



BillingCenter 10 Introduction: Kickstart

Student Workbook

Labs and Tutorials

Table of Contents

Introduction	4
Instructions for Self-study	4
Lesson 1 Billing Lifecycle	5
1.1 Lab: Match BillingCenter terms with their definitions	5
Lesson 2 Interacting with the Development System	6
2.1 Prerequisites.....	6
2.2 Lab: QuickJump box, Server Tools, Internal Tools.....	6
2.3 Solution	6
Lesson 3 Charge Invoicing Overview	8
Lesson 4 Billing a One-Time Charge	9
4.1 Prerequisites.....	9
4.2 Lab: Bill a Taxes charge.....	9
4.3 Solution	10
Lesson 5 Billing a Pro Rata Charge	12
5.1 Prerequisites.....	12
5.2 Lab: Bill a Premium charge.....	12
5.3 Solution	13
Lesson 6 Administering Charge Invoicing	15
6.1 Prerequisites.....	15
6.2 Lab: Create and test a payment plan	15
6.3 Solution	16
Lesson 7 Sending Invoices	19
7.1 Prerequisites.....	19
7.2 Lab: Bill an invoice.....	19
7.3 Solution	20
Lesson 8 Managing Invoices	22
8.1 Prerequisites.....	22
8.2 Lab: Split a down payment across two invoices.....	22
8.3 Solution	23
Lesson 9 Receiving Direct Bill Payments.....	25
9.1 Prerequisites.....	25
9.2 Lab: Enter new payments.....	25

BillingCenter 10 Introduction: Kickstart - Student Workbook

9.3 Solution	26
Lesson 10 Applying Direct Bill Payments.....	29
10.1 Prerequisites.....	29
10.2 Lab: Explore payment allocation plans.....	29
10.3 Solution	30
Lesson 11 Managing Direct Bill Payments	32
11.1 Prerequisites.....	32
11.2 Lab 1: Handle a suspense payment.....	32
11.3 Solution	33
11.4 Lab 2: Correct payment allocation	33
11.5 Solution	34
Lesson 12 Processing a Delinquency	37
12.1 Prerequisites.....	37
12.2 Lab 1: Explore a delinquency plan.....	37
12.3 Solution	37
12.4 Lab 2: Test delinquency processing.....	38
12.5 Solution	39
Lesson 13 Using Trouble Tickets to Resolve Issues	40
13.1 Prerequisites.....	40
13.2 Lab: Use a trouble ticket to hold a delinquency.....	40
13.3 Solution	42

Introduction

Welcome to the Guidewire BillingCenter 10.0 Introduction – Kickstart course.

The Student Workbook will lead you through the course labs. The lesson numbers correspond to the lesson numbers in your training. Complete the assigned labs to the best of your ability.

Instructions for Self-study

You should have access to a Guidewire virtual machine (VM) to complete this course. Contact Guidewire Education (edadmin@guidewire.com) if you do not have access.

After you gain access to a VM, follow these steps to start the BillingCenter application.

- 1. Locate and open the InsuranceSuite 10 folder on the Desktop.**
- 2. Open the BillingCenter folder.**
- 3. From the file list double-click on Start BillingCenter.**
 - a) This will open a command prompt window. Several messages related to BillingCenter’s startup appear in the window. When the steps are finished, you will see the following message in the command prompt window.

```
*****BillingCenter ready*****
```
 - b) Leave the command window open (minimize if needed).
 - c) It is easy to miss the “ready” message since BillingCenter continues to process activities after displaying the notice. If you have waited three minutes or more without seeing the message, go to step 4 and open Chrome. You can disregard the percentage, which will remain at 0%.
- 4. Open Chrome from the bottom bar of the VM.**
- 5. In the browser, connect to the following URL:**

```
localhost:8580/bc/BillingCenter.do
```
- 6. When you are finished working on training for the day, you must manually stop the application server.**
 - a) To stop the server, click on the Stop BillingCenter shortcut in the BillingCenter folder. This will open a command prompt window to shut down BillingCenter.
 - b) After shutting down BillingCenter, both of the command prompt windows will close.

Lesson 1

Billing Lifecycle

1.1 Lab: Match BillingCenter terms with their definitions

In the Billing Lifecycle lesson, you learned several terms that BillingCenter uses. Your assignment is to match each term in a list with the description that best defines the term.

1. **Click the Billing Lifecycle Lab link on the course page to start the activity.**

Lesson 2

Interacting with the Development System

2.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Supported web browser
 - URL: **http://localhost:8580/bc/BillingCenter.do**
- Log in as Super User
 - User name: **su**
 - Password: **gw**

2.2 Lab: QuickJump box, Server Tools, Internal Tools

In this brief lab, you familiarize yourself with the QuickJump box, simulate the passing of time, and run a batch process from the Server Tools tab.

1. **Log in to BillingCenter as su with a password of gw.**
2. **Press Alt + / to move the cursor to the QuickJump box.**
3. **From the QuickJump box, run the command to list the commands for advancing the BillingCenter system clock.**
4. **Advance the BillingCenter system clock to the 17th of the month using the QuickJump box. Notice the list of selections narrows as you type.**
5. **Confirm the Info bar reflects the new date.**
6. **Press Alt + Shift + T to go to Server Tools.**
7. **From the Internal Tools tab, advance the testing system clock by one month.**
8. **On the Server Tools tab, find the Invoice batch process and run it. (The batch process will have nothing to process until you add a policy in the next lesson.)**
9. **Return to BillingCenter.**

2.3 Solution

1. **Log in to BillingCenter as su with a password of gw.**
2. **Press Alt + / to move the cursor to the QuickJump box.**

BillingCenter 10 Introduction: Kickstart - Student Workbook

3. From the QuickJump box, run the command to list the commands for advancing the BillingCenter system clock. *Run Clock ListAllMethods*
4. Advance the BillingCenter system clock to the 17th of the month using the QuickJump box. Notice the list of selections narrows as you type. *Run Clock withDayls 17*
5. Confirm the Info bar reflects the new date.
6. Press Alt + Shift + T to go to Server Tools.
7. From the Internal Tools tab, advance the testing system clock by one month. *Go to InternalTools → Testing System Clock. Click the Add Month button.*
8. On the Server Tools tab, find the Invoice batch process and run it. (The batch process will have nothing to process until you add a policy in the next lesson.) *On the Batch Process Info screen, find the Invoice batch process and click the Run button in that row.*
9. Return to BillingCenter. *Actions → Return to BillingCenter*

Lesson 3

Charge Invoicing Overview

There is no lab for this lesson.

