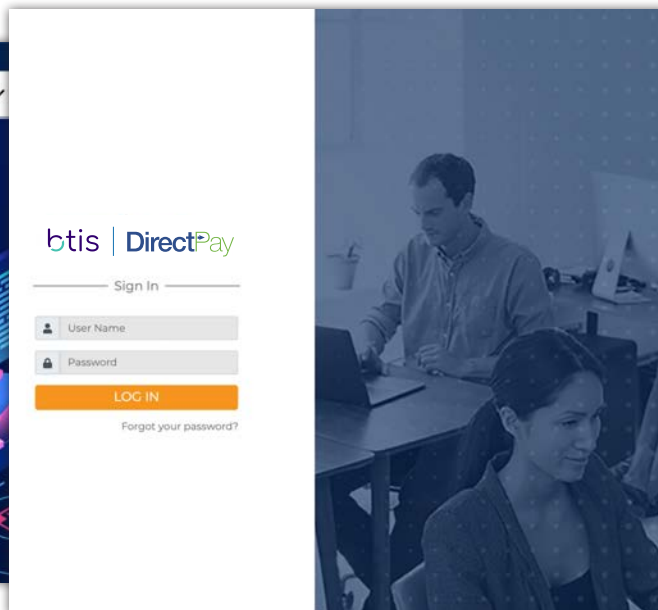
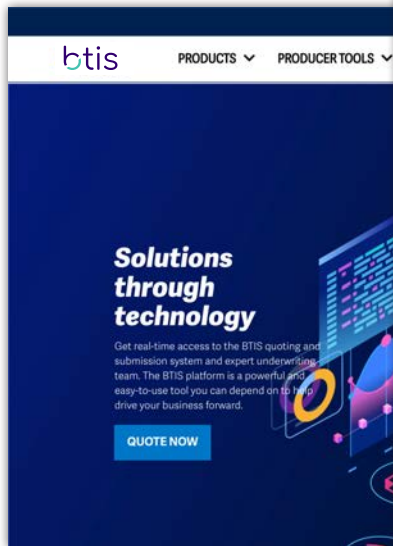


btis | DirectPay

User Guide


Manage your direct bill accounts online, anytime, anywhere.



Introduction

BTIS would like to welcome you to this brief User Guide for DirectPay Accounts. This guide is designed to help familiarize you with the process, features and options available.

At a high level you and your staff will be able to:

- › Select the direct billing option and enter payment information
 - › View detailed account information
 - › Manage digital notice delivery
 - › View and print reports
 - › View and print previously generated documents
 - › Enter one-time electronic check and credit card payments
 - › Set up and manage recurring payment options
- 

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Selecting Direct Bill

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Contact Information

Binding Documents

Upon receiving the Binding Documents, you'll be asked to select a coverage option.



Victory® Admitted
Small Artisan Contractor General Liability

Binding Documents

Kentucky Required Items

Submission ID: QAA01090700
 Applicant Name: Jane Smith
 DBA Name: Furnishings LLC

1. Please select from available coverage options:
 - Occurrence Form (CG 00 01) \$1,557.00
2. Please select a payment option:

Please note: If you select BTIS DirectPay, you must fill out all information for that option and click the Save button, or your selections will not be saved.

 - Direct Bill** - BTIS DirectPay
 Pay with ACH/Bank Account or Credit Card
 1, 2, 5 and 10 Installment Options
 Easily Add Your Broker Fee
 - Pay in Full or Agency Finance**
 Pay by Check or Credit Card
 Pay Online, eCheck is free of charge!
 - Premium Finance** - Best Choice Premium Financing
 Down Payment + 10 Monthly Installments
 Available for Premiums \$325 and Above
 Easily Add Your Broker Fee
3. Add your broker fee here:

- If a broker is not applicable, please leave as 0
 Please note: broker fee amount cannot be changed once the binding documents are saved
4. Please select a payment plan:
 - One Pay** - \$1,567.00 (includes fully earned fees and applicable taxes)
 - Pay Now
 - Zero Down - scheduled 21 days from effective date
 - Two Pay** - \$1,053.50 initial payment, 1 remaining payment of \$523.50 due monthly
 - Pay Now
 - Zero Down - scheduled 21 days from effective date
 - Five Pay** - \$745.40 initial payment, 4 remaining payments of \$215.40 due monthly
 - Pay Now
 - Zero Down - scheduled 21 days from effective date
 - Ten Pay** - \$642.70 initial payment, 9 remaining payments of \$102.70 due monthly

Selecting Direct Bill

After selecting your coverage option, you can now select Direct Bill from the available payment options.

Once you select Direct Bill - BTIS DirectPay as the payment option, you may elect to include a broker fee.

2. Please select a payment option:
 Please note: If you select BTIS DirectPay, you must fill out all information for that option and click the Save button, or your selections will not be saved.

Direct Bill - BTIS DirectPay
 Pay with ACH/Bank Account or Credit Card
 1, 2, 5 and 10 Installment Options
 Easily Add Your Broker Fee

Pay in Full or Agency Finance
 Pay by Check or Credit Card
 Pay Online, eCheck is free of charge!

Premium Finance - Best Choice Premium Financing
 Down Payment + 10 Monthly Installments
 Available for Premiums \$325 and Above
 Easily Add Your Broker Fee

3. Add your broker fee here:

- If a broker is not applicable, please leave as 0
 Please note: broker fee amount cannot be changed once the binding documents are saved

4. Please select a payment plan:

One Pay - \$1,567.00 (includes fully earned fees and applicable taxes)
 Pay Now
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 Pay Now
 Zero Down - scheduled 21 days from effective date

Ten Pay - \$642.70 initial payment, 9 remaining payments of \$102.70 due monthly
 Pay Now
 Zero Down - scheduled 21 days from effective date

Quote #

Applicant Name

DBA Name

Applicant Email

Payment Method Credit Card ACH/Bank Account

Bank Name

Selecting a Payment Plan

There are four payment plan options available. Each plan is broken down by initial payment amount and remaining payment amount.

Pay Now

If the Pay Now option is selected, the payment will be drafted once a DirectPay account is established, typically within 24-72 hours.

