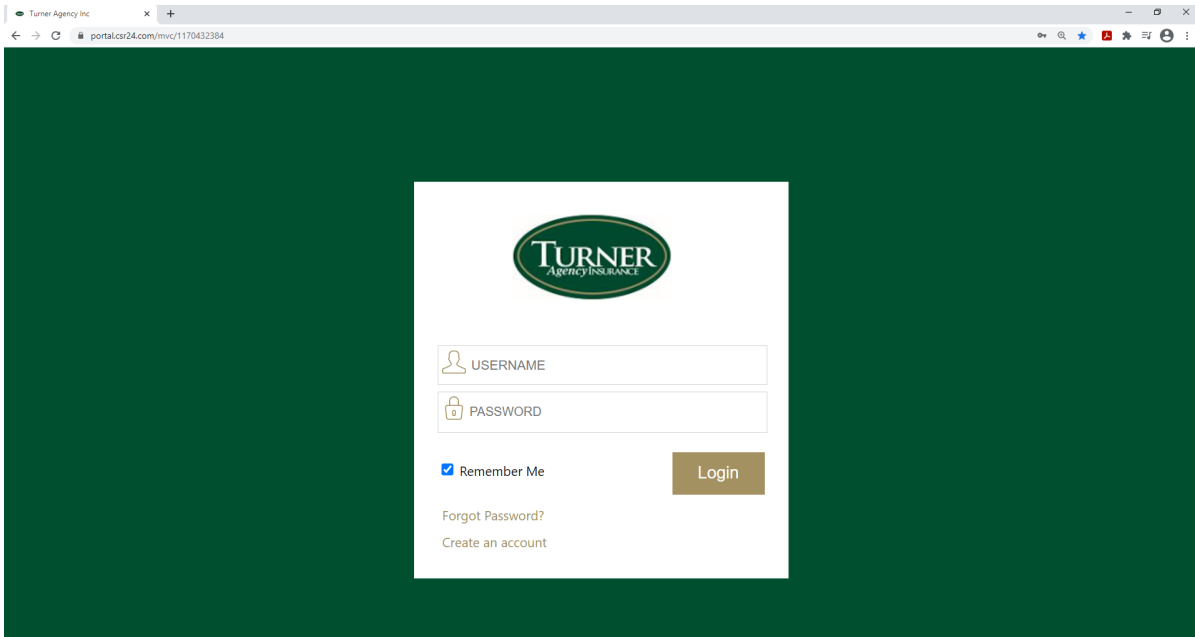




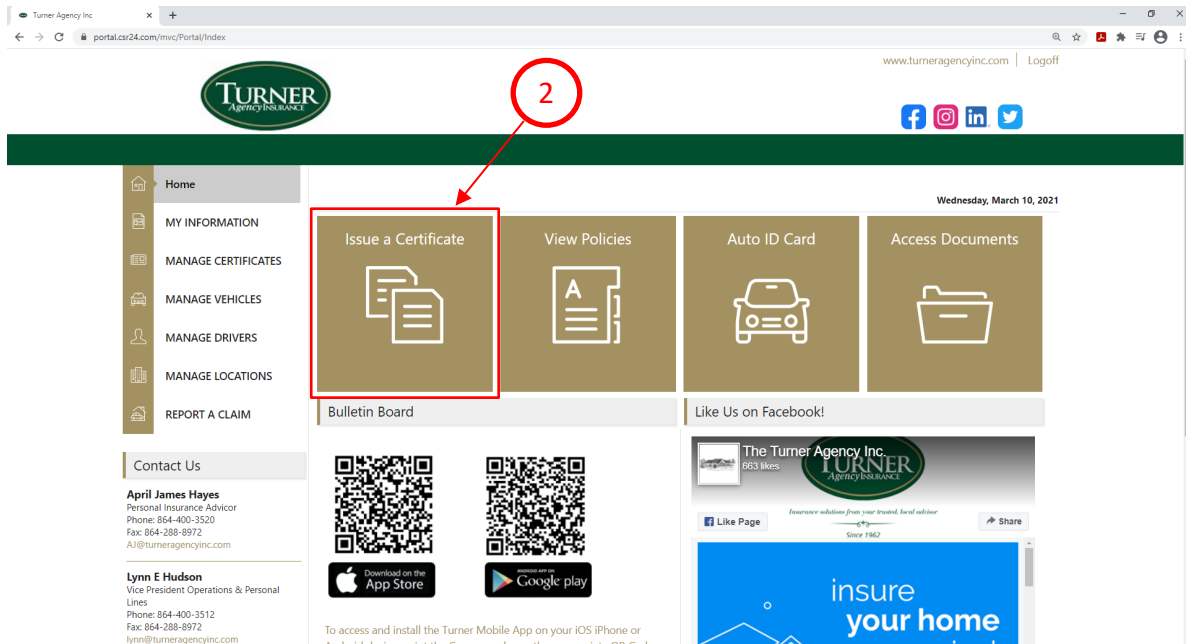
TURNER₂₄ User's Manual

Obtaining a certificate in the Web Portal

1. Log in to the Web Portal (insert web portal address)



2. Click on "Issue a Certificate" Icon



3. Select the appropriate insured (If you have access to both a commercial and personal account)

Select An Insured

Contact Name Location Desc Insured Name Agency Code Find

Advanced Options

Contact Name	Location	Insured Name	Agency Code
Jolie Barker Turner	40 CHARLEBURN STREET GREENVILLE SC 29607	J Barker and Jolie B Turner	TURNER001
Turner Agency Inc.	400 Hatcher Road Greenville SC 29607	Turner Agency Inc.	TURNER001

> Result(s)

4. Click on the title under the word template. (Ex. Below 20-21 Cert)

Template Selection List Previously Issued

Template Date Find

Preview	Template	Descriptions of Ops	Expiration Date
	20-21 Cert		1/20/2022

1 Result(s)

5. Scan the available list of certificate holders. If the certificate holder you are looking for is already on the list you will click the name of the certificate holder then **skip to step 7**. If the name of the holder is not showing you will click **“Add Holder”**.

Select Holder Add Holder

Name Address Description of Ops Find

Advanced Options

Name	Address	Named Insured	Description of Ops
ABC Cleaning	100 Willowood Road Spartanburg SC 29582		

- Once you have clicked **“Add Holder”** you will tab through the next screen entering the name and address for the appropriate holder. You do not need to check the box that says **“This certificate supersedes previously issued certificate”**. You will need to make a selection beside **“Do they receive renewals”** Please select either **“Yes”** or **“One Time Only”**.

The screenshot shows the 'Add Holder' form. The title bar contains a pencil icon and the text 'Add Holder'. Below the title bar is a section header 'Holder Information' with a downward arrow. The form fields are as follows:

Name	<input type="text"/>
Address	
Line 1	<input type="text"/>
Line 2	<input type="text"/>
Line 3	<input type="text"/>
Line 4	<input type="text"/>
City	<input type="text"/>
State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Country	<input type="text"/>

