



# AccountManager

Welcome to the NIPR Account Manager!

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

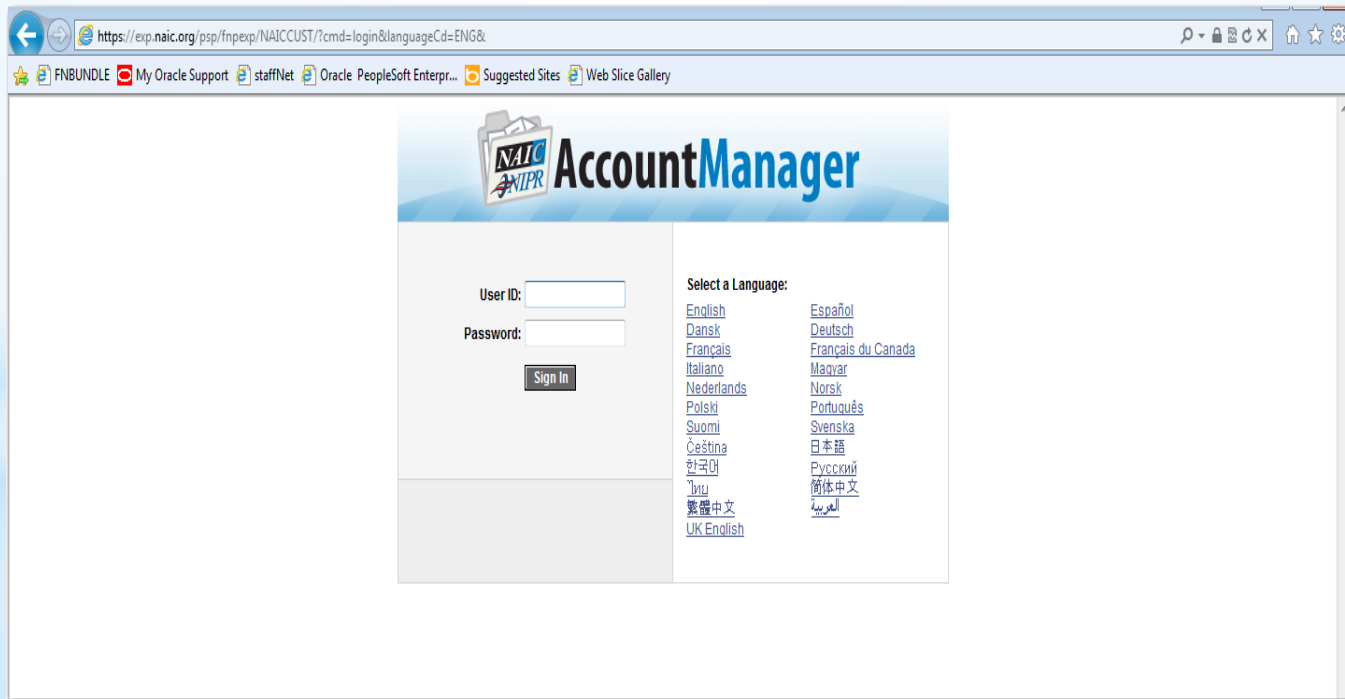
- Pay Invoices online via Credit card (up to \$2500) or via Customer Initiated ACH
- Review Invoices and Email copies of Invoices
- Review Monthly Statements of Account
- Validate payment posting
- Communicate to NIPR Billing staff via the online system

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](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.



The screenshot shows a web browser window displaying the NAIC Account Manager login page. The browser's address bar shows the URL: <https://exp.naic.org/psp/fnpexp/NAICCUSTOM?cmd=login&languageCd=ENG&>. The page features the NAIC Account Manager logo at the top. Below the logo, there is a login form with the following elements:

- User ID:
- Password:
- Sign In button
- Select a Language:
  - [English](#)
  - [Español](#)
  - [Dansk](#)
  - [Deutsch](#)
  - [Français](#)
  - [Français du Canada](#)
  - [Italiano](#)
  - [Magyar](#)
  - [Nederlands](#)
  - [Norsk](#)
  - [Polski](#)
  - [Português](#)
  - [Suomi](#)
  - [Svenska](#)
  - [Čeština](#)
  - [日本語](#)
  - [한국어](#)
  - [Русский](#)
  - [ไทย](#)
  - [繁體中文](#)
  - [简体中文](#)
  - [UK English](#)
  - [العربية](#)



# AccountManager

Upon login to the system the most recent Bills (Invoices) and Account Balances will be shown as well as the Customer account being accessed

Most Recent Bills(Invoices) -  
Billing information shows all  
bills paid and unpaid

Account Balance and  
Customer Information

The screenshot displays the Oracle AccountManager interface. On the left is a 'Menu - Classic' sidebar with a search field and navigation links for 'eBill Payment', 'Contact Assistance', and 'Account Management'. The main content area is divided into three panels:

