



AccountManager

Welcome to the NIPR Account Manager!

Via Account Manager, customers will now have the capability to:

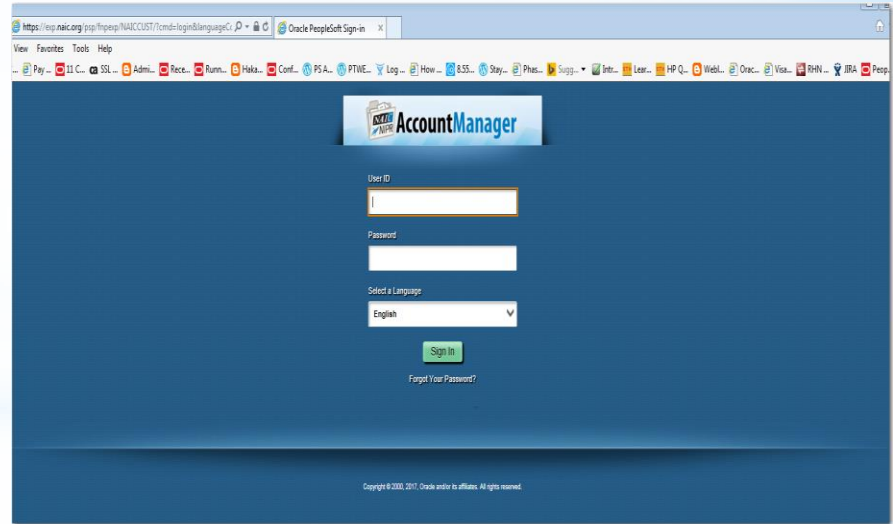
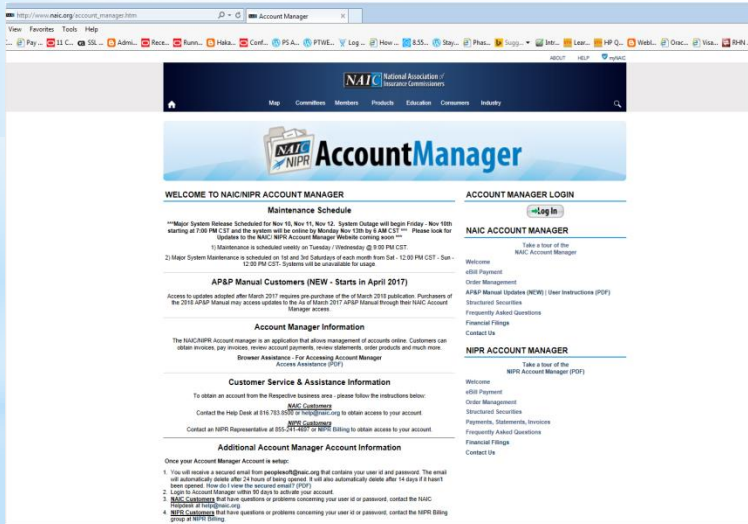
- Pay Invoices online via Credit card (up to \$2500) or via Customer Initiated ACH
- Review Invoices and Email copies of Invoices
- Review Monthly Statements of Account
- Validate payment posting
- Communicate to NIPR Billing staff via the online system

We encourage you to take a Tour of Account Manager and to see what it can provide for your Company today!



AccountManager

Upon receipt of the NIPR Account Manager secure email, customers will make their way to the http://www.naic.org/account_manager.htm web site. The web site will host a listing of information from whom to contact for an account to frequently asked questions. The Account Manager website will provide a “Login Button” when clicked that will access the login page to the Account Manager interface. On this page please enter the User ID and password provided and follow the instructions to access the account manager interface, reset the password provided and begin to utilize the system for associated customer accounts.





AccountManager

Upon login to the system the new interface for E-Bill Payment will be the landing page for the Customer/Contact. The screen now has tiles that will allow the customer to Switch Customers if there are more than one “customer id(s)” associated to their user access, access Invoices / Payment History / Account Balance and more from one area.

