



Account Status



The Account Status screen provides a summary view of both active and inactive accounts.

Account Status

Active accts Inactive accts All accts Show Me How

Selection Criteria

Filter Options → Filter Records on: Acct # Customer # Quote # Insured Status Pymt Remaining Down Payment

Starts With Contains Search

Total records: 326 Items per page: 25

First Previous 1 2 3 4 5 6 7 8 9 10 Next Last

← Customize column view here. Column Preferences Save Preferences Reset Preferences

Acct #	Invoice	Customer #	Insured	Insured Online	Online Pymt	Status	Amt Due	Pymt Remaining	Eligible Cancel Date	AutoPay Method	Down Payment
COR-542683	INVOICE	-	Demo Client		PAY NOW	PENDING	DUE NOW	8	--	---	Agent
COR-542841	INVOICE	-	Demo Client		PAY NOW	PENDING	DUE NOW	8	--	---	Agent
COR-542998	INVOICE	-	Demo Client		PAY NOW	DELINQUENT	DUE NOW	7	ELIGIBLE	---	Agent
COR-542999	INVOICE	-	Demo Client		PAY NOW	PENDING	DUE NOW	8	--	---	Agent
COR-543001	INVOICE	-	Demo Client		PAY NOW	PENDING	DUE NOW	8	--	---	Agent
COR-543096	INVOICE	-	Demo Client		PAY NOW	DELINQUENT	DUE NOW	7	ELIGIBLE	---	Agent
COR-543225	INVOICE	-	Demo Client		PAY NOW	CURRENT	DUE NOW	6	--	ACH	Agent

Click the Acct # link to access Account Details

Click to make payment.

Account Details

Shows a comprehensive picture of the account.

Print – opens a PDF of the Account Details.

Invoice – opens a PDF copy of the Notice of Payment Due.

Email a PDF of the Account Details.

Account Details Print Invoice Email

<p>Agent</p> <p>DEMO PRODUCER #3 1234 MAIN STREET ANY CITY, NY 11797 Tel: (555)555-5511</p>	<p>Insured Edit</p> <p>Demo Client 1234 MAIN STREET ANY CITY, NY 10591 Tel: (555)555-5511 Cancellation Warning Email: techsupport@ipfs.com</p>
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Edit insured name, address, email, cancellation email or text.

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Account Data Display		
Acct #: 634163	Current: \$829.44	First Pymt: 09/14/2023
Status: CURRENT	Principal: \$817.49	Next Pymt: 06/14/2024 *
Accepted: 08/22/2023	Unearned: \$11.95	Maturity: 07/14/2024
APR: 13.400 %	Credit: \$0.00	Received: 9 of 11
		Installment Amt: \$414.72
Bill: Coupon	Late Charge: \$0.00	
Type: Commercial	NSF Charge: \$0.00	Broker Fee: \$0.00
Cancel Date:	Default Charge: \$0.00	Check Charge: \$0.00
* Payments must be made by 5:00 PM Central Time on the due date to avoid late fees.		

Renewal/AP – create a renewal or AP quote, if eligible.

Hold – if authorized, request to hold cancellation.

Initiate AutoPay ACH – initiate insured enrollment in AutoPay ACH on eligible accounts.

Enroll Card – initiate Recurring CC.

Unenroll Card – remove Recurring CC.

Update Card – change the credit card used for recurring payment.

Pay Now – start an online payment.

Account Detail Tabs

- APs
- Disbursements
- Due Now
- Fees
- Mailings
- Pymt Schedule
- Policies
- Transaction History

AP's – details on the original and AP account(s)

Disbursements – funding details including amount, payee, and method.

Due Now – the contractual amount the insured legally owes under the PFA.

- You can also calculate a payoff.

Fees – details fees paid. Only available if eligible and Admin grants the user rights to view.

Mailings – lists correspondence sent to all parties on the account.

-  - Any item with this icon can be viewed, emailed, or downloaded.

Payment Schedule – current payment schedule and any payments made.

Policies – list policy information.

- Add or change policy numbers here.

Transaction History – record of all monetary transactions.

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