Zero Down

If the Zero Down option is selected, the initial payment will be drafted 21 days from the policy effective date.

4. Please select a payment plan:

One Pay - \$1,567.00 (includes fully earned fees and applicable taxes)

- Pay Now
- Zero Down - scheduled 21 days from effective date

Two Pay - \$1,053.50 initial payment, 1 remaining payment of \$523.50 due monthly

- Pay Now
- Zero Down - scheduled 21 days from effective date

Five Pay - \$745.40 initial payment, 4 remaining payments of \$215.40 due monthly

- Pay Now
- Zero Down - scheduled 21 days from effective date

Ten Pay - \$642.70 initial payment, 9 remaining payments of \$102.70 due monthly

- Pay Now
- Zero Down - scheduled 21 days from effective date

Quote #	<input type="text" value="QAA01090700"/>
Applicant Name	<input type="text" value="Jane Smith"/>
DBA Name	<input type="text" value="Furnishings LLC"/>
Applicant Email	<input type="text" value="jsmith@furnishings.com"/>
Payment Method	<input type="radio"/> Credit Card <input checked="" type="radio"/> ACH/Bank Account

Bank Name	<input type="text" value="Bank of America"/>
Routing Number	<input type="text" value="122000247"/>
Account Number	<input type="text" value="123123120201"/>
Account Type	<input type="radio"/> Checking <input type="radio"/> Savings
Name On Account	<input type="text" value="Jane Smith"/>
Payment Plan	<input type="text" value="Ten Pay"/> 1st Installment <input type="text" value="\$642.70"/>
	<input checked="" type="checkbox"/> I have read and agreed to the Terms and Conditions

Important Information:

- **Producer commissions will be paid directly from the billing company**
- Only US banks are accepted
- All fees are earned at binding
- A billing fee of \$10 is applied to each installment
- There is a \$50 reinstatement fee for cancelled policies

Payment Method: Credit Card

After choosing the payment plan, the applicant's information will be shown for confirmation.

The applicant's email address is required so that login information and account notices can be sent to the insured.

By default, the Credit Card payment method is selected. Simply enter the insured's payment details and select the Terms and Conditions check-box acknowledging that you have read and agreed to the Terms and Conditions.

Important Note: If you navigate away from this page without clicking [Save](#), the information entered will be lost and the Binding Documents will immediately be reset.

Quote #	<input type="text" value="QAA01090700"/>
Applicant Name	<input type="text" value="Jane Smith"/>
DBA Name	<input type="text" value="Furnishings LLC"/>
Applicant Email	<input type="text" value="jsmith@furnishings.com"/>
Payment Method	<input checked="" type="radio"/> Credit Card <input type="radio"/> ACH/Bank Account

Card Type	<input type="text" value="Visa"/>
Card Number	<input type="text" value="4111111111111111"/>
Expiration Date	<input type="text" value="08"/> / <input type="text" value="20"/>
Security Code	<input type="text" value="123"/>
Name On Card	<input type="text" value="Jane Smith"/>
Address	<input type="text" value="123 Main St"/>
City	<input type="text" value="Lexingtont"/>
State	<input type="text" value="KY"/>
Zip Code	<input type="text" value="40510"/>
Payment Plan	<input type="text" value="Ten Pay"/> <input type="text" value="1st Installment"/> <input type="text" value="\$642.70"/>
	<input checked="" type="checkbox"/> I have read and agreed to the Terms and Conditions

Important Information:

- **Producer commissions will be paid directly from the billing company**
- Only US banks are accepted
- All fees are earned at binding
- A billing fee of \$10 is applied to each installment
- There is a \$50 reinstatement fee for cancelled policies
- A late fee of \$10 will be added to your account if payment is received after the installment due date
- A charge of \$25 will be assessed for any returned payment, regardless of reason
- Notice of Cancellation will be sent immediately after installment due date if payment is not received

To view the application, click [here](#) (PDF)

To view the forms list, click [here](#) (PDF)

Please remember that a policy is not bound until a binder is issued by BTIS!
 Please forward all completed and signed forms (all pages) to bindrequests@btisinc.com or fax to 916.772.9292

[Save](#)

Payment Method: ACH

If the ACH/Bank Account payment method option is chosen, simply enter the insured's information and click save.

Important Note: If you navigate away from this page without clicking [Save](#), the information entered will be lost and the Binding Documents will immediately be reset.

Important Note: Important Information and Cancellation Terms listed below may not apply to the admitted production in California.

Quote #	<input type="text" value="QAA01090700"/>
Applicant Name	<input type="text" value="Jane Smith"/>
DBA Name	<input type="text" value="Furnishings LLC"/>
Applicant Email	<input type="text" value="jsmith@furnishings.com"/>
Payment Method	<input type="radio"/> Credit Card <input checked="" type="radio"/> ACH/Bank Account

Bank Name	<input type="text" value="Bank of America"/>
Routing Number	<input type="text" value="122000247"/>
Account Number	<input type="text" value="123123120201"/>
Account Type	<input type="radio"/> Checking <input type="radio"/> Savings
Name On Account	<input type="text" value="Jane Smith"/>
Payment Plan	<input type="text" value="Ten Pay"/> <input type="text" value="1st Installment"/> <input type="text" value="\$642.70"/>
	<input checked="" type="checkbox"/> I have read and agreed to the Terms and Conditions

Important Information:

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- Only US banks are accepted
- All fees are earned at binding
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To view the application, click [here](#) (PDF)

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Please remember that a policy is not bound until a binder is issued by BTIS!
 Please forward all completed and signed forms (all pages) to bindrequests@btisinc.com or fax to 916.772.9292

[Save](#)

Submission and Confirmation

After clicking SAVE, the payment information and binding will be submitted. You will see a red confirmation text at the bottom thanking you for your Direct Bill submission.

Click close button and you have finished submitting for btis direct pay.

