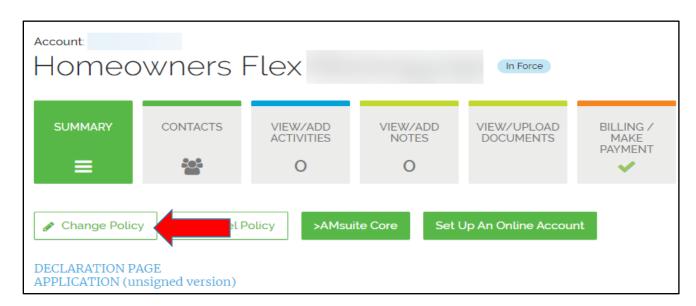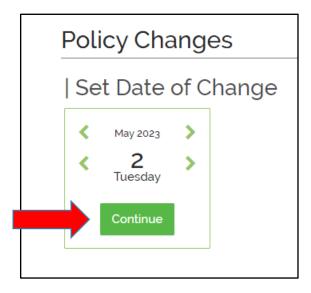This Job Aid will provide step by step instructions on how to set up EZPay in AMsuite.

1 From AMsuite, Select **Change Policy**

Account:
Homeowners Flex   In Force

| SUMMARY ☰ | CONTACTS 👥 | VIEW/ADD ACTIVITIES ○ | VIEW/ADD NOTES ○ | VIEW/UPLOAD DOCUMENTS | BILLING / MAKE PAYMENT ✔ |

🖉 Change Policy   el Policy   >AMsuite Core   Set Up An Online Account

DECLARATION PAGE
APPLICATION (unsigned version)

2 Review the **Date of Change**, Select **Continue**.

Policy Changes

| Set Date of Change

‹ May 2023 ›
‹ **2** ›
Tuesday

Continue

AMsuite®   EZpay Setup

3 Select **Billing** for the policy change description, Select **Continue**.

Policy Changes

Date		Select Changes
2 May 2023	☐ Primary Insured ☐ Additional Insured incl. Premium Finance Co., Designees ☐ Additional Interests Mortgagee, Park Owner, Property Mgr ☐ Dwelling ☐ Coverages ☐ Address (Mailing & Billing) ☑ Billing ☐ Other	

⮕ Continue

4 Select the drop down for the **Billing Type**, Select **Recurring Electronic**

Billing

Billing Method *	Direct Bill ⌄
Bill To *	⌄
Billing Type *	Invoice ⌄
	Invoice
	Recurring Electronic
Original Payment Plan	Full Pay Plan

(5) Select the drop down for the **New Payment Plan**, Select a **Payment Plan**

Billing

EZPay Authorization form is needed. Please scroll down to print or attach a form.

Billing Method *	Direct Bill
Bill To *	
Billing Type *	Recurring Electronic
Original Payment Plan	Full Pay Plan

Pay in Full has been selected as a payment plan but the Paid in Full Discount is set to "no". With this payment plan you may be able to take this discount by changing Paid in Full to "yes" on the Policy Info page of AMsuite Core. This can be done in a policy change which has a change reason of 'Other' or by retrieving this policy change in Core.

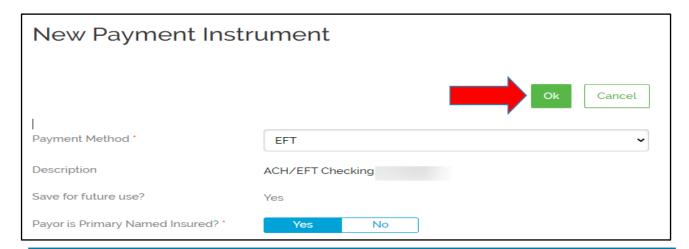|	
New Payment Plan *	Full Pay Plan
	Full Pay Plan
	Semi-Annual Pay Plan
Date of Payment *	Quarterly Pay Plan
	Bi-Monthly Pay Plan
Recurring Payment Method *	Monthly Electronic Pay Plan

6 Review and **Select** the **Date of Payment.**

- o The **Draft Date** can be **Any Date** from the **1st through 28th** of the month.

   To add a **New Payment Method,** Select the Green **Drop-Down Arrow** and **Select New.**

New Payment Plan *	Monthly Electronic Pay Plan ⌄
Date of Payment *	17 ⌄
Recurring Payment Method *	⌄
	New ⑦

7 Select the Drop-Down for the **Payment Method** and **enter** in **Payment Information, Select Ok.**

- o EFT and Credit Card Payment Methods are accepted

New Payment Instrument

		Ok	Cancel

Payment Method *	EFT ⌄
Description	ACH/EFT Checking
Save for future use?	Yes
Payor is Primary Named Insured? *	Yes | No

8 Review and Enter the required fields for **Electronic Signature** to send the Authorization Form by E-signature.

Select **Traditional Signature** to print and sign the form manually

- o EZpay Authorization form sent via **Electronic Signature** will automatically be uploaded to AMsuite once signed electronically.

- o EZpay Authorization form sent via **Traditional Signature** will need to be uploaded to AMsuite. .

Required Signature Forms

Signatures on required forms can be obtained two ways
Emailed to Primary Named Insured for electronic signature, or
Printed for 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 form? * | **Yes** | No |

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

Standard message and data rates apply

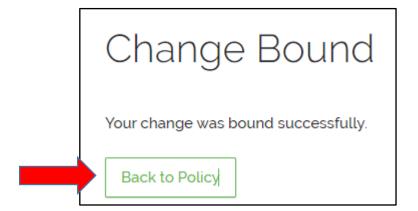View Privacy Notice

○ Traditional Signature

View/Print All

9 Select **Complete Change** to finish setting up Ezpay..

Total Cost

Current Total Cost	$3,317.00
Adjusted Total Cost	$3,317.00
Prorated Difference	$0.00

Complete Change

10 Select **Back to Policy** to navigate back to Policy view.

Change Bound

Your change was bound successfully.

Back to Policy