Lesson 7   Sending Invoices

7.1   Prerequisites

For this Exercise, use:

- In a supported browser go to the BillingCenter URL
  - ○   Username: **studentXX**
  - ○   Password: **gw**

This exercise builds on the policy entered in the *Create and test a payment plan* exercise from the **Administering Charge Invoicing** lesson. If you have not completed this exercise, please do so before starting this exercise.

7.2   Exercise: Bill an invoice

Activity

In this exercise, you continue working with the policy that you created in the previous exercise.

1.   <u>WAIT:</u> **The Instructor will make the first invoice billed.**

2.   **Go to the Invoices screen for the Sunita Singh <u>XX</u> account.**

   a)   What is the status of the remaining invoices?
   b)   Do any of the invoices have an invoice fee? If so, where is the fee specified?
   c)   Was a payment request created? If so, when did this happen and why?
   d)   Indicate to the instructor that you are ready to continue (0**7.1.2**)

3.   <u>WAIT:</u> **The instructor will advance the clock to the due date of the first invoice.**

   a)   Go to the Account Summary screen. What has changed?
   a)   Indicate to the instructor that you are ready to continue (0**7.1.3**)

4.   <u>WAIT:</u> **The instructor will run the Invoice Due batch process.**

   a)   On the Invoices screen, has the status of the first invoice changed to **Due**? If not, why not?
   b)   Indicate to the instructor that you are ready to continue (0**7.1.4**)

5.   <u>WAIT:</u> **The instructor will make the first invoice due.**

   a)   On the **Account Summary** and **Policy Summary** screens, what alerts you that a payment is past due?

7.3 Solution

Solution

1. <u>WAIT:</u> **The instructor will make the first invoice billed. –** *See Appendix for instructions*

2. **Go to the Invoices screen for the Sunita Singh <u>XX</u> account.**

   a) What is the status of the remaining invoices? *Planned*

   b) Do any of the invoices have an invoice fee? If so, where is the fee specified? *Yes, the first invoice has an invoice fee of $2. This fee is defined on the billing plan (BP02) used by this account.*

   c) Was a payment request created? If so, when did this happen and why? *Yes. The Invoice batch process created the payment request because the account has a nonresponsive payment instrument.*

   d) Indicate to the Instructor that you are ready to continue (**07,1,2**)

3. <u>WAIT:</u> **The instructor will advance the clock to the due date of the first invoice. –** *See Appendix for instructions*

   a) Go to the **Account Summary** screen. What has changed? *An alert warns the account will become delinquent if the expected payment is not received by a certain date.*

   b) Indicate to the Instructor that you are ready to continue (**07,1,3**)

4. <u>WAIT:</u> **The instructor will run the Invoice Due batch process*. –** *See Appendix for instructions*

   a) Has the status of the first invoice changed to Due? If not, why not*? The status has not changed because the status of a billed invoice to Due one day after the due date.*

   b) Indicate to the Instructor that you are ready to continue (**07,1,4**)

5. <u>WAIT:</u> **The instructor will make the first invoice due. –** *See Appendix for instructions*

   a) On the **Account Summary** and **Policy Summary** screens, what alerts you that a payment is past due? *There are several indicators that the account and policy are delinquent: A delinquency alert appears on the Infobar. On both screens, the Delinquencies field states that there has been 1 delinquency in 12 months. A red clock appears next to the past due amount on both screens. On the Account Summary, the red clock also appears next to the policy, which is listed at the bottom of the screen.*