

Billing Transactions



Step 1: To see billing transaction, start on the account landing page.

Step 2: Click on the “Billing Transactions” button.

A screenshot of a software interface. At the top, there is a navigation bar with four purple buttons: "Loss Runs", "Billing Transactions", "Go to #1511169183", and "Pay". A red arrow points to the "Billing Transactions" button. Below the navigation bar is a section titled "Memo Activities" containing a table with one row of data.

| Due Date | Priority | Subject | Assigned To |
|----------------------------------|----------|------------------------|-------------|
| 2022-03-09T14:50:15.091000-07:00 | High | Additional Information | Kenly Smith |

Billing Transactions



Once clicked, you will be directed to a billing information screen which, contains the account status, balance, and due dates.



[Billing Info](#)

Billing Information

Account Number :123456789

Address

5201 Balloon Fiesta Parkway NE, Albuquerque,
NM 87113

[Policy Terms](#)

Account Holder Email : user@newmexicomutual.com

Phone Number

(505) 345-7260

[Payments](#)

Account Status:

Past Due

Account Billing Information

Remaining Account
Balance: \$11,170.00

Past Due Amount: \$11,170.00

Current Amount Due: \$0.00

****Current Amount**
Due Date: 11/09/2022

Total Amount Due: \$11,170.00

Billing Transactions



On the Policy Terms page, you can view billing reconciliation by term.



- Billing Info
- Policy Terms
- Payments

Policy Terms

Account Number: 123456789

* Current Policy Term

Policy Term: 0100571.102

Policy Status: Audited

Delinquency Status: Collections

Final Audit Type: Voluntary

Effective Date: Oct 27, 2020

Expiration Date: Oct 27, 2021

Payment Plan: Annual Payment

| Status | Invoice Date | Invoice Due Date | Charge Type | Amount Billed | Amount Paid Display | Remaining Policy Balance |
|------------------------|--------------|------------------|-------------|--------------------|---------------------|--------------------------|
| Billed | 11/10/2020 | 12/09/2020 | | \$1,232.00 | \$1,232.00 | \$0.00 |
| Billed | 09/10/2022 | 10/09/2022 | | \$1,862.00 | \$0.00 | \$1,862.00 |
| Billed | 10/10/2022 | 11/09/2022 | | \$9,308.00 | \$0.00 | \$9,308.00 |
| Overall - Total | | | | \$12,402.00 | \$1,232.00 | \$11,170.00 |

Billing Transactions



On the Payments page, you may view payment details.



- [Billing Info](#)
- [Policy Terms](#)
- [Payments](#)

Payments

*

Account Number:123456789

| Payment Type | Payment Date | Reserved | Reversal Reason | Check /Ref # | Amount |
|------------------------|--------------|----------|-----------------|--------------|-------------------|
| ach | 10/27/2020 | | | | \$1,232.00 |
| creditcard | 02/25/2021 | | | 108637 | \$1,345.00 |
| Overall - Total | | | | | \$2,577.00 |