
Quick Reference Guide

Version 5 - May 2016

For additional help with topics not outlined in the following pages:

Policyholder: Please contact your broker.

Broker: Please contact your Carrier.

Navigating

- Using your internet browser, go to www.billitnow.com
- Enter your username and password in the Login dialog box and press <ENTER> to access the Welcome Page.
- Producers are provided with their login credentials from the Carrier. Policyholders will need to register as new users.

Welcome to the Weston Insurance Company Login Screen

Please enter your username and password.

Once you are logged in, you will be able to easily navigate through the site and view all transactions.

If this is your first time here, please register using the link below. If you have any questions regarding the login please contact your insurance broker.

▼ Login

Username

Password

Remember me on this computer

[New User? Register Here](#)


[Forgot Password? Click Here](#)

Policyholders click
here to register

New User Registration

- Click on the “New User? Register Here” link on Home Screen
- Enter the requested information below directly from your statement. Use the zip code of your physical address, not the mailing address if they are different. If the statement shows the zip code with a dash and four digits, enter this as the full zip code.
- The email address you enter will be used to send password information.
- Select submit when all information is entered. An email will be sent to you with your username and password. Login to the system with this information. You will then be prompted to set up security questions. Follow prompts to finish login registration.
- At anytime you can update your username and password by clicking on “Change Username and Password” link which is found under the Tools section on the Home Screen (see next page).

New User Registration

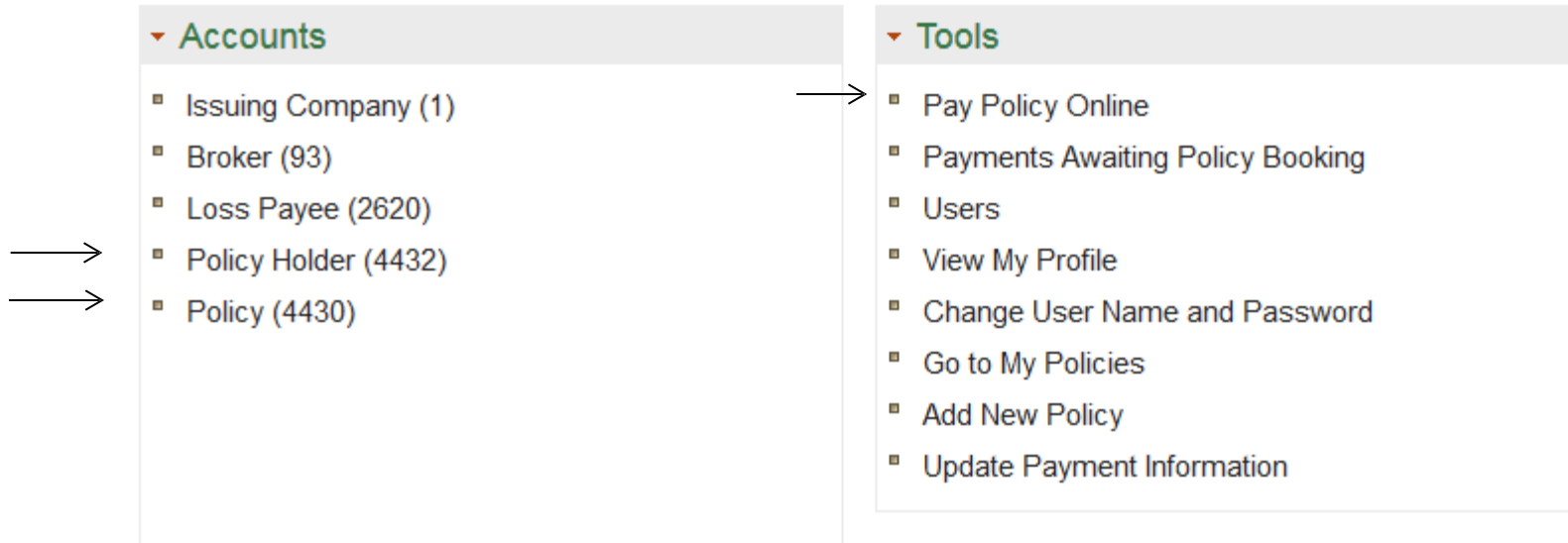
 Back

Please enter the information exactly as as it appears on your statement or your insurance declarations page.
Your email address will be used to deliver your temporary username and password. Please be sure to check your Junk Email folder if you do not receive your temporary password.

