Electronic Billing and Payments

Trucking

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SECTION 1: SIGN-UP/REGISTRATION

SECTION 1.1: FIRST-TIME REGISTRATION

- From the landing page, select the blue hyperlink **Sign Up**. (THIS IS FOR INSUREDS ONLY)
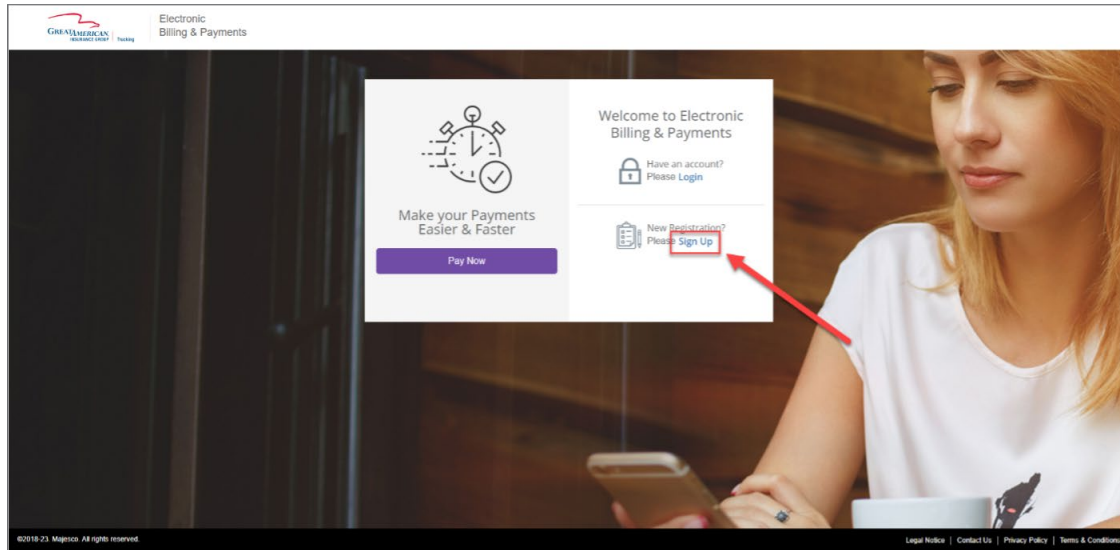
- You will then be prompted to enter the following information:
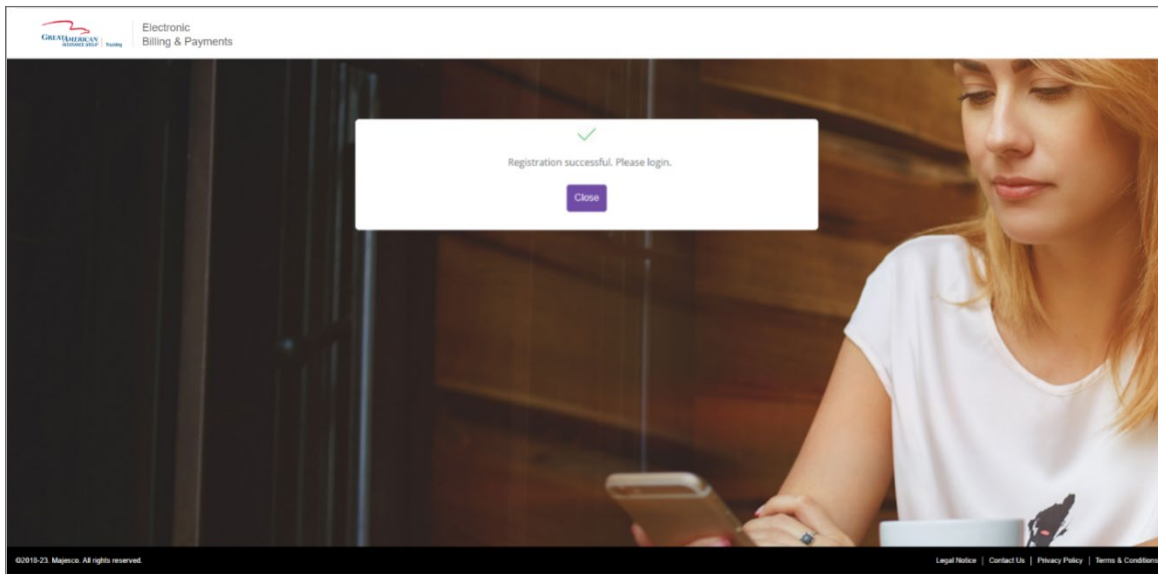 - You must enter both Policy Number and Zip Code correctly.
    - **IMPORTANT!** If your policy number includes an additional P in the prefix (New Great Roadmap Policy #), the dash and mod (-0) must be included (for example: GTPP123456-7)
- **IMPORTANT!** Please enter a valid email address as this will be used to retrieve your password/username in the future. Click **Sign Up** to create your account:

SECTION 1.2: FORGOT USERNAME/PASSWORD
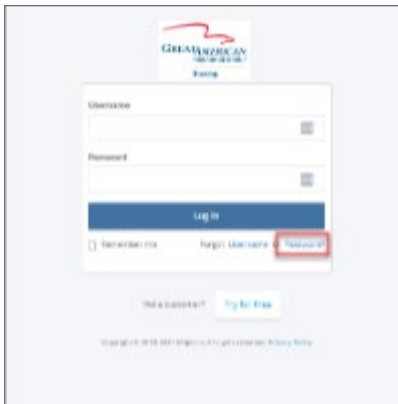
- Select **Forgot Username** by clicking on the hyperlink:

- Enter your policy number and click submit.
  - **IMPORTANT!** If your policy number includes an additional P in the prefix (New Great Roadmap Policy #), the dash and mod (-0) must be included (for example: GTPP123456-7)
- You will receive an email confirmation to retrieve your username:

- Select **Forgot Password** by clicking on the hyperlink:
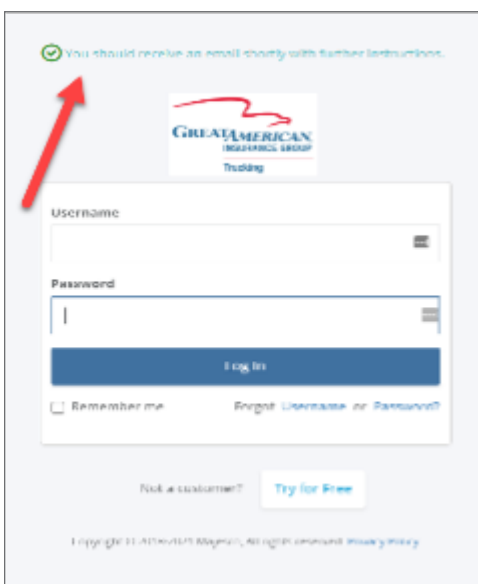

- Enter your *User ID* or *Email* then click **Submit**.
- You receive the following message:

SECTION 2: QUICK PAYMENT/ONE-TIME PAYMENT

SECTION 2.1: PAY AS GUEST/QUICK PAY

- **To Pay As A Guest** and make a quick payment, click the **Pay Now** button to begin.
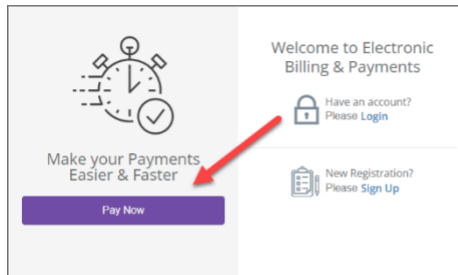
- Fill out the following information then select **Proceed to Pay** when finished (make sure to enter policy number as GTPXXXXXXX). **NOTE!** If your policy number includes an additional P in the prefix (New Great Roadmap Policy #), the dash and mod (-0) must be included (for example: GTPP123456-7)

  - **IMPORTANT!** The payment methods use for **Pay As A Guest** will NOT be retained.

- A payment successful message will appear and provide a short recap of the payment.