****important note: submission is not payment confirmation ****

Quote #	<input type="text" value="QAA01090700"/>
Applicant Name	<input type="text" value="Jane Smith"/>
DBA Name	<input type="text" value="Furnishings LLC"/>
Applicant Email	<input type="text" value="jsmith@furnishings.com"/>
Payment Method	<input type="radio"/> Credit Card <input checked="" type="radio"/> ACH/Bank Account

Bank Name	<input type="text" value="Bank of America"/>
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	<input checked="" type="checkbox"/> I have read and agreed to the Terms and Conditions

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To view the application, click [here](#) (PDF)

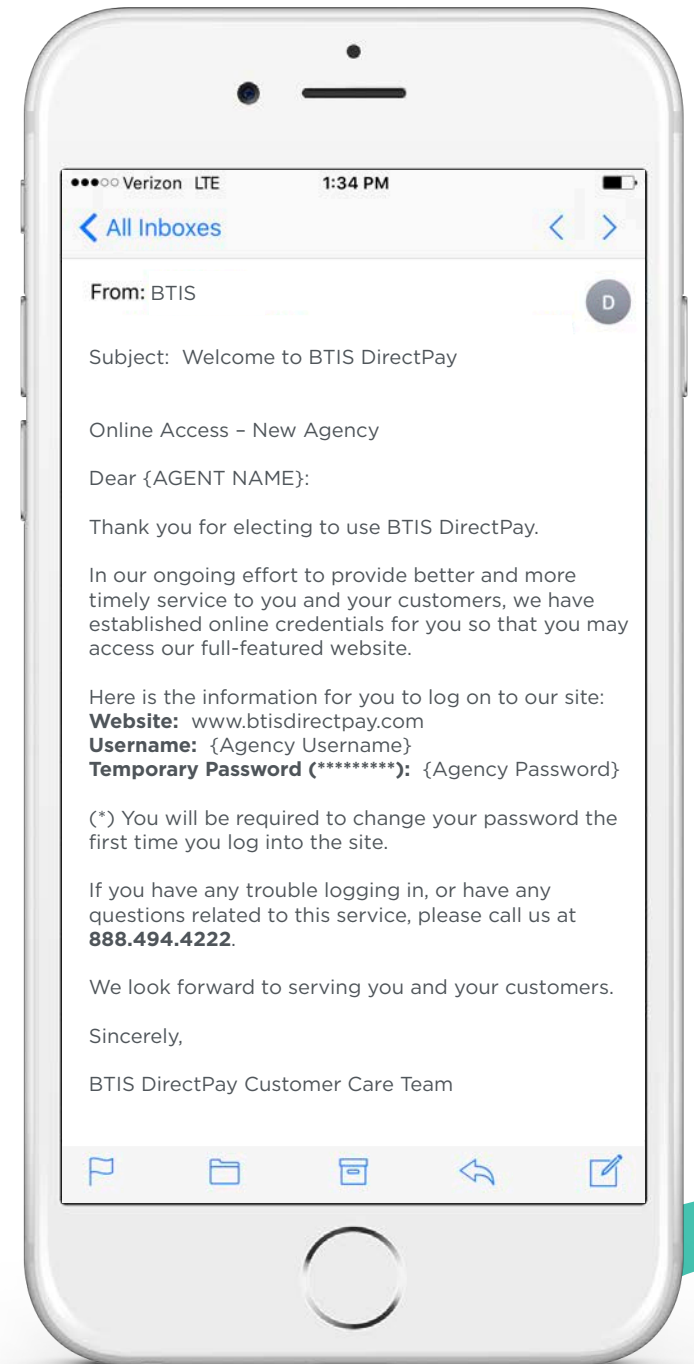
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Please remember that a policy is not bound until a binder is issued by BTIS!
 Please forward all completed and signed forms (all pages) to bindrequests@btisinc.com or fax to 916.772.9292

Welcome to DirectPay

BTIS DirectPay automatically greets all new agents with an informative email that outlines the details of their new service. It also delivers important account details.

- › A uniquely addressed welcome message (?)
- › Custom login information
- › Support details and contact information
- › Instructions to change password



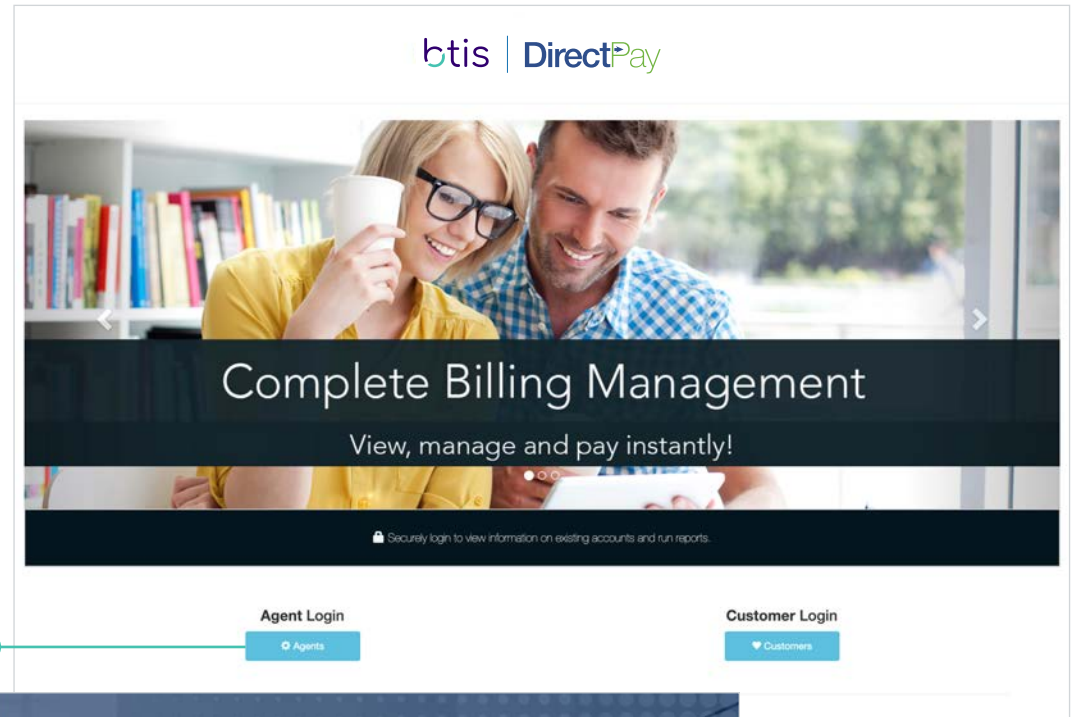
Logging into the Portal

The BTIS DirectPay portal provides login access for customers and agents.