Policy Number	<input type="text"/>
Policy Effective Date	<input type="text"/> 
Name	<input type="text"/> Exactly as it appears on your statement
Zip Code	<input type="text"/>
Email Address	<input type="text"/>
Confirm Email Address	<input type="text"/>

Welcome Page

- The Welcome Page provides links to various options. The Accounts section provides links to your policies and other entities. Select the Policy Holder or Policy link to search or browse these levels.
- The Tools section provides links to settings and actions.
- To make an online payment, you can either:
 - click on 'Policy' under the Accounts Section and then click on the policy number for the policy you are making a payment for.
 - click 'Pay Policy Online' under the Tools Section.
 - Continue to Page 9 for further instructions.



Policy Holder Screen

- Selecting the Policy Holder link (shown on page 4) will display the Policy Holder Screen, as shown below. To search for a policy, enter all or part of the name in the search box and click on <SEARCH>.
- Alternatively, you can scroll through the list of policy names.
- Click on the policy Policyholder Name to pull up the Policy Holder Detail Screen .

Home Reports Help Log Out

Policy Holder Test MGA ◀ Back

Name	Address
Another Policyholder	Gregory . TX-78359
Test Policyholder	Test City . Test State-77581

© Weston Insurance Version 6.13.0

Policy List Screen

- Selecting the Policy link (shown on page 4) will display the Policy List Screen, shown below. To search for a policy, enter all or part of the name or policy number in the search box and click on <SEARCH>. You can also filter selection further by using the selections on the drop down menus.
- Alternatively, you can scroll through the list of policies and click on the Policy or Policyholder.
- Click the POLICYHOLDER to see the Policy Holder Detail Screen
- Click the POLICY NUMBER to access the Policy Detail Screen.
- Active policies appear in bold and inactive policies appear in gray.

HomeReportsHelpLog Out

Policy List ◀ Back

Show All Policies ▼ Show All MGA ▼ Sort by Policy Holder ▼ Add New Policy

Policy	Policyholder	Effective Date	Expiration Date	Type	Total Premium
PTA-00000-24000	Another Policyholder	3/18/2018	3/18/2019	Homeowners	\$722.00
PTA-00000-40010	Test Policyholder	11/7/2017	11/7/2018	Homeowners	\$1,546.00

Page: 1

Policy Holder Detail Screen

- The Policy Holder Detail Screen displays policyholder contact information, as well as information on the issuing company, carrier, MGA and broker. The policyholder's policies can be accessed from this screen by clicking on the link located in the upper left hand portion of the screen. If multiple policies are held by the same insured, the policy link will bring you to a Policy List of all policies associated with the insured.
- Transactions can be viewed at the account level by clicking 'Account Transactions'.
- If any of this information needs to be updated, please contact your broker.

Test Policyholder (Policy Holder)

[Back](#)

- ▣ Statement Delivery Preference
- ▣ Policy (1)
- ▣ Permission
- ▣ Change Password
- ▣ Account Transactions

Issuing Company

Test Issuing Company
1 Test Drive,
Test City
Test State-33114

Broker
Test Broker
1 Test Drive,
Test City
Test State-77546 USA

Loss Payee
Test Loss Payee
1 Test Drive,
Test City
Test State-29502-0562 USA

* Required field

System ID	123456
Client ID	123-45678-90123
Name *	Test Policyholder
InsuredDBA	
Address *	1 Test Drive
City *	Test City
State *	Test State
Zip *	77581
Country	USA
Mail Address	1 Test Drive
Mail City	Test City
Mail State	Test State
Mail Zip	77581
Mail Country	USA
Tax ID	
Phone 1	
Phone 2	
Fax	
Email *	test@123456.com
Alternate Email	
SSN	
User Contact Type	
Login ID	123-45678-90123

Active

Save

Cancel

Policy Detail Screen

- The Policy Detail Screen provides detailed billing information for the policy.