- On the next screen, you'll choose how to make your payment, either via **Credit Card** or **Bank Account**.
- **IMPORTANT!** If you fill out an initial payment method, switching to another method will delete all information entered.
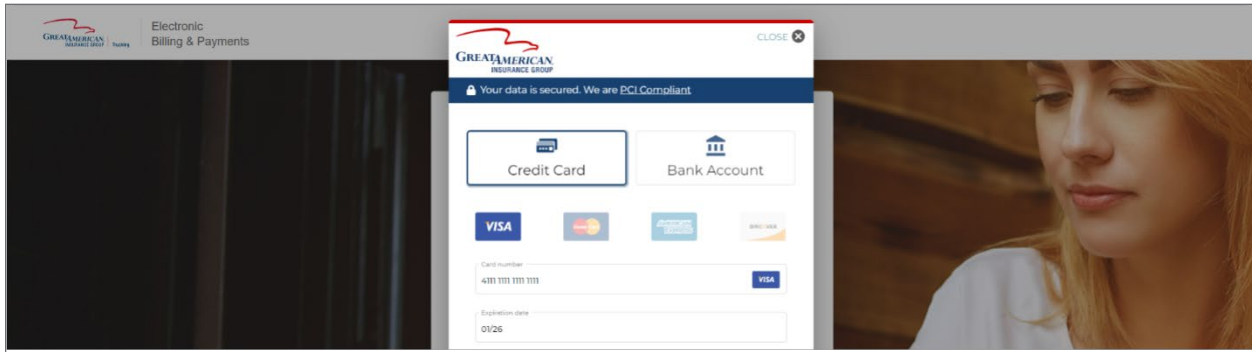
- **Credit Card**
  - This will require the following information:
    – Card number
    – Expiration date
    – Name on card
    – Billing address
    – Billing zip code
- **Bank Account**
  - This will require the following information:
    – Account number (entered twice)
    – Routing number
    – Name on account
    – Checking or Savings
- Once all information is provided, click **Submit**
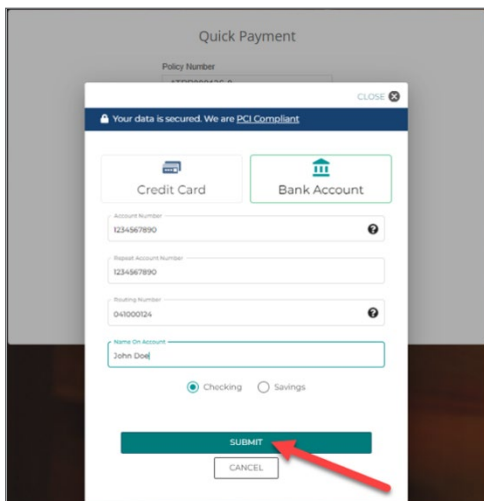
- You'll then be prompted to **Save Payment Method**, completing the payment.
    - **IMPORTANT!** Bank and Credit Card information will not be saved for future use or stored in our system.

- A confirmation will be sent to the email address provided.

SECTION 3: DASHBOARD (NAVIGATION)

SECTION 3.1: PROFILE INFORMATION

- By selecting the down arrow, you can either log out of the account or visit My Profile to view personal information, passwords, or payment options.
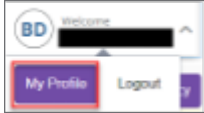
- My Profile
  - Once clicking on **My Profile**, a new window will appear with three line items:
    ### Personal Info
    - ❖ Here you'll find your Name, Email, and Phone Number. You can edit this information at any time.

    ### Change Password
    - ❖ If needing to change your password, enter your new password twice and click **Save**.

    ### Payment Options
    - ❖ Add **Credit Card** or **Bank Accounts** here to store within your account. Once added here, these payment methods can be used for **one-time payments** or **auto-payment** (not applicable for Pay As A Guest). There is **no limit** to the amount of cards or banks that can be added.

SECTION 3.2: ADD POLICY

- To add a new policy to your existing account, click the **+Add Policy** below the profile dropdown, in the upper right corner:
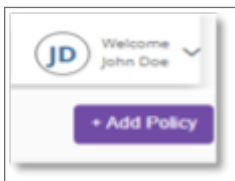
- You will be prompted to enter the Policy Number (Ex. GTPXXXXXXX) and Zip Code. Then click **Add Policy**.
  - **IMPORTANT!** If your policy number includes an additional P in the prefix (New Great Roadmap Policy #), the dash and mod (-0) must be included (for example: GTPP123456-7)

- If the information is correct, this will allow you to add new or existing policies to the dashboard and will be located on the left-hand column.

- Each policy will indicate the status (i.e. In-Force, Cancelled etc.), policy number, and policy term. You can also select which policy term you'd like to view by clicking the down-arrow on the block.
  - **IMPORTANT!** When making payments on the policy, be sure the **current/active** term is selected.

