

Billing Summary Page Overview

Billing in Insured Portal

From the Billing summary page, users can:

- Download their billing accounts as an Excel file
- Find contact information for billing support
- Make a payment
- Manage auto pay

Additionally, users can search, sort, and filter their billing accounts to quickly locate specific information and access the Billing Details page.

The screenshot displays the 'Billing' section of the Great American Insurance Group portal. The left sidebar contains navigation links for Dashboard, Policies, Claims, Billing, and Resources. The main content area is titled 'Accounts' and includes a search bar (D), a 'Download as Excel' button (A), a 'Billing Support' button (B), and a 'Payment Options' dropdown (C). Below these are sorting and filtering controls (E). The table lists three accounts: one in 'DELINQUENT' status with a total due of \$1,072.75 due on 01/28/2024, and two in 'CURRENT' status with a total due of \$0.00. Each row has a 'Billing Account #' link (F) and a 'Kabob' menu (G) for actions like 'Make a Payment', 'Manage Autopay', 'View Invoice', and 'View Billing Details'. At the bottom, there are pagination arrows (H) and a results per page dropdown (I) set to 10.

A Click **Download as Excel** to download all your billing accounts into an Excel spreadsheet.

B Click **Billing Support** to find contact information or send a message to billing support.

C Click **Payment Options** to **Make a Payment** or **Manage Autopay**.

D To search for an account, enter the Account Name, Billing Account #, or Billing Method then click **Search**.

E Click **Sort By** to sort accounts by any of the column headers.

Click **Filters** to open the filters pane and select from the available criteria (i.e., Billing Status, Total Due, or Due Date).

F Click the **Billing Account #** link to go directly to that account's Billing Details page.

G Click the **kabob (⋮)** in the Actions column to **Make a Payment, Manage Autopay, View Invoice, or View Billing Details**.

This close-up shows the 'ACTIONS' column of the table. A dropdown menu is displayed, listing four actions: 'Make a Payment', 'Manage Autopay', 'View Invoice', and 'View Billing Details'. The icon used to trigger this menu (three vertical dots) is highlighted with a red rectangular box.

H For users with several accounts, click the arrows to navigate between multiple pages.

I Users can also select to show 10, 25, or 50 accounts per page.