Lesson 4

Billing a One-Time Charge

4.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

4.2 Lab: Bill a Taxes charge

In this lab, you add a policy with a Taxes charge to an existing account. The steps for adding a policy are listed in the lab solution.

1. **Using the JP browser, open the Millie Crane account.**
2. **Add a policy to the account with the following details:**
 - Policy #: **PA01-MCRANE**
 - Product: **Personal Auto**
 - Payment Plan: **PP09**
 - Charges: Taxes for **\$103**
3. **Before looking at the invoices, go to the payment plan for the policy:**
 - a) What is the payment interval?
 - b) What do you think the periodicity of the resulting invoice stream will be?
 - c) What do you think the placement date for the Taxes invoice item will be?
 - d) What do you think the bill date of the only invoice will be?
4. **Return to the Millie Crane account on the Account tab and visit the Charges, Invoices, and Invoice Streams screens to verify your responses to the previous questions.**

4.3 Solution

Steps for adding a policy to an account

1. **Open the account on the Account tab.**
2. **From the Actions menu, select Add Policy. The New Policy wizard opens.**
3. **Enter the required information in Step 1. For this course, you should enter:**
 - **Policy #**–Suggested policy numbering convention is:
2 letters indicating product + 2 digit sequential number starting with 01 + hyphen + uppercase first initial and last name
Example: H002-MCRANE is the second Homeowners policy for the Millie Crane account
 - **Product**–Click the down arrow to display the list of products.
 - **Payment plan**–Every policy must have a payment plan. Click the down arrow to display the list of payment plans.
4. **Click Next.**
5. **On Step 2, for each charge:**
 - a) Click **Add**.
 - b) Select a charge type.
 - c) Enter a charge amount.
6. **Click Finish.**

Solution to lab

1. **Using the JP browser, open the Millie Crane account.**
Select Search → Accounts on the InfoBar. Enter Millie in the Account Name field. Click Search. Click the Account# link.
2. **Add a policy to the account with the following details:**
 - Policy #: **PA01-MCRANE**
 - Product: **Personal Auto**
 - Payment Plan: **PP09**
 - Charges: Taxes for **\$103**
3. **Before looking at the invoices, go to the payment plan for the policy:**
Administration → Business Settings → Payment Plans. Click PP09.
 - a) What is the payment interval? *Quarterly*
 - b) What do you think the periodicity of the resulting invoice stream will be? *Monthly*
 - c) What do you think the placement date for the Taxes invoice item will be? *<current BillingCenter date>*
 - d) What do you think the bill date of the only invoice will be? *The answer depends on the length of the current month. In this case, BillingCenter calculates the bill day of month by*

BillingCenter 10 Introduction: Kickstart - Student Workbook

adding 30 days to the current BillingCenter date because the payment plan specifies the first installment will be billed 30 days after the policy effective date.

- 4. Return to the Millie Crane account on the Account tab and visit the Charges, Invoices, and Invoice Streams screens to verify your responses to the previous questions.**

Lesson 5

Billing a Pro Rata Charge

5.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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 Lab: Bill a Premium charge

In this lab, you examine a payment plan to predict how a set of charges will be invoiced. Then you create a policy to test your predictions.

1. **Using the JP browser, open the PP02 payment plan and answer the following questions:**
 - a) Is there a blackout window?
 - b) If there is a blackout window, will it reduce the maximum number of possible invoices generated for a Premium issuance charge on a policy with a 12 month term?
 - c) Will the down payment and first installment land on the same invoice?
 - d) Will the down payment and Taxes item land on the same invoice?
2. **Open the Albany Dude Ranches account.**
3. **Add a policy to the account with the following details:**
 - Policy #: **CA01-ADRANCH**
 - Product: **Business Auto**
 - Payment Plan: **PP02**
 - Charges: **Premium** for \$5000; **Taxes** for \$500
4. **On the Account tab, visit the Charges, Invoices, and Invoice Streams screens to verify your responses to the previous questions (use the questions below to guide you):**

- a) Are the down payment and one-time invoice items on the same invoice?
 - b) Which invoice has the first installment?
 - c) How many installments were created?
 - d) Did the blackout window restrict the number of installments that created?
5. **Open the PP06 payment plan and answer the following questions:**
- a) Is there a down payment?
 - b) What invoice items will be placed on the first invoice?
 - c) What invoice items will be placed on the second invoice?
6. **Add a second policy to the Albany Dude Ranch account with the following details:**
- Policy #: **BO01-ADRANCH**
 - Product: **Business Owners**
 - Payment Plan: **PP06**
 - Charges: **Premium for \$9400; Taxes for \$890**
7. **On the Account tab, visit the Invoices screen to verify your responses to the previous questions. Tip: You can use the Invoice Stream filter to restrict the view to invoices for the BO01-ADRANCH policy only.**

5.3 Solution

1. **Using the JP browser, open the PP02 payment plan and answer the following questions:**
 - a) Is there a blackout window? *Yes, a 30 day window*
 - b) If there is a blackout window, will it reduce the maximum number of possible invoices generated for a Premium issuance charge on a policy with a 12 month term? *No, because the maximum number of invoices is 10 (1 for the down payment and a maximum of 9 for installments). 10 invoices will fit within the timeframe restricted by the blackout window of 30 days.*
 - c) Will the down payment and first installment land on the same invoice? *No. The down payment will be invoiced on the first invoice, whereas the first installment will be invoiced one month after the policy effective date.*
 - d) Will the down payment and Taxes item land on the same invoice? *Yes. They will both have placement dates of 25 days before the policy effective date.*
2. **Open the Albany Dude Ranches account.**

3. **Add a policy to the account with the following details:**
 - Policy #: **CA01-ADRANCH**
 - Product: **Business Auto**
 - Payment Plan: **PP02**
 - Charges: **Premium for \$5000; Taxes for \$500**
4. **On the Account tab, visit the Charges, Invoices, and Invoice Streams screens to verify your responses to the previous questions (use the questions below to guide you):**
 - a) Are the down payment and one-time invoice items on the same invoice? *Yes*
 - b) Which invoice has the first installment? *The 2nd invoice*
 - c) How many installments were created? *9*
 - d) Did the blackout window restrict the number of installments that created? *No. The max # of installments was 9 and 9 installments were generated.*
5. **Open the PP06 payment plan and answer the following questions:**
 - a) Is there a down payment? *No*
 - b) What invoice items will be placed on the first invoice? *Invoice items for one-time charges such as Taxes*
 - c) What invoice items will be placed on the second invoice? *Installments 1 and 2*
6. **Add a second policy to the Albany Dude Ranch account with the following details:**
 - Policy #: **BO01-ADRANCH**
 - Product: **Business Owners**
 - Payment Plan: **PP06**
 - Charges: **Premium for \$9400; Taxes for \$890**
7. **On the Account tab, visit the Invoices screen to verify your responses to the previous questions. Tip: You can use the Invoice Stream filter to restrict the view to invoices for the BO01-ADRANCH policy only.**

Lesson 6

Administering Charge Invoicing

6.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

6.2 Lab: Create and test a payment plan

In this lab, you create a payment plan using the Payment Plan wizard. You will test the new payment plan by adding a policy that uses the plan.