SECTION 3.2.1: VIEW BILLING INFORMATION

- If your account contains multiple policies, you can toggle between each policy view by clicking on **View Billing Information**.

- When initially logging in, the billing information you see on the screen relates to the **View Billing Information** bar that is grayed out and cannot be re-selected.

- Viewing the billing information provides you the following:
  - Policy Number
  - Status of Account
  - Payment Due (including date and amount)
  - Last Payment (including date and the amount will show red)
  - Invoice History
  - Payment History
  - Future Installments (See Number 8.)
  - Payment Plan (including auto-enrollment)
  - Agent Information

SECTION 3.3: PAY NOW – NORMAL PAYMENT

- To make a one-time payment on your policy, simply select the Icon **Pay Now**.
- A **payment window** will appear prompting you to select a payment amount and payment method
  - By selecting **Due Amount** or **Policy Balance**, you can proceed to select a **payment method**.
  - If **Other Amount** is selected, you must **enter an amount** (cannot be zero) before proceeding to payment method.
  - After an amount is chosen, if a payment method is on file (found in Profile Options), you click the Select button to proceed. If no payment method exists, click the **PAY** button to proceed.
  - **IMPORTANT!** If you do not want to use the payment methods on file, selecting the **PAY** button allows you to set up a new card or bank (which will then be saved for future use).

- The next screen will require you to provide **Credit Card** or **Bank Information**.

  - **Credit Card** information requires Card number, Expiration date, Name on the card, billing address, and billing zip will automatically populate from your profile. If the billing information does NOT match your account, please update as necessary to ensure payment is accepted.

  - **Bank Information** requires the account number (entered twice for accuracy), routing number, name on account (populated from your profile), and selecting either **checking** or **savings**.

- After clicking **Submit**, the next screen will confirm your information is correct. **Reminder!** This will save the payment method to your profile for future use.

- To continue, select **Save Payment Method**

- You receive two messages:

  - Payment Method was added successfully (confirming that this will be saved for future use).

  - Payment was successful (recapping amount paid and which policy applied to).

SECTION 3.4: DOWNLOAD INVOICE

- This function allows you to view a PDF of your invoice electronically. By simply clicking on Download Invoice, a new PDF document will appear and allow you to save to your computer for future reference.

SECTION 3.5: INVOICE HISTORY

- This function allows you to download a PDF document of your previous invoices, if any, for the current policy in view.

- Simply click **Invoice History** and a new block will appear with multiple viewing options such as 30, 60, or 90 days. You can also view **All Invoices** as shown below.

- Once you select your desired timeframe, you'll see the following information appear:
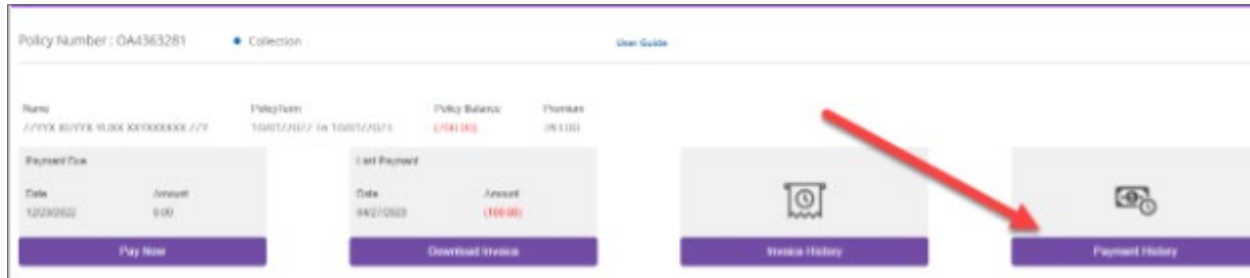

- To download a copy, simply click the icon shown on the right column.
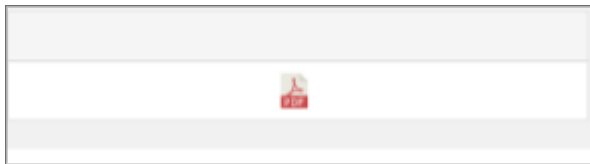
- To exit this block, select the **X** on the top right corner and your invoice screen will minimize.

SECTION 3.6: PAYMENT HISTORY

- To review historic payments, select the **Payment History** tab.

