

AMsuite®

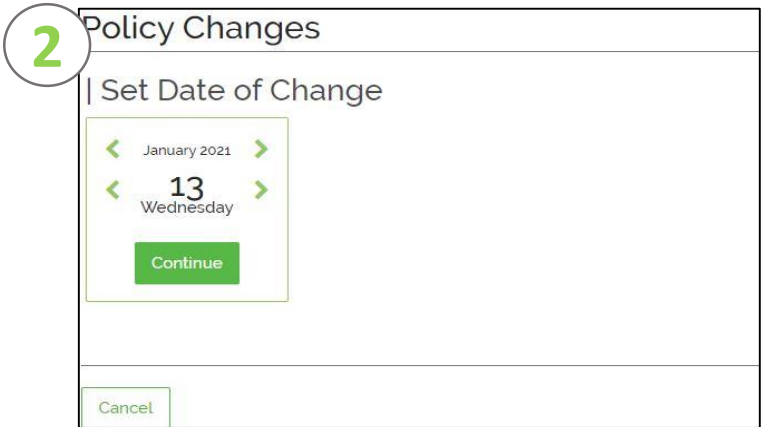
Setting up EZpay

This job aid will provide step by step instructions for setting up ezpay in AMsuite.

Start by pulling up the policy and click **Change Policy**.



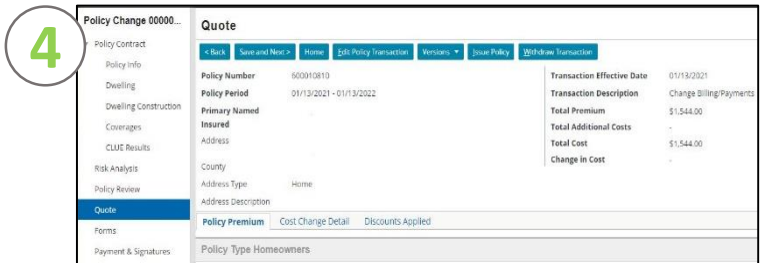
Enter the effective date of the change and click **Continue**.



Select the blue **Quote** button at the top of the screen.



Click the **Payments & Signatures** tab on the left-hand side.



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Setting up EZpay

Updated the billing type, draft date, payment plan and payment method. To add a payment new method, click the drop-down arrow and select new.

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Billing Options

Billing Method: Direct Bill

Billing Type:

Date of Payment:

Billing Contact:

EZPay Form Signed?: No

EZPay Form Version:

Payment Plan Options

Original Payment Plan: Bi-Monthly Pay Plan

New Payment Plan:

Total cost could be significantly reduced if you choose to pay in full. You may do t

Recurring Payment Method

Payment Method:

For electronic signature fill out the required fields or select traditional signature to print and sign.

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Required Signature Forms

Signatures on required forms can be obtained two ways 1) Emailed to Primary Named Insured for electronic signature, or 2) Printed for a traditional signature by Primary Named Insured. Please choose an option below. Note: If electronic signature is selected, the electronic envelope may first be emailed to the Producer for signature before being forwarded to the Primary Named Insured.

Electronic Signature - Mobile Device Required

Consent to electronic delivery of required signature forms? Yes No

Producer email address for e-signature:

Mobile phone number for text message delivery* of Personal Identification Number (PIN):

* Standard message and data rates apply

[View Privacy Notice](#)

Traditional Signature

| Form # | Description |
|----------|---------------------------|
| EFT AUTH | EZPay Enrollment and A... |

Primary Named Insured email address:

Click **Issue Policy** at the top of your screen to apply the changes.

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Payment & Signatures

Payment

For Agent Use Only - Not for Distribution

January 2021
Version: 2.0

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