

Billing and Account History

To view account billing, the registered user must have the Billing user permission. You may then access billing history by clicking the Billing tap from the top menu.

Account Summary

Billing Account: 5000030540 Status: Delinquent	Current Due: \$16,692.00 Past Due: \$ 67,405.84	10/28/2019 Due Immediately	Make a Payment
			Set up Automatic Payments
			Automatic Payment(ACH/EFT): Not Enrolled

Billing Summary	Invoice Documents	Transaction Download
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The top line indicates Current Due amount and Past Due amount, if any. Items that are currently due are marked as “Billed” in the Billed Status column in the Account Invoices section at bottom. If the account is delinquent, there will be a past due amount in red, and these items will have a Billed Status of “Due” in Account Invoices. Payment can be made using the Make a Payment orange button (see the Making a Payment instructional document).

AUTOMATIC PAYMENT ENROLLMENT

The account status of being enrolled in automatic payments will be indicated at the right. To have funds automatically withdrawn from a bank account on the due date of invoice, click on the Set up Automatic Payments link to download the form.

TRANSACTION HISTORY

There are several tools to track the posting of credits and debits on account.

On the right side of the page are two **Transaction Download** buttons. This document will list a comprehensive record of transactions for all policies on account, from oldest at top to newest at bottom. The balance at the end of F-column should match the account balance or total amounts due at the top of the Billing page.

The **Recent Account Payments** section will show the last five payments received, identified by the date received, amount, and reference number.

[Billing Summary](#)[Invoice Documents](#)

Recent Account Payments

RECEIVED DATE	PAYMENT METHOD	CHECK #	AMOUNT
10/29/2019	Credit Card	W15000031603	\$123.00

The **Account Invoices** section will show the totals from the invoices on account. A dropdown is available to select from the last five years on the account. For each item, the invoice amount is displayed with the remaining balance for that invoice and its billed status. Future invoice amount can be seen and are listed with “Planned” status.

INVOICE DOCUMENTS

Use the creation date from the Account Invoices section to find the document. By selecting the orange “Invoice Documents” tab (next to “Billing Summary” below the top section), all invoices on the account from the last five years will appear, and they are listed with most recent on top. Click the PDF link at right to download and view the document.

[Billing Summary](#)[Invoice Documents](#)

Billing Documents

DATE CREATED	DESCRIPTION	DOWNLOAD
10/15/2019	Billing Invoice	PDF
10/09/2019	Billing Invoice	PDF
10/09/2019	Billing Invoice	PDF