Billing and Account History

Last Updated February 1, 2022

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

Automatic Payment Enrollment

The account status of automatic payment enrollment 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 To have funds automatically withdrawn from a bank account on the due date of invoice, click on the Set up Automatic Payments link. Enter your banking information, and a confirmation email will be sent once successfully enrolled.

You may cancel automatic payments or change your banking information by selecting the associated option on the Billing tab.

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

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