Policy [776-00000-0000](#) (11/7/2017 - 11/7/2018) Back

[Pay Online](#)
[View Scheduled Payments](#)
[Set policy email settings](#)

MGA ID#: 23784 **Total Premium Amount:** \$1,546.00
Policy Type: Homeowners **Current Balance Due:** \$1,621.00
Program: [View Policy Details](#)

Type	Name	Commission
Policy Holder	Test Policyholder	
Issuing Company	Test Issuing Company	
Broker	Test Broker	16.00%
Loss Payee	Test Loss Payee	

[+ Add New Transaction](#)

Date	Description	Notes	Reference	Amount	Balance
06/23/2017	New Policy			1,546.00	1,546.00
06/23/2017	Broker Policy Fee	Policy Broker Fees applied.	MGA Fee	75.00	1,621.00

[Fees Adjustment](#) [Premium Adjustment](#) [Add New Installment Schedule](#)

Stmt No.	Statement Date	Payment Due Date	Prem Due	Fees Due	Prem Paid	Fees Paid	Total Paid	Amount Due	Stmt. Status	Delivery Method	Pmt. Status
1	10/8/2017	11/7/2017	1,546.00	75.00	0.00	0.00	0.00	1,621.00		Paper	
Total:			1546.00	75.00	0.00	0.00	0.00	1621.00			

Past Amount Due: \$0.00
Current Amount Due: \$0.00
Minimum Amount Due: \$0.00
Account Level Schedule

[<< Previous Term](#) [Next Term >>](#)

Policy term

Click any linked entity to view detail

Payment Due Date

Scheduled Statement Generation Date

Links are highlighted when prior/next term exists for the same policy number.

Link to make Online Payment

View online payments that are already scheduled.

Total Premium Booked

Current Balance Due

Transaction History

Pmt. Status indicates if an installment is paid, in full or partially, or if recurring online payments are scheduled.

Stmt. Status indicates if an installment statement has been sent, disabled or withheld.

Pay Policy Online

- To pay a policy online, click the Pay Online link from the Policy Detail Screen (as shown on the prior page in the upper right hand corner). This will take you to the Online Payment Screen.
- You can pay for the policy you selected by clicking on the first option which shows the policy number (Policy Level). If you have multiple policies, select the second option to pay toward the entire account.
- Offered payment methods (ACH and/or Credit Card) will be available once the policy is selected. Select desired payment method and then click on “Next”

Online Payment

[Back](#)

Payment Mode

I would like to submit a payment for a:

Policy not yet uploaded to the system

Select Program:

Policy Number:

Policy or account present in the system

I would like to submit a payment by:

Credit Card

Electronic Check (ACH)

Privacy and Security

Click here to select one policy from the drop down menu

Click here to select all policies for insured



Online Payment Screen – Checking Account


- To make a payment with a checking account, click the radio button for Electronic Check (ACH).
- Select the New Checking Account radio button. Select applicable Personal or Business Checking option. If a checking account has been previously saved under the login id, select Saved Checking Account.
- Press the Next button to display the New Checking Account Screen

Online Payment


 Back

▼ Payment Mode

I would like to submit a payment for a:

- Policy not yet uploaded to the system
- Policy or account present in the system
- I want to make a payment only for policy
 - I want to make a payment toward the entire account
-  [Click Here to Select Account](#)

I would like to submit a payment by:

- Credit Card
- Electronic Check (ACH)
- Saved Checking Account
 - 
 - New Checking Account
 - This will be a Personal Checking Account
 - This will be a Business Checking Account



Privacy and Security

Next

New Online Payment Screen – Checking Account

- Fill in the blank fields with your checking account information. If the billing address on the account is the same as the policy address, clicking 'Yes' will use the address shown. If the address is different, then select 'No' and enter applicable billing address for checking account.
- When ready, click 'Next'.

Online Payment

[Back](#)

▼ New Online Payment

▼ **Policy Holder:** [REDACTED]
Total Balance Due: \$1,621.00
Minimum Balance Due: None
Policies: [REDACTED]

▼ **Payment Details**

Name of Account Holder:

Account Number:

Account Number (repeat):

Routing Number:

Routing Number (repeat):

Billing Address: Your current address information is

Address1:

Address2:

City:

State:

Zip:

e.g. Zip 45454 Or 45432-3433

Is this also the account billing address?

Yes

No

Save this account so I can use it next time.

Note: A charge of \$15.00 will be assessed for any returned electronic checking transaction. Transactions may be returned as a result of insufficient funds, or improper routing/account numbers. Only U.S. bank accounts are accepted.

Weston Insurance Company
800-888-5002

PO Box 142057
Coral Gables FL 33114

What's this?
What's this?

