

From the billing screen you click on the Billing tab.

Policy Info **Billing** Status Driv / Veh Cov / Prem Notes/Susp

Policy Information

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Pronto Falcon		
POLICY: 01240678-00	EFF DATE: 05/03/2021 (10:57 AM)	EXP DATE: 11/03/2021
STATUS: Active [Edit]	END EFF DATE: 05/03/2021 (12:00 AM)	

NAMED INSURED(S)		AGENCY NAME & ADDRESS
Melvin Garcia [Name/Address Change] 2617 35th Ave Oakland, CA 94619		Pronto Insurance Agency (Corp) (DSH007-01-25) 1133 EL CAMINO REAL, STE 1&2 SO. SAN FRANCISCO, CA 94080 (949) 851-6562

INSURED VEHICLE DESCRIPTION									
Veh #	Year	Make/Model	VIN	State	Zip/Terr	Usage/ Surcharged	Annual Mileage	Coll/Comp Sym.	Class
1	2010	HONDA CIVIC EX	19XFA1F80AE051579	CA	94619 / 71	Pleasure / N	8000	16 / 16	4SM

DRIVERS						
Drv #	Name	Drv. Exp.	Marital / Sex	State	Included/Excluded	Points
1	Melvin Garcia	4	S / M	International	Included 1	0

CURRENT COVERAGE			
Coverage	Limits Of Liability	Veh 1	
Bodily Injury Liability	\$15,000 per person/ \$30,000 per accident	\$ 282.55	
Property Damage Liability	\$5,000 per accident	\$ 443.30	
Vehicle Totals		\$ 725.85	

FORMS AND ENDORSEMENTS: ASC-PGA-105-CA, ASC-PGA-046-CA, ASC-PGA-100-CA	Total Premiums	\$ 725.85
	* Policy Fee	\$ 25.00
	* Fraud Fee	\$ 0.88
	TOTAL POLICY	\$ 751.73

[Policy History](#)

Next you click on the Add automatic payment

Policy Info **Billing** Status Driv / Veh Cov / Prem Notes/Susp

Billing Information

Policy #: 01240678-00 Insured: Melvin Garcia

Financial Snapshot	
Due as of (05/17/2021):	\$ 0.00
Next Payment Due:	N/A
Installment Fee:	\$ 0.00**
Remaining Balance:	\$ 0.00
True Balance Due:	\$ 0.00
**Premium Installment amounts do not include the installment fee	

Last Payment Received: \$ 751.73 (05/03/2021)		Add automatic payment
Remaining Payments: (Pay In Full) (PIF)		
Earned Premium To Date: \$ 572.00		
Carry Date: 11/02/2021		

Items/Charges Due	Total Premiums \$ 725.85	Total Fees \$ 25.88	Total Due \$ 751.73
Insured Payments & Invoices	Total Invoices \$ 0.00	Total Payments \$ 751.73	
Click here to make a financial adjustment			
Commission Amount	Total Payments \$ 725.85	Total Paid \$ 0.00	

Once on this screen you select the Payment Method: Insured Bank Draft to Company (EFT) or Insured Credit Card via Primoris (Recurring Credit Card)

The screenshot shows a web browser window with the URL `sterling.staging.ptsapp.com/Default.cfm`. The page title is "Pronto General Insurance Agency - STAGING". A navigation menu on the left includes items like "System Maint", "Claim Maint", "Financial", "Payments", and "Lookup". The main content area displays "Insured: Melvin Garcia" and "Policy: 01240678-00". Below this is a yellow box titled "Recurring Payments:" with the instruction "Please select the type of recurring payment and enter all the requested information." Underneath, the "Payment Method" section has two radio button options: "Insured Bank Draft to Company" and "Insured Credit Card via PRIMORIS". Two black arrows point from the text above to these two radio button options.

When selecting EFT, the EFT form and voided check or proof of account must be submitted (proof of account may be a screen shot of their banking info on their phone). Click on Same as Insured mailing address to auto populate the insured's address. When you enter the routing # and hit tab the bank name will auto populate if the routing number is correct. Then enter the account number and click "Post Info".

