Binding the coverage by taking payment

For step-by-step instructions, download a Quote & Issue job aid from within AMsuite.

Select the payment option.

Sometimes you will be ready to bind a quote as soon as you have created it. Other times you may want to come back to it later. Either way, at this point you will have completed the **Issuance Checklist**, and will be looking at the **Payment & Signatures** screen.

Early in the submission process you noted whether or not the policy would be paid in full. You can change that selection on this screen, and choose a payment plan.





Get the signatures.

On the lower half of the payment screen, you select either a **signature on a paper form** from the customer, or an **electronic signature**.

Issue the policy.

After you have entered payment details and have collected the signatures, the last step is to bind the policy. At the top of the **Payment & Signatures** page, click **Bind Options** and select **Issue Policy**. When complete, AMsuite will show a **summary screen**.





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