

TIPS ON T.I.P.S. SUMMARY

Sending a Payment Link to Your Client

To send your client a payment link:

1. Complete all pages of a quote in the TIPS system.
2. On the final page of the quote, select the payment type.
3. A new button will appear allowing you to send a payment link to your client (you can still accept the quote and enter the credit card information yourself). We recommend the payment link as it is more secure for your clients and if you use the link on a Monthly Pay policy, we do not need the MPP authorization form completed.

There are two options available when sending the payment link:

- Option 1 – Once payment is processed, I want to send Policy Confirmation myself.
- Option 2 – Once payment is processed, I want the system to automatically send the Policy Confirmation to client.
- The pop-up box will look like this:

Please enter email address of the client to receive payment processing link:

** This is a secure link*

Email Address

Once payment is processed, I want to send Policy Confirmation myself.

Once payment is processed, I want the system to automatically send the Policy Confirmation to client.

The first option works best if you want to stay in the quote and remain on the phone with your client as they enter their credit card information. Once the payment has been sent, you check the status and then you will be able to send the policy confirmation.

The second option works best if you want to send the link so your client can make payment later (the link remains valid for up to 3 hours). TIPS will automatically email the policy confirmation to your client (with a copy to you) once payment is received. You will be notified if no payment is received and the link expires. If the payment link expires and the client has not made payment, you will need to send a new link if they still want to proceed.

When your client opens the payment link, a password will be required. The password is the date of birth of Insured 1 on the quote entered as MMDDYYYY (no slashes or dashes and all numeric).

E.g. DOB is March 31, 1962 the password is 03311962.

Remember that the payment link is available for all 21st Century Travel Insurance products and works with all payment types (VISA, MasterCard, and Monthly Credit Card Payment). The link will expire 3 hours after being sent to the client.