- 1 You can access the login page by going to www.btisdirectpay.com and clicking Agent Login.
- 2 Enter your username and password to access your agent account.

If you do not have a username or password or have misplaced it, please email: btisdirectpay@input1.com

Important Note: In order to prevent unauthorized access to your accounts, login assistance email requests must come from an



Navigating the Home Page

A variety of options to view and manage your accounts are available on the home page.

Accounts/Customer Service

View any and all accounts placed through the program.

Reports

A variety of business reports can be run anytime, anywhere.

e-Payment Wizard

Process one-time payments on behalf of the customer.

- A** Home menu provides access to accounts, the e-Payment Wizard and reports as well as the ability to update your password.
- B** Quick search by name or account number.
- C** Quick Links connect you to your most-used features.
- D** Hot buttons give you instant access to accounts and reports.



Locating Customer Accounts

In Customer Service, accounts can be located using the Basic or Advanced search options.

Basic Search

Basic Search allows you to search for accounts by entering the known criteria into any of the fields provided.

Advanced Search

Advanced Search allows you to search all available fields with complex search criteria

Example: You can use Advanced Search to list all accounts with a total premium greater than or equal to \$1,000.00 with a customer city of “Los Angeles”.

- 1 Add the search fields *Total Premium* and *Customer City* from the drop-down menu.
- 2 Select *greater than or equal to (>=)* condition for *Total Premium* and equal (=) condition for *Customer City* from the drop-down menu.
- 3 Enter the values “1000” for *Total Premium* and “Los Angeles” for *Customer City* in the designated fields.
- 4 Click **Search** to list all accounts containing these conditions.

BASIC SEARCH

Customer Service - Search

Account #: Name: Serial #:
 Address: City: Policy #:
 Region: Postal Code: Pymt Amt Rcvd:
 Agent Contact Email:

Include Archived Accounts

Advanced... **Search**

Account No +	Name	Address	City	Region	APs
1114-7511	Welsh Construction	45730 Peak Road	Los Angeles	CA	0
1114-7922	Lee Selman	PO BOX 3294	Paso Robles	CA	0
1114-8432	Robert HVAC	42818 Sachs Drive	Lancaster	CA	0
1114-8735	RCN Drywall LLC	PO BOX 995	Springville	CA	0

ADVANCED SEARCH

Customer Service - Search

Total Premium:
 Customer City:

Include Archived Accounts

Basic... **Search**

1 Add Search Field... Include Archived Accounts

- Account Next Due Date
- Account Next Intent Date
- Account Reinstatement Effective Date
- Account Reinstatement Schedule Date
- Alternate Account Number
- Customer Contact Info
- Customer Name
- Customer Postal Code
- Customer Street Address

Address	City	Region	APs
45730 Peak Road	Los Angeles	CA	0
1640 W 12th Place	Los Angeles	CA	0
816 W 102nd St	Los Angeles	CA	0
PO BOX 995	Los Angeles	CA	0

Viewing and Managing Customer Accounts

A tremendous amount of information and tools can be found on the main customer service screen. The tabs at the top allows users to review pertinent and detailed account information including:

- › Account Summary
- › Customer Information
- › Policies placed on the account
- › Terms
- › Payments
- › Documents
- › Notice Delivery

Customer Service - 1114-7511 - Welsh Construction
Account Number: 1114-7511 Account Name: Welsh Construction Current / Active

Summary
Customer
Policies
Terms
Payments
Documents
Notice Delivery
Endorsements

Customer Information	Summary Financials																																						
<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30%;">Account Number:</td><td>7511</td></tr> <tr><td>Alt. Account #:</td><td>QAA03954182-1</td></tr> <tr><td>Account Holder:</td><td>Welsh Construction Daniel Welsh</td></tr> <tr><td>Main Address:</td><td>45730 Peak Road Los Angeles, CA 92260</td></tr> <tr><td>Main Phone:</td><td>(818) 636-6221</td></tr> <tr><td>Agent:</td><td>A00008 - Insurance Group</td></tr> <tr><td>Main Phone:</td><td>(720) 457-1101</td></tr> </table>	Account Number:	7511	Alt. Account #:	QAA03954182-1	Account Holder:	Welsh Construction Daniel Welsh	Main Address:	45730 Peak Road Los Angeles, CA 92260	Main Phone:	(818) 636-6221	Agent:	A00008 - Insurance Group	Main Phone:	(720) 457-1101	<table style="width: 100%; border-collapse: collapse;"> <tr><td>Total Premium:</td><td style="text-align: right;">1,089.00</td></tr> <tr><td>Down Payment: (-29.797 %)</td><td style="text-align: right;">0.00</td></tr> <tr><td>Original Unpaid Balance</td><td style="text-align: right;">1,089.00</td></tr> <tr><td>No. of Installments:</td><td style="text-align: right;">10</td></tr> <tr><td>Original Installment Amount:</td><td style="text-align: right;">Irregular</td></tr> <tr><td>Installments Made/Remaining:</td><td style="text-align: right;">1 / 9</td></tr> <tr><td>Next Installment Amount:</td><td style="text-align: right;">80.90</td></tr> <tr><td>Next Late Fee Amount:</td><td style="text-align: right;">0.00</td></tr> <tr><td>Shortage:</td><td style="text-align: right;">0.00</td></tr> <tr><td colspan="2">Auto Assessed Late Fee Breakdown</td></tr> <tr><td>Account Balance (inc. fees):</td><td style="text-align: right;">728.10</td></tr> <tr><td>Current Amount Due:</td><td style="text-align: right;">0.00</td></tr> </table>	Total Premium:	1,089.00	Down Payment: (-29.797 %)	0.00	Original Unpaid Balance	1,089.00	No. of Installments:	10	Original Installment Amount:	Irregular	Installments Made/Remaining:	1 / 9	Next Installment Amount:	80.90	Next Late Fee Amount:	0.00	Shortage:	0.00	Auto Assessed Late Fee Breakdown		Account Balance (inc. fees):	728.10	Current Amount Due:	0.00
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Account Balance (inc. fees):	728.10																																						
Current Amount Due:	0.00																																						
<table style="width: 100%; border-collapse: collapse;"> <tr><td>Received Date:</td><td>--</td><td>Next Intent Date:</td><td>6/19/2020</td></tr> <tr><td>Creation Date:</td><td>5/8/2020</td><td>Scheduled Cancellation Date:</td><td>7/6/2020</td></tr> <tr><td>Created By:</td><td>John Smith</td><td>Cancellation Hold Date:</td><td>--</td></tr> <tr><td>Effective Date:</td><td>5/18/2020</td><td>Next Reinstatement Date:</td><td>--</td></tr> <tr><td>Archive Date:</td><td>--</td><td>Next Late Fee Date:</td><td>6/21/2020</td></tr> <tr><td>Balance Due Date:</td><td>--</td><td></td><td></td></tr> </table>	Received Date:	--	Next Intent Date:	6/19/2020	Creation Date:	5/8/2020	Scheduled Cancellation Date:	7/6/2020	Created By:	John Smith	Cancellation Hold Date:	--	Effective Date:	5/18/2020	Next Reinstatement Date:	--	Archive Date:	--	Next Late Fee Date:	6/21/2020	Balance Due Date:	--																	
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Balance Due Date:	--																																						
<table style="width: 100%; border-collapse: collapse;"> <tr><td>First Due Date:</td><td>5/18/2020</td><td>Last Intent Date:</td><td>--</td></tr> <tr><td>Next Due Date:</td><td>6/18/2020</td><td>Last Cancellation Date:</td><td>--</td></tr> <tr><td>Final Due Date:</td><td>2/18/2021</td><td>Last Reinstatement Date:</td><td>--</td></tr> </table>	First Due Date:	5/18/2020	Last Intent Date:	--	Next Due Date:	6/18/2020	Last Cancellation Date:	--	Final Due Date:	2/18/2021	Last Reinstatement Date:	--																											
First Due Date:	5/18/2020	Last Intent Date:	--																																				
Next Due Date:	6/18/2020	Last Cancellation Date:	--																																				
Final Due Date:	2/18/2021	Last Reinstatement Date:	--																																				

