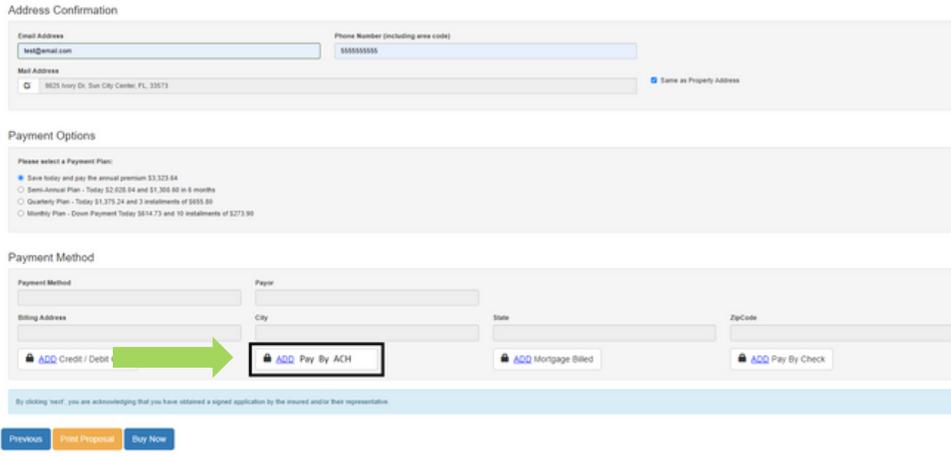


How to Guide

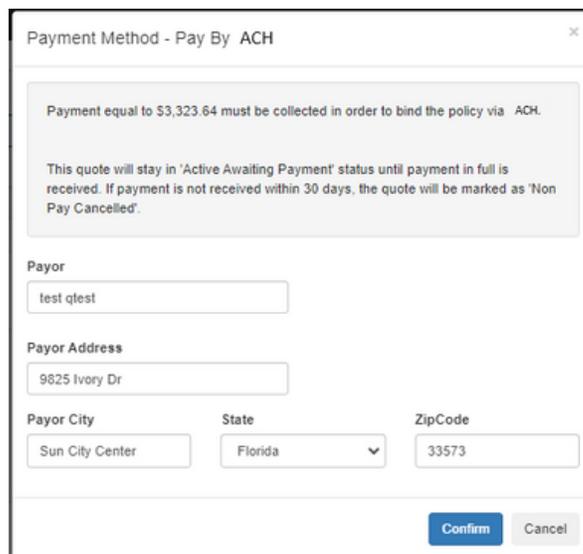
- 1 User moves through the Quote flow, enters policy information, and lands on the Payment page. User then selects the “Pay By ACH” payment method option



The screenshot shows a multi-step payment form. The 'Address Confirmation' section includes fields for Email Address (test@email.com), Phone Number (5555555555), and Mail Address (9825 Ivory Dr, Sun City Center, FL 33573). The 'Payment Options' section lists three plans: 'Save today and pay the annual premium \$3,323.64' (selected), 'Semi-Annual Plan', and 'Quarterly Plan'. The 'Payment Method' section has a green arrow pointing to the 'ADD Pay By ACH' button, which is highlighted with a black box. Other buttons include 'ADD Credit / Debit', 'ADD Mortgage Billed', and 'ADD Pay By Check'. Navigation buttons at the bottom are 'Previous', 'Print Proposal', and 'Buy Now'.

- 2 The “Email Address” will be required to bind with the “Pay By ACH” payment method

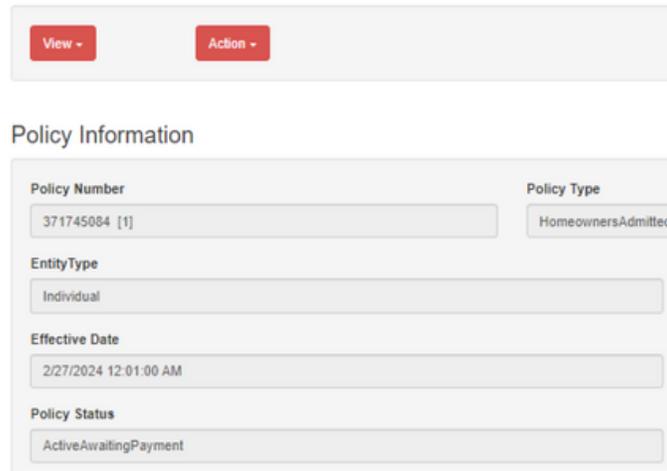
- 3 Upon clicking the “Pay By ACH” option the pop-up modal below appears with the information pre-filled, similar to Pay By Check. Information fields will be open and allow for changes