Online Payment Screen – Credit Card

- To make a payment with a credit card, click the radio button for Credit Card.
- If a credit card has been previously saved under the login id, select Saved Credit Card.
- Press the Next button to display the New Credit Card Screen

Online Payment

[◀ Back](#)

▼ Payment Mode

I would like to submit a payment for a:

- Policy not yet uploaded to the system
- Policy or account present in the system
- I want to make a payment only for policy
- I want to make a payment toward the entire account
- [██████████ Click Here to Select Account](#)

I would like to submit a payment by:

- Credit Card
- Saved Credit Card
-
- New Credit Card
- Electronic Check (ACH)



Privacy and Security

Next


New Online Payment Screen – Credit Card

- Fill in the blank fields with your credit card information. If the billing address on the account is the same as the policy address, clicking 'Yes' will use the address shown. If the address is different, then select 'No' and enter applicable billing address for credit card.
- If you would like to save the credit card information for future payments, click on the box and then enter a descriptive name. Be mindful of the expiration date when making future payments.
- When ready, click 'Next'

Online Payment

 Back

▼ New Online Payment

▼ **Policy Holder: Aaron Hinze**
Total Balance Due: \$1,503.00
Minimum Balance Due: None
Policies: 

▼ **Payment Details**
Card Type: American Express ▼
Card Number:
Expiration Date: Aug ▼ 2017 ▼
Name as it appears on card:

Billing Address:
Address1:
Address2:
City:
State:
Zip:

Your current address information is

e.g. Zip 45454 Or 45432-3433

Is this also the account billing address?
 Yes
 No

Save this account so I can use it next time.

Weston Insurance Company
800-888-5002


PO Box 142057
Coral Gables FL 33114

Payment Options Screen

- One time payment


- Select 'Make One-Time Payment' if you are making a single payment.
 - The Amount to Pay field defaults to the current date. If this is not the date you wish to use, change it at this time. When you are finished making changes, press the Next button. The Payment Review Screen will display.

Online Payment

 Back

▼ **Payment Options**


▼ **Policy:** XXXXXXXXXX (3/18/2018 - 3/18/2019)

Total Balance Due: \$797.00 

Minimum Balance Due: None

▼ **Payment Options**

Make One-Time Payment

Amount to Pay: Pay On: 

You will see a charge for your payment of \$0.00 from Weston Insurance Company.

Total Payment: \$0.00

Set up Recurring Payments

Weston Insurance Company
800-888-5002


PO Box 142057
Coral Gables FL 33114

Payment Options Screen

- Recurring Payments

- Select 'Set up Recurring Payments' if you want to set up recurring payments based on your installment schedule.
 - A suggested schedule will be presented to you according to the installment schedule set forth by the carrier. You may accept this or change any amount or date. You can select a date in the box to have all payments made on a specific day of each month. Review the presented schedule and the terms and Conditions. If you agree with the schedule as outlined, click 'Next'.

Online Payment

 Back

▼ Payment Options

▼ Policy: F... (3/18/2018 - 3/18/2019)

Total Balance Due: \$797.00

Minimum Balance Due: None

▼ Payment Options

Make One-Time Payment

Set up Recurring Payments

A suggested payment schedule is below. You may modify the dates and amounts as needed:

Date	Amount	
3/18/2018	\$797.00	 

Add New

Set all payment dates to be on day:

Set **Undo**

Back

Next

Weston Insurance Company
800-888-5002

PO Box 142057
Coral Gables FL 33114

Payment Review Screen

- Validate the information that you have entered for accuracy. Read the Terms and Conditions field and check the box to accept the terms.
- If scheduling recurring payments, you can also:
 - Select to receive notification if there are premium changes on the policy.
 - Pre-authorize any premium changes to adjust your payments accordingly.
 - Pre-authorize all future policy renewals to continue to draw as per the installment schedule set forth by the carrier.
- When ready, click 'Pay Online' to process the payment.

Online Payment ◀ Back

Online Payment Review

Your payment is not yet complete.
Please review the information below and click "Pay".

