

Client Payment Portal Procedure

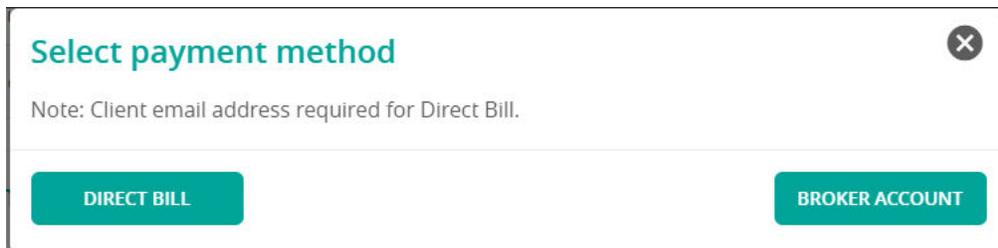
A Step-by-Step Guide to Making Payments Through the Client Portal

Introduction

This procedure outlines the steps brokers and clients should follow to select the billing method and make payments securely and efficiently through the client payment portal.

1. On Binding a quote

On binding a quote, a prompt will follow to select your client's preferred billing method. The available payment methods on Direct Bill include **Pay in full via credit card** (a 2.97% access fee applies) or **monthly payment plan via FIRST Insurance Funding**. FIRST Insurance payment plans include a financing fee. First payment plans are available using a Canadian bank account or a credit card (plus, a 2.97% access fee when credit card is selected).



The screenshot shows a dialog box titled "Select payment method" with a close button (X) in the top right corner. Below the title, there is a note: "Note: Client email address required for Direct Bill." At the bottom of the dialog, there are two buttons: "DIRECT BILL" on the left and "BROKER ACCOUNT" on the right.

Upon selecting Direct Bill, a schedule of the finance plan will be estimated and you will be required to enter the client's email address. The client will receive a link at this address with where they can pay for their policy.

Select payment method



CHANGE PAYMENT METHOD

Accepting this quote with Direct Bill will send the client a link to the payment portal.

On the payment portal, the client can pay via finance plan or credit card.

A 2.97% fee applies to credit card transactions. A finance charge matching the current Bank of Canada rate applies to monthly payment plans.

The following finance plan is available from FIRST:

Total Premium	\$1,031.40
Sales Tax	\$76.40
Finance Charge	\$40.72
Less Down Payment Due Now	- \$159.01
Total Finance Premium	\$913.11
Monthly Instalments	\$83.01

Upon clicking the Confirm button below, an access email for the payment portal will be sent to the client email address specified below and the policy will be bound.

*Email address

CONFIRM

After entering the client's email address and selecting confirm, the next pop-up will allow you to Accept or go back to change the client's email address or change the billing method.

Are you sure you want to accept this policy?

BACK ACCEPT

2. Client payment link

The client will receive a link at the email entered in the previous step.



Agile Motorcycles policy - Payment due

Hi Jason Andrews,

We're reaching out as a reminder that the total payment amount for your Agile Motorcycles policy including taxes and fees is \$1,126.00 and is due on 12/15/2025.

Policy type: Agile Motorcycles
Policy number: AGMC00004156
Policy term: 12/15/2025 - 12/15/2026
Invoice number: 110050884
Due date: 12/15/2025

Click the button below to go to the Agile Payment Portal and pay it online.

You can choose to **pay it in full** with a debit/credit card or set up a **monthly payment** plan through your Canadian bank account or credit card.

[Continue to Payment Options](#)

Thank you,

Agile Underwriting Solutions

Agile Underwriting Solutions acknowledges it is situated in Mikma'ki, the ancestral and unceded territory of the Mi'kmaq people. This territory is covered by the Treaties of Peace and Friendship, which Mi'kmaq, Maliseet (Wabastakwiyik), and Passamaquoddy (Peskotomuhkati) peoples first signed with the British Crown in 1726.

Upon selecting 'Continue to Payment Options' the client will be redirected to their payment portal.

My Invoice Need to speak to us?

Balance owing: \$1,126.00

Please select your preferred payment method

Set up monthly payments

Pay monthly through a Canadian bank account or credit card

[Next ▶](#)

Pay now

Pay for your policy by Visa, MasterCard or Amex

[Pay by card ▶](#)

[Back to all invoices](#)

3. Monthly Payments

Upon selecting monthly payments, the following pop-up is displayed:

Preferred date ✕

Your monthly payments will be set up through FIRST Insurance Funding of Canada. Please note that:

- FIRST Insurance Funding of Canada is a third-party organisation.
- If you miss a monthly payment, FIRST Insurance Funding of Canada can cancel your policy.