- Most Recent Bills:** A table showing bills for 'OneBeacon Ins Group - MA'. The table has columns for 'Invoice', 'Item Balance', and 'Currency'. The data rows are as follows:

Invoice	Item Balance	Currency
<a href="#">NP08037495</a>	0.00	USD
<a href="#">NP08036305</a>	0.00	USD
<a href="#">NP08035098</a>	0.00	USD
<a href="#">NP0710482</a>	0.00	USD
<a href="#">NP0706480</a>	0.00	USD

A 'View All Bills' link is located below the table.
- Account Balance:** A section titled 'Account Balance' for 'OneBeacon Ins Group - MA' with the message 'No account balance information.'
- NIPR Customer Relations:** A section titled 'NIPR Customer Relations' with the sub-heading 'Customer Relations Assistance'. It provides contact information: 'Phone Number: 855-241-4697' and 'Email Address: [NIPR Billing Department](#)'.



# AccountManager

Via the menus located in Account Manager the customer can

- Review Customer Originated Payments - or ACH
- Review Bills(Invoices) and obtain copies of invoices via the Bills link
- Obtain an overview of the Account Balance
- Retrieve Customer Statements
- Access the payment cart for to pay Invoices that have been selected
- Review Payment History
- And Switch Customer access if more than one customer is assigned to the Account via the Customer Link

The screenshot displays the Oracle Account Manager interface. At the top, the Oracle logo is on the left, and 'Home' and 'Sign out' links are on the right. Below the header, there are navigation links for 'Favorites' and 'Main Menu'. The main content area is divided into three panels:

- Menu - Classic:** A sidebar menu with a search field and a list of options including 'eBill Payment', 'Customer Originated Payments', 'Bills', 'Balance Detail', 'Account Balance', 'Company Statements', 'Payment Cart', 'Payment History', 'Customers', 'Contact Assistance', and 'Account Management'.
- Most Recent Bills:** A table showing bills for 'OneBeacon Ins Group - MA'. The table has columns for 'Invoice', 'Item Balance', and 'Currency'.

Invoice	Item Balance	Currency
<a href="#">NP08037495</a>	0.00	USD
<a href="#">NP08036305</a>	0.00	USD
<a href="#">NP08035098</a>	0.00	USD
<a href="#">NP0710482</a>	0.00	USD
<a href="#">NP0706480</a>	0.00	USD

A 'View All Bills' link is located below the table.
- Account Balance:** A panel showing 'OneBeacon Ins Group - MA' with the message 'No account balance information.' Below this is the 'NIPR Customer Relations' section, which includes 'Customer Relations Assistance', 'Phone Number: 855-241-4697', and 'Email Address: [NIPR Billing Department](#)'.



# 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 Current Bills(Invoices) were associated to the payment

CRALL

Favorites | Main Menu > eBill Payment > Customer Originated Payments

Naic Cash Review

### Customer Originated ACH Payments Information

Torus US Services Inc

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.

Transaction ID	Customer ID	eBill Payment Date	Amount	ACH Status	Unlock	Details
1 CIP0000023	00033439	07/26/2012	1230.660	Cancelled	<input type="button" value="Unlock"/>	<input type="button" value="Details"/>
2 CIP0000030	00033439	10/26/2012	1230.660	Completed	<input type="button" value="Unlock"/>	<input type="button" value="Details"/>

Personalize | Find | View All | First 1-2 of 2 Last



# AccountManager

## Bills

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

The screenshot displays the AccountManager interface. The main panel shows a list of bills for Torus US Services Inc. A 'Bill Search' dialog box is open, allowing users to search for specific invoices by date or amount.

**Bills**  
Torus US Services Inc  
Select the bill you wish to view.  
If the bill you are looking for does not appear in the list below, use [Bill Search](#)

Item Status	Invoice Number	Invoice Date	Due Date	Pay Method	Inv Am
Open	<a href="#">NP12095489</a>	06/30/2012	07/30/2012	Check	
Closed	<a href="#">NP12094318</a>	06/20/2012	07/20/2012	Credit Card	
Closed	<a href="#">NP12003693</a>	04/30/2012	05/30/2012	Check	1,23
Closed	<a href="#">NP12002595</a>	03/31/2012	04/30/2012	Check	7
Closed	<a href="#">NP12001424</a>	02/29/2012	03/30/2012	Check	2
Closed	<a href="#">NP12000395</a>	01/31/2012	03/01/2012	Check	4

**Bill 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:

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

Favorites | Main Menu > eBill Payment > Balance Detail

### Balance Detail

Torus US Services Inc

If the item you are looking for does not appear in the list below, use Click on Item ID to see item detail information.