▼ **Policy:** PFA-00000-0000 (3/18/2018 - 3/18/2019)

Total Balance Due: \$797.00
Minimum Balance Due: None

▼ **Account Information**

Pay with Card: XXXX-XXXX-XXXX-6666
Expiration Date: 8/2018

▼ **Billing Address**

Address 1:
City:
State:
Zip:

▼ **Payment Details**

PolicyID:

Recurring Payments:

On Date	Amount
3/18/2018	\$797.00

Terms and Condition:

Terms and Conditions That Apply to All Transactions:

Please note that these terms and conditions may not be the only terms and conditions applicable to your insurance coverage. These terms are applicable only to the collection of premiums and fees related to your insurance policy. Your insurance carrier, broker, and/or agent govern all coverage and underwriting decisions. Your insurance carrier may have the right to cancel your insurance policy effective at inception (as if the policy never existed) should no payment ever be received and deposited for the written policy. Also please note that you are responsible for any

I have read and agreed to the terms and conditions.

Notify me if there are premium changes on this account.

I pre-authorize any premium changes to adjust these recurring amounts as needed.

I pre-authorize all future policy renewals and endorsements to be charged as per the installment schedule set-forth by the insurance company.

When ready to submit payment, please click the below button only once.

If acceptable, click Pay Online ONLY CLICK ONCE

Payment Confirmation Screen

- From the Payment Confirmation Screen, you may print a copy of the confirmation for your records. When ready, click 'Return to Account' to return to the policy detail page.

Online Payment ◀ Back

PAYMENT AUTHORIZED

Thank you for submitting your payment for processing. It may take up to 2 business days for your payment to appear on your account. Though your payment has been authorized, it is possible for it to be later declined or returned by your bank during settlement. Please be sure to confirm that your payment appears on your card or account statement, indicating that it was successful. Below are the details of your transaction. You may print this page for your records.

Login User Name	DinaWIM			
Login User ID	DinaWIM			
Policy Holder Name	Policy	Total Fees	Total Amount	Order Number
21 Green LLC	PTA-2017-10000	\$0.00	\$797.00	A2017NCGIJ
Scheduled on Date	8/7/2017			

Your recurring payments are scheduled as below:

Amount	On Date
\$797.00	3/18/2018

© Billing Management Services, LLC.

[Print](#) [Return to Account](#)

Reporting at Your Fingertips

Please note: this section is not applicable for policyholders.

- In addition to providing agencies with detailed policy and policyholder information, The DirectPay system provides many reports, including commission reports, pending cancellation reports, overdue payment reports, etc. based on your permissions.
 - Commission reports can be run to forecast future disbursements, and past commission statements can be viewed by clicking 'View Earlier Reports'
 - The Pending Cancellation Report provides a detailed listing of all policies for which a cancellation notice has mailed, but have not yet been paid or cancelled.
 - The Billed Balance report can display all amounts billed, billed and not paid, or billed and now overdue. All reports feature custom sorting.
- All reports can be exported and saved to PDF, Excel, or Word files for easy manipulation, storage and reference.
- To access the available report listing, click the Reports link, located on the main menu bar (shown below), which is displayed on all screens.
- If you need a report that is not listed, please contact your carrier.



Reporting at Your Fingertips

The Billing Management Services reporting engine makes managing the process simple. One click gets you account details, payment activity, commission statements, pending cancellation reports, and more. Below is just a short list of the many reports already available. Need a specific type of report for your specialized agency? We can make it happen. We can custom build any report you need to track your data.

Available Reports Screen

- This screen displays a list of available reports. Click a report link to access the Report Criteria Screen for the report you wish to run.