- A new block will appear showing past payments. You can select from 30 days, 60 days, 90 days, or All Payments.

SECTION 3.7: FUTURE INSTALLMENTS (VIEW SCHEDULE)

- If you would like to view your payment schedule for the remaining policy year, click on the icon **View Schedule**.
  - **IMPORTANT!** Under **Future Installments**, you can view when the next invoice will be sent, the amount, and when that payment is due.
- This will generate a new block showing future installments for your specific policy:
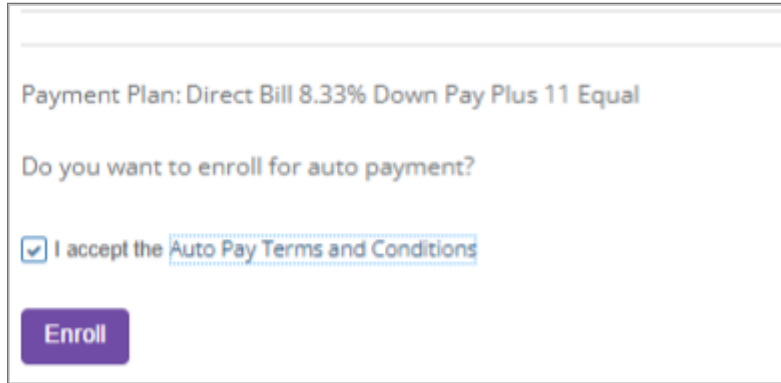
- In some cases, there may be multiple pages depending on the type of payment plan selected for the policy. For instance, you will notice this policy has 10 records but only shows six on the block. To view more installments, click on the **page button** at the bottom of the block or select the dropdown **Go To Page** to change the page number. This allows you to view all installments for the current policy year.
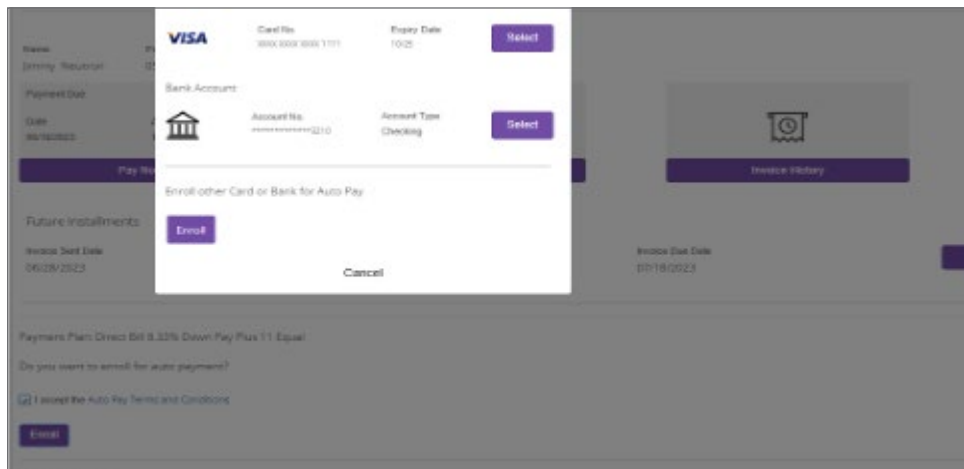
SECTION 3.8: AUTO-PAY ENROLLMENT

- On the main screen, under **Future Installments**, you can find your **Payment Plan** listed and below will ask if you would like to initiate auto payment. This feature will automatically charge your bank or credit card for upcoming invoices. To initiate this feature, you must first accept the terms and conditions by **checking the box**, then clicking **Enroll**.

- You will then be prompted to select your method of payment; **Credit Card** or **Bank Account**. If you would like to use a completely different bank account or card, select **Enroll** to add another form of payment.

  - **NOTE!** By adding another payment method, it will be saved to your Profile for future use.

- Once you have selected your method of payment, **auto payment is activated**.

- If you select the wrong payment method to auto payment, rather than disabling and reactivating auto payment, you can select the hyperlink **Switch Payment Method** shown **here**.

- You will then be prompted to select another method of payment, other than what is currently selected (**grayed out**).

- Once selected, the method of payment will automatically switch over and become ready for use.

- To unenroll in auto payment, click on the **green slider**.

- The system will then confirm auto payment should be **disabled**.