Audit Log
Pay Now
Account Options...
Edit
Close

Updating Customer Information

The customer's address, contact information and notice delivery method can be reviewed from the **Customer** tab.

Any changes to the customer's information needs to be emailed to endorsements@btisinc.com

Customer Service - 1114-7511 - Welsh Construction
Account Number: 1114-7511 Account Name: Welsh Construction Current / Active ✔

Summary **Customer** Policies Terms Payments Documents Notice Delivery Endorsements

Submitted By: A00008 - Insurance Group

Name & Address	Contact
Name: Welsh Construction	Tax ID:
Daniel Welsh	Driver's License:
	E-Mail: welshconstruction@gmail.com
Address: 45730 Peak Road	Main Fax:
	Home Phone:
	Main Phone: (818) 636-6221
City: Los Angeles	Create:
Country: United States of America	
Region / Postal: CA - California 92260	
Additional Addresses	

Email Notices:

Other Information	
Agent: A00008 - Insurance Group	Account Profile: Commercial
New/Renewal: New	Received Date:
Agent Contact Name: Alice Sun	Old Account:
Agent Contact Email: alicesun@insurancegroup.com	Alt. Account #: QAA03954182-1
Agent Contact Phone: 818-600-5605	Renewal Alt. Account #:
Rating State: CA	
Bankruptcy Status:	
Bankruptcy Date:	
Guarantee Amt:	
Last Return Mail Date:	
Return Mail Reason:	
Lienholders:	Code Name
	No lienholders associated.
Notice Schema: DEFAULT: Default Schema	
Password:	Confirmation:

[Audit Log](#) [Pay Now](#)
Account Options... [Edit](#) [Close](#)

Updating the Billing Method or Recurring Payment Information

The billing method and recurring payment information can be updated from the **Terms** tab.

- 1 Click **Edit** to edit the account.
- 2 The Billing Method can be changed by selecting an item from the drop down menu.
- 3 Recurring payment information can be entered or changed. Click **Save** to save the changes.

Important Note: When entering ACH or Credit Card information, be sure to select the appropriate Billing Method prior to saving the changes.

Customer Service - 1114-7511 - Welsh Construction
 Account Number: 1114-7511 Account Name: Welsh Construction Current / Active

Summary Customer Policies **Terms** Payments Documents Notice Delivery Endorsements

Governing Region: California Billing Method: ACH
 Billing Cycle: Monthly

ACH Information	Credit Card Information
Bank Name: Bank of America	Name on Credit Card:
Routing Number: 121000358	Address:
Account Number: *****0201	City:
Account Type: [Select an Item]	Country: United States of America
ACH Hold: <input type="checkbox"/>	Region / Postal:
	Credit Card Type: [Select an Item]
	New Credit Card Number:
	Expire Date (MM/YY):
	Credit Card Hold: <input type="checkbox"/>

Clear ACH Information

Account Options... Edit Close

Setting or Removing a Recurring Payment Hold

If the billing method is a recurring payment option, such as ACH or Credit Card, a hold to prevent a payment from drafting may be set or removed from the **Terms** tab.

- 1 Click **Edit** to edit the account.
- 2 To place a hold on the recurring payment, check the appropriate hold check-box for the current billing method. Click **Save** to save the changes.

Important Note: Any payment made on the account, such as a one-time e-Payment or a mailed-in check, will automatically remove the hold on the recurring billing.

