Attaching Documents To A Shipment

You may attach documents to the certificate using the Attachments fields at the bottom of the REVIEW SHIPMENT screen.

Description	Enter a description of the document.
Type Of File	Select the type of document from the drop-down.
File Path	Click the Browse button to select the document to upload from your computer or network drives.

Click on the **Attach** button to upload the document and link it to the shipment. You may delete it afterward by checking the **Delete** box next to the document and clicking the **Remove** button.

Adding A Note To A Shipment

Click on the Add Notes button at the bottom of the REVIEW SHIPMENT screen in order to add a text note to the shipment.

The screenshot shows a web form titled "SHIPMENT NOTE ENTRY". It is divided into two main sections: "Note" and "E-mail".

- Note Section:**
 - FOLLOW-UP DATE:** A date field containing "1/30/2004" with a calendar icon.
 - NOTE:** A text area containing "Other information will follow."
 - SCOPE:** A dropdown menu set to "Open".
 - EDITABLE:** An unchecked checkbox.
- E-mail Section:**
 - RECIPIENT(S) (SEPERATE ADDRESSES WITH COMMAS):** A text area containing "test@oceanwide.com".
 - SUBJECT:** A text area containing "Note on shipment 555TEX".

At the bottom right of the form are two buttons: "Update" and "Cancel".

Follow-Up Date	Type in a follow-up date, or select it from the CALENDAR lookup by clicking on the [cal] icon to have the note flagged to users who can view it or sent by e-mail (see below) on the specified date.
Note	Enter your note or follow-up text.
Scope	Select from the drop-down menu the parties allowed to view the note.
Editable	Check this box if the parties viewing the note are allowed to edit it.
Recipient(s)	If you wish to have the note sent by e-mail, enter the email addresses of the parties to whom the note is addressed; separate with commas.
Subject	Enter the subject line of the email.

Click **Update** to add the note to the shipment, or **Cancel** to exit the screen without doing so.

How To Manage A Shipment

All previously-entered shipment data - quotes, referrals, issued certificates and even cancelled shipments - is automatically saved in the database and retrievable through the Query/List search function in the Shipment section.

Querying The Shipment List

Select Query/List from the Shipment drop-down menu in the HOME PAGE navigation bar. The SEARCH CRITERIA screen will appear.

SEARCH CRITERIA	
NAMED ASSURED	<input type="text"/>
REFERENCE NUMBER	555TEX
CERTIFICATE NUMBER	<input type="text"/>
POLICY YEAR	<input type="text"/>
INSURED VALUE RANGE	From <input type="text"/> To <input type="text"/> All Currencies
POLICY RECORDED BY	All Policies All Companies <input type="checkbox"/> Subsidiaries All Users
DATE OF DEPARTURE	From <input type="text"/> To <input type="text"/>
DATE OF ISSUE	From <input type="text"/> To <input type="text"/>
CONVEYANCE	All Conveyances
ROUTE	All Routes
COMMODITY	All Commodities
PACKING METHOD	All Packing Categories
COVERAGE	All Coverage Categories
CARRIER	<input type="text"/>
VESSEL	<input type="text"/>
ORIGIN	Region <input type="text"/> Country <input type="text"/> State/Province/Other <input type="text"/>
DESTINATION	Region <input type="text"/> Country <input type="text"/> State/Province/Other <input type="text"/>
STATUS	<input checked="" type="checkbox"/> Booked <input type="checkbox"/> Referred <input type="checkbox"/> Cancelled <input type="checkbox"/> Change/Pending <input type="checkbox"/> Rejected <input type="checkbox"/> Quoted
TYPE OF SHIPMENT	<input checked="" type="checkbox"/> Certificates <input type="checkbox"/> Declarations
REPORT FORMAT	<input checked="" type="radio"/> Screen <input type="radio"/> Excel <input type="radio"/> PDF
<input type="button" value="Search"/> <input type="button" value="Clear"/>	

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Enter any combination of criteria in the fields below to narrow your search.

