

# Getting Started

## How to Build a Corporate Policy

Corporate Policy Creation | Global Policies

**i** Pre-requisite: must have a created an Organization and a Customer (a.k.a. a traveler profile).

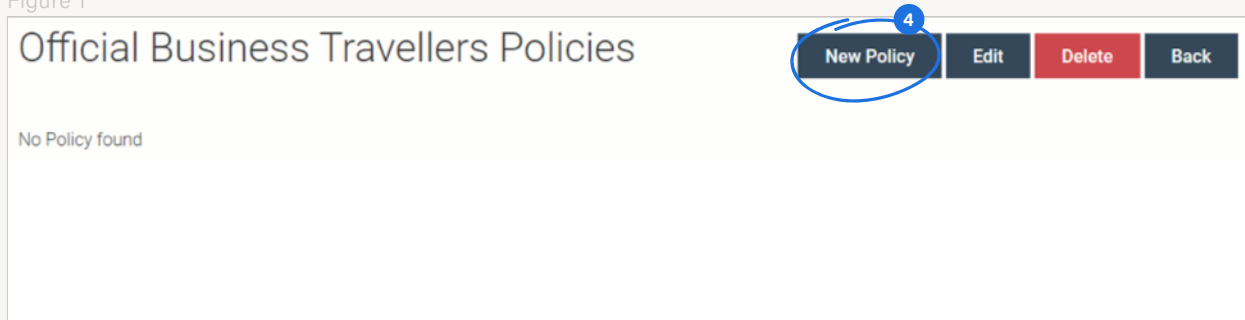
### 1.0 Building a Corporate Policy

1. Select **"Customers"** and click on the Organization from the list
2. Once the Organization profile has opened, click on **"Policy Levels"** on top right side of page
3. Select **Add New**

**i** Note: if you have a travel policy which applies to various levels of employees it is suggested to label this to the group of employees it refers to e.g Sales Team.

4. Once this has been given a Title of who the required policy applies to within the organization, click on New Policy on top right corner.

Figure 1



## 1.0 Building a Corporate Policy Continued...

5. Here is a quick guide to the fields that need to be completed:

The screenshot shows a 'New Policy' form with the following fields and callouts:

- Approval Required?** : Callout: *Select Approval Required should this policy require an approval process.*
- Exclude** : Callout: *If you select Exclude this policy will then not follow an approval process.*
- Label**
  - Preferred** : Callout: *If select Preferred this will refer to preferred supplier.*
  - Out Of Policy** : Callout: *If select Out of Policy will apply if a certain airline or country is not to be used.*
- Applies To** (Dropdown menu): Callout: *Select which aspect the policy applies to e.g airline / class of travel.*
- Approver** (Dropdown menu): Callout: *Select which approver the request must be approved by.*
- Create Policy** (Button): Callout: *Note: the approvers are pre-loaded*

Figure 2

6. Once completed click **Create Policy**.

**i** *Note: This policy will then apply to this group of travelers. Travelers can be linked to a certain policy created by selecting the customer on the list, click on Policy Level Tag and then select which policy is to apply to this traveler and then update the traveler profile.*

## 1.0 Building a Corporate Policy Continued...

Figure 3

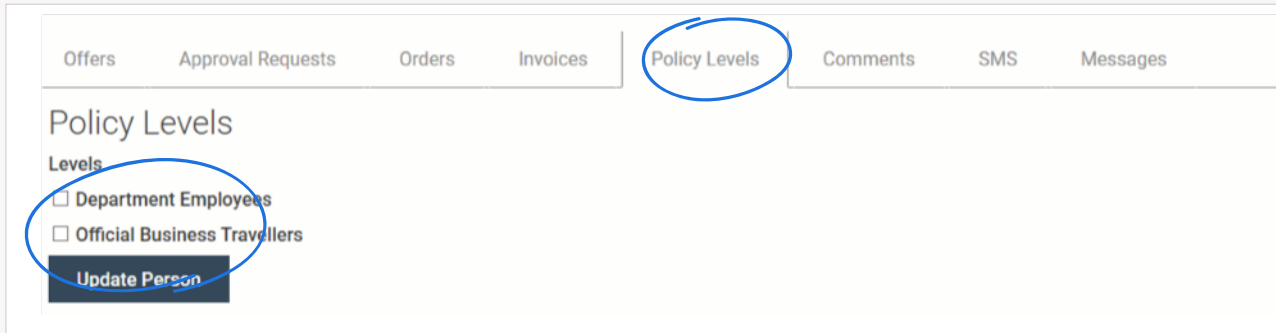
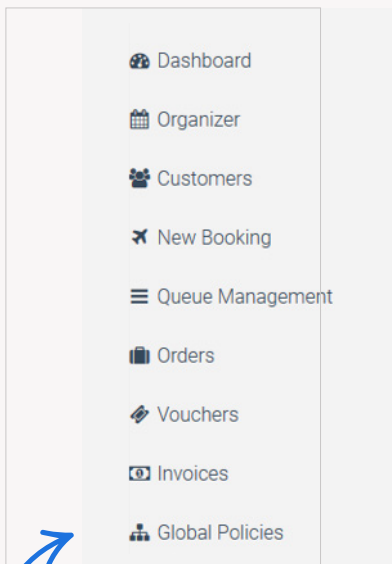


Figure 4



1. Click on Global Policies and then New Policy tab on the top right hand side of the screen.
2. Complete the template as per the above mentioned process and create policy

Policies can also be created under Global Policies



*Note: it is recommended to make use of Global Policies when creating a policy which applies to more than one organization.*