Select the day you'd like your payments to start

Preferred payment date

[Next](#)

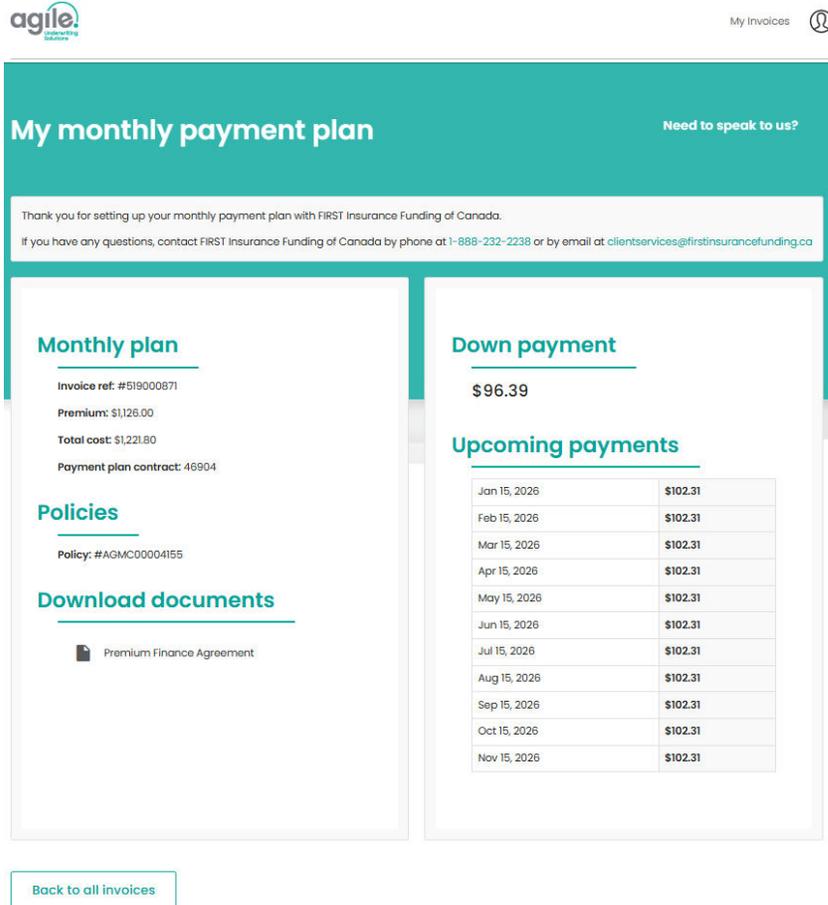
Easy monthly payment plans provided by

FIRST INSURANCE[®]
— OF CANADA — FUNDING
A WINTRUST COMPANY

The downpayment will always be withdrawn on the effective date of the policy. The preferred payment date can be no more than 30 days after the effective date of the policy.

Upon clicking Next the user will be directed to First Insurance to setup their finance plan.

Upon completion, the following screen will show details of the accepted plan with access to their Premium Finance documents.



agile Underwriting Solutions My Invoices

My monthly payment plan [Need to speak to us?](#)

Thank you for setting up your monthly payment plan with FIRST Insurance Funding of Canada.
If you have any questions, contact FIRST Insurance Funding of Canada by phone at 1-888-232-2238 or by email at clientservices@firstinsurancefunding.ca

Monthly plan

Invoice ref: #519000871
Premium: \$1,126.00
Total cost: \$1,221.80
Payment plan contract: 46904

Policies

Policy: #AGMC00004155

Download documents

 Premium Finance Agreement

Down payment

\$96.39

Upcoming payments

Jan 15, 2026	\$102.31
Feb 15, 2026	\$102.31
Mar 15, 2026	\$102.31
Apr 15, 2026	\$102.31
May 15, 2026	\$102.31
Jun 15, 2026	\$102.31
Jul 15, 2026	\$102.31
Aug 15, 2026	\$102.31
Sep 15, 2026	\$102.31
Oct 15, 2026	\$102.31
Nov 15, 2026	\$102.31

[Back to all invoices](#)

4. Paying via Credit card

When opting to pay by card, this will take clients to the following screen:

Welcome to Agile Payment Portal

Need to speak to us?

Complete your payment of **£1,126.00**

Completely secure



Payment Details

Card Number VISA  

Card Number

Expiry

Security Code

MM/YY Security Code 

Cardholder Name

Cardholder Name

 **PAY NOW**

 256-bit SSL encrypted

Securely processed by Global Payments 

Upon successful completion, the receipt page will follow:

My receipt

Need to speak to us?

Invoice ref: #518992966

Policy: #AGMC00004123

Balance owing: \$1,126.00

Download documents

 Receipt

Card payment

Total cost: \$1,126.00

Date paid: Pending

Card used: **** * 5262

[Back to all invoices](#)

5. Resending payment links

If for any reason the client doesn't receive a link, it can always be resent from the 'Policy Summary' screen. The broker can resend links to existing client emails or add new email addresses to the account.

Payment Portal Access

[EDIT PAYMENT PORTAL ACCESS](#)

Payment is outstanding. Select an email below to resend a payment access email.

*Email Address

[RESEND PAYMENT EMAIL](#)

Payment Portal Access

[EDIT PAYMENT PORTAL ACCESS](#)

Payment is outstanding. Select an email below to resend a payment access email.

*Email Address

*Email address

[SEND PAYMENT EMAIL](#)

Add user ✕

Please enter the details below.

Email address ✓

! Account added with email address: test2@indigotesting.acturis.com

ADD ACCOUNT

Update user - TEST@INDIGOTESTING.ACTURIS.COM CLOSE

Email address

*Active Yes No

*Locked Yes No

Validated **No**

UPDATE ACCOUNT

6. Troubleshooting and Support

If you encounter any issues accessing the portal or completing your payment, contact the support team at agileoperations@agileuw.ca