1. **In the JP browser, use the Payment Plan wizard to create a plan that implements the following requirements:**
 - Name: **PP-Lab06**
 - Monthly invoices
 - Due date invoicing
 - Last invoice must be due by 40 days before policy expiration date
 - No down payment
 - Maximum of 6 installments
 - First and second installments invoiced 1 day after 1 month after the Policy Effective Date
 - One-Time charges invoiced on Charge Effective Date
2. **Add a General Liability policy to the Sunita Singh account to test the payment plan. The policy should have a Premium charge and a Taxes charge.**
3. **Examine the resulting invoices and answer the following questions:**
 - a) Is there a down payment?
 - b) How many installments are on the first invoice?
 - c) What is the total number of installments?

- d) What field or fields on the payment plan determined the invoice stream anchor date?

6.3 Solution

1. **In the JP browser, use the Payment Plan wizard to create a plan that implements the following requirements:**
 - Name: **PP-Lab06**
 - Monthly invoices
 - Due date invoicing
 - Last invoice must be due by 40 days before policy expiration date
 - No down payment
 - Maximum of 6 installments
 - First and second installments invoiced 1 day after 1 month after the Policy Effective Date

BillingCenter 10 Introduction: Kickstart - Student Workbook

- One-Time charges invoiced on Charge Effective Date

Payment Plan Wizard - Step 1 of 2

Payment Plan

Name * PP-Lab06

Description

Effective Date * 01/17/2019

Expiration Date MM/dd/yyyy

Used for Premium Reporting * ☐ Yes ☒ No

Currency USD

Payment Interval * Monthly

Billing Level Settings

Policy-Level Billing

Fix Bill Date/Due Date & Item Placement Cutoff Date * Due Date

Account-Level Billing/Agency Billing

Item Placement Cutoff Date * Bill Date

Fix Bill Date/Due Date This is set at the account level.

Final Installment

Final installment must be * Due

before the last # days of the policy period * 40

Payment Plan Wizard - Step 2 of 2

Pro Rata Charges

Create Down Payment For * ☐ Every Term ☐ Only First Term ☒ None

Max # of Installments * 6

Start Periodic Installments * ☐ First Installment ☒ Second Installment

First Installment Placement Date

Invoiced * 1

days * After

* One Interval After Policy Effective Date

Second Installment Placement Date

Invoiced * 1

days * After

* One Interval After Policy Effective Date

One-Time Charges

Invoiced * 0

days * Before

* Charge Effective Date

Summary

Name PP-Lab06

Payment Interval Monthly

Policy-Level Billing

Fix Bill Date/Due Date & Item Placement Cutoff Date Due Date

Account-Level Billing/Agency Billing

Item Placement Cutoff Date Bill Date

Fix Bill Date/Due Date This is set at the account level

Final Installment

Final installment must be Due

before the last # days of the policy period 40

Overridden Billing Instructions

Billing Instruction Create Down Payment

No data to display

- Add a General Liability policy to the Sunita Singh account to test the payment plan. The policy should have a Premium charge and a Taxes charge.
- Examine the resulting invoices and answer the following questions:

BillingCenter 10 Introduction: Kickstart - Student Workbook

- a) Is there a down payment? *No*
- a) How many installments are on the first invoice? *2*
- b) What is the total number of installments? *6*
- c) What field or fields on the payment plan determined the invoice stream anchor date?

Second Installment Placement Date: Invoiced and days fields

Lesson 7

Sending Invoices

7.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

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

7.2 Lab: Bill an invoice

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

1. **Go to the Invoices screen for the Sunita Singh account.**
2. **Use the SU browser to make the first invoice billed and then return to the JP browser.**
 - a) Click any link in the **Sidebar** to refresh the display and then return to the **Invoices** screen.
 - b) What is the status of the remaining invoices?
 - c) Do any of the invoices have an invoice fee? If so, where is the fee specified?
 - d) Was a payment request created? If so, when did this happen and why?
3. **Use the SU browser to advance the clock to the due date of the first invoice and then return to the JP browser.**
 - a) Go to the Account Summary screen. What has changed?
4. **Use the SU browser to run the Invoice Due batch process and then return to the JP browser.**
 - a) On the Invoices screen, has the status of the first invoice changed to Due? If not, why not?

5. **Use the SU browser to make the first invoice due and then return to the JP browser.**
 - a) On the **Account Summary** and **Policy Summary** screens, what alerts you that a payment is past due?

7.3 Solution

1. **Go to the Invoices screen for the Sunita Singh account.**
2. **Use the SU browser to make the first invoice billed and then return to the JP browser.**
Internal Tools → Testing System Clock: Advance the clock to the bill date of the first invoice.
Server Tools → Batch Process Info: Click Run button for Invoice batch process.
 - a) Click any link in the **Sidebar** to refresh the display and then return to the **Invoices** screen.
 - b) What is the status of the remaining invoices? *Planned*
 - c) 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.*
 - d) 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.*
3. **Use the SU browser to advance the clock to the due date of the first invoice and then return to the JP browser.**
 - 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.*
4. **Use the SU browser to run the Invoice Due batch process and then return to the JP browser.**
Server Tools → Batch Process Info: Click Run button for Invoice Due batch process.
 - 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.*
5. **Use the SU browser to make the first invoice due and then return to the JP browser.**
Internal Tools → Testing System Clock: Advance the clock by one day.
Server Tools → Batch Process Info: click Run button for Invoice Due batch process.
 - 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*

BillingCenter 10 Introduction: Kickstart - Student Workbook

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.

Lesson 8

Managing Invoices

8.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

8.2 Lab: Split a down payment across two invoices

In this lab, you modify a payment schedule to split the down payment across two invoices.

1. **Using the SU browser, advance the clock to the 15th of the month.**
2. **In the JP browser, add the following policy to the Sharleen Pierson DMD PA account:**
 - Policy #: **CP01-SPIERSON**
 - Product: **Commercial Property**
 - Payment Plan: **PP10**
 - Premium: **\$8900**
 - a) What is the payment interval on the PP10 payment plan?
3. **Take a look at the invoices.**
 - a) What is the total amount of the first invoice?
 - b) What is the total amount of each remaining invoice?
 - c) What invoice stream is being used?
4. **Change the payment plan so that the policy is billed twice per month.**
 - a) What are the steps required to do this?
 - b) What invoice stream is being used?
 - c) What is the total amount of the first invoice?

