



Pathpoint PathPay User Guide

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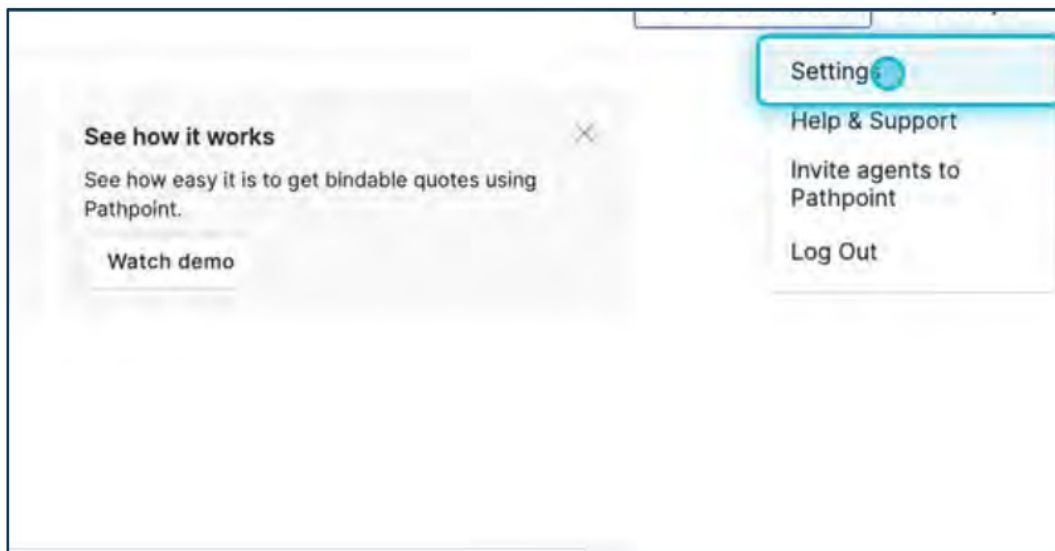
PATHWAY PAYMENT SETUP

Pathpoint is the first in the E&S industry to offer a fully digital payment method called PathPay. This digital payment experience provides agents two choices, PathPay Insured and PathPay Agency, to manage billing through our online invoicing and payment processor. Follow these steps to set up your billing account.

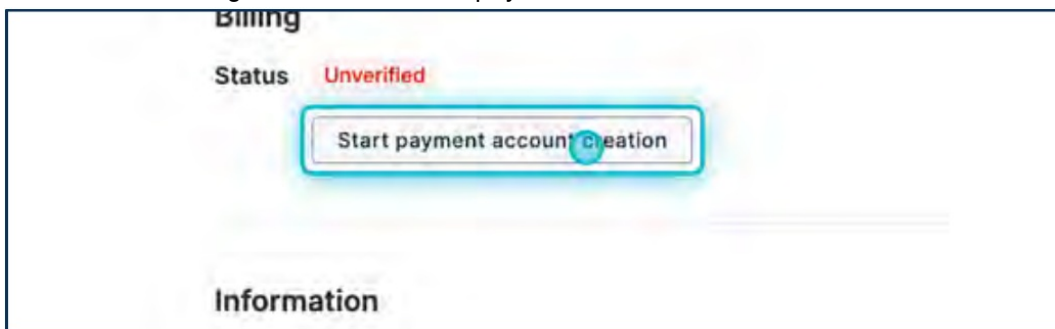
Step One: Set up your profile



After agents are done registering, select the option to Finish Setting Up Your Profile in your dashboard or click your name in the top right of the dashboard and select Settings



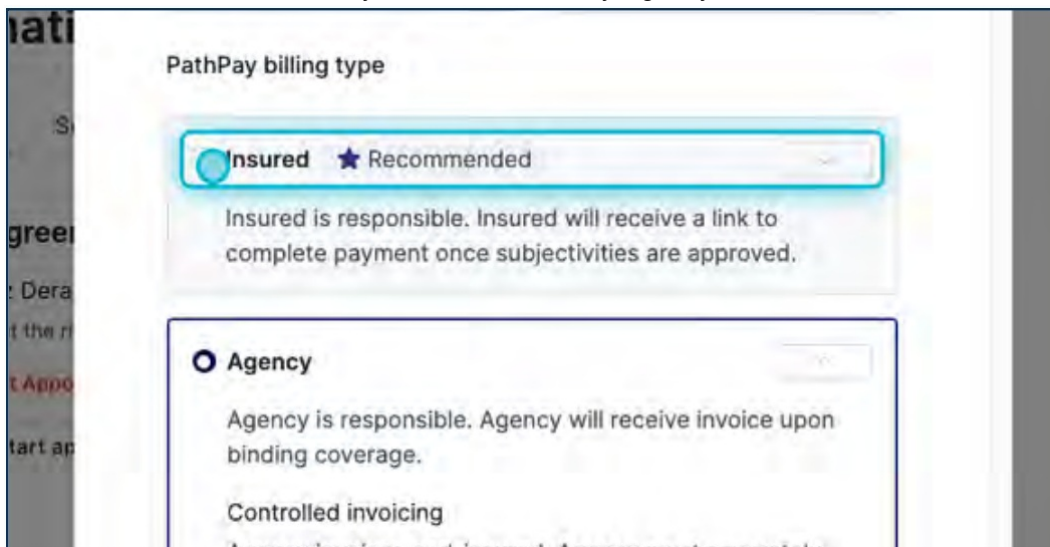
In the Billing section, click Start payment account creation