Below the address fields are two checkboxes: 'This certificate supersedes previously issued certificate' (unchecked) and 'Do They Receive Renewals' (checked). The 'Do They Receive Renewals' section also includes 'Yes' (checked), 'One Time Only' (unchecked), and 'Interest Ends' (text input). A red bracket on the right side of the form groups the Name and Address fields with the annotation 'Fill in appropriate holder information.' Red boxes highlight the 'This certificate supersedes...' and 'Do They Receive Renewals' sections.

- If the holder already exists you will then need to review the certificate holders name and address to be sure they are correct. (Update as needed)

The screenshot shows the 'Edit Holder' form. The title bar contains a pencil icon and the text 'Edit Holder'. Below the title bar is a section header 'Holder Information' with a downward arrow. The form fields are as follows:

Name	ABC Cleaning
Address	
Line 1	100 Middle Road
Line 2	
Line 3	
Line 4	
City	Easley
State/Province	SC
Zip/Postal Code	2642
Country	

Below the address fields are two checkboxes: 'This certificate supersedes previously issued certificate' (unchecked) and 'Do They Receive Renewals' (checked). The 'Do They Receive Renewals' section also includes 'Yes' (checked), 'One Time Only' (unchecked), and 'Interest Ends' (text input). A red bracket on the right side of the form groups the Name and Address fields with the annotation 'Update as needed'.

8. Scroll down to **“Recipient”** Section and enter the name and email address for each person that you want to send the certificate to. (You can send to up to 3 recipients).

▼ Recipient 1

Attention	<input type="text"/>
Subject	Proof of Insurance for Turner Agency, Inc.
Message	<input type="text"/>
Email Current Cert	<input type="checkbox"/>
Email Renewal Cert	<input type="checkbox"/>
Email	<input type="text"/>

▶ Recipient 2

▶ Recipient 3

9. At the bottom of screen there is a section titled **“Send a One Time Confirmation Copy”**. If you would like a copy of the certificate to also be sent to you, you will need to enter your email address here and select the **“Send Me Confirmation box”**.

▼ Send a One Time Confirmation Copy

Email	<input type="text" value="turn@turneragencyinc.com"/>
Send Me Confirmation	<input type="checkbox"/>

9

10. Once all of the above is completed you will click **“Submit”** at the bottom of the screen.

▶ Recipient 2

▶ Recipient 3

▼ Send a One Time Confirmation Copy

Email	<input type="text" value="turn@turneragencyinc.com"/>
Send Me Confirmation	<input type="checkbox"/>

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Preview

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