



# Step by Step Instructions Recurring Credit Card Application

- When insured chooses **Credit Card** as their method of Recurring Payment
  - **Select Payment Method:**
    - **Credit Card**

Down Payment Information	
Select Payment Method	<input type="text" value="CREDIT CARD"/>
Down Payment Unverified	<input type="text" value="EFT"/>
Down Payment Amount	<input type="text"/>
Date Paid	<input type="text" value="09/14/2017"/>
Can the Agent Bind this application?	<input type="text" value="No"/>
UW Override of rating error, premium \$250	<input type="text" value="No"/>
UW Override of rating error, address verification failed.	<input type="text" value="No"/>

- The button to enter the required Credit Card information will appear
  - Click the **Enter Credit Card Info**

Down Payment Information	
Select Payment Method	CREDIT CARD ▼
Collect Credit Card Information	<b>Enter Credit Card Info</b>
Activate Recurring Payments for future payments?	No ▼
Down Payment Unverified	Yes ▼
Down Payment Amount	175.71
Date Paid	09/14/2017
Can the Agent Bind this application?	No ▼
UW Override of rating error, premium \$250	No ▼
UW Override of rating error, address verification failed.	No ▼

- **Name as it appears on the credit card (Defaults to 1<sup>st</sup> Named Insured)**
  - Verify name
    - Name must match exactly to the name as it appears on the credit card
- **Credit Card Billing Address (Address, City, State & Zip)**
  - Defaults to the policy Mailing Address
    - Verify that this is the **Billing Address** for the credit card
      - Update as necessary
- **Credit Card Type** will default to Visa
  - Verify Credit Card Type
  - Update accordingly
- **Credit Card Number**
  - Enter number
- **Card Security Code (CSC)**
  - Enter 3 digit number
  - Located on back of card
- **Card Expiration Date**
  - Enter date
- **Click Submit**

accesshomestage.cogisi.com Credit Card Information

Name as it appears on the credit card: JACKIE ROBINSON

Credit Card Billing Address: **Address** 2267 N WARM SPRINGS ROAD

**City** GREENWEL SPGS

**State Zip** LOUISIANA ▼ 70739

Credit Card Type: Visa ▼

Credit Card Number:

Card Security Code (CSC): ?

Card Expiration Date: MM ▼ YYYY ▼

Click Submit to post credit card information. Click Close at the top of the screen to Cancel

➤ If the following fields are not populated the user will receive an error:

➤ **Credit Card Number**



➤ **Card Security Code**



➤ **Card Expiration Date**



- Credit Card number with Credit Card Type mismatch:
  - Error message

The screenshot shows a web form titled "accesshometest." with a blue header. The form contains several input fields: "Name as it appears on the credit card:", "Credit Card Address:", "Credit Card Type:" (with a dropdown menu showing "MasterCard"), "Credit Card Number:" (with the value "411111111111"), "Card Security Code (CSC):" (with a dropdown menu showing "459"), and "Card Expiration Date:" (with dropdown menus showing "03" and "2021"). An "OK" button is visible in the error message dialog box. At the bottom right, there is a "Submit" button. The error message dialog box is titled "Information" and contains the text: "accesshometest.cogisi.com says: Invalid credit card format - please check the credit card type and verify the credit card number".

**Setting up the recurring payment in ISi does not verify the account information. The payment authorization is not sent to the bank until it is due. Therefore, input errors will not be found until submitted, potentially causing the cancelation of a policy.**

- Activate Recurring Payments for future payments
  - YES

### Down Payment Information

Select Payment Method

CREDIT CARD ▼

Collect Credit Card Information

Enter Credit Card Info

Activate Recurring Payments for future payments?

Yes ▼

No

Yes

Down Payment Unverified

Down Payment Amount

175.71

Date Paid

09/15/2017

Can the Agent Bind this application?

No ▼

UW Override of rating error, premium \$250

No ▼

UW Override of rating error, address verification failed.

No ▼

- Once the application is approved the following screen will appear
  - Click View policy to confirm Recurring Credit Card was successfully processed

**Application Processed**

**Policy Number: HO170085275-00**

[Display DEC Page](#)

[View Policy](#)

[View Payment Receipt](#)

[Upload Images](#)

- **RCC** will appear if correctly set up

**Extended Policy Details**

Account ID: 85275

Pay Plan: Monthly - 2 Months Down - Insured Billed **RCC**

[Future Installments](#)