The screenshot displays the Oracle eBill Payment Account Manager interface. The top navigation bar includes the Oracle logo, the text "eBill Payment", and icons for home, flags, and user profile. The main content area is a grid of tiles:

- Invoices**: Tile with the Oracle Peoplesoft logo.
- Account Balance**: Tile with the Oracle Peoplesoft logo.
- Customer Selection**: Tile with the Oracle Peoplesoft logo.
- Pending Payments**: Tile with an icon of a stack of money and a clock.
- Payment History**: Tile with an icon of a stack of money and a calendar.
- Contact Us**: Tile with an icon of a telephone handset and an envelope.
- Account Settings**: Tile with an icon of a person and a gear.



AccountManager

Navigating the new Account Manager Interface



Home button - Use to return to the default homepage, which is the fluid homepage the user arrives at immediately upon sign-on.



Notifications button - Displays the notification window showing any pending actions or alerts.



Actions List button - Use to display the actions menu based on the page you're viewing. Allows user to add/customize home pages and the navigation bar.

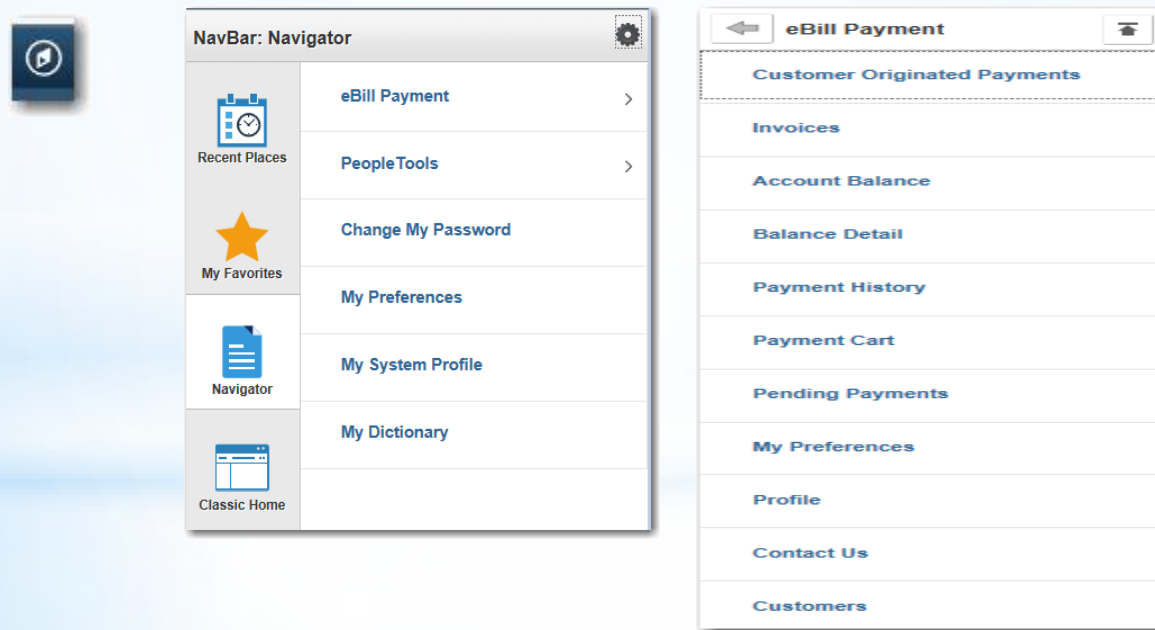


Navigation bar button (compass). -Use to display the navigation bar ("NavBar"). Access additional navigational options.



Navigator Bar (compass)

The NavBar - Navigator will provide the user with options to access the e-Bill Payment options via Navigation or via the “Classic Home interface.





AccountManager

Customer Originated ACH Payments will allow the control of payments that were previously selected for payment via ACH.

- If for some reason a payment is unable to be processed in ACH format - simply unlock the payment via the Customer Originated Payment screen to allow payment via Credit Card or Check
- Review the Status of a ACH payment to see if it has been received and posted
- Review the Transaction ID to identify what Invoices were associated to the payment

NavBar: Navigator

Recent Places

eBill Payment

Customer Originated Payments

Naic Cach Review

Customer Originated ACH Payments Information

OneBeacon Ins Group - ME

Customers can see items that have been selected for Customer Originated Payment processing via ACH and the current status of the transaction set. If for any reason a customer needs to unlock a transaction set to pay via another method - Click on the "Unlock" option next to the transaction id.

