



## TRANSACTIONS TAB IN TRIDENT –

AGENT USERS CAN SEE PAYMENT AND REFUND DATA FOR POLICIES

NOVEMBER 2022

# TRANSACTIONS TAB IN TRIDENT

Overview:

A new tab is added to the policy details page called “Transactions”. The transactions tab in trident provides the payment and refund data for issued transactions.

The account tab will still be visible to the underwriter users; and will still assist underwriters in understanding incoming payments for transactions that have not been issued.

The transactions tab appears ONLY on the policy details page.

<b>ACCOUNT TAB</b>	<b>TRANSACTIONS TAB **New**</b>
Visible to underwriters only. Agents cannot see this tab	Visible to agent users and underwriter users
Shows payments incoming into Trident for transactions that have not been issued.	Shows payment data for transactions issued. This is the data that underwriters currently view in “Current Account” in policy master.
Does not show refund data	Provides all users into data about issued refunds.
Does not show historic payment data.	Shows all current account data for all policy terms, displaying the newest on top. This allows you to see current and historic transaction details.

# TRANSACTION TAB IS ADDED TO THE POLICY DETAILS PAGE

**Policy Management**  [+ Create Quote](#) [Rollover Policy](#) [?](#) [🗨](#) [👤](#)

**POLICY #8706248433**  
738 ROWAN DR,  
NASHVILLE, TN, 37207-3521

[File Claim](#) [Cancel](#) [Endorse](#)

[Summary](#) [Notes](#) [Documents](#) [Claims](#) [Transaction](#)

**In-force** Mar 25, 2022 – Mar 25, 2023 [View Policy Periods](#) [Open this policy in FloodPro 1.0](#)

### OVERVIEW





Rating Method Standard	Policy Form Dwelling <a href="#">🔗</a>	Policy Declaration —	Premium Amount <b>\$0</b> <a href="#">↓</a>		
Insured By Kimeo Smith <a href="#">i</a>	Property Address 738 ROWAN DR NASHVILLE, TN, 37207-3521		Building	Coverage	Deductible
			Content	\$80,000	\$1,500
				\$5,000	\$1,500

### INSURED CONTACT INFORMATION

Insured Contact CAROLYN JOHNSON (615) 569-3513	Insured Mailing Address Same as Property Address
--	---

### PROPERTY DETAILS [?](#)

# TRANSACTION TAB IS ADDED TO THE POLICY DETAILS PAGE

 Policy Management  [+ Create Quote](#) [Rollover Policy](#)   

**POLICY #8706248433**  
738 ROWAN DR,  
NASHVILLE, TN, 37207-3521

[File Claim](#) [Cancel](#) [Endorse](#)

[Summary](#) [Notes](#) [Documents](#) [Claims](#) [Transaction](#)

### TRANSACTION HISTORY

Date Processed	Event	Payee	Payee Name	Amount	Receipt Date	Certified Date	Check #/Remittance ID
09/12/2022	CANCEL REFUND			\$491.00			400207092
03/08/2022	CHECK PAYMENT	Other	DOVENMUEHLE MORTGAGE INC	\$1,334.00	03/07/2022	03/08/2022	0006096463
03/08/2022	RENEWAL WRITTEN			\$1,334.00			
02/25/2020	CHECK PAYMENT	Mortgagee	WELLS FARGO BANK NA 708	\$758.00	02/24/2020	02/24/2020	7036629670
02/25/2020	NEW BUSINESS WRITTEN			\$758.00			

Rows per page: 100 1-5 of 5

Copyright © National Flood Services LLC 2022. All rights reserved.

# KEY TO UNDERSTANDING TRANSACTION TAB

1	2	3	4	5	6	7	8
Date Processed	Event	Payee	Payee Name	Amount	Receipt Date	Certified Date	Check #/Remittance ID
09/12/2022	CANCEL REFUND			\$491.00			400207092
03/08/2022	CHECK PAYMENT	Other	DOVENMUEHLE MORTGAGE INC	\$1,334.00	03/07/2022	03/08/2022	0006096463
03/08/2022	RENEWAL WRITTEN			\$1,334.00			
02/25/2020	CHECK PAYMENT	Mortgagee	WELLS FARGO BANK NA 708	\$758.00	02/24/2020	02/24/2020	7036629670
02/25/2020	NEW BUSINESS WRITTEN			\$758.00			

1. Date payment entered the system.
2. Describes the type of transaction. Note that “check payment” means we received a check. Electronic payment means that we received a payment via pay.gov
3. Payee describes the entity of the party or person that made the payment.
4. Payee name is the name of the person or party that made the payment.
5. The amount is the amount of the payment, written transaction, or refund amount.
6. Receipt date is the “received date” for payments; and may be different than the date the payment entered the system.
7. Certified date is the certified cash receipt date that may apply to the payment
8. Check # / Remittance id provides the check number of an incoming payment, remittance id for a pay.gov payment, or check number of an outgoing refund check.

# REFUND DETAIL

If the event is a refund or cancellation refund, the check number is a working link that you can click to view details about the outgoing check.

NOTE: if the check has not been issued by accounting; the check number will not be available.

Event	Payee	Payee Name	Amount	Receipt Date	Certified Date	Check # / Remittance ID
CANCEL REFUND						<a href="#">400207092</a>
CHECK PAYMENT	Other			03/07/2022	03/08/2022	0006096463
RENEWAL WRITTEN						
CHECK PAYMENT	Mortgagee			02/24/2020	02/24/2020	7036629670
NEW BUSINESS WRITTEN						

### Cancel Refund Details

CHECK # / REMITTANCE ID (400207092) 09/12/2022

Check Payable to: JOHNSON, CAROLYN	Mailing Address 738 ROWAN DR, NASHVILLE, TN, 37207 3521	Refund Amount \$491.00
---------------------------------------	---	---------------------------

Close

Rows per page: 100 1-5 of 5