**Steps to trigger different types of Billing forms and letters**

**Normal Invoice Letter**

1. Create a policy by suppressing the payment in Policy(also include scenario where you make some payment while issuance).
2. Open the same policy in Billing.
3. Navigate to the “Installment Schedule” page and check the “Install Date” for the active invoice.
4. Move the system date to the “Install Date” of the active invoice(Or you can create a backdated policy incase you don’t want to change system dates).
5. Check the “Account Documents” tab on the next day of the “Install Date”.
6. The invoice pdf should be present.

**Account Breakdown Letter**

1. Create a policy and make some payment in the policy.
2. Open the same policy in Billing.
3. From the left hand side navigation pane navigate to the “Form Letters” screen.
4. In that screen select “Form Type” as “Account Breakdown Letter” and click on “Go”.
5. In the screen that comes up give the “Start Date” and “End Date” and then on “Go”.
6. In the next screen that comes up click on “Create Letter”.
7. On the same screen if you click on “View Letter” the pdf form of letter will open.
8. Else if you had clicked on create letter then the letter should be present in the “Account Documents” tab.

**Debit change notice letter**

1. Create a new Business policy by suppressing the payment in policy.
2. Open the same policy in Billing.
3. Navigate to the “Installment Schedule” screen and check the “Install Date” of the active invoice.
4. Once the system date crosses the “Install Date” and before the “Due Date” change the “Due Date” by navigating to the “Account Settings” screen.
5. The form will also be generating if you change the payment plan in Billing, payment plan & due date change both or only due date change.
6. The document can be found at the by clicking a link on the line item that will be generated in Billing Dashboard due to the change or even in the Account Document screen.

**Reminder Notice (PSIC R4 – Reminder)**

1. Create a new business policy in Policy.
2. When the policy comes up for renewal we know that 60 days before the renewal effective date the renewal is scheduled.
3. Do not make any payment for the renewal premium within these 60 days.
4. On the renewal effective date the renewed policy becomes effective in the system.
5. On the next day of the renewal effective date if the payment for the renewal premium is still not received the “Reminder Notice” for renewal will be generated.

**Credit Card Transaction Detail- RN**

1. Create a new Business policy with a Credit card associated with it for recurring payments.
2. When the policy comes up for renewal we know that 60 days before the renewal effective date the renewal is scheduled.
3. Within these 60 days make 2 attempts on 2 separate days or on the same day to pay the renewal premium through the already attached credit card.
4. Both the attempts should fail due to the reasons “Credit Card is expired”, “Insufficient funds” or “Change/Replacement of a card”.
5. When the second attempt fails the required document will be generated.

**Automatic payment notice (Credit card/EFT)**

1. Create a new business policy in Policy with recurring payment option for Credit card or EFT.
2. When the policy comes up for renewal we know that 60 days before the renewal effective date the renewal is scheduled.
3. Exactly on the day the renewal is scheduled and the renewed policy shows in Billing the automatic payment notice will be generated in Billing.

**Credit card payment receipt**

1. Create a new business policy by paying part of the premium as down payment through cash.
2. Then open the same policy in Billing and pay rest of the premium through a credit card.
3. Once the credit card payment is posted to the Billing dashboard the credit card payment receipt should be available in the documents tab.

**PSIC - Invoice EFT-CC**

1. Create a new Business policy and make the down payment in policy with a credit card and set up the credit card for recurring payments for future invoices.
2. Move the system date to the next invoice date.
3. The EFT/CC invoice document will be generated on that day.

**PSIC - RN Invoice-Letter**

1. Create a new business policy.
2. Renew the created policy and don’t make the down payment in policy application.
3. Move the system date to the invoice date of the first invoice if required.
4. The renewal invoice letter will be generated on that day.

**PSCI - CC Refund Letter**

1. Create a new business policy.
2. Make any payment with a credit card either in policy(as down payment) or in Billing.
3. Then do any transaction for which you will be eligible for a refund (eg – prorata cancellation , debit endorsement, payment reversal etc).
4. The money will be refunded to the Credit Card with which payment was made and the refund letter will be generated.