

Lesson 4 Billing at Account Level

4.1 Prerequisites

For this exercise:

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

4.2 Exercise: Modify bill dates



Activity

In this exercise, you add two policies to an account that uses account-level billing. Then you play the part of a Billing Clerk responding to questions and a request from the policyholder.

1. Open the Christian Piquenit XX account.

- a) Does the account use policy or account-level billing?
- b) How do you know?

2. Add two policies to the Christian Piquenit XX account with the following details:

Policy 1

- Policy #: CA01-CPIGUENIT-XX
- Product: Business Auto
- Payment Plan: PP02
- Charges: Premium for \$5000; Taxes for \$490

Policy 2

- Policy #: BO01-CPIGUENIT-XX
- Product: Business Owners
- Payment Plan: PP10
- Charges: Premium for \$6200; Taxes for \$660

3. Answer the following questions about the policy invoicing:

- a) Where is the payment interval for a policy specified?

- b) What are the payment intervals for the two policies?
 - c) How many invoice streams have been generated?
 - d) What is the **Default Day of Month** for the **Monthly** invoice stream?
 - e) Where does this setting come from?
 - f) Indicate to the Instructor that you are ready to continue. (4.1.3)
4. **WAIT: The instructor will make the first invoice billed.**
 5. **Pretend that you are a customer service representative taking a call from Christian Piguénit XX. Respond to the following questions and requests from the policyholder:**
 - a) When is my next invoice due? Is it for both policies or only one policy?
 - b) I would prefer to be billed later each month. Please change my billing date to the 18th of the month.
 - c) Will this month's invoice be billed on the 18th?
 6. **Fully pay the billed invoice.**
 - a) On the **Direct Bill Payment** screen, what do you notice about the **Use Unapplied Fund Amount** field?

4.3 Solution



Solution

1. **Open the Christian Piguénit XX account.**
 - a) Does the account use policy or account-level billing? *Account level*
 - b) How do you know? *On the Account Details screen, the Billing Level setting is Account*

Billing Level Settings	
Billing Level	Account-Level Billing
Cash Separation	Disabled

2. **Add two policies to the Christian Piguénit XX account with the following details:**

Policy 1

- Policy #: CA01-CPIGUENIT-XX
- Product: Business Auto
- Payment Plan: PP02
- Charges: Premium for \$5000; Taxes for \$490

Policy 2

- Policy #: BO01-CPIGUENIT-XX
- Product: Business Owners
- Payment Plan: PP10
- Charges: Premium for \$6200; Taxes for \$660

3. Answer the following questions about the policy invoicing:

- Where is the payment interval for a policy specified? *The payment plan*
- What are the payment intervals for the two policies? *CA01-CPIGUENIT-XX is every month; BO01-CPIGUENIT-XX is every other month*
- How many invoice streams have been generated? *One (Monthly)*
- What is the **Default Day of Month** for the **Monthly** invoice stream? *8*
- Where does this setting come from? *On the Account Details, the Monthly Policies: Day of Month*
- Indicate to the Instructor that you are ready to continue. **(4.1.3)**

4. **WAIT:** The instructor will make the first invoice billed. See Appendix

5. Pretend that you are a customer service representative taking a call from Christian Piguénit XX. Respond to the following questions and requests from the policyholder:

- When is my next invoice due? *<bill date of the second invoice>*
- Is it for both policies or only one policy? *both*
- I would prefer to be billed later each month. Please change my billing date to the 18th of the month. *On **Account Details** screen, click **Edit**. Change the Monthly Policies: Day of Month to 18. Click **Update**.*
- Will this month's invoice be billed on the 18th? *No, only the planned invoices are changed*

Invoices								
Invoice Stream		All		Create New Invoice		Delete Invoice		
<input type="checkbox"/>	Bill Date	Due Date	Invoice Number	Ad Hoc	Status	Amount	Due	Invoice Stream
<input checked="" type="checkbox"/>	12/08/2018	12/29/2018	1000000110	No	Billed	\$4,130.00	\$4,130.00	Monthly
<input type="checkbox"/>	01/18/2019	02/08/2019	1000000120	No	Planned	\$1,244.00	\$1,244.00	Monthly
<input type="checkbox"/>	02/18/2019	03/11/2019	1000000121	No	Planned	\$500.00	\$500.00	Monthly
<input type="checkbox"/>	03/18/2019	04/08/2019	1000000122	No	Planned	\$1,244.00	\$1,244.00	Monthly
<input type="checkbox"/>	04/18/2019	05/09/2019	1000000123	No	Planned	\$500.00	\$500.00	Monthly
<input type="checkbox"/>	05/18/2019	06/08/2019	1000000124	No	Planned	\$1,244.00	\$1,244.00	Monthly
<input type="checkbox"/>	06/18/2019	07/09/2019	1000000125	No	Planned	\$500.00	\$500.00	Monthly
<input type="checkbox"/>	07/18/2019	08/08/2019	1000000126	No	Planned	\$1,244.00	\$1,244.00	Monthly
<input type="checkbox"/>	08/18/2019	09/08/2019	1000000127	No	Planned	\$500.00	\$500.00	Monthly
<input type="checkbox"/>	09/18/2019	10/09/2019	1000000128	No	Planned	\$1,244.00	\$1,244.00	Monthly
Total						\$12,350.00	\$12,350.00	

6. Fully pay the billed invoice.

- a) On the **Direct Bill Payment** screen, what do you notice about the **Use Unapplied Fund Amount** field?

You cannot select an unapplied fund because there is only one unapplied fund.

Direct Bill Payment

[Return to Invoices](#)

Account

Selected Account #LAB00210

Selected Account NameChristian Piguénit

Payment

Received Date12/08/2018

Amount

*\$4,130.00

Use Unapplied Fund

☐

Amount [\$0.00]