- d) What is the total amount of each remaining invoice?
- 5. **Split the down payment across the first two invoices.**
 - a) What are the steps required to do this?
 - b) What is the first invoice amount?
 - c) What is the second invoice amount?

8.3 Solution

1. **Using the SU browser, advance the clock to the 15th of the month.**
2. **In the JP browser, add the following policy to the Sharleen Pierson DMD PA account:**
 - Policy #: **CP01-SPIERSON**
 - Product: **Commercial Property**
 - Payment Plan: **PP10**
 - Premium: **\$8900**
 - a) What is the payment interval on the PP10 payment plan? *Every Other Month*
3. **Take a look at the invoices.**
 - a) What is the total amount of the first invoice? *\$3,560*
 - b) What is the total amount of each remaining invoice? *\$1,068*
 - c) What invoice stream is being used? *CP01-SPIERSON (Monthly)*
4. **Change the payment plan so that the policy is billed twice per month.**
 - a) What are the steps required to do this?
 - Go to **Administration** → **Business Settings** → **Payment Plans**
 - Find a payment plan with a **TwicePerMonth** payment interval.
 - Open the **CP01-SPIERSON** policy.
 - Go to the **Payment Schedule** screen.
 - Click **Change Payment Plan**.
 - Select **PP05** as the **New Payment Plan**.
 - Click **Execute**.
 - b) What invoice stream is being used? *CP01-SPIERSON (Twice Per Month)*
 - c) What is the total amount of the first invoice? *\$1238.27*
 - d) What is the total amount of each remaining invoice? *\$348.27 each*
5. **Split the down payment across the first two invoices.**
 - a) What are the steps required to do this?
 - Go to the **Charges** screen and click **Modify Invoice Items**.
 - Find the **Down Payment** charge for \$890.
 - Change the amount to \$445, which is half of \$890.

BillingCenter 10 Introduction: Kickstart - Student Workbook

- Click **Add**.
 - Enter the same placement date as the original down payment.
 - In the **Invoice Bill Date** field, click the lookup button and select the second invoice on the CP01-SPIERSON (Twice Per Month) invoice stream.
 - Change the type field to **Down Payment**.
 - Enter **\$445** as the amount.
 - Click **Update**.
- b) What is the first invoice amount? \$793.27
- c) What is the second invoice amount? \$793.27

Lesson 9

Receiving Direct Bill Payments

9.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

9.2 Lab: Enter new payments

This lab simulates a few common payment entry tasks in BillingCenter. Assume that you are customer service representative who is responsible for entering payments that your office has received from policyholders. During this lab, you will use both the **Multiple Payment Entry wizard** and the **Direct Bill Payment screen** to record payments.

1. **Open the Extreme Watersports account.**
 - a) Where is the default payment instrument specified for this account?
 - b) What default payment instrument is specified and what does it mean?
2. **Add a policy to the account with the following details:**
 - Policy #: **GL01-EWATERSPORTS**
 - Product: **General Liability**
 - Payment Plan: **PP14**
 - Charge: **Premium \$11500**
 - Charge: **Tax \$500**
3. **Look at the first invoice:**
 - a) What is the total amount of the first invoice?
 - b) Is the policy using bill date or due date invoicing?
 - c) When will the first invoice be billed?

4. Using the SU browser, make the first invoice billed. (You will need to refresh the display in the JP browser to see the changed invoice status.)
5. You are given a \$2000 check for GL01-EWATERSPORTS that must to be applied to the current invoice.
 - a) What payment entry screen is suitable for entering a single payment with a known target?
 - b) Enter and execute the payment.
6. Open the GL01-EWATERSPORTS policy.
 - a) How much has been paid on this policy?
 - b) How much has been billed and not yet paid?
 - c) How can you verify that the \$2000 payment was received for this policy?
7. Open the Multiple Payment Entry wizard. Attempt to enter the following set of payments into BillingCenter and resolve any issues you encounter:
 - \$400 payment to policy PA01-CBRANDT
 - \$1950 payment to policy GL01-EWATERSPORTS
8. What issue did you encounter in the previous step? How did you resolve the issue?
9. Where in BillingCenter can you find:
 - a) The \$400 payment entered earlier for policy PA01-CBRANDT?
 - b) The \$1950 payment entered earlier for policy GL01-EWATERSPORTS?
10. Has the payment for \$1950 been allocated to invoice items on the GL01-EWATERSPORTS policy? If not, why not?

9.3 Solution

1. Open the Extreme Watersports account.
 - a) Where is the default payment instrument specified for this account? *Account Details screen*
 - b) What default payment instrument is specified and what does it mean? *Responsive. The insured will be billed and will respond by paying the bill.*
2. Add a policy to the account with the following details:
 - Policy #: **GL01-EWATERSPORTS**
 - Product: **General Liability**
 - Payment Plan: **PP14**
 - Charge: **Premium \$11500**
 - Charge: **Tax \$500**
3. Look at the first invoice.
 - a) What is the total amount of the first invoice? **\$3950**

BillingCenter 10 Introduction: Kickstart - Student Workbook

- b) Is the policy using bill date or due date invoicing? *Due date—the Due Dates have the same day of month.*
- c) When will the first invoice be billed? *Date will vary*
- 4. **Using the SU browser, make the first invoice billed. (You will need to refresh the display in the JP browser to see the changed invoice status.)**
On the Internal Tools tab, advance the clock to the bill date.
On the Server Tools tab, run the Invoice batch process.
- 5. **You are given a \$2000 check for GL01-EWATERSPORTS that must to be applied to the current invoice.**
 - a) What payment entry screen is suitable for entering a single payment with a known target?
The Direct Bill Payment screen so that the payment can be applied immediately to the current invoice.
 - b) Enter and execute the payment.
Account tab: Actions → New Payment → New Direct Bill Payment. Select the unapplied fund.
Enter 2,000 in the Amount field. Click Execute.
- 6. **Open the GL01-EWATERSPORTS policy.**
 - a) How much has been paid on this policy? *\$2000*
 - b) How much has been billed and not yet paid? *\$1950*
 - c) How can you verify that the \$2000 payment was received for this policy? *There are several ways to do this in BillingCenter, but the easiest way is to look at the “Last Payment Received” field on the Policy Summary screen. If the payment has been applied to this policy, that field will have the payment amount.*
- 7. **Open the Multiple Payment Entry wizard. Attempt to enter the following set of payments into BillingCenter and resolve any issues you encounter:**
Desktop tab: Actions → New Payment → New Direct Bill Payment.
 - \$400 payment to policy PA01-CBRANDT
 - \$1950 payment to policy GL01-EWATERSPORTS
- 8. **What issue did you encounter in the previous step?**
Because the PA01-CBRANDT policy does not exist in BillingCenter, you will receive an error.
How did you resolve the issue?
Changing the item type to Suspense will allow the payment to be entered.
- 9. **Where in BillingCenter can you find:**
 - a) The \$400 payment entered earlier for policy PA01-CBRANDT? *Since this was a suspense payment, it is not associated with either an account or a policy. The money from this*

BillingCenter 10 Introduction: Kickstart - Student Workbook

payment is held in suspense payments and is visible on the Desktop in the Suspense Payments screen.