Shipper	Enter the company identified as the Named Assured of the shipment(s) or quote(s). Click on the [binoc] lookup for a list of the named assureds available under your enabled policy and administrative scope.
Reference Number	Enter the Reference Number identifying the shipment or quote.
Certificate Number	Enter the system-issued Certificate Number identifying the booked shipment.
Policy Year	Enter the Policy Year of the shipment(s) or quote(s).
Valuation Range	Enter a range of insured values by which to filter your search results. Only shipments with insured values within this range will be returned.
Policy	Select the Policy of the shipment(s) or quote(s) from the options listed in this drop-down. The default value is <i>All Policies</i> , which will grey out all policy-specific fields such as Recorded By, Conveyance, Route, Commodity, Packing Method and Coverage.
Recorded By	Select the User who recorded the shipment(s) or quote(s). Only shipments entered by this user will be returned. The default values are <i>All Companies</i> and <i>All Users</i> .
Date Of Departure	Type in a date range by which to filter your search results. Only shipments or quotes with a Date Of Departure within the specified range will be returned. You may also select the dates from the CALENDAR lookup by clicking on the [cal] icon.
Date Of Issue	Type in a date range by which to filter your search results. Only shipments or quotes with a Date Of Issue within the specified range will be returned. You may also select the dates from the CALENDAR lookup by clicking on the [cal] icon.
Conveyance	Select a Conveyance from the drop-down; only shipments where the specified conveyance was used will be returned. The choices available depend on the selected Policy.
Route	Select a Route of the shipment(s) or quote(s) from the drop-down in order to search for shipments to/from countries corresponding to the specified Route. The choices available depend on the selected Policy.
Commodity	Select a Commodity from the drop-down by which to filter search results. The choices available depend on the selected Policy.
Packing Method	Select a Packing Method from the drop-down by which to filter search results. The choices available depend on the selected Policy.
Coverage	Select a Coverage option from the drop-down by which to filter search results. The choices available depend on the selected Policy.

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Carrier	Type in the first few letters of a Carrier, or click on the [binoc] icon after typing in the first letter(s) of the desired carrier to access the CARRIER LOOKUP functionality. You can filter search results to only include shipments where the specified carrier was used.
Vessel	Type in a Vessel name, or click on the [binoc] icon after typing in the first letter(s) of the desired carrier to access the VESSEL LOOKUP functionality. This allows you to filter search results to only include shipments where the specified vessel was used.
Origin	Specify any or all of the Region, Country and State/Province/Other fields to search for shipments which originated in said country/region/state.
Destination	Specify any or all of the Region, Country and State/Province/Other fields to search for shipments where the destination corresponds to said country/region/state.
Status	You may restrict your search to shipments and/or quotes of one of the following types: <ul style="list-style-type: none"> • All (default value) • Booked • Referred • Cancelled • Change/Pending • Rejected • Quote
Type Of Shipment	Select either <i>Certificate</i> or <i>Declaration</i> .
Report Format	Select the format in which the search results should be returned. If <i>Excel</i> or <i>PDF</i> is selected, then a link to a generated file of the appropriate type will be returned as well as the on-screen results. Click on the link to open the file for viewing, and save it to your own computer.

Click **Search**; the page will be refreshed to show SHIPMENT SEARCH RESULTS on the top of the page. Click on the hyperlinked *Shipment ID/Status* of each returned result to view the REVIEW SHIPMENT screen of the shipment in question.

SHIPMENT SEARCH RESULTS								
SHIPMENT STATUS	NAMED ASSURED	DATE/REF	CONVEYANCE INFORMATION	ORIGIN	DESTINATION	INSURED VALUE	BASIC PREMIUM	WAR PREMIUM
1932619000001 Booked and Confirmed	GS_ANA1	10/08/2003	Ocean Vessel Zhen Hua 2	Richmonds,CANADA	georgetown,U.S.A.	20,006.00USD	639.11USD	0.00USD
1932619000008 Booked and Confirmed	mytest	12/23/2003	Derek Wu test	montreal,CANADA	test,U.S.A.	1,000.00CAD	3.45CAD	0.00CAD

You may also continue searching by entering more or new criteria into the SEARCH CRITERIA form (clicking on **Reset** will clear all fields or reset them to default).

