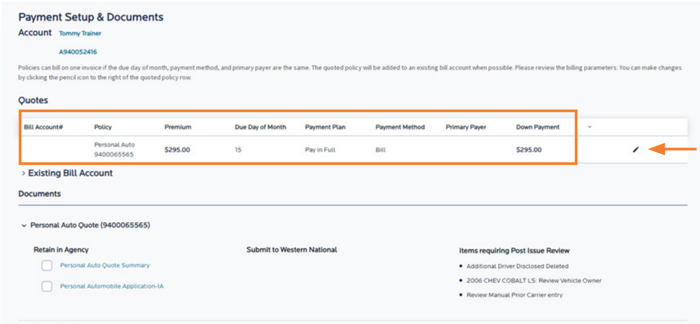
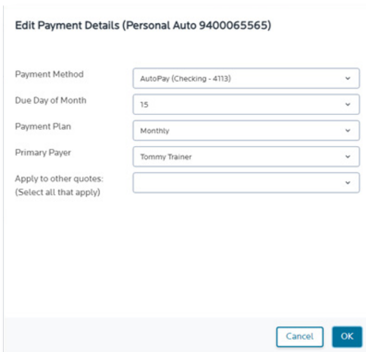
## Payment Setup & Documents




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.

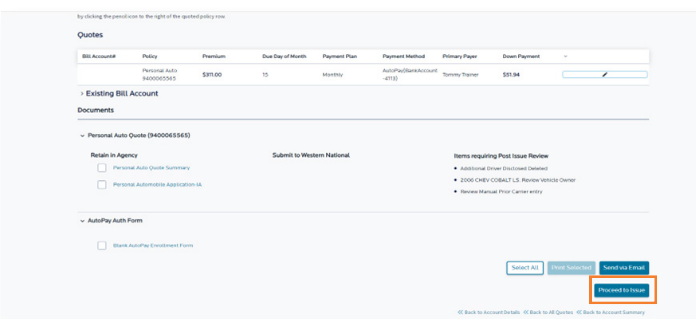
- To set up the payment for the policy, select the **pencil icon** next to the **quote** to update the billing parameters.



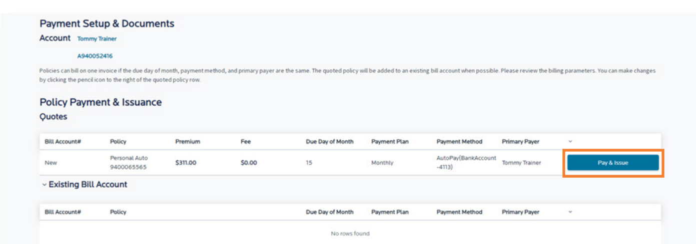

**Choose the Following to set up Payment Details:**

- **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

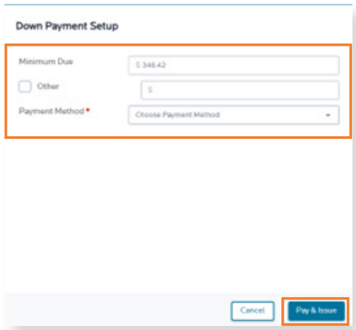



- Scroll down to the bottom of the page.
- Select **Proceed to Issue**.

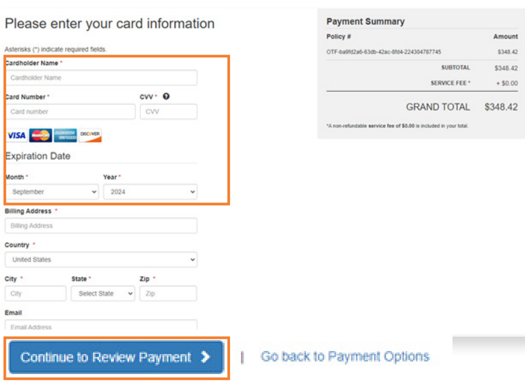



- **Pay & Issue - Down Payment** *(will not show for Mortgage Bill)*
- Select **Pay & Issue** to make the down payment on the quote.