- b) The \$1950 payment entered earlier for policy GL01-EWATERSPORTS? *On the Account Summary and Policy Summary screens. You can also see it on the Payments screen for the policy.*

10. Has the payment for \$1950 been allocated to invoice items on the GL01-EWATERSPORTS policy? If not, why not?

Not yet. It is currently in the unapplied fund for the policy. The Total Unapplied field on the Account Summary shows the unallocated amount. There are batch processes such as New Payment that will automatically apply this money based on the payment allocation plan.

Lesson 10

Applying Direct Bill Payments

10.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

10.2 Lab: Explore payment allocation plans

In this lab, you explore how BillingCenter uses payment allocation plans. In the default configuration, BillingCenter automatically applies payments only to invoice items on invoices that are billed or due. You will modify BillingCenter to automatically apply payments to invoice items on the next planned invoice as well.

1. **Find the Ines Augustine account.**
 - a) What payment allocation plan will be used to allocate payments for this account?
2. **Add a new Homeowners policy to the Ines Augustine account:**
 - Payment Plan: **PP12**
 - Premium: **\$3400**
 - Taxes: **\$200**
3. **Using the SU browser, make the first invoice billed.**
4. **Start to add a new direct bill payment of \$1000.**
 - a) How much of the payment will be applied?
 - b) How much of the payment will remain unallocated?
 - c) Cancel the payment entry.
5. **Modify the Default Allocation Plan to include invoice items for the next planned invoice.**

Hint: This step requires the addition of a new filter on the payment allocation plan.

6. **Start to add another new direct bill payment of \$1000:**
 - a) How much of the payment will be applied?
 - b) How can you confirm that part of the payment will be applied to the next planned invoice?
 - c) How much of the payment will remain unallocated?
7. **Execute the payment.**

10.3 Solution

1. **Find the Ines Augustine account.**
 - a) What payment allocation plan will be used to allocate payments for this account? *Default Payment Allocation Plan (this information is specified on the Account Details screen).*
2. **Add a new Homeowners policy to the Ines Augustine account:**
 - Payment Plan: **PP12**
 - Premium: **\$3400**
 - Taxes: **\$200**
3. **Using the SU browser, make the first invoice billed.**

On the Internal Tools tab, advance the clock to the bill date.

On the Server Tools tab, run the Invoice batch process.
4. **Start to add a new direct bill payment of \$1000.**

Remember to change the Unapplied Fund field to the fund for your policy.

 - a) How much of the payment will be applied? **\$880**
 - b) How much of the payment will remain unallocated? **\$120**
 - c) Cancel the payment entry. *Click **Cancel**.*
5. **Modify the Default Payment Allocation Plan to include invoice items for the next planned invoice.**

Hint: This step requires the addition of a new filter on the payment allocation plan.

- a) Go to the **Account Details** screen.
 - b) Click the **Default Payment Allocation Plan** link.
 - c) On the **Default Payment Allocation Plan** screen, click **Edit**.
 - d) In the **What invoice items should be paid?** section, click **Add**.
 - e) On the **Distribution Filters** page, select **Next Planned Invoice** and click **Add Filters**.
 - f) On the **Default Payment Allocation Plan** screen, click **Update**.
6. **Start to add another new direct bill payment of \$1000:**

BillingCenter 10 Introduction: Kickstart - Student Workbook

- a) How much of the payment will be applied? *The whole payment--\$1000*
- b) How can you confirm that part of the payment will be applied to the next planned invoice?
On the Distribution tab, look for the designation of (Planned) next to the invoice bill date.
Also, you can set the Aggregate field to Summary. This shows the two invoices with their statuses. The first one is the billed invoice and the second is the planned invoice.
- c) How much of the payment will remain unallocated? *none*

7. Execute the payment.

Lesson 11

Managing Direct Bill Payments

11.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

This lab builds on the payments entered in the **Enter New Payments** lab from the **Receiving Direct Bill Payments** lesson. If you have not completed this lab, enter a new suspense payment for \$400 for policy PA01-CBRANDT before starting this lab.

11.2 Lab 1: Handle a suspense payment

In this lab, you continue with the suspense payment that you created in the lab from the **Receiving Direct Bill Payments** lesson.

1. **Add a Personal Auto policy the Caroline Brandt account:**
 - Policy #: **PA01-CBRANDT**
 - Payment Plan: **PP12**
 - Premium: **\$2000**
 - Tax: **\$400**
2. **On the Suspense Payments screen, confirm that there is an open suspense payment that is targeted for the policy you just created.**
3. **Using the SU browser, run the batch process to automatically release the suspense payment you created in a previous lab.**
4. **Refresh the display in the JP browser and answer the following questions about the suspense payment:**
 - a) Is the \$400 suspense payment listed on the **Suspense Payments** screen?
 - b) Where is the money from the suspense payment now?

5. **Using the SU browser, bill the first invoice for the new policy.**
 - a) What happened to the money from the suspense payment?

11.3 Solution

1. **Add a Personal Auto policy the Caroline Brandt account:**
 - Policy #: **PA01-CBRANDT**
 - Payment Plan: **PP12**
 - Premium: **\$2000**
 - Tax: **\$400**
2. **On the Suspense Payments screen, confirm that there is an open suspense payment that is targeted for the policy you just created.**
3. **Using the SU browser, run the batch process to automatically release the suspense payment you created in a previous lab.**

In the SU browser, run the Suspense Payment batch process from Server Tools → Batch Process Info.
4. **Refresh the display in the JP browser and answer the following questions about the suspense payment:**
 - a) Is the \$400 suspense payment listed on the **Suspense Payments** screen? *No, it does not appear in the list of Open suspense payments. If you select Applied from the drop-down, you will see the payment. Note: If the payment appears in the Open list, check that the suspense payment has the correct policy number.*
 - b) Where is the money from the suspense payment now? *It is in the designated unapplied fund for the Caroline Brandt's Personal Auto policy.*
5. **Using the SU browser, bill the first invoice for the new policy.**

From SU browser: On the Internal Tools tab, advance the clock to the bill date. On the Server Tools tab, run the Invoice batch process.