Customer Service - 1114-7511 - Welsh Construction
 Account Number: 1114-7511 Account Name: Welsh Construction Current / Active

Summary Customer Policies **Terms** Payments Documents Notice Delivery Endorsements

Governing Region: California Billing Method: ACH
 Billing Cycle: Monthly

ACH Information	Credit Card Information
Bank Name: Bank of America	Name on Credit Card:
Routing Number: 121000358	Address:
Account Number: *****0201	City:
Account Type:	Country: United States of America
ACH Hold: <input type="checkbox"/>	Region / Postal:
Clear ACH Information	Credit Card Type: [Select an Item]
	New Credit Card Number:
	Expire Date (MM/YY):
	Credit Card Hold: <input type="checkbox"/>

Account Options... Edit Close

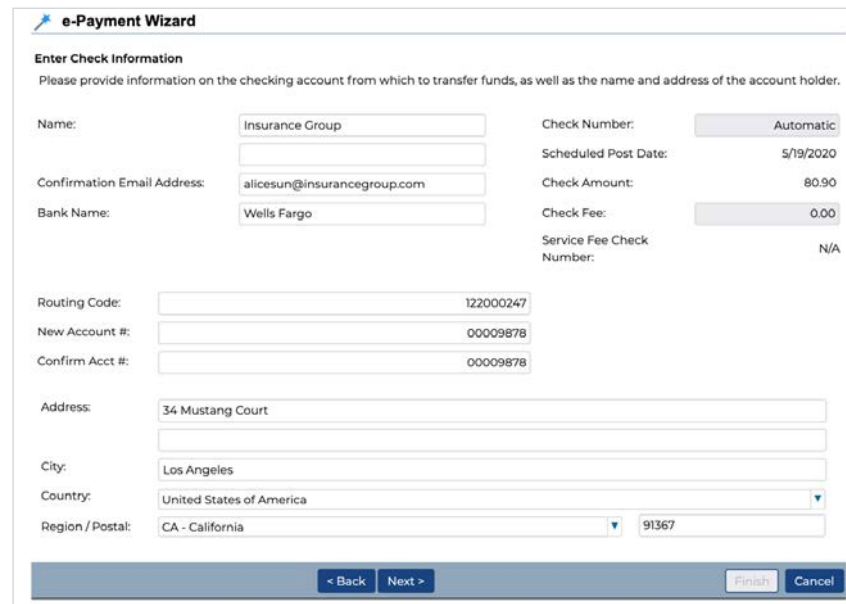
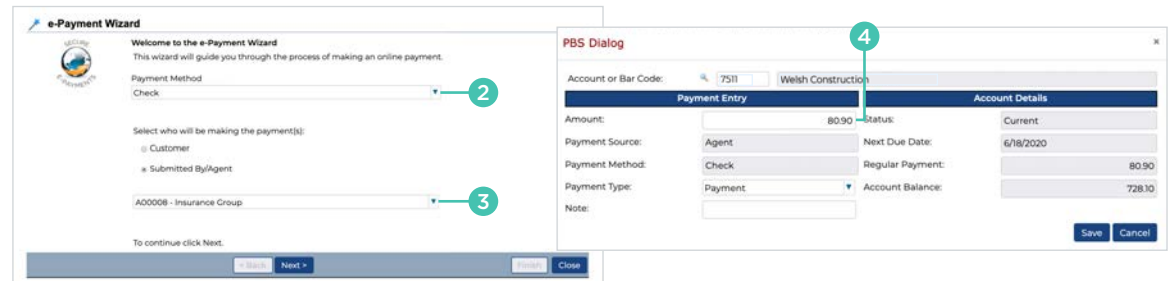
Governing Region: California Billing Method: ACH
 Billing Cycle: Monthly

ACH Information	Credit Card Information
Bank Name: Bank of America	Name on Credit Card:
Routing Number: 121000358	Address:
Account Number: *****0610	City:
New Account Number:	Country: United States of America
Account Type: [Select an Item]	Region / Postal: [Select an Item]
ACH Hold: <input checked="" type="checkbox"/>	Credit Card Type: [Select an Item]
Clear ACH Information	New Credit Card Number:
	Expire Date (MM/YY):
	Credit Card Hold: <input type="checkbox"/>

Making One-time Payments

One-time e-Payment can be made by the customer or on behalf of the customer.

- 1 Click **Pay Now** towards the bottom of the Customer Service screen of an account to start the e-Payment Wizard.
- 2 Choose the Payment Method.
- 3 Select who will be making the payment. You are able to make a payment on behalf of the customer. Click **Next >** to continue.
- 4 The payment amount will be prefilled if the payment is due or soon to be due. To process a different amount, enter the new amount in the *Amount* field. Click **Save** to continue.
- 5 Enter the payment information for the payment method selected in Step 2. Click **Next >** to continue.



Making One-time Payments (continued)

After entering the payment information, a confirmation of the information entered will be shown.

- 6 Confirm the information entered is correct and click **Finish** to complete the transaction.
- 7 The e-Payment Confirmation confirms the transaction was completed successfully. You can print the e-Payment confirmation for your records. A copy of the e-Payment Confirmation has also been sent via email if an email address was entered during Step 5.

Important Note: Credit card e-Payments are processed in real-time during the e-Payment Wizard. If declined, the declination reason will be shown in lieu of the e-Payment Confirmation.

Check e-Payments are processed as a batch. The e-Payment Confirmation will always appear even though the payment may be returned by the bank after the fact. To minimize returned payments, it is important to enter payment information accurately.

6

e-Payment Wizard

Confirm Payment

Check the information below. Click the back button to make any changes. If all the information below is correct, click the finish button to complete the transaction.

Paid By: Insurance Group	Bank Information: Bank Name: Wells Fargo Routing #: 122000247 Account #: *****9878 Service Fee Serial Number: N/A	Check Information: Check #: N/A Date Entered: 5/19/2020 Check Amount: 80.90
------------------------------------	--	---

34 Mustang Court Los Angeles, CA 91367
Scheduled Post Date: 5/19/2020

Account	Payment Type	Amount
1114-7511 - Welsh Construction	Payment	80.90

1 Item Total Payment Amount: 80.90

7

e-Payment Wizard

e-Payment Confirmation

You have successfully completed the e-Payment Wizard.

Summary of Tasks Completed:

- Payment Entered By: Insurance Group
- Payment Entered Time: 5/19/2020 10:03 AM
- Payment Source: A00008 - Insurance Group
- Selected 1 Account to make a payment on.
- List of Account(s):

1114-7511	Welsh Construction	80.90
-----------	--------------------	-------
- Reference Number: 7823
- Check Number: N/A
- Scheduled Post Date: 5/19/2020
- Total Amount: 80.90

Note: The E-payment Cut-off time is 4:00 PM EST. Any payment made after that time will be posted on the next business day. The Scheduled Post Date indicates the date this payment will be posted to your account.

