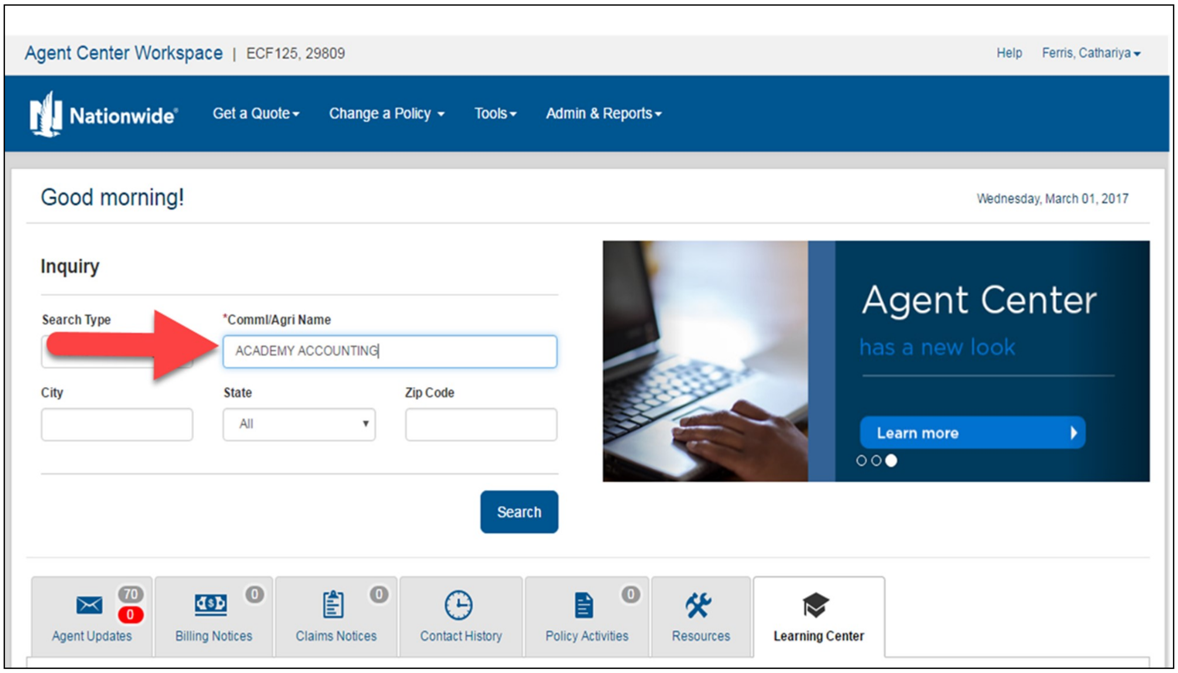
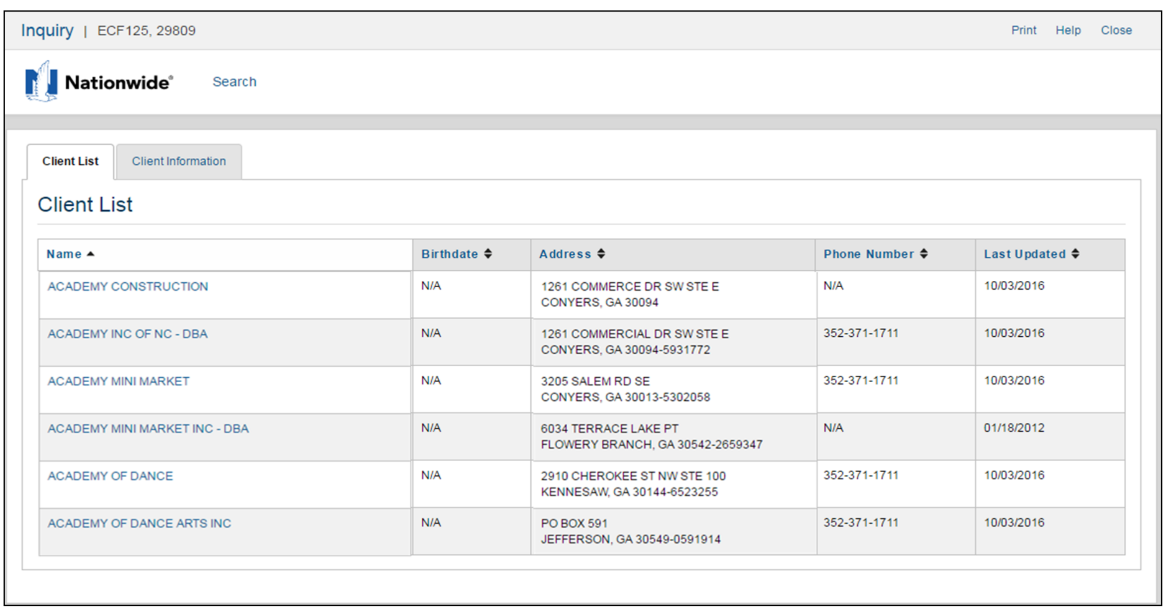
Search for a Billing Account

Quick Navigation

You can easily search for customers in the Inquiry section of your Workspace. Only clients in your own book of business will show up in the results section. You can narrow results by city, state, and zip code for common names.



Results will show clients within your book of business. Some customers may be listed twice if they have multiple named insureds.



Name ▲	Birthdate ⬍	Address ⬍	Phone Number ⬍	Last Updated ⬍
ACADEMY CONSTRUCTION	N/A	1261 COMMERCE DR SW STE E CONYERS, GA 30094	N/A	10/03/2016
ACADEMY INC OF NC - DBA	N/A	1261 COMMERCIAL DR SW STE E CONYERS, GA 30094-5931772	352-371-1711	10/03/2016
ACADEMY MINI MARKET	N/A	3205 SALEM RD SE CONYERS, GA 30013-5302058	352-371-1711	10/03/2016
ACADEMY MINI MARKET INC - DBA	N/A	6034 TERRACE LAKE PT FLOWERY BRANCH, GA 30542-2659347	N/A	01/18/2012
ACADEMY OF DANCE	N/A	2910 CHEROKEE ST NW STE 100 KENNESAW, GA 30144-6523255	352-371-1711	10/03/2016
ACADEMY OF DANCE ARTS INC	N/A	PO BOX 591 JEFFERSON, GA 30549-0591914	352-371-1711	10/03/2016

Client at a Glance

This page will show you:

1. Active client names
2. List of active and expired policies. Clicking on the blue hyperlink for the active policy will take you into Policy Viewer
3. List of billing accounts. Clicking in the blue account number will take you into their billing account summary
4. The right hand side of the page has a column called “actions” The black square will take you into the policy’s document vault where you can upload documents to the policy, or see what documents have already been attached to the policy file.
5. To view the customer’s billing screens, select the Billing Account Number.