 - a) What happened to the money from the suspense payment? *The Invoice batch process automatically applied the payment from the designated unapplied fund to invoice items on the first invoice. The Invoice batch process is one of the four batch processes that perform payment allocation.*

11.4 Lab 2: Correct payment allocation

You have received a \$1440 payment from Caroline Brandt. Caroline wants \$200 applied to the Personal Auto policy and the remaining amount to a new Homeowners policy. For the purposes of this lab, you will incorrectly apply the payment and subsequently correct the payment allocation.

1. **Add a new Homeowners policy to the Caroline Brandt account:**
 - Policy #: **HO01-CBRANDT**
 - Payment Plan: **PP12**
 - Premium: **\$4400**
 - Tax: **\$800**
2. **Using the SU browser, bill the first invoice of the new policy.**
3. **Using the JP browser, enter a new direct bill payment as specified below:**
 - Amount: **\$1440**
 - Unapplied Fund: **HO01-CBRANDT**
 - Payment Instrument: **Check**
 - a) Why does the **Distribution** tab include an item from a planned invoice?
 - b) Execute the payment.
4. **Caroline requested that \$200 be applied to the Personal Auto policy and the remaining \$1240 be applied to the Homeowners policy. However, currently the whole payment is applied to the Homeowners policy.**
 - a) How can you confirm that this payment is applied incorrectly (that is, not applied according to Caroline's request)?
5. **Modify the allocation of the payment to apply \$200 to the Personal Auto policy and \$1240 to the Homeowners policy. Tip: To allocate an amount to a policy, first aggregate the invoices by Summary on the Distribution tab of the Modify Payment screen. You can refer to the Solution for detailed steps, if needed.**
 - a) After you execute the modified payment, will there be any unpaid amounts on the billed invoices for either policy?
 - b) What are the paid amounts on both policies?
 - c) Is this what you expected?
6. **Execute the modified payment.**
7. **Edit the Default Payment Allocation Plan. Remove the Next Planned Invoice filter that you added in a previous lab to restore the plan to its original functionality.**

11.5 Solution

1. **Add a new Homeowners policy to the Caroline Brandt account:**
 - Policy #: **HO01-CBRANDT**
 - Payment Plan: **PP12**
 - Premium: **\$4400**
 - Tax: **\$800**

2. Using the SU browser, bill the first invoice of the new policy.
*From SU browser: On the Internal Tools tab, advance the clock to the bill date.
On the Server Tools tab, run the Invoice batch process.*
3. Using the JP browser, enter a new direct bill payment as specified below:
 - Amount: **\$1440**
 - Unapplied Fund: **HO01-CBRANDT**
 - Payment Instrument: **Check**
 - a) Why does the **Distribution** tab include an item from a planned invoice? *In the previous lab, you added a filter to the **Default Payment Allocation Plan** to include invoice items from the **Next Planned Invoice**.*
 - b) Execute the payment.
4. Caroline requested that \$200 be applied to the Personal Auto policy and the remaining \$1240 be applied to the Homeowners policy. However, currently the whole payment is applied to the Homeowners policy.
 - a) How can you confirm that this payment is applied incorrectly (that is, not applied according to Caroline's request)? *Go to the **Payments** screen for the account and click the \$1440 payment. The payment details show that the entire payment has been applied to the same billed invoice.*
5. Modify the allocation of the payment to apply \$200 to the Personal Auto policy and \$1240 to the Homeowners policy. **Tip: To allocate an amount to a policy, first aggregate the invoices by Summary on the Distribution tab of the Modify Payment screen. You can refer to the Solution for detailed steps, if needed.**
Steps for reallocating a payment
 - a) On the **Payments** screen for the account, select **Actions** → **Modify Distribution** for the payment.
 - b) In the **Modify Payment** screen, click **Override Distribution**.
 - c) If the account uses cash separation (which our example does use) and you want to include invoice items from another policy, click **Add Items**.
 - d) Find and select the target policy. You can filter
 - e) Click **Search** to find the invoice items belonging to the selected policy.
 - f) Click the checkbox next to the items you want to pay.
 - g) Click **Add Selected Items**.
 - h) Optional: On the Distribution tab, select **Summary** as the **Aggregate**.
 - i) Enter the desired amount in the **Override Amount** field.

The solution starts here:

BillingCenter 10 Introduction: Kickstart - Student Workbook

- a) After you execute the modified payment, will there be any unpaid amounts on the billed invoices for either policy? *No*
 - b) What are the paid amounts on both policies? *The Homeowners policy is \$1240 and the Personal Auto is \$600.*
 - c) Is this what you expected? *Yes, the Personal Auto policy had the initial \$400 payment applied. Then the \$1440 payment was split across both policies. The Personal Auto policy received \$200 and Homeowners policy received \$1240.*
6. Execute the modified payment. **Click Execute.**
7. Edit the Default Payment Allocation Plan. Remove the Next Planned Invoice filter that you added in a previous lab to restore the plan to its original functionality.
- a) Open **Default Payment Allocation Plan** (**Administration** → **Business Settings**—**Payment Allocation Plans**).
 - b) Click **Edit**.
 - c) Select the **Next Planned Invoice** filter and click **Remove**.
 - d) Click **Update**.

Lesson 12

Processing a Delinquency

12.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

12.2 Lab 1: Explore a delinquency plan

In this lab, you explore the **DP02** delinquency plan.

1. **Open the DP02 delinquency plan (Administration tab → Business Settings → Delinquency Plans).**
 - a) How much is the late fee?
 - b) How long is the grace period? What does this mean?
 - c) What types of delinquency does DP02 handle?
2. **Look at the Not Taken reason.**
 - a) When will delinquency be initiated?
 - b) What event or events will be executed?
3. **Look at the Past Due reason**
 - a) When will the **Collections** event be executed?