To exit this wizard, click Close.

Accessing Documents

Previously generated account notices and letters are stored on the account and can be viewed from the **Documents** tab.

- 1 Click on the document you wish to view.
- 2 The document will open in a separate window.

Important Note: If the document does not automatically open in a separate window, you may need to turn off the pop-up blocker on your browser.

Customer Service - 1114-7511 - Welsh Construction

Account Number: 1114-7511 Account Name: Welsh Construction Current / Active

Summary Customer Policies Terms Payments **Documents** Notice Delivery Endorsements

Title	Description	Method	Creator	Date Created	Pages
Notice of Intent to Cancel		Day End	PbsSystemAccou...	6/19/2020	4
Welcome Letter		Day End	PbsSystemAccou...	5/8/2020	4

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BTIS DirectPay
1 Baxter Way
Suite 270
Thousand Oaks, CA 91362

Phone/Fax: (888) 494-4222/(855) 750-2303
www.btisdirectpay.com

NOTICE OF CANCELLATION

Statement Date **6/19/2020**
Account Number **1114-7511**
Policyholder **Welsh Construction**

Statement Effective Date **6/19/2020**
Scheduled Cancellation Date **7/6/2020**

Welsh Construction
45730 Peak Road
Los Angeles, CA 92260

To Our Valued Customer:

Your payment due on 6/18/2020 has not been received. You are hereby notified of your insurance carrier(s) intent to cancel your insurance policy(ies) listed below at 12:01 A.M. Pacific Standard/Daylight Time on 7/6/2020 unless payment is received in our office by said date.

If payment is received by 6/21/2020, please pay 80.90.
If payment is received after 6/21/2020, please pay 90.90 which includes an additional late charge of 10.00.

Sincerely,

BTIS DirectPay

Running Reports

A number of standard reports are available to be run anytime, on demand.

- 1 To access the list of reports, select Reports from the Home menu or click Reports in the Quick Links section.
- 2 Select the report you wish to run.
- 3 Modify the report parameters to filter the report results.

Example: A Pending Cancellation Report can be run for one or more office locations for a specified time period.

- 4 Select the report format: PDF or Excel.
- 5 Click **Run** to generate the report.

The screenshot illustrates the process of running a report in the BTIS DirectPay system. It shows the navigation path from the Home menu to the Reports section, the selection of the Pending Cancellation Report, and the configuration of its parameters. The report format is set to PDF, and the Run button is highlighted.

Running Reports (continued)

After the report has been initiated, the Report Activity window will open in a separate window. Reports may be viewed or downloaded once they are ready.

- Once the report is ready, you can click to view the report in a separate window or download the file to your computer.

Important Note: If the Report Activity window or viewed report does not automatically open in a separate window, you may need to turn off the pop-up blocker on your browser.

For Excel files, most browsers require the file to be downloaded before it can be viewed.

- The report will display the available information based on the report parameters selected.

Report Activity - BTIS DirectPay

Requested	Report Name	Status
5/22/2020	Pending Cancellation Report	Ready. View / Download ✕

Tip: For Excel documents, pressing <Ctrl> + 7 will show/hide the File menu

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Pending Cancellation Report BTIS DirectPay

Filter(s): Scheduled Cancellations from 6/1/2020 to 6/30/2020
Specific Agent(s) Insurance Group - A00008

Option(s): Sorted by Cancellation Date Friday, May 22, 2020 11:04 AM

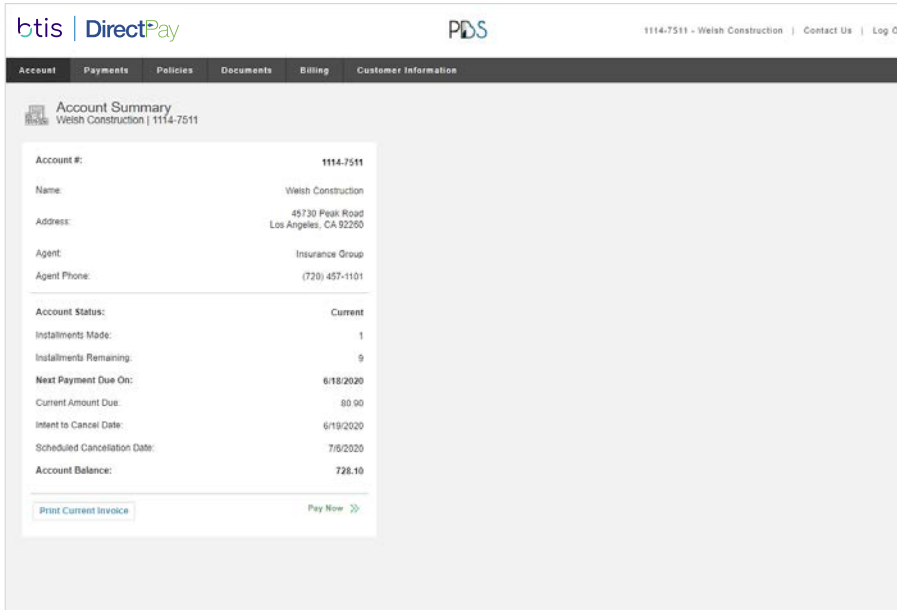
Account Number	Insured Name	Policy Number	Agent	Agent Contact Name	Installments Made	Next Due Date	Scheduled Cancellation Date	Cancellation Hold Date	Amount Due	Customer Telephone Number
1114-9454	I&J FLOORING LLC	NA000025400	Insurance Group - A00008	Rodolfo Arroyo	4	5/22/2020	6/4/2020	--	160.60	(661) 933-1648
1114-9773	VISTA PAINTING LLC	NA000243000	Insurance Group - A00008	Jay Corchado	1	5/22/2020	6/4/2020	--	138.90	(818) 849-1713
1114-4175	MANZANARES CONSTRUCTION	NA000389800	Insurance Group - A00008	Karen Franz	0	5/22/2020	6/4/2020	--	475.90	(661) 357-8835
1114-6465	FLOOR AND HOME INC	NA000159100	Insurance Group - A00008	Nick Hammer	1	5/22/2020	6/4/2020	--	120.00	(621) 366-4312
1114-8585	OR LANDSCAPING LLC	NA000237200	Insurance Group - A00008	Lizbeth Hems	1	5/22/2020	6/4/2020	--	86.80	(818) 589-3156
1114-7726	CABRERA PAINTING	NA000148600	Insurance Group - A00008	Karla Mina	2	5/23/2020	6/5/2020	--	81.90	(818) 723-1459
1114-9649	AM SOLUTIONS INC	NA000254100	Insurance Group - A00008	Rosa White	1	5/23/2020	6/5/2020	--	111.50	(818) 666-7417
1114-49561	STONE N TILE LLC	NA000019600	Insurance Group - A00008	Veronica Cruz	4	5/23/2020	6/5/2020	--	126.20	(818) 435-1221
1114-50163	3K CONSTRUCTION LLC	NA166333701	Insurance Group - A00008	Dan Buck	4	5/24/2020	6/6/2020	--	149.20	(818) 771-8924