Select	Item ID	Line	Type	Status	Deduction Flag
<input checked="" type="checkbox"/>	<a href="#">NP12095489</a>		D M NIPR	Open	<input type="checkbox"/>

[Select All](#)      [Deselect All](#)

[Add to Payment Cart](#)      [Add to Schedule Payment](#)

### Bills

#### Bill Summary

Invoice Number: NP12095489

Invoice Date	Due Date	Current Balance
06/30/2012	07/30/2012	12.90 USD
Subtotal:		12.90
Total Discounts:		0.00
Total Surcharges:		0.00
Net Extended Amount:		12.90
Total VAT Amount:		0.00
Total Sales/Use Tax:		0.00
Total Invoice Amount:		12.90

Have a question about this bill? Call (855)241-4697

Line	Description	Quantity	UOM	Unit Price	Disc / Surch	Tax Amount	Total Amount
1	<a href="#">PDB Hits for Account.1</a>	10.00		1.29	0.00	0.00	12.90

[Add to Payment Cart](#)

[Return to Balance Detail](#)      [Email Me an Invoice Copy](#)

Favorites | Main Menu > eBill Payment > Balance Detail

### Balance Detail

#### Item Detail

Torus US Services Inc

Item ID: NP12095489  
Item Status: Open  
Item Balance: 12.90      Currency: USD

Type: Debit Memo NIPR  
Due Date: 07/30/2012  
Division: NATL INS PRODUCER REGISTRY  
Customer: Torus US Services Inc  
Payment Terms: NET30  
Check



# AccountManager

Company statements are now accessible inside the NIPR Account Manager and can be pulled directly from the system as a PDF file

- Save the PDF locally to your machine
- View multiple statements
- Payment via the Statements

ORACLE

Favorites | Main Menu > eBill Payment > Company Statements

Statements

Torus US Services Inc

Select	Stmt Num	Statement Date	Attachments
<input type="checkbox"/>	1871	12/01/2012	
<input type="checkbox"/>	1870	12/01/2012	
<input type="checkbox"/>	1785	07/09/2012	





# 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 \$2500 dollars
- Pay for multiple Billing invoices

Balance Detail

### Payment Cart

The items shown below 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 items will be paid.

\*Payment Method:  (Dropdown menu with options: Credit Card, Customer Originated ACH)

Pay	Item ID	Line	Due Date	Item Balance	Currency	Error Status	Payment Amount	Reason	
<input checked="" type="checkbox"/>	NP12095489		07/30/2012	12.90	USD		12.90		

[Select All](#)   [Deselect All](#)

Currency	Total Count	Item Balance	Selected	Payment Amount
USD	1	12.90	1	12.90

Comments:

[Make Payment](#)

[Return to Balance Detail](#)



# 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
- Or Search for a specific payment

ORACLE

Favorites | Main Menu > eBill Payment > Payment History

### Payment History

Torus US Services Inc

If the payment you are looking for does not appear in the list below, use [Payment Search](#).

Click on Payment ID to see payment detail information.

Payment ID	Payment Method	Payment Applied	Date Received	Payment Amount	Currency
<a href="#">2JTXWS1630J3T</a>	Credit Card	Yes	12/17/2012		
<a href="#">2K8F4NRXYN14P</a>	Credit Card	Yes	12/17/2012		
<a href="#">CIP0000030</a>	Customer Initiated ACH	Yes	11/06/2012		
<a href="#">10183</a>	Check	Yes	05/14/2012		
<a href="#">10072</a>	Check	Yes	04/09/2012		
<a href="#">4118</a>	Check	Yes	03/09/2012		
<a href="#">3894</a>	Check	Yes	01/30/2012		

**Payment Search**

Torus US Services Inc

Please enter search criteria and click on Search. Blank search value means all values.

**Payment Search Options**

Payment ID:

Payment Applied:

From Date:

To Date:

From Amount:

To Amount:

Sort payments by:  \*Sort Order:

Payment Method:

**Payment Detail**

Torus US Services Inc

**Payment Detail**

Payment ID: 2K8F4NRXYN14P  
 Date Received: 12/17/2012  
 Payment Applied: Yes  
 Date Applied: 12/31/2012  
 Payment Amount: 16.77 Currency: USD

**Payment Activity**

Customer Name	Item ID	Activity Type	Entry Amount	Currency
Torus US Services Inc	<a href="#">NP12094318</a>	Payment	16.770	USD

[Return to Payment List](#)



# 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

Favorites | Main Menu > eBill Payment > Customers

### Customers

Hall, Bertha is currently representing: OneBeacon Ins Group - MA

Select the billing customer you wish to represent.

Customers	
00022189	<a href="#">OneBeacon Ins Group - MA</a>
00021030	<a href="#">OneBeacon Ins Group - ME</a>
00031530	<a href="#">OneBeacon Insurance Group</a>

Favorites | Main Menu > eBill Payment > Customers

### Customers

---

#### Selection Confirmation

✓ You are now representing OneBeacon Ins Group - ME