

Certificates Now Step-By-Step Guide_ Larry Thompson Agency

BEFORE YOU BEGIN- TIPS

DO NOT use the BACK button on the browser Cancel acts as a Back Button
Clicking on any menu item on the Navigation bar will cancel the process but not save the work.

Read Instructions Carefully

Follow Instructions for deleting information at the end

STEP 1- LOG IN

Go to the following website: www.CertificatesNow.com

User ID: LTAgency

Password: 12345

**Please note ~ LTA must be capitalized*

STEP 2

Once you have logged in, select "Deliver Certificates"

**certificates
NOW**

Home Certificates Admin Directory Reports Help Contact Us

Quick Links

[Deliver Certificates](#)
[View Reports](#)

STEP 3- SEARCH FOR ASSOCIATION NAME

A) Search for the association using the search tool in the upper right hand corner. You can search for the association by: Name, Address, City, State, Zip. It's easiest to use one base word when searching by name. Example- Terrace.

B) Select account name and hit continue

Deliver

1. Select Account 2. Select Master 2a. Exclude Attachments 3. Select Named Insured 4. Select Cert Holder 5. Select Additional Recipients 6. Review Recipients 6a. Create supplement master for DOO overflow 7. Edit Certificate 8. Review & Deliver

Step 3- A → Search: Terrace in Name Go

Select	Account Name	Address / City / State / Zip
Step 3- B → <input type="radio"/>	Terrace Condominium	

STEP 4- SELECT MASTER

Select Master Certificate Name and press continue

1. Select Account 2. Select Master 2a. Exclude Attachments 3. Select Named Insured 4. Select Cert Holder 5. Select Additional Recipients 6. Review Recipients 6a. Create supplement master for DOO overflow 7. Edit Certificate 8. Review & Deliver

Account Name: Terrace Condominium, ID: 247807
[Reselect Account](#)

Select	Master Certificate Name
Step 4 → <input type="radio"/>	Terrace Condominium 2017 - 2018 Term

1 total records.
Records per page: 5 [10] 20 40 < First | Prev 1

[Continue](#)

STEP 5- SELECT NEW RECIPIENT

Account Name: Terrace Condominium, ID: 247807
Master Name: Terrace Condominium 2017 - 2018 Term

Select	Name	Address / E-mail / Fax
No records found.		

Agency recipient Account recipient Named Insured recipient

[New Recipient](#)

STEP 6

Add Lender information, delivery method, and unit owner information. *If you just want a blank certificate, you can put "Evidence" as the name and include an email or fax number for delivery.* Don't forget to hit SAVE.

NAME: Name of Cert Holder- Mortgage Company name → **Name:*** **Attention:**

Additional Name:

Phone: → **Fax:***

Alt/International Phone: **Alt/International Fax:**

EMAIL/FAX: Where the cert will be delivered. → **E-mail:***

ADDRESS- Mortgagee Clause/address of Cert Holder → **Address:***

DEFAULT DELIVERY METHOD: You have the option of fax or email delivery. If you need the cert faxed, change the delivery method and enter the fax number → **Default Delivery Method:***

City:* **State:***

Zip/Postal Code:* **Province/Region:***

Country:*

Information entered into these fields will map to the first two lines of the D.O.O. of the selected Master Certificate.

CONDO OWNER NAME: This is where the unit owner's name, address, and loan number will be entered. → **Condo Owner Name:**

Condo Owner Address:

Condo Loan Number:

→

STEP 7- REVIEW RECIPIENTS

Once you save the certificate holder information, just click **Continue**.

Select **add/remove additional recipients** if you want to send multiple certificates. You will have to insert information like in step 6.

If you hit Edit, you can view the certificate. *Note: the condo unit owner information will not be added. In addition, when you are looking at the preview certificate, you must click continue at the bottom to view the second page.*

Account Name: Terrace Condominium, ID: 247807
Master Name: Terrace Condominium 2017 - 2018 Term

Certificate Holder	Address / E-mail / Fax
Lender	Mortgagee Clause Portland OR 97225 USA LAgency@amfam.com
<input type="button" value="Re-select Certificate Holder"/>	
Additional Recipients	Address / E-mail / Fax
<input type="button" value="Add/Remove Additional Recipients"/>	
<input checked="" type="radio"/> Agency recipient <input checked="" type="radio"/> Account recipient <input checked="" type="radio"/> Named Insured recipient	

STEP 8- REVIEW AND DELIVER

Make sure the delivery method is correct (Email or Fax). You can edit the subject line if you like— It automatically is "Delivery by CertificatesNow".

HIT CONTINUE

Account Name: Terrace Condominium, ID: 247807
Master Name: Terrace Condominium 2017 - 2018 Term

Certificate Holder	Address / E-mail / Fax	Delivery Method	TrackCerts ID (For TrackCerts deliveries only)
Lender	Mortgagee Clause Portland OR 97225 USA LAgency@amfam.com	<input type="text" value="E-mail"/>	<input type="text"/>
Recipients	Address / E-mail / Fax	Delivery Method	
You have no recipients for this certificate.			

Subject line (applicable only to email and fax deliveries)

→

STEP 9- Deliver

Hit **Deliver Now**.

The certificate should be sent within 5 minutes.

If you don't get it right away please wait for at least 10 minutes.

Account Name: Terrace Condominium, ID: 247807
Master Name: Terrace Condominium 2017 - 2018 Term

Certificate Holder	Address / E-mail / Fax	Delivery Method	Renewal Status
Lender	Mortgagee Clause Portland OR 97225 USA LAgency@amfam.com	<input type="text" value="E-mail"/>	<input type="text" value="Included"/>
Recipients	Address / E-mail / Fax	Delivery Method	Renewal Status
You have no recipients for this certificate.			

Check to send yourself an email of this certificate. [Preview]

→

DELETING CERTIFICATE HOLDER INFORMATION

Once you send your certificate it is important to delete the certificate holder info

STEP 1

Hover over Certificates at the top, and select Delivery



Home Certificates Admin Directory

STEP 2

Follow Steps 3 and 4 on page one to find the association

STEP 3

A) Click on the certificate holder name you entered before.

Account Name:	Terrace Condominium, ID: 247807	
Master Name:	Terrace Condominium 2017 - 2018 Term	
Select	Name	Address / E-mail / Fax
<input type="radio"/>	Evidence	
	ID: 11094415	rnichola@AMFAM.COM
<input checked="" type="radio"/>	Lender	Mortgagee Clause Portland OR 97225 USA
	ID: 11094409	LTAgency@amfam.com

B) Hit Delete

(E-mail, Postal Code, and Country):

Name:	Lender	Attention:	
Additional Name:			
Phone:		Fax:	
Alt/International Phone:		Alt/International Fax:	
E-mail:	LTAgency@amfam.com		
Address:	Mortgagee Clause		
City:	Portland	State:	OR - Oregon
Zip/Postal Code:	97225	Province/Region:	(If Applicable)
Default Delivery Method:	E-mail	Country:	United States

Information entered into these fields will map to the first two lines of the D.O.O. of the selected Master Certificate.

Condo Owner Name:	John Smith
Condo Owner Address:	12345 Dream Street Bank
Condo Loan Number:	123456

These certificates will NOT automatically be sent at renewal. You will need to go through the same process next year to get the renewal certificate.