

## Payment Setup & Documents

**Payment Setup & Documents**  
Account: Tommy Trainer  
#A940052416

Policies can bill on one invoice if the due day of month, payment method, and primary payer are the same. The quoted policy will be added to an existing bill account when possible. Please review the billing parameters. You can make changes by clicking the pencil icon to the right of the quoted policy row.

Bill Account#	Policy	Premium	Due Day of Month	Payment Plan	Payment Method	Primary Payer	Down Payment	
Personal Auto 9400065565	Personal Auto 9400065565	\$295.00	15	Pay in Full	Bill		\$295.00	

**Existing Bill Account**

**Documents**

**Personal Auto Quote (9400065565)**

Retain in Agency **Submit to Western National** **Items requiring Post Issue Review**

- Personal Auto Quote Summary
- Personal Automobile Application IA
- Additional Driver Disclosed Deleted
- 2006 CHEV COBALT LS Review Vehicle Owner
- Review Manual Prior Carrier entry

Quotes can be issued by setting up a payment plan, payment method, down payment amount, and due date on this page. You can print documents, including AutoPay Enrollment Form, and view items requiring post issuance review.

- To set up the payment for the policy, select the **pencil icon** next to the **quote** to update the billing parameters.

**Edit Payment Details (Personal Auto 9400065565)**

Payment Method:

Due Day of Month:

Payment Plan:

Primary Payer:

Apply to other quotes:

Choose the Following to set up Payment Details:

- Choose Payment Method
- Due Day of Month (*prefills to policy effective date*)
- Payment Plan
- Primary Payer (*will be selected for you*)
- Apply to other quotes (*used for Home policies*)
- Select **OK** to continue

## Proceed to Issue

by clicking the pencil icon to the right of the quoted policy row.

Bill Account#	Policy	Premium	Due Day of Month	Payment Plan	Payment Method	Primary Payer	Down Payment	
Personal Auto 9400065565	Personal Auto 9400065565	\$31.94	15	Monthly	AutoPay(BankAccount - 4113)	Tommy Trainer	\$31.94	

**Existing Bill Account**

**Documents**

**Personal Auto Quote (9400065565)**

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**AutoPay Auth Form**

Blank AutoPay Enrollment Form

© Back to Account Details © Back to All Quotes © Back to Account Summary

- Scroll down to the bottom of the page.
- Select **Proceed to Issue**.

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**Policy Payment & Issuance**

**Quotes**

Bill Account#	Policy	Premium	Fee	Due Day of Month	Payment Plan	Payment Method	Primary Payer	
New	Personal Auto 9400065565	\$311.00	\$0.00	15	Monthly	AutoPay(BankAccount - 4113)	Tommy Trainer	<input type="button" value="Pay &amp; Issue"/>

**Existing Bill Account**

Bill Account#	Policy	Due Day of Month	Payment Plan	Payment Method	Primary Payer
No items found					

- Pay & Issue - Down Payment** (*will not show for Mortgage Bill*)
- Select **Pay & Issue** to make the down payment on the quote.

## Down Payment Setup

- The payment amount will prefill with the **Minimum Due** amount.
- Select the **Payment Method** to choose how you will make the payment.
- Next click **Pay & Issue**.
- This will bring you to the existing payment pages.

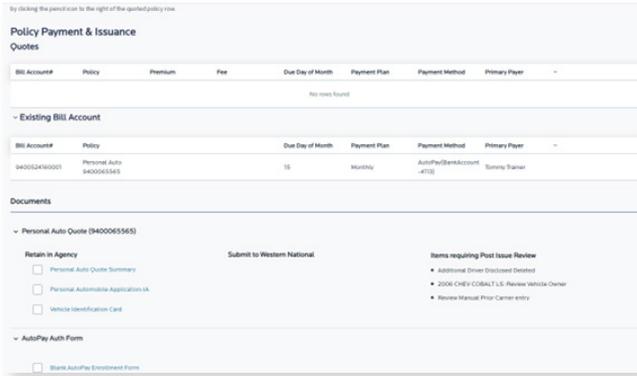
Policy #	Amount
017-698268-018-026-018-12104707765	\$348.42
SUBTOTAL	\$348.42
SERVICE FEE*	+ \$0.00
<b>GRAND TOTAL</b>	<b>\$348.42</b>

- The following screens will pop up, asking for card or bank account information. Enter the payment information on this screen and choose **Continue to Review Payment**.

Policy #	Amount
017-65457166-1206-4504-8602-44837168126	\$526.00
SUBTOTAL	\$526.00
SERVICE FEE*	+ \$0.00
<b>GRAND TOTAL</b>	<b>\$526.00</b>

- The **Review your information** page will follow. Put a check mark in the box to agree to the terms and conditions, and you can choose **Process Payment** to complete the payment.

- Finally, the confirmation page will appear with a link that directs you to print a copy of the receipt.

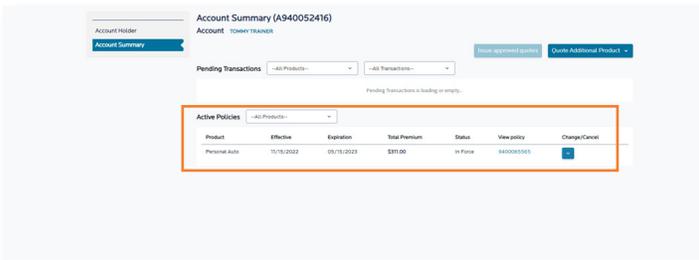


Once the down payment has been made, you will be brought back to the **Payment Setup & Documents page**. However, the Quote field will be blank as your Policy has been issued. It will now show under **Existing Bill Account**.

- Below the new policy will be the documents available for printing, including ID Cards and AutoPay Enrollment Form. If you would like to print all the documents, use the Select All button near the bottom of the page. If you would like to print only one document, put a check mark in the field and select Print Selected.
- Next to this will be the **Items requiring Post Issue Review** for you to review what additional information is needed.
- When finished, you can click on **Back to Account Details**, **Back to All Quotes**, or **Back to Account Summary** at the bottom of the page.



## Account Summary



- The **Account Summary** page will show all **Pending Transactions** and **Active Policies**.
- You can also start a **Change** or **Cancel** from the **Account Summary** page.