

Tips and Tricks Guide

Coromandel Umbrella Assoc

Go to the following website: www.CertificatesNow.com

User ID: coromandelumbr

Password: amfam

TMake sure to request BOTH a Liability AND a Property/Crime Certificate****

IP 1: Sending A Certificate

1. Select **Certificates** on the Navigation Bar.
2. Select **Deliver** on the Navigation Bar.
3. Select the Master Certificate and click **Continue**.
4. Select Certificate Holder (**required**):
 - A. Search for the Certificate Holder and then click the button to the left of the Certificate Holder's name and click **Continue**.
 - B. If you Certificate Holder was not found in the search, click the **New Recipient** button at the bottom of the pager. Enter the Certificate Holder's name, mailing address plus fax or email if that information is known and click **Save**. Next, follow **Step A** above.
5. Select any additional Recipients (**not required**) by clicking **Select Recipients** located below the Certificate Holder and follow **Steps A & B** above.
6. When list is complete click **Continue**.
7. The Certificate form will display. Review, edit (if available) and click **Continue**.
 - The Attachments (if any) are displayed, review and click **Continue**.
8. Select Delivery Method(s) and edit Subject Line and click **Continue**.
9. Amend **Renewal Status** from Included to Excluded if you do not want this certificate holder included in the renewal next year.
10. Click **Deliver Now** to send the certificate.

TRICKS:

- DO NOT use the **BACK** button on the browser except on the Log Out Screen.
- **Cancel** acts as a **BACK** button.
- To **Preview** a certificate, click on the **Edit** button on Step 6. Preview can also be accomplished by clicking on the master name link. Preview can be done throughout the Delivery and Resend process.
- Clicking on any menu item on the Navigation bar will cancel the process but not save the work.

QUESTIONS? Email customer.care@ebix.com or call us toll free at 877-669-8600.