



Agency Sweep, Credit Card and One-Time EFT Payments Online

USER GUIDE

Western National Insurance Group
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User Guide

Agency Sweep, Credit Card and One-Time EFT Payments

New Business Application Down payment

Make down payments on AgentsXpress applications via Agency Sweep (HO & PAP)

For agencies enrolled in Agency Sweep, the option to choose Agency Sweep for the down-payment will be available in the drop-down on the “Method of Payment” page in **AgentsXpress**. Select **Agency Sweep** and the funds indicated will be electronically withdrawn from the agency’s bank account.

Select Method of Payment

Your estimated six month premium is \$544.50

Down Payment:

Minimum Due:	\$544.50
Amount Paid:	0
Paid By:	

Future Installments

Method of Billing:	Electronic Funds Transfer (EFT)
Method of Payment:	Agency Sweeps

EFT Information

After submitting the payment, a Confirmation page will display indicating Agency Sweep as down payment.

Confirmation Page

Your estimated six month premium is \$544.50

Payment Information:

A down payment of \$544.50 will be paid by Agency Sweeps.

Method of Billing: Direct Bill - Full Pay

Method of Payment: Check

Change Payment Information Exit Payment Information Confirm Payment & Submit

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Mid-Term and Renewal Payments

Make payment on Personal & Commercial Policies

All agencies will have the ability to make mid-term and renewal policy payments through **AgentsXpress** at the “**Make Payments**” link. If the agency is not set up for Agency Sweep, the payment options available will be credit card (Visa or MasterCard) and one-time EFT draft from the checking or savings account.

Welcome HOME OFFICE AGENCY

Select Producer of Record:

 Please [click here](#) to fill out our quick **survey**.

Please select one of the following:

- Personal Lines
 - Create Application
 - Create Quote
 - Change/Cancel Policy
 - Copy Policy
- Pending Activity (Application/Quotes/Policy Changes)
- Transaction History
 - View Existing Replacement Cost Reports
 - Purged Transaction History
- Commercial Lines
 - Commercial Lines Inquiry
- Other
 - Make Payments** ←
 - View Policy Documents

Enter client information (Insured Name, Company Name, Policy Number or Account Number), and click on **Begin Search**. Once the account or policy information is returned, click on the *account number* (to make payment on the account) or *policy number* (to make payment on one policy). **It is recommended to make payments on the Account Number, whenever presented.**

Bill Type	Acct #	Policy Number	Mod	Name	State	Status	Effective Date	Expiration Date
	0001000125	WCV-1000877	00	AGENCY SWEEP 057 CROSS	MN	Verified	08/01/09	08/01/10

An amount due will display if there is a current or outstanding billed amount for the account or policy. Enter amount to be paid and indicate the payment method from the drop down options. The payment amount must be equal to or more than the Minimum Due.

If paying by Agency Sweep, just click **Next** and you are done.

A Confirmation Page will display indicating payment method. Review for accuracy and click **Confirm Payment & Submit**.

If paying by EFT, complete the account information and click **Next**.

Make a Payment

Payment:	
Minimum Due:	\$359.00
Amount Paid:	\$ 359.00
Paid By:	Electronic Funds Transfer (EFT) ▼

EFT Information

By completing the information below, your client's payment(s) will be made via an electronic funds transfer (EFT) and automatically be deducted from his or her account.

Name of Financial Institution:	<input type="text"/>
Routing Number:	<input type="text"/>
Account Number:	<input type="text"/>

Checking
 Savings

< Back Exit Payment Information Next >

A Confirmation Page will display indicating payment method. Review for accuracy and click **Confirm Payment & Submit**.

Confirmation Page

Payment Information:

A **payment of \$359.00** will be paid by Electronic Funds Transfer (EFT) on 02/09/2012.
Payment will be withdrawn from the bank account entered in two business days.

EFT Information:

Financial Institution:	Wells Fargo
Routing Number:	xxxxx0019
Account Number:	xxxxxxxx1651
Checking/Savings:	Checking

Change Payment Information Exit Make Payment Confirm Payment & Submit

If paying by credit card, click **Next**.

Make a Payment

Payment:	
Minimum Due:	\$359.00
Amount Paid:	\$ 359.00
Paid By:	Credit Card ▼

< Back Exit Payment Information Next >

The credit card payment information will display in a new window. Enter the required fields.



credit card account information

Card number: ⓘ

Card verification ID: ⓘ

Expiration date: (mm/yyyy)

Type:
 Consumer ⓘ
 Commercial

Enter information from the credit card.

Will be prefilled with the insured's information but can be changed if needed.

credit card billing information

Note: If entering a commercial credit card, the business name and card billing address should be entered below.

Name on card:

Address line 1:

Address line 2:

City/State/ZIP: ,

payment information

Reference number: 10000000241488

Payment date: 02/08/2012

Payment amount: \$ (99.99)

Will be prefilled with the amount entered previously.

Cancel Payment

Continue ▶

Click Continue and the payment verification screen will allow you to return to the previous screen, cancel the payment or submit the payment.

credit card payment - payment verification



◀ **Previous**

Cancel Payment

Submit Payment

Next, the payment confirmation and authorization page will display with the confirmation and authorization numbers.

If you receive a Real Time Authentication Error the payment can't be authorized at this time. Choose one of the following options below:

1. **Cancel Payment:** We recommend selecting this option and entering a different credit card or payment method.
2. **Continue and Save:** This option will try to authorize the payment once more during the same day. If the payment does not get an authorization on the second attempt we will contact your agency to obtain a replacement payment.

credit card payment - real time authorization



GARVEY FOUR PAY
8416 28TH AVE N ,
NEW HOPE, MN 55427

Account: 000000055147

Consumer name

First name: GARVEY
Last name: FOUR PAY

Real Time Authentication Error:

A system problem prevented the authorization of your credit card transaction.
You can either Continue and save the payment for later processing or Cancel the payment.

Cancel Payment

Continue and Save

Important Information

Account Bill Pay Plans – Message will be displayed

If the policy is on an Account Bill payment plan and you have selected to pay an individual policy, click on **Pay Account Statement**.

****NOTE:** You have selected to pay an individual policy. This client is on an Account Bill Pay Plan. To pay the correct minimum due, select Pay Account Statement.

Pay Account Statement

Payment:	
Minimum Due:	\$199.50
Amount Paid:	\$ 0
Paid By:	<input type="text"/>

EFT Pay Plans – Message will be displayed

If making a payment on an account/policy set up on an EFT Pay Plan, a message will display advising to notify Western National at least 3 business days prior to the date due in order to stop the automatic transaction.

Make a Payment

This account is set up for automatic EFT deductions. If this payment replaces a pending transaction, please call us at 800-862-6070, at least 3 business days prior to the date due in order to stop the transaction.

Payment:	
Minimum Due:	\$577.00
Amount Paid:	\$ 0
Paid By:	<input type="text"/>

Past Due Payments – Message will be displayed

If the payment is past due, the following message will be displayed:

Payment is past due. Please contact your Underwriter regarding reinstatement. If the Underwriter is not contacted within one business day, a refund check may be issued to the policyholder.

Payment will be applied, however the policy/account will not be reinstated.

Make a Payment

Payment is past due. Please contact your Underwriter regarding reinstatement. If the Underwriter is not contacted within one business day, a refund check may be issued to the policyholder.

Payment:	
Minimum Due:	\$53.00
Amount Paid:	\$ 0
Paid By:	<input type="text"/>

Policy Payments

Please allow up to three business days for the payment to post in ***InquiryXpress*** (for Personal Lines) or ***AgentsXpress Commercial*** (for Commercial Lines).