

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



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)**