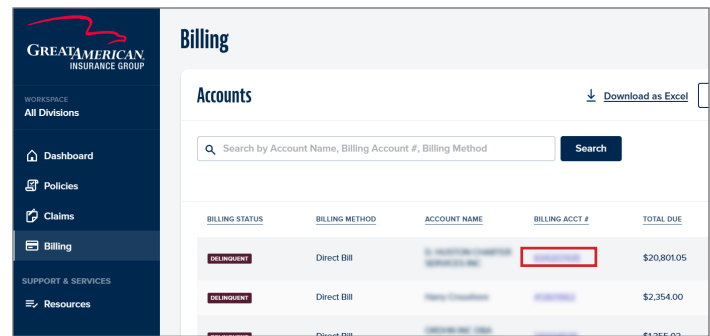


Billing Details > Transaction History Tab

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.



Transaction History Tab Overview

Billing Details

Billing > Billing Details - [Account Name]

Transaction History

Download as Excel

Search by Transaction Type

Search

SORT BY: None

Filters

Reset All

PRODUCT	POLICY #	TRANSACTION TYPE	EFFECTIVE DATE	PROCESS DATE	TRANSACTION AMOUNT	PAYMENT DETAILS
CAP	[Redacted]	Taxes & Surcharges - Cancellation	03/24/14	04/11/15	(\$16.10)	--
CAP	[Redacted]	Premium - Cancellation	03/24/14	04/11/15	(\$17,651.00)	--
CAP	[Redacted]	Taxes & Surcharges - Temp Reinstatement	03/24/14	04/10/15	\$16.10	--
CAP	[Redacted]	Premium - Temp Reinstatement	03/24/14	04/10/15	\$17,651.00	--
CAP	[Redacted]	Taxes & Surcharges - Cancellation	03/24/14	04/29/14	(\$16.10)	--
PAC	[Redacted]	Premium - Cancellation	03/24/14	04/29/14	(\$4,667.00)	--

A Click on each tab to view the **Billing Summary**, **Transaction History** (shown), and **Billing Documents** for a specific account.

B The Transaction History section shows the list of transactions for a specific account including the Product, Policy #, Transaction Type, Effective Date, Process Date, Transaction Amount, and any Payment Details.

C You can search an accounts transaction history by Transaction Type (e.g., Taxes & Surcharges, Premium, etc.).

Simply enter a search term and click **Search**.

D Click **Download as Excel** to download the transaction as an Excel spreadsheet.

Click **Billing Support** to find Contact Information and email contact form.

E Users can sort transactions by Product, Policy #, Transaction Type, Effective Date, Process Date, Transaction Amount, and any Payment Details.

To sort, simply click **Sort By** and select an option from the drop-down menu.

Users can also apply a filter to look for specific transactions.

To filter, simply click **Filters** and select or enter one or more of the criteria available in the Filters panel then click **Apply**.