12.3 Solution

1. **Open the DP02 delinquency plan (Administration tab → Business Settings → Delinquency Plans).**

- a) How much is the late fee? \$50
 - b) How long is the grace period? *0 days* What does this mean? *Delinquency processing starts immediately after the delinquency is initiated (there is no waiting period).*
 - c) What types of delinquency does DP02 handle? *Past Due and Not Taken*
- 2. Look at the Not Taken reason.**
- a) When will delinquency be initiated? *This will be initiated on the delinquency inception date.*
 - b) What event or events will be executed? *Notice of Intent to Cancel is the only event.*
- 3. Look at the Past Due reason**
- a) When will the Collections event be executed? *This will be executed 45 days after the delinquency inception date.*

12.4 Lab 2: Test delinquency processing

In this lab, you test a delinquency processing scenario where a payment is received for a delinquent policy before the policy is cancelled by the PAS.

- 1. Add a Commercial Property policy to the James, Baldwin, and Riveria LLC account. Use the PP02 payment plan. Add a Premium of \$5000.**
- 2. Using the SU browser, make the first invoice billed.**
- 3. Pay the first invoice in full. Make sure the payment is applied to the first invoice.**
- 4. Using the SU browser, make the second invoice billed and due.**
- 5. In the JP browser:**
 - a) Has a delinquency occurred? How do you know?
 - b) Has a late fee been charged?
 - c) According to the **Delinquencies** screen for the account, what delinquency events have completed? *Dunning Letter 1 and Late Fee*
 - d) When will the Dunning Letter 2 event occur? *In 7 days*
- 6. Using the SU browser:**
 - a) Advance the clock to the target date of the **Dunning Letter 2** event.
 - b) Run the **Workflow Writer** batch process.
- 7. In the JP browser, has the Dunning Letter 2 event happened?**
- 8. What do you think will happen when the past due amount is paid?**
- 9. Pay the past due amount.**
 - a) What is the status of the delinquency? Why did this happen?

12.5 Solution

1. Add a Commercial Property policy to the James, Baldwin, and Riveria LLC account. Use the PP02 payment plan. Add a Premium of \$5000.
2. Using the SU browser, make the first invoice billed.
On the Internal Tools tab, advance the clock to the bill date.
On the Server Tools tab, run the Invoice batch process.
On the Internal Tools tab, advance the clock to the due date.
On the Server Tools tab, run the Invoice Due batch process.
3. Pay the first invoice in full. Make sure the payment is applied to the first invoice.
4. Using the SU browser, make the second invoice billed and then due.
On the Internal Tools tab, advance the clock to the bill date of the second invoice.
On the Server Tools tab, run the Invoice batch process.
On the Internal Tools tab, advance the clock to the due date + 1 of the second invoice.
On the Server Tools tab, run the Invoice Due batch process.
5. In the JP browser:
 - a) Has a delinquency occurred? How do you know? *There is an alert on the Account Summary and Policy Summary screens. The info bars for the account and policy have a delinquency icon. Also, the Delinquencies screens for the account and policy show an open delinquency.*
 - b) Has a late fee been charged? *Yes, a policy late fee of \$50 was charged on the third invoice.*
 - c) According to the **Delinquencies** screen for the account, what delinquency events have completed? *Dunning Letter 1 and Late Fee*
 - d) When will the Dunning Letter 2 event occur? *In 7 days*
6. Using the SU browser:
 - a) Advance the clock to the target date of the Dunning Letter 2 event.
On the Internal Tools tab, advance the clock to the target date.
 - b) Run the **Workflow Writer** batch process.
On the Server Tools tab, run the Workflow Writer batch process.
7. In the JP browser, has the Dunning Letter 2 event happened?
Yes, it's marked Complete on the Delinquencies screen.
8. What do you think will happen when the past due amount is paid?
When the past due invoice is paid, BillingCenter will automatically close the delinquency.
9. Pay the past due amount.
 - a) What is the status of the delinquency? *Closed* Why did this happen? *As expected, when the past due amount was paid, BillingCenter automatically closed the delinquency.*

Lesson 13

Using Trouble Tickets to Resolve Issues

13.1 Prerequisites

For this lab, use:

- BillingCenter 10.0 Training Installer
- Two supported web browsers
 - They must be different browsers such as Chrome and Firefox
 - URL: <http://localhost:8580/bc/BillingCenter.do>
- 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**

13.2 Lab: Use a trouble ticket to hold a delinquency

This lab simulates a new renewal situation. Assume that the PAS has sent BillingCenter a new renewal billing request for a Homeowners policy. The policyholder has requested an additional week for deciding whether to accept the renewal offer. Ultimately she decides not to take the renewal she was offered.

1. Add a policy to the Suki Freeman account with the following details:

- Policy #: **HO01-SFREEMAN**
- Product: **Homeowners**
- Payment Plan: **PP12**
- Charge: **Premium \$1234**

- a) What delinquency plan is associated with the Suki Freeman account?
- b) What delinquency reasons are specified in the delinquency plan?

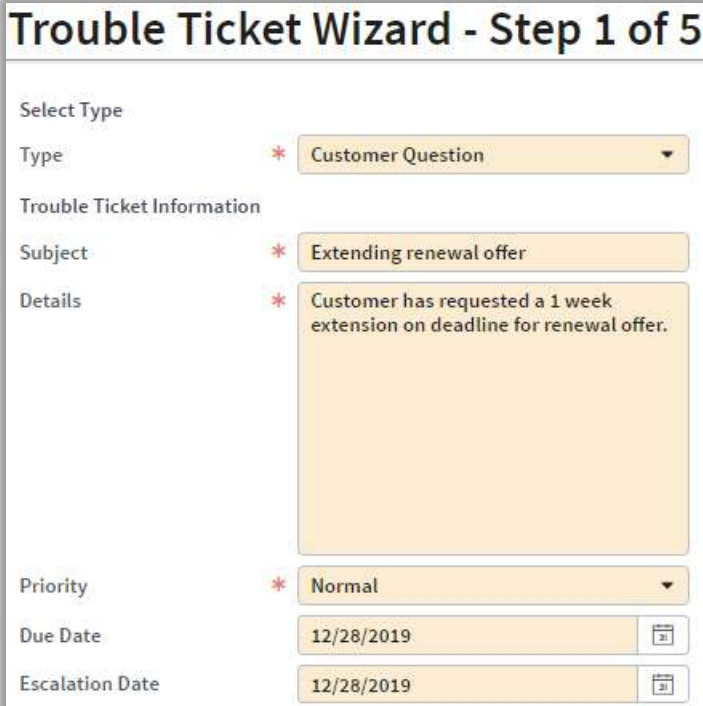
2. Using the SU browser, make the first invoice billed.

Assume the policy is actually a renewal offer. Suki has received her first bill for the renewal. She contacts Succeed Insurance and asks for an additional week to decide whether to renew the policy.