The modal window is titled 'Payment Method - Pay By ACH'. It contains a message: 'Payment equal to \$3,323.64 must be collected in order to bind the policy via ACH. This quote will stay in 'Active Awaiting Payment' status until payment in full is received. If payment is not received within 30 days, the quote will be marked as 'Non Pay Cancelled'.' Below the message are pre-filled fields: Payor (test qtest), Payor Address (9825 Ivory Dr), Payor City (Sun City Center), State (Florida), and ZipCode (33573). At the bottom right are 'Confirm' and 'Cancel' buttons.

4

Upon clicking the “Buy Now” button the policy will be moved into the “Active Awaiting Payment” policy status



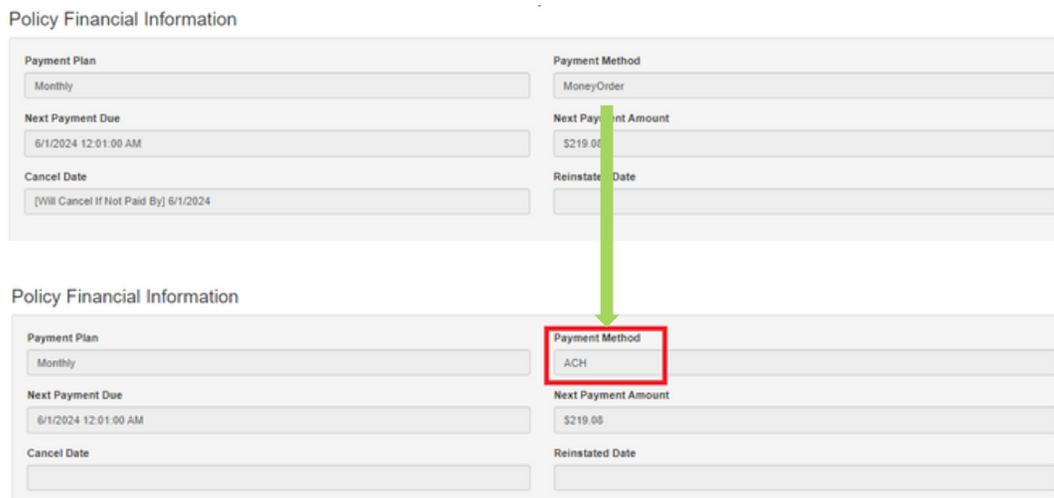
View - Action -

Policy Information

Policy Number	Policy Type
371745084 [1]	HomeownersAdmitted
Entity Type	
Individual	
Effective Date	
2/27/2024 12:01:00 AM	
Policy Status	
ActiveAwaitingPayment	

5

Policy will be placed on the “Money Order” payment method until an ACH payment method is added through the CSSP and set as the Active Payment Method



Policy Financial Information

Payment Plan	Payment Method
Monthly	MoneyOrder
Next Payment Due	Next Payment Amount
6/1/2024 12:01:00 AM	\$219.00
Cancel Date	Reinstatement Date
[Will Cancel If Not Paid By] 6/1/2024	

Policy Financial Information

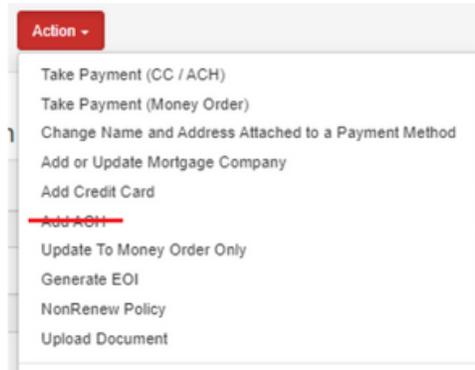
Payment Plan	Payment Method
Monthly	ACH
Next Payment Due	Next Payment Amount
6/1/2024 12:01:00 AM	\$219.00
Cancel Date	Reinstatement Date

6

The post-bind “Add ACH” Action menu option will be removed for policies using Checkout as their active payment vendor. Customers will need to add ACH payment methods through the CSSP

7

For policies already using Payeezy as their active payment vendor the option to “Add ACH” will remain available



8

The “Welcome to MSI” policy email is delivered to email address listed on the policy, and the document is stored in VIP. Email contains link to CSSP, the customer’s login username, and a temporary password