Report Totals
Count: 9 1,451.00

Insured Access

A Welcome Letter is issued to every account holder upon set up of their account with DirectPay. This letter contains details to access their account online to perform the following:

- View account summary information
- Enter one-time electronic check and credit card payments (Additional Fees will apply)
- Change passwords
- View policy details
- View and print previously generated documents



BTIS DirectPay
 1 Baxer Way
 Suite 270
 Thousand Oaks, CA 91362

Phone/Fax: (888) 494-4222/(855) 750-2303
www.btisdirectpay.com

Welsh Construction
 45730 Peak Road
 Los Angeles, CA 92260

WELCOME LETTER

Statement Date	5/8/2020
Account Number	1114-7511
Policyholder	Welsh Construction
Installment Amount	See Installment Schedule
# of Installments	10
First Installment Due Date	5/18/2020

Your account is set up for automatic payment via your bank account. Your first installment will be withdrawn from your bank account on or about 5/18/2020.

To Our Valued Customer:

BTIS DirectPay provides monthly billing services. Please contact us for any questions regarding billing or payments. Please contact your broker for questions concerning your insurance coverage.

We encourage you to use our online system to view payment history, see your next due date, make a payment and perform other helpful tasks. Should you have any billing questions, please contact our billing department at the number shown below, Monday through Friday between the hours of 6:00am and 5:00pm PST/PDT.

Thank you for your business. We look forward to serving you.

Sincerely,

BTIS DirectPay

For Questions Concerning Your Coverage:

Call
 Insurance Group
 Phone: (818) 600-5605

Builders and Tradesmens Insurance Services

For Questions Concerning Billing or Payment:

Visit us on the internet:
www.btisdirectpay.com

Username: 1114-7511
Password: X27892u
 (unless you have changed it)

Call us: (888) 494-4222









Email us: BTISdirectpay@input1.com

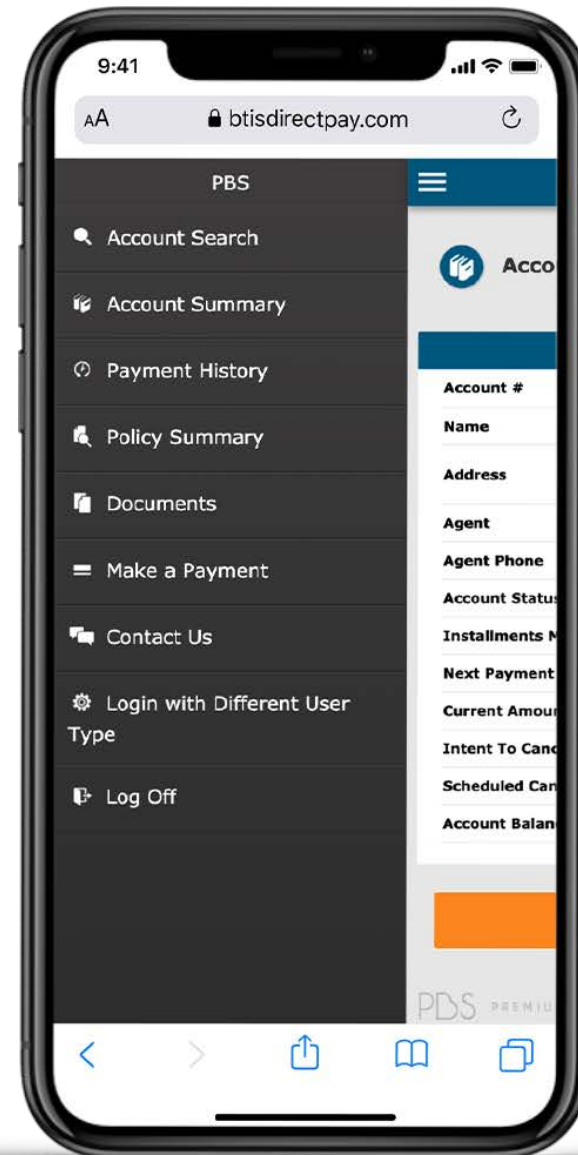
INSURANCE POLICY(IES) RELATING TO THIS NOTICE

Policy No.	Effective Date	Coverage
NA155712300	5/18/2020	GL
IM123571200	5/18/2020	IM

Mobile Web Application

A convenient and easy way to manage your account information is available through the mobile web application. Users can access their accounts, view account summaries, monitor their payment history, make one-time payments and much more.

- 
Account Search
 Find any account at any time
- 
Account Summary
 The account detail you need
- 
Payment History
 A complete view of payments
- 
Policy Summary
 Your need-to-know info
- 
Documents
 Retrieve any document
- 
Make a Payment
 Payments from anywhere
- 
Contact Us
 Provide faster access to service
- 
Different User Type
 Portfolio access for all types of users



Contact Information

Customer Care

Main Phone: (888) 494-4222

Email: BTISDirectPay@input1.com

Account Information

Visit the portal, www.btisdirectpay.com, and enter your login credentials.

Address

1 Baxer Way, Suite 270
Thousand Oaks, CA 91362