3. Using the JP browser, create a trouble ticket for the **HO01-SFREEMAN policy** (not the account):

BillingCenter 10 Introduction: Kickstart - Student Workbook

- a) Use the example below as a guide for completing step 1 (make your **Due Date** and **Escalation Date** 1 week after the **Due Date** of the first invoice).



Trouble Ticket Wizard - Step 1 of 5

Select Type

Type * Customer Question

Trouble Ticket Information

Subject * Extending renewal offer

Details * Customer has requested a 1 week extension on deadline for renewal offer.

Priority * Normal

Due Date 12/28/2019

Escalation Date 12/28/2019

- b) Copy the **Due Date** (so you can paste in the **Escalation Date** field and also use it in a later step).
- c) Suspend automatic processing for delinquencies. Paste the date you copied in step 1 as the **Release Date**. This means the delinquency hold **Release Date** is the same as the **Due Date** and **Escalation Date** of the trouble ticket.
- d) Assign the trouble ticket to yourself.
4. Open the new trouble ticket and confirm that the delinquency hold has been placed and has the correct release date.
5. Look at the trouble ticket alerts:
- a) Go to the **Policy Summary**. Why are two trouble ticket alerts displayed?
- b) Go to the **Account Summary** to confirm the trouble ticket alert is displayed.
6. Using the SU browser, make the policy past due.
7. In the JP browser:
- a) On the **Invoices** screen for the account, what is the **Status** of the invoice?
- b) Has a delinquency occurred? Why or why not?

BillingCenter 10 Introduction: Kickstart - Student Workbook

Assume the deadline for the renewal has passed and Succeed Insurance has not received a payment for the renewal. This means that the policyholder has decided not to renew the policy.

8. In the SU browser:

- a) Advance the clock to the **Escalation Date** of the trouble ticket.
- b) Run the **Trouble Ticket Escalation** batch process.

9. In the JP browser, open the trouble ticket.

- a) What indication of the escalation appears on the **Trouble Tickets** screen?

10. In the SU browser, run the Release Trouble Ticket Hold Types batch process. Note: Do not run the Release Charge Hold batch process by mistake.

11. In the JP browser, go to the Delinquencies screen.

- a) What type of delinquency has occurred?
- b) What is its status?
- c) What events were executed?

12. On the Policy Summary screen:

- a) What is the **Cancellation Status**?
- b) Why isn't the policy cancelled?

13. Click the trouble ticket alert on the Account Summary screen. Close the trouble ticket.

13.3 Solution

1. Add a policy to the Suki Freeman account with the following details:

- Policy #: **HO01-SFREEMAN**
- Product: **Homeowners**
- Payment Plan: **PP12**
- Charge: **Premium \$1234**
- a) What delinquency plan is associated with the Suki Freeman account? *DP02 (specified on Account Details screen)*
- b) What delinquency reasons are specified in the delinquency plan? *Past Due, Not Taken*

2. Using the SU browser, make the first invoice billed.

Assume the policy is actually a renewal offer. Suki has received her first bill for the renewal. She contacts Succeed Insurance and asks for an additional week to decide whether to renew the policy.

3. Using the JP browser, create a trouble ticket for the HO01-SFREEMAN policy (not the account):

BillingCenter 10 Introduction: Kickstart - Student Workbook

- a) Use the example below as a guide for completing step 1 (make your **Due Date** and **Escalation Date** 1 week after the **Due Date** of the first invoice).

Trouble Ticket Wizard - Step 1 of 5

Select Type


Type * Customer Question ▼


Trouble Ticket Information

Subject * Extending renewal offer

Details * Customer has requested a 1 week extension on deadline for renewal offer.

Priority * Normal ▼

Due Date 12/28/2019 

Escalation Date 12/28/2019 

- b) Copy the **Due Date** (so you can paste in the **Escalation Date** field and also it in a later step).
- c) Suspend automatic processing for delinquencies. Paste the date you copied in step 1 as the **Release Date**. This means the delinquency hold **Release Date** is the same as the **Due Date** and **Escalation Date** of the trouble ticket.
- d) Assign the trouble ticket to yourself.

Trouble Ticket Wizard - Step 5 of 5

Click Finish to Create the Trouble Ticket.

Assignment

Assigned To * Jeff Park (Operations) 

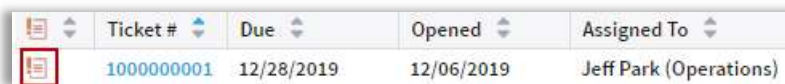
4. Open the new trouble ticket and confirm that the delinquency hold has been placed and has the correct release date.
5. Look at the trouble ticket alerts:


BillingCenter 10 Introduction: Kickstart - Student Workbook

- a) Go to the **Policy Summary**. Why are two trouble ticket alerts displayed? *By default, a trouble ticket is associated with both a policy and a policy period.*
 - b) Go to the **Account Summary** to confirm the trouble ticket alert is displayed.
6. Using the SU browser, make the policy past due.
On the Internal Tools tab, advance the clock to the due date + 1.
On the Server Tools tab, run the Invoice Due batch process.
7. In the JP browser:
- a) On the **Invoices** screen for the account, what is the **Status** of the invoice? *Due*
 - b) Has a delinquency occurred? Why or why not? *No, because the trouble ticket placed a hold on automatic delinquency processing.*

Assume the deadline for the renewal has passed and Succeed Insurance has not received a payment for the renewal. This means that the policyholder has decided not to renew the policy.

8. In the SU browser:
- a) Advance the clock to the **Escalation Date** of the trouble ticket.
On the Internal Tools tab, advance the clock to the escalation date.
 - b) Run the **Trouble Ticket Escalation** batch process.
On the Server Tools tab, run the Invoice batch process.
9. In the JP browser, open the trouble ticket.
- a) What indication of the escalation appears on the Trouble Tickets screen? *An icon appears to the left of the trouble ticket number.*



	Ticket #	Due	Opened	Assigned To
	1000000001	12/28/2019	12/06/2019	Jeff Park (Operations)

10. In the SU browser, run the Release Trouble Ticket Hold Types batch process. Note: Do not run the Release Charge Hold batch process by mistake.
On the Server Tools tab, run the Release Trouble Ticket Hold Types batch process.
11. In the JP browser, go to the Delinquencies screen.
- a) What type of delinquency has occurred? *Not Taken*
 - b) What is its status? *Closed*
 - c) What events were executed? *Send Notice of Intent to Cancel*
12. On the Policy Summary screen:
- a) What is the **Cancellation Status**? *Pending Cancellation*
 - b) Why isn't the policy cancelled? *As the system of record, the PAS must cancel the policy before it is cancelled in BillingCenter.*

- 13. Click the trouble ticket alert on the Account Summary screen. Close the trouble ticket.**