Step Two: Enter your agency information and preference



Here you will enter your agency information and select your billing contact. You will choose either PathPay Insured or PathPay Agency and click send.

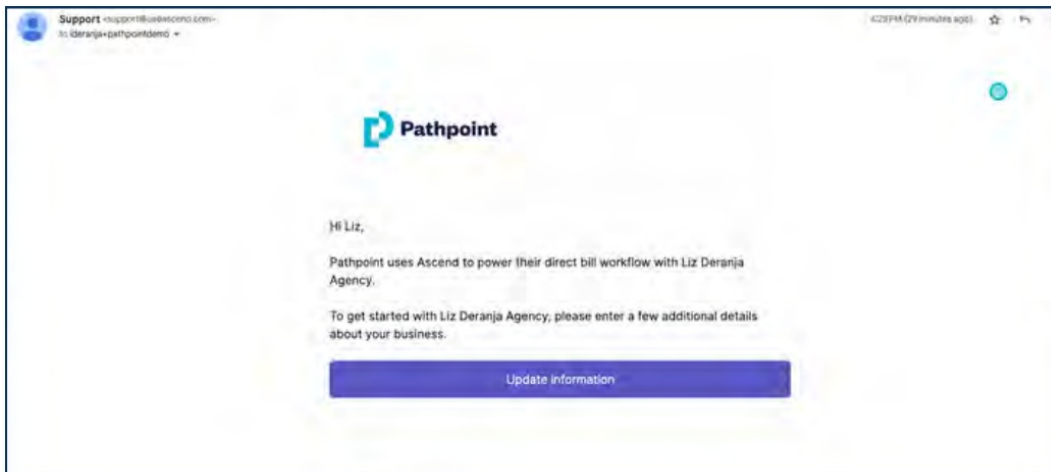


Pathpointer: If you prefer insureds to pay directly, opt for PathPay Insured. If you prefer to collect payments upfront, select PathPay agency. Compare the differences with our [PathPay guide](#).

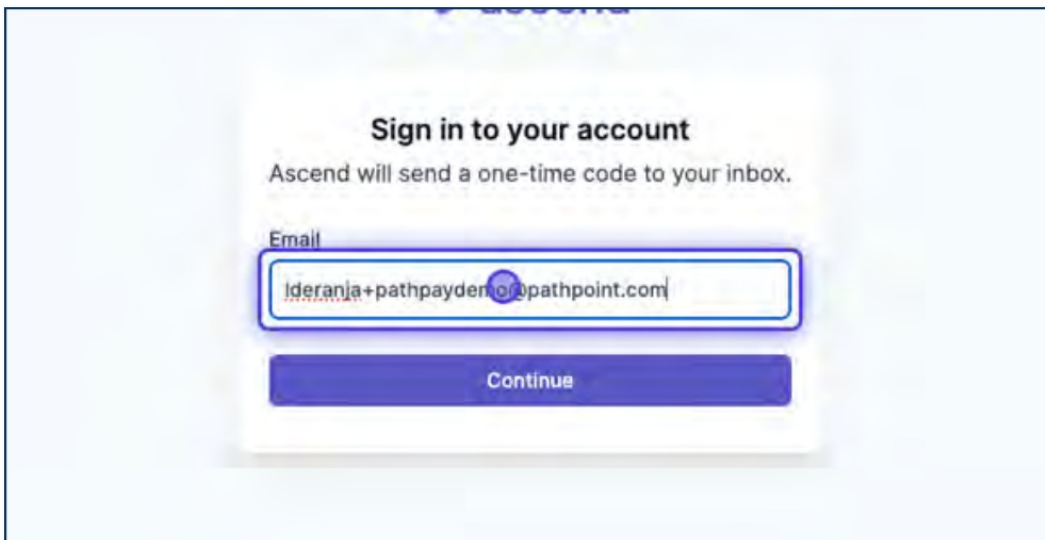
Step Three: Verify your account in Ascend