Priority - Google Drive x Sterling Policy Tracking System x

Not secure | sterling.staging.ptsapp.com/Default.cfm

Apps Bookmarks Google Maps password change f... UW- Calendar - Ma... Compass casualpay PTS ISO Google Hangouts TSheets = Sign In % Percenta

Pronto General Insurance Agency - STAGING

Hide/Show Print Back Forward Endorse Info Forms Memos E-Quote Pay

System Maint
 Claim Maint
 Financial
 Payments
 Lookup
 Policy Progress
 Claims Progress
 Policy
 Quote
 Submission
 New Claims
 Claims Search
 Reports
 Memos
 Batch
 Other
 Other Webs
 HOME
 PRO RATES
 VIN TOOL
 LOGOUT
 Change Password
 New Window

Insured: Melvin Garcia Policy: 01240678-00

Recurring Payments:
 Please enter in the Insured banking information and click the "Post Info" button. The company will sweep the Insured's account.

Payment Method
 Insured Bank Draft to Company
 Insured Credit Card via PRIMORIS

Bank Account Information
 Same as Insured mailing address

Payment Name Melvin Garcia
 Address 2617 35th Ave
 City Oakland State CA Zip 94619

Routing # 123454366 9 digits between symbols: 1 2 3 4 5 6 7 8 9
 Account # 154843451 Series of digits after symbol: 1 2 3 4 5 6 7 8 9
 Bank Name Wells Fargo Bank

Use this account for ALL future policy payments

PLEASE NOTE: When an insured is set up on EFT, this type of payment is automatically swept from a checking/savings account. The insured will get a discount on their Installment Fee if they are set up on this type of Auto Pay (**please refer to the FEE SCHEDULE attached**). The swept can also occur up to 2 days before the due date.

When selecting Recurring Credit Card Payments the Recurring Credit Card form has to be submitted. Click on Same as Insured mailing address to auto populate the insured's address (make sure that the zip code provided is the credit card billing zip) if there is a –and 4 numbers after the zip, these must be deleted. Select Visa or Mastercard and enter the Credit Card #, Expiration Date and the CVV2 (3 digit number on the back of the credit card) and click "Post Info".

Priority - Google Drive | Sterling Policy Tracking System

Not secure | sterling.staging.ptsapp.com/Default.cfm

Apps | Bookmarks | Google Maps | password change f... | UW- Calendar - Ma... | Compass | casualpay | PTS | ISO | Google Hangouts | TSheets :: Sign In | % Percentage Calculat... | IT helpdesk

Pronto General Insurance Agency - STAGING

Hide/Show | Print | Back | Forward | Endorse | Info | Forms | Memos | E-Quote | Pay

System Maint
 Claim Maint
 Financial
 Payments
 Lookup
 Policy Progress
 Claims Progress
 Policy
 Quote
 Submission
 New Claims
 Claims Search
 Reports
 Memos
 Batch
 Other
 Other Webs
 HOME
 PRO-RATES
 VIN TOOL
 LOGOUT
 Change Password
 New Window

Insured: Melvin Garcia **Policy: 01240678-00**

Recurring Payments:
Please complete the credit card information and click the "Post Info" button. The company will bill the Insured's credit card.

Payment Method

Insured Bank Draft to Company
 Insured Credit Card via PRIMORIS

Cardholder information must match EXACTLY as it appears on the Credit Card Statement!

New card

Same as Insured mailing address

Cardholder Name Melvin Garcia
Cardholder Address 2617 35th Ave
Cardholder State / Zip CA 94619
Credit Card Type MasterCard VISA
Credit Card # 456451548434453
Expiration 05 22
CVV2 186 (What is this?)

Post Info Cancel - return to policy

Sofia Tena - ADMIN Monday, 17th May 2:23:30 PM

Please Note: When an insured is set up on Recurring C/C payments, this type of payment will charge the insured's credit card for the payment due. The insured does **NOT** get a discount on the Installment fee but they save the credit card processing fee. The swept will occur 1 day before the due date.

Email the documents to: autopay@prontodocuments.com