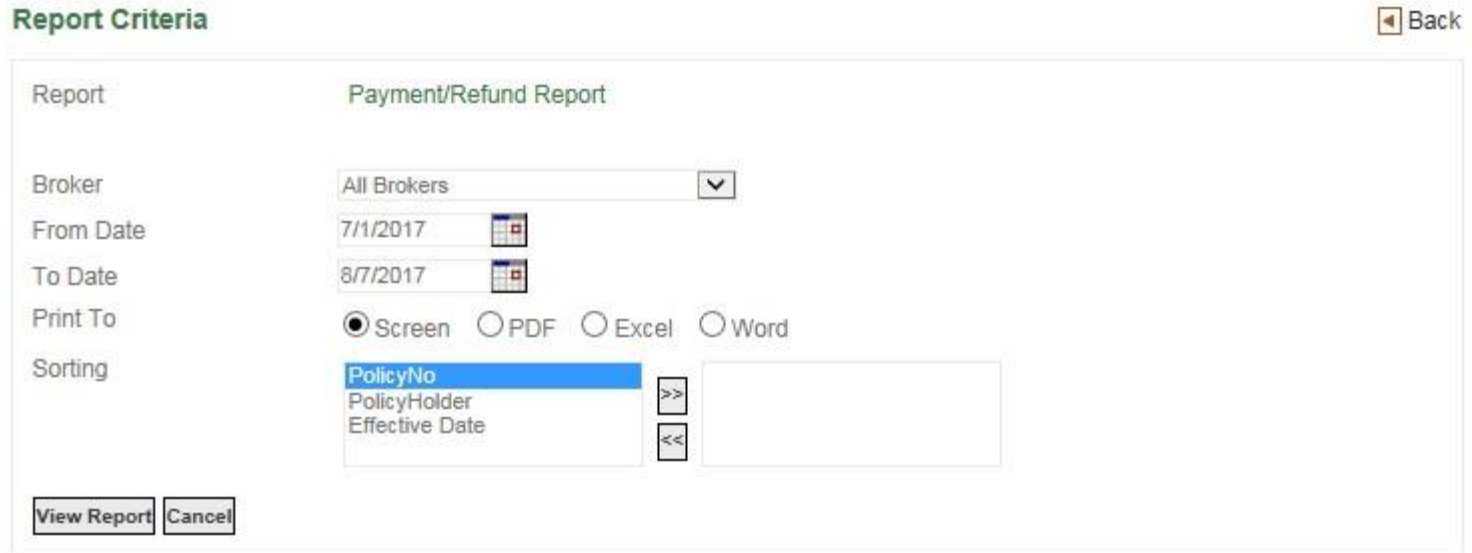
Reporting at Your Fingertips

The Billing Management Services reporting engine makes managing the process simple. One click gets you account details, payment activity, commission statements, pending cancellation reports, and more. Below is just a short list of the many reports already available. Need a specific type of report for your specialized agency? We can make it happen. We can custom build any report you need to track your data.

Available Reports	
ReportName	Description
Commission	
AccountCurrent	Account Current
BMS Policy Fees	BMS Policy Fees
Broker Commission	Broker Commission
Commission and Fee Payment Report	Commission and Fee Payment Report
MGA Commission	MGA Commission
Service Fees	Service Fees
Overnight Result	
Transaction Report	Transaction Report
Payment	
Billed Balance Report	Billed Balance Report
Credit Balance Report	Credit Balance Report(Negative Account Balance)
Future Receivable Report	Future Receivable
Installments Report	Installments
Payment Transaction Report	Payment/Refund Report
Pending Cancellation Report	Pending Cancellations
Entity	
Broker Listing	Broker Details
Policy Holder Report	Active PolicyHolder Report
Policy Report	Active Policy Report
Policy Balance	
Policy Balance Due (Active)	Policy Balance Due (Active)
Policy Balance Due (Inactive)	Policy Balance Due (Inactive)
Underpaid Policy Report	Underpaid Policy Report

Report Criteria Screen

- From the Report Criteria Screen, shown below, specify the date range, sort, and print to options (as applicable) and click the View Report button to return the results.



The screenshot shows the 'Report Criteria' screen for a 'Payment/Refund Report'. The interface includes the following elements:

- Report:** Payment/Refund Report
- Broker:** All Brokers (dropdown menu)
- From Date:** 7/1/2017 (calendar icon)
- To Date:** 8/7/2017 (calendar icon)
- Print To:** Radio buttons for Screen (selected), PDF, Excel, and Word.
- Sorting:** A list box containing 'PolicyNo' (highlighted), 'PolicyHolder', and 'Effective Date'. To the right of the list are up and down arrow buttons.
- Buttons:** 'View Report' and 'Cancel' buttons at the bottom left.
- Navigation:** A 'Back' button with a left-pointing arrow at the top right.

- If you chose to print the report to the screen, you can export the results to the file options given by clicking on the drop down box and then clicking "Go", as shown below. Once exported, the document can be saved.



This screenshot shows the 'Export To' dropdown menu. The menu is open, displaying the following options: 'Select', 'PDF', 'Excel', and 'Word'. To the right of the dropdown is a 'Go' button. A red arrow points from the 'Go' button to the left, indicating the next step in the process.