Note: This will cancel all invoice payment(s) for the associated transaction id and will require a new transaction id to be created if Customer Originated ACH is selected for these invoices again.

Personalize | Find | View All | First 1 of 1 Last

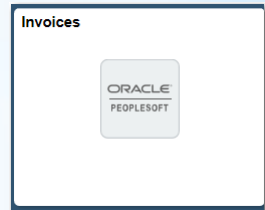
Transaction ID	Customer ID	eBill Payment Date	Amount	ACH Status	Unlock	Details
1 CIP0000138	00021030	05/10/2013	660.000	Completed	Unlock	Details



AccountManager

Invoices

- Search for existing invoices that have been paid or are outstanding
- Current Invoices will appear on panel
- Click on Invoice Search to search for specific invoice or to search by date or invoice ID



Navigation: Favorites ▾ Main Menu ▾ > eBill Payment > Invoices

Invoices

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Select the Invoice you wish to view.
If the invoice you are looking for does not appear in the list below, click on the Invoice Search link to change your search criteria.

[Invoice Search](#)

Invoice List

Select	Invoice	Invoice Date	Due Date	Pay Method	Invoice Amount	
<input type="checkbox"/>	NP18089152	01/31/2018	03/02/2018	Check	400	
<input type="checkbox"/>	NP18088196	12/31/2017	01/30/2018	Check	400	
<input type="checkbox"/>	NP17087081	11/30/2017	12/30/2017	Check	400	
<input type="checkbox"/>	NP17085871	10/31/2017	11/30/2017	Check	400.00	0.00 USD
<input type="checkbox"/>	NP17084904	09/30/2017	10/30/2017	Check	500.00	0.00 USD
<input type="checkbox"/>	NP17083800	08/31/2017	09/30/2017	Check	401.29	0.00 USD
<input type="checkbox"/>	NP17082566	07/31/2017	08/30/2017	Check	450.00	0.00 USD
<input type="checkbox"/>	NP17081375	06/30/2017	07/30/2017	Check	400.00	0.00 USD
<input type="checkbox"/>	NP17080107	05/31/2017	06/30/2017	Check	401.29	0.00 USD

[Invoice Details](#)

[Email Selected Invoices](#)

Invoices Invoice Search

Enter search criteria and click on Search. Leave blank for all values.
You can preset Search Defaults in My Preferences.

Search Criteria ?

Invoice

From Invoice Date (example: 12/31/2000)

To Invoice Date (example: 12/31/2000)

From Amount

To Amount

Paid Status

Sort By



AccountManager

Via the Balance Detail Screen the customer

- Review invoice item status and details
- Determine what Invoice items can be selected for payment
- Select more than one invoice for payment
- Drill into the detail of Invoice
- Retrieve the Invoice and see invoice activity

NavBar: Navigator

Recent Places

My Favorites

eBill Payment

Customer Originated Payments

Invoices

Account Balance

Balance Detail

Navigator

Favorites ▾ Main Menu ▾ > eBill

Balance Detail

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Select the invoice you wish to view.

If the invoice you are looking for does not appear

Invoice Search

Balance Detail ?

Invoice	Type
<input checked="" type="checkbox"/> NP18089152	Debit Memo NIPR Net 30

Select All Deselect All

Add to Cart

Return to Home Page

Balance Detail

Invoice Detail

Invoice NP18089152
Invoice Status Open
Invoice Balance 400.00 Currency USD
Type Debit Memo NIPR
Due Date 03/02/2018
Division NATL INS PRODUCER REGISTRY
Customer OneBeacon Ins Group - ME
Payment Terms Net 30
Payment Method Check
Dispute Reason
Collection Code
Deduction Reason:

Show Invoice Summary

Invoice Activity

Accounting Date	Type	Amount	Currency
01/31/2018	Debit Memo NIPR	400.00	USD

Add to Cart

Return to Balance Detail

Invoices

Invoice Summary

Invoice NP18089152

Invoice Summary ?

Invoice Date	Due Date	Current Balance
01/31/2018	03/02/2018	400.00 USD

Invoice Details

Line	Description	Quantity	UOM	Unit Price	Discount/Surcharge	Tax Amount	Total Amount
1	Company Specialized Report fo	8.00		50.00	0.00	0.00	400.00
Subtotal							400.00
Total Discounts							0.00
Total Surcharges							0.00
Net Extended Amount							400.00
Total Sales/Use Tax							0.00
Total Invoice Amount							400.00

Have a question about this Invoice? Call 855-241-4697.

