QQCATALYST[™]

Quick Start Guide

Creating A Bill & Printing An Invoice

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Terms & Definitions

Billing Types

- Agency Bill agency responsible for collecting premium
- Direct Bill carrier bills the customer directly

Premium Sent

- Net agency withholds commission up front and sends net premium to the Carrier or MGA/Broker.
- Gross agency sends full down payment to the carrier and receives commission in full at a later date.
- Monthly agency sends full down payment to the carrier and receives commission in installments as the premium is earned

Financing

- Paid in Full customer pays premium in full either to the carrier or the agency
- Carrier Financed customer pays the carrier in installments
- 3rd Party Financed agency arranges financing through a third party

Agency Fees

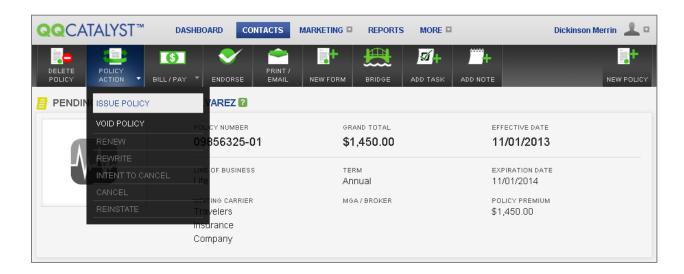
Fees charged by the agency to the customer for services

Create A Bill

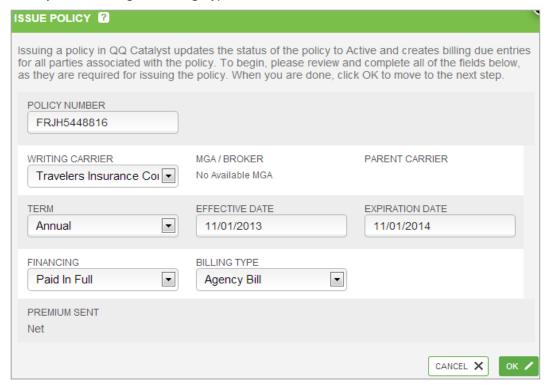
Billing entries are used to help an agency track their payables and receivables. You will be able to create bills for both agency fees and policy premium. Financial functionality has been built into the Issue A Policy and Endorse A Policy workflows to help you automatically create bills.

Agency Bill Policies

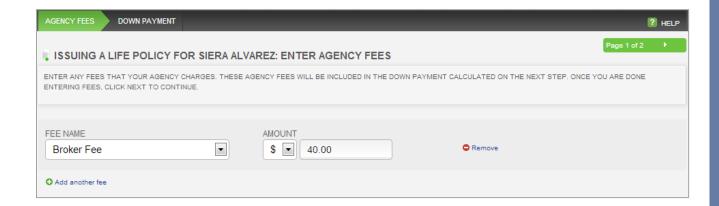
A billing entry for premium due on an Agency Bill policy is automatically created when the policy is issued. Select the Policy Action icon in the tool bar and select **Issue Policy**.



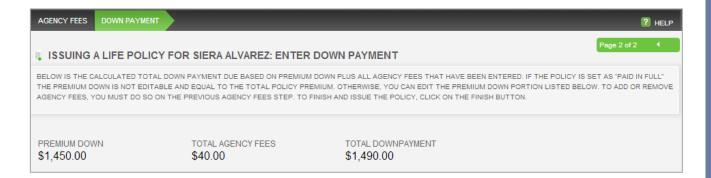
Make your Financing and Billing Type selections and click OK to continue.



Agency fees can be added in the next step of the workflow. The list of agency fees comes from the Global Preferences section.



The total premium including the agency fees are listed as the total down payment because Paid In Full was selected as the Financing option. If 3rd Party Finance was selected, you would have the option to manually enter the Premium Down amount.



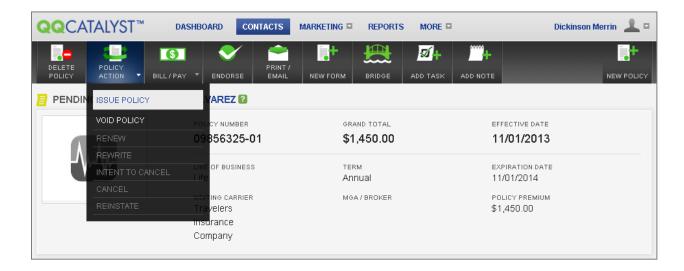


When you click Finish and confirm that you want the policy issued, the bill will be created.

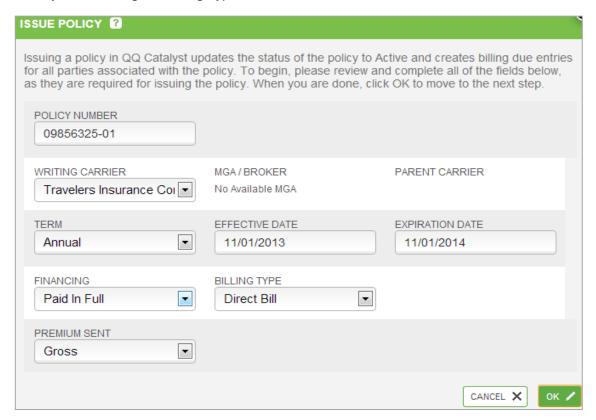
At the end of the "Issue A Policy" workflow, you have the option of printing an invoice, taking a payment or Returning to the Policy.