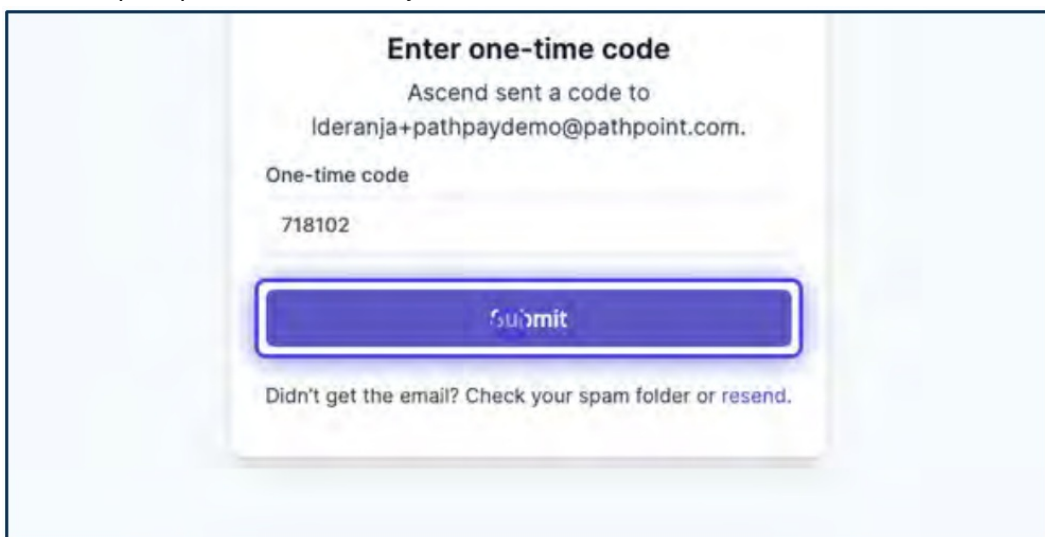
Open the email inbox of the email address you just entered into the billing information when you set up your PathPay account in Pathpoint. You should find an email coming from support@useascend.com that looks like this. Click Update Information in the email body.



Sign into your new Ascend account using the same email you used to create your PathPay account in Pathpoint.



If prompted, refer back to your email to find a one-time code, and enter it in.



Pathpointer: Didn't receive the Ascend email or code? First, double check the email you entered. Next,

check your spam folder or resend. If the email is still not found, reach out to support@pathpoint.com or use our live online chat.



Why use two-step verification for insurance payments? It safeguards sensitive data and protects against hackers and data breaches! For more cyber security info [click here](#).

Step Four: Enter your banking information



Update your business and bank details accordingly.

The screenshot displays the 'Business and bank details' settings page in the Pathpoint interface. On the left, a sidebar shows 'Settings' with options for 'User management' and 'Bank details'. The main content area is titled 'Business and bank details' and contains two sections. The first section, 'Deranja Agency', includes fields for 'Doing business as', 'Phone' (+1 (310) 936-2512), 'Website' (http://www.pathpoint.com), 'Address' (2201 Wisconsin Ave Second Floor, Washington, DC 20007), 'Tax identification number' (128544254), and 'Type' (Corporation). The second section, 'Bank Details', has an 'Edit' button and fields for 'Operational account', 'Account holder name', 'Account number', and 'Routing number'.



Pathpointer: There are no fees with ACH or wire transfers. For credit card payments, there is an additional charge of 3.5% + \$0.30 of the total transaction. These fees are included in the checkout link of any account.

Step Five: Head back to your Pathpoint account

Go back to your agent information page in Pathpoint, where you initially set up your PathPay account and refresh. It should now say Verified in green in the Billing section. You're all set!

Pathpointer:Download your quotes, ACORDs, and supplementalsto compare all Pathpointer: Verification may take up to 72 hours. If you need to expedite coverage issuance for your insured, contact our support team for assistance.



Visit our PathPay library in our Help Center for more information.

Enjoy a 100% digital payment process with these benefits!

Less paperwork

- Say goodbye to manual admin tasks. We handle the payment processing that an agency normally has with a wholesale broker.

Transparent reporting

- Access a dashboard to track payment status in real time. Offer a simple, easy, and seamless payment process to maintain high-quality client service.

Streamlined process

- Experience a seamless, consistent, and transparent payment process that your clients expect and appreciate.

Full optionality

- You have the freedom to choose between PathPay Insured or PathPay Agency, not the other way around! Find the method that suits you best and make a choice that aligns with your preferences.

Exceptional personal support

- Discover solutions to your inquiries through our comprehensive Help Center, convenient online chat support, and the dedicated expertise of our Support Team.


Choose the PathPay option of your choice at www.pathpoint.com!

Still have questions? Contact your account representative or ops@pathpoint.com

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Documents / Resources

	<p>Pathpoint PathPay [pdf] User Guide PathPay, PathPay</p>
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References

- [Pathpoint Help Center](#)
- [Pathpoint | Instant, bindable small commercial E&S insurance](#)
- [User Manual](#)

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