Add to Cart

Return to Balance Detail Email Invoice Copy



AccountManager

Via the Payment Cart

- Select to pay items(Invoices) via Credit Card or Customer Originated ACH
- Credit Card Payments will be accepted up to \$1000 dollars
- Pay for multiple Billing invoices

Favorites ▾ Main Menu ▾ > eBill Payment ▾ > Payment Cart

Payment Cart [Contact Us](#)

The invoices shown are currently in your Payment Cart. Please note that your changes may not be saved until you click on the Update Cart button. When you select Make Payment, the selected invoices will be paid.

*Payment Method **Credit Card** ▾

Invoices in the Cart

Pay	Invoice	Due Date	Invoice Balance	Remaining Balance	Payment Date	Payment Amount Currency	Remove
<input checked="" type="checkbox"/>	NP18089152	03/02/2018	400.00	400.00	02/12/2018	400.00 USD	

Select All Deselect All

▼ Totals

Count	Selected	Invoice Balance	Remaining Balance	Payment Date	Payment Amount Currency
1	1	400.00	400.00	02/12/2018	400.00 USD

Return to Menu

* Required Field

NavBar: Navigator

← eBill Payment

- Recent Places
- My Favorites
- Navigator
- Classic Home

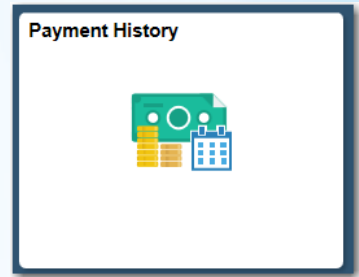
- eBill Payment
- Customer Originated Payments
- Invoices
- Account Balance
- Balance Detail
- Payment History
- Payment Cart**



AccountManager

Review Payment History

- See the Payment ID and methods and when the payment was applied and received
- Drill into the payment to see what items (invoices) were tied to the payment
- Add a message to a Payment
- Or Search for a specific payment



Payment History

OneBeacon Ins Group - ME

Payment History 236 rows

Payment ID	Amount	Currency	Date Received	Date Applied	Payment Method
90824	400.00	USD	02/01/2018	02/02/2018	Check
90109	400.00	USD	01/08/2018	01/09/2018	Check
89701	400.00	USD			
89441	500.00	USD			

Message Center

OneBeacon Ins Group - ME

Payment ID 90824

Messages

Add New Message

No messages found

06/05/2017 06/06/2017

05/01/2017 05/02/2017

04/07/2017 04/10/2017

Payment Detail

Payment ID 90824

Payment Method Check

Payment Amount 400.00 USD

Date Received 02/01/2018

Date Applied 02/02/2018

Payment Activity

Customer Name	Invoice / Line	Activity Type	Amount	Currency
OneBeacon Ins Group - ME	NP18088196	Payment	-400.00	USD

Filters

Payment Date

From 01/01/1997

To

Select a date range no earlier than 1/1/1997

Other Filters

Payment ID

Payment Method

From Amount

To Amount

Currency

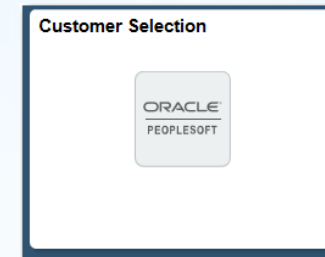
Reset



AccountManager

Customers

- For accounts that may have more than one customer ID assigned to them, customers can switch between accounts and manage all customers in one place



Navigation: Favorites ▾ Main Menu ▾ > eBill Payment > Customers

Customers

Walsh, Donna is currently representing: 00021030 - OneBeacon Ins Group - ME.

Select the billing customer you wish to represent.

Customer ID	Customer Name	Phone Number	Address
00021030	OneBeacon Ins Group - ME		
00020747	OneBeacon Insurance - INACTIVE		1 Constitution Way # Fe1-12, Foxboro, MA, 02035-2661, USA

Customer Selection Confirmation

You are now representing 00021030 - OneBeacon Ins Group - ME.

[Help](#)