Direct Bill Policies

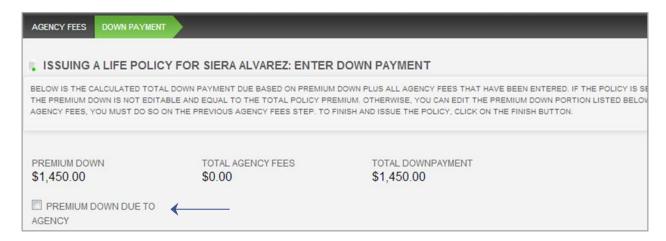
A billing entry for premium due on a Direct Bill policy can also be created when issuing the policy. Select the Policy Action icon in the tool bar and select **Issue Policy**.

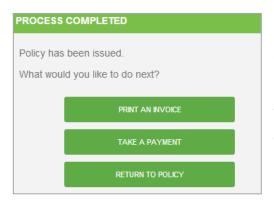


Make your Financing and Billing Type selections and click Ok to continue.



If the agency is collecting the down payment or total policy premium, select the **Premium Down Due To Agency** checkbox to have the bill created for the amount shown. This should only be checked if the customer is paying in a method that requires the agency to forward premium to the Carrier i.e., cash, money order, cashier's check, or check made payable to the agency. If the payment is being uploaded directly to the carrier's website, do not select the checkbox.



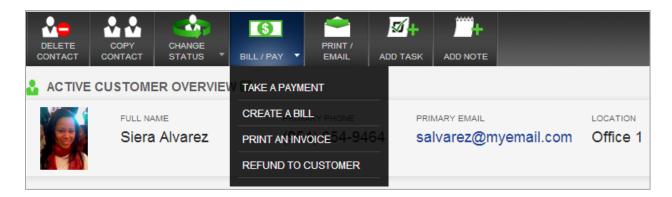


When you click Finish and confirm that you want the policy issued, the bill will be created.

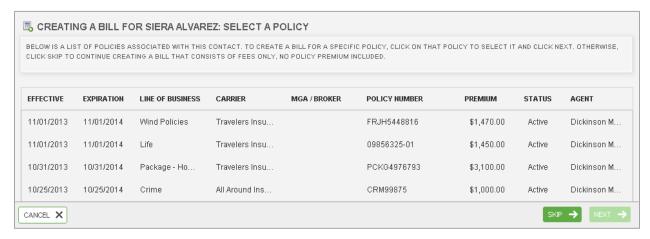
At the end of the "Issue A Policy" workflow, you have the option of printing an invoice, taking a payment or Returning to the Policy.

Manually

Billing entries can be created manually on either the Customer Overview screen or the Policy Overview screen.



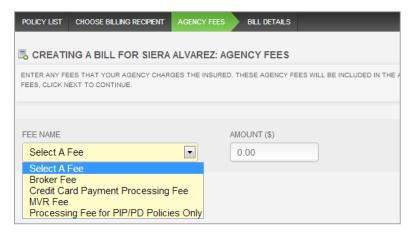
If originated from the Customer Overview screen, you will be prompted to select a policy. A policy has to be selected if you want to create a bill for policy premium. If you do not select a policy you will only be able to create a bill for agency fees.



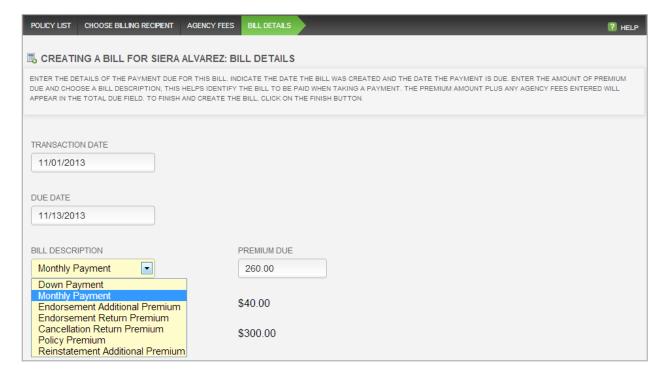
Money due to the agency from the customer will be the default selection but it can be changed.

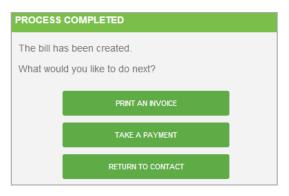


Agency fees can be added in the next step of the workflow. The list of agency fees comes from the Global Preferences section.



On the final step of the workflow you can enter your Due Date, the Bill Description and the amount of premium due.

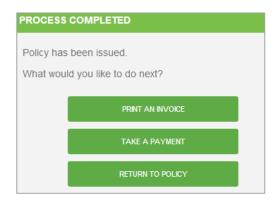