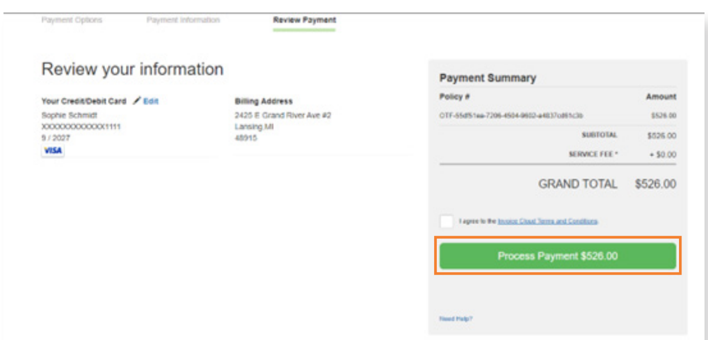
## Down Payment Setup



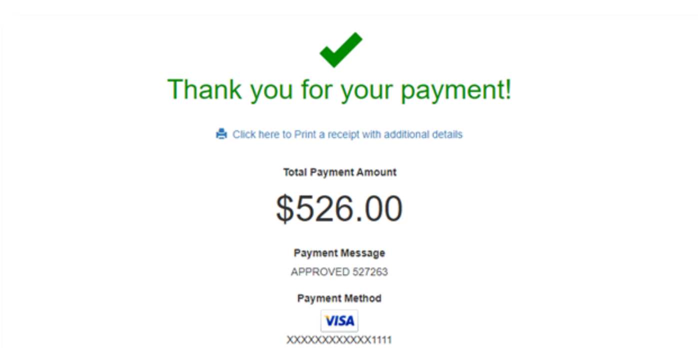

- The payment amount will prefill with the **Minimum Due** amount.
- Select the **Payment Method** to choose how you will make the payment.
- Next click **Pay & Issue**.
- This will bring you to the existing payment pages.



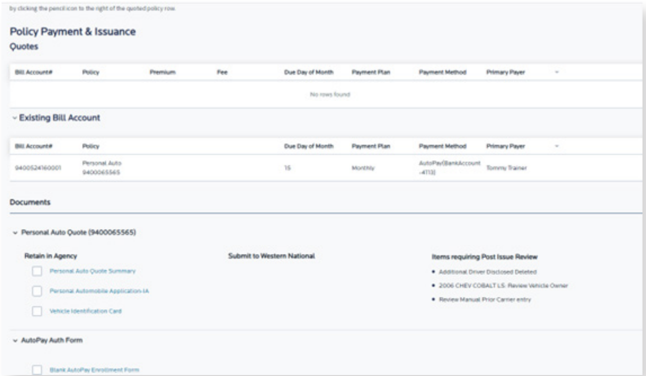

- The following screens will pop up, asking for card or bank account information. Enter the payment information on this screen and choose **Continue to Review Payment**.

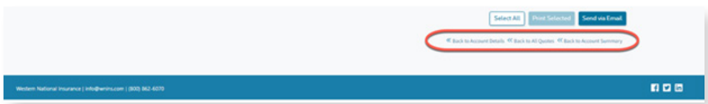



- The **Review your information** page will follow. Put a check mark in the box to agree to the terms and conditions, and you can choose **Process Payment** to complete the payment.




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

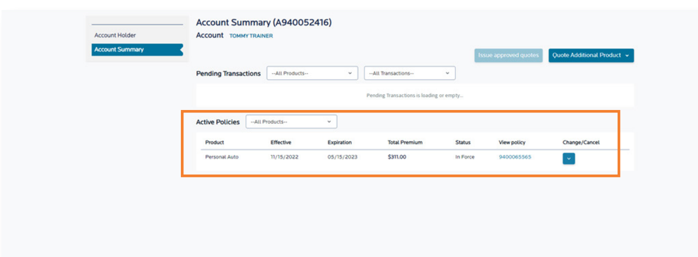


Once the down payment has been made, you will be brought back to the **Payment Setup & Documents page.** However, the Quote field will be blank as your Policy has been issued. It will now show under **Existing Bill Account**.

- 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.