

Lesson 5 Designating an Alternate Payer

5.1 Prerequisites

For this exercise, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
- In one browser ("SU browser"), log in as Super User
 - User name: su
 - Password: gw
- In the other browser ("JP browser"), log in as Jeff Park
 - User name: jpark
 - Password: gw

5.2 Exercise: Create a list bill account



Activity

In this exercise, you assume the role of a Billing Clerk for Succeed Insurance. Your job is to set up a new list bill account for Second Community Bank. This bank will be paying for homeowners policies on behalf of their customers.

1. Create a new list bill account for Community Bank XX with the following details:

- Account Name: Community Bank XX
- Type: List Bill
- Billing Plan: BP01
- Delinquency Plan: DP01
- Send Invoices By: email
- Add Community Bank XX as a company contact and primary payer
- Payment Plan: PP01, PP03, PP04, and PP12
- Invoice Stream: Monthly and Twice Per Month

2. Use the new list bill account to answer the following questions:

- a) Click the **Actions** button and notice that **Add Policy** is missing. Why is this?
- b) Where can you view which payment plans are supported by this account?

- c) How would you add a payment plan to the list bill account?
- d) Why is it necessary to add the twice per month invoice stream?
- 3. **Add a homeowners policy to the Grahame Aulay XX account with the following details:**
 - o Policy #: HO01-GAULAY-XX
 - o Product: Homeowners
 - o Billing Method: List Bill
 - o Overriding Payer Account: Community Bank XX
 - o Payment Plan: PP03
 - o Overriding Invoice Stream: Monthly
 - o Charges: Premium for \$3200; Taxes for \$490
- 4. **Answer the following questions about the Grahame Aulay XX account:**
 - a) On the **Invoices** screen, why are there no invoices listed for the account?
 - b) On the **Charges** screen, which filters show the Premium and Taxes charges for the HO01-GAULAY policy?
- 5. **Open the Community Bank XX account and answer the following questions:**
 - a) Given a policy that is paid quarterly with a 30% down payment, is it possible to add this to the list bill account?
 - b) Given a policy that is paid twice per month with a 50% down payment, is it possible to add this to the list bill account?
 - c) Indicate to the Instructor that you are ready to continue. (5,1,5)

5.3 Solution



Solution

1. **Create a new list bill account for Second Community Bank with the following details:**
 - o Account Name: Community Bank XX
 - o Type: List Bill
 - o Billing Plan: BP01
 - o Delinquency Plan: DP01
 - o Send Invoices By: email
 - o Add Community Bank XX as a company contact and primary payer
 - o Payment Plan: PP01, PP03, PP04, and PP05
 - o Invoice Stream: Monthly and Twice Per Month

Click the Account tab and select Actions → New Account. Fill in details. Click Create Account

2. Use the new list bill account to answer the following questions:

- a) Click the **Actions** button and notice that **Add Policy** is missing. Why is this? *List Bill accounts only pay for policies owned by other accounts. They cannot own any policies.*
- b) Where can you view the list of payment plans that are supported by this account? *On the **Account Details** screen, click the **Supported Payment Plans** link.*
- c) How would you add a payment plan to the list bill account? *On the **List Bill Payment Plans** screen, click **Edit** and then **Add**.*
- d) Why is it necessary to add the twice per month invoice stream? *The **Twice Per Month** invoice stream is needed to support the PP05 payment plan, which bills the customer twice per month. A **Monthly** invoice stream cannot support a payment interval of **Twice Per Month**.*

3. Add a homeowners policy to the Grahame Aulay XX account with the following details:

- Policy #: HO01-GAULAY-XX
- Product: Homeowners
- Billing Method: List Bill
- Overriding Payer Account: Community Bank XX
- Payment Plan: PP03
- Overriding Invoice Stream: Monthly
- Charges: Premium for \$3200; Taxes for \$490

4. Answer the following questions about the Grahame Aulay XX account:

- a) On the **Invoices** screen, why are there no invoices listed for the account?
The Grahame Aulay XX is the owner of the HO01-GAULAY-XX policy; however, Community Bank XX is the payer of that policy. The invoices for this policy are on the Community Bank XX account.
- b) On the **Charges** screen, which filters show the Premium and Taxes charges for the HO01-GAULAY-XX policy?
***All** and **Only Owned**. The other two filters (**Only Own and Pay**, and **Only Pay**) filter out Grahame Aulay XX because he is not the payer of the charges.*

5. Open the Community Bank XX account and answer the following questions:

- a) Given a policy that is paid quarterly with a 30% down payment, is it possible to add this to the list bill account?
Yes, this list bill account supports payment plan PP04, which is a quarterly plan with a 30% down payment.
- b) Given a policy that is paid twice per month with a 50% down payment, is it possible to add this to the list bill account?
No, this list bill account does not have a payment plan that supports twice per month with 50% down. PP05 has the correct payment interval, but the down payment is only 10%.
- c) Indicate to the Instructor that you are ready to continue. **(5,1,5)**