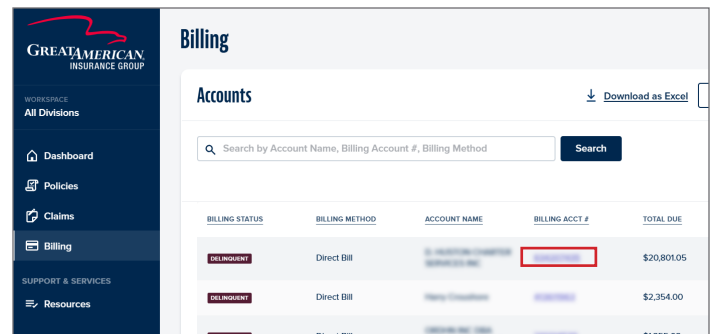


Billing Details > Billing Summary Tab

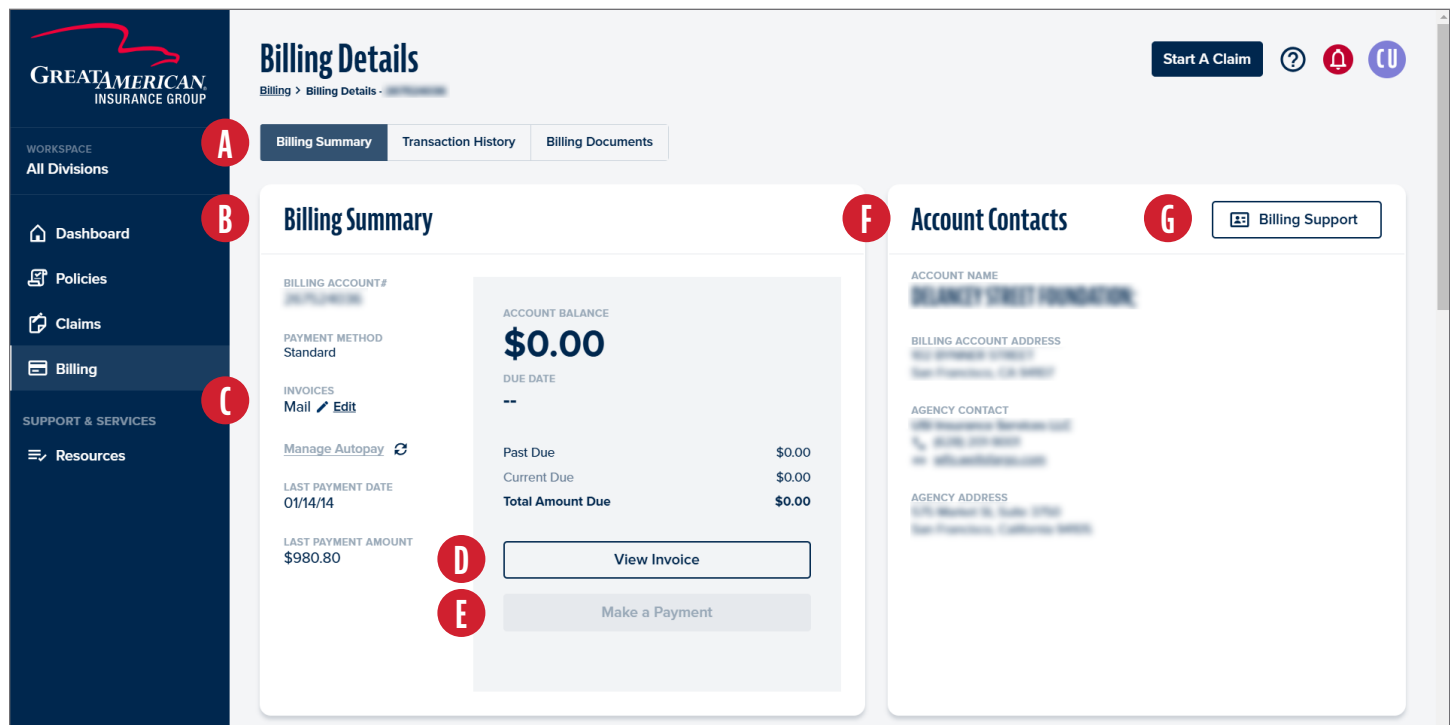
Billing in Insured Portal

Access the Billing Details Page

To access an account's Billing Details page, click on the **Billing Acct #** link from the Billing page.



Billing Summary Tab Overview



- A** Click on each tab to view the **Billing Summary** (shown), **Transaction History**, and **Billing Documents** for a specific account.
- B** The Billing Summary section shows a high-level view of a specific account including Billing Account #, Payment Method, Last Payment Date and Last Payment Amount.
- C** Shows how an account receives its invoice. Users can click on **Edit** to update their invoicing preferences or **Manage Autopay** to make changes to their automatic payment settings.
- D** Click **View Invoice** to open the account's invoice in a pop-up modal.
- E** Click **Make a Payment** to open the Account Payment modal.
- F** The Account Contacts section shows the Account Name, Billing Account Address, and Agency Contact information. Users can click on the email address to send an email. The Agency Address is also listed.
- G** Click Billing Support to open the Billing Support modal with contact information. There is also a form to send an email directly to the appropriate person for assistance.

Continued on the next page...

Billing Details > Billing Summary Tab (continued)

Billing in Insured Portal

While still on the Billing Summary tab, scroll down to see the Policies section and Projected Installment Schedule for a specific account.

WORKSPACE

All Divisions

Dashboard

Policies

Claims

Billing

SUPPORT & SERVICES

Resources

H

Policies

5 of 33

M

Download as Excel

BILLING STATUS	PRODUCT	POLICY #	POLICY COVERAGE	PAYMENT PLAN	PAST DUE	TOTAL DUE	ACTIONS
CURRENT	DPK	POLICY #	07/01/13 - 07/01/14	Monthly Equal	\$0.00	\$0.00	
CURRENT	DPK	POLICY #	07/01/15 - 07/01/16	Monthly Equal	\$0.00	\$0.00	
PAID IN FULL	DPK	POLICY #	07/01/11 - 07/01/12	Monthly Equal	\$0.00	\$0.00	
CURRENT	DPK	POLICY #	07/01/19 - 07/01/20	Monthly Equal	\$0.00	\$0.00	
EARNED PREMIUM PAID IN FULL	DPK	POLICY #	07/01/08 - 07/01/09	Monthly Equal	\$0.00	\$0.00	

Show More

J

Projected Installment Schedule

N

Download as Excel

SELECT THE ACCOUNT OR POLICY

K

Billing Account #

L

All3 Months12 Months24 Months

INVOICE DATE	DUE DATE	INVOICE AMOUNT	AMOUNT OUTSTANDING
05/06/25	05/26/25	\$13,075.42	\$13,075.42
04/06/25	04/26/25	\$13,075.43	\$13,075.43
03/06/25	03/26/25	\$13,075.43	\$13,075.43

- H

The Policies section shows all of the policies associated with a specific billing account.
- I

Users can access a policy’s details by clicking on the **Policy #** link or selecting **View Policy Details** in the Action column.
- J

The Projected Installment Schedule can show the 3, 12, or 24-month invoicing schedule for a specific billing account.
- K

Select the Account or Policy from the drop-down menu to view the project installment schedule.
- L

Click on each tab (**All**, **3 Months**, **12 Months**, or **24 Months**) to view the projected installment schedule for those months.
- M

Click **Download as Excel** to download the list of policies as an Excel spreadsheet.
- N

Click **Download as Excel** to download the Project Installment Schedule as an Excel spreadsheet.