Creating A Shipment From A Saved Quote

In order to create a shipment from a previously saved quote, select **Query/List** from the Shipment drop-down menu in the HOME PAGE navigation bar. Enter any search criteria for the quote in the SEARCH CRITERIA form that appears, and select *Quote* as the status field.

Click **Search** and the page will be refreshed to show SHIPMENT SEARCH RESULTS on the top of the page. (See [Querying The Shipment List](#))

SHIPMENT SEARCH RESULTS								
SHIPMENT STATUS	NAMED ASSURED	DATE/REF	CONVEYANCE INFORMATION	ORIGIN	DESTINATION	INSURED VALUE	BASIC PREMIUM	WAR PREMIUM
952 Quote	GarySub1	10/08/2003 coffee001	Ocean Vessell Zhen Hua 2	Richmonds,CANADA	georgetown,U.S.A.	25,000.00CAD		
973 Quote	GS_ANA3	10/08/2003 coffee4	Ocean Vessell Zhen Hua 2	rewr,CANADA	etrwet,U.S.A.	4,500.00CAD		

Click on the hyperlinked *Shipment ID/Status* of the desired quote. This will take you to the SHIPMENT INFORMATION screen for said quote.

Update the data fields as necessary (see [Creating A New Shipment – Shipment Information](#)), and click **Verify Coverage**. The system will then proceed to verify coverage in the usual manner. (See [Creating A New Shipment – Verify Coverage](#))

You may also print a draft of the certificate or save the new shipment information as another quote (you will be prompted to enter a different Reference Number).

Verifying The Status Of A Referral

To verify the status of a previously referred shipment, select **Query/List** from the Shipment drop-down menu in the HOME PAGE navigation bar. Enter any search criteria for the referral in the SEARCH CRITERIA form that appears, and select *Referral* as the status field.

Click **Search** and the page will be refreshed to show SHIPMENT SEARCH RESULTS on the top of the page. (See [Querying The Shipment List](#))

Click on the hyperlinked *Shipment ID/Status* of the desired referral. This will take you to the REVIEW SHIPMENT screen for said referral; its status will be indicated above the shipment information.

Editing A Shipment

To edit the details of a shipment that has been previously booked and confirmed, first retrieve the shipment in question with the [Query/List](#) function (see [Querying The Shipment List](#)). Click the [Change](#) button (next to the [Print Certificate](#) and [Confirm Booking Change](#) buttons). You will be returned the same page with the fields un-greyled.

Make the requisite modifications and click the [Confirm Booking Change](#) button near the bottom of the page. Your coverage will be re-evaluated in accordance with the rules prescribed by the policy.

If the shipment falls within the terms of your insurance policy, and no referral is necessary:

You will receive a message stating that the shipment has been modified successfully. An audit trail of former versions remains in the system and may be retrieved for review at any time through the [Query/List](#) function.

If the shipment necessitates a referral:

Confirm the referral by clicking on the [Confirm Referral](#) button.

To edit a shipment that has been saved but not yet booked (i.e. a saved quote), simply call up the quote from the [Query/List](#) function and save again after modifying the fields as necessary.

Cancelling A Shipment

To cancel a shipment that has been previously booked and confirmed, first retrieve the shipment in question with the [Query/List](#) function (see [Querying The Shipment List](#)). Click the [Cancel](#) button (next to the [Print Certificate](#) and [Confirm Booking Change](#) buttons).

You will receive a message stating that the shipment has been cancelled successfully. Details of cancelled shipments remain in the system and may be retrieved for review at any time through the [Query/List](#) function.
