



Phone: 1-800-442-7050

Email: RobinM@policy-pal.com

## **How to Set an Account up for Recurring Payments:**

1. Locate the desired account
2. From the Account Menu, select Set up for recurring payments
3. Select ACH (EFT) or Credit (Debit) card payment and click on Enter Payment Information
  - a. If ACH is selected
    - i. Complete the Account Information screen based on the information of the bank account holder (may not be the same as the insured's information)
    - ii. Enter the Bank Name, Type of Account, Routing Number, and Account Number
    - iii. Click Save
  - b. If Credit Card is selected
    - i. Complete the Billing Information page based on the billing information of the credit card being used. Please note fields with an "\*" are required fields
    - ii. Click Next
    - iii. Complete the Payment Details and click Next
    - iv. Review your order and click Finish
    - v. Click Save then click Close
4. Refresh page if needed to ensure payment method has been updated