

Avalara Portal Update:

Account Overview

We have exciting news. The **Account Overview** page in the Avalara Portal has been redesigned to help with billing and invoices.

With an improved layout, better navigation, and enhanced visualizations, our new centralized workspace makes it easier for you to track usage, manage billing, and stay on top of invoices.

What's new?

A more intuitive layout:

- The **Account > Overview** tab is now consolidated into a single Account Overview screen for a cleaner, more organized experience.
- The page layout is more spacious, giving key data room to breathe and making it easier to scan and interpret.

Bringing the most important data into view:

- **Usage data:** Customers no longer need to dig around for this—it's now front and center.
- **New visualizations:** The first thing customers will see is a sleek gauge visualization that clearly distinguishes between usage within parameters and excess usage.
- **Transaction usage detail filters and downloads:** Customers can now filter and create their own customized usage reports for download on demand.

Smarter organization for billing and payments:

To reduce visual clutter, we consolidated [Open invoices](#), **Paid invoices**, **Subscriptions**, and **Payment methods** in a single “**Current Balance**” card.

- **Invoices:** We've made it easier to manage and [review open invoices](#).
- **Billing contact:** We've surfaced the billing contact for customer visibility.
- **Payments:** It's now easier to [add a bank](#), [add a payment type](#), change [default payment options](#), and [set up automatic payments](#).

Better navigation and simplified account management:

- **Breadcrumb trail:** Navigating back to Account Overview is simple

- **User and company management:** We've unbundled Account user management and AvaTax company management, making them directly accessible from the Account Overview screen.

To discover added features and tools and explore new usage details, log in to the **Avalara Portal** and navigate to **Account Overview**.

For technical assistance, reach out to us by completing a [Support Team ticket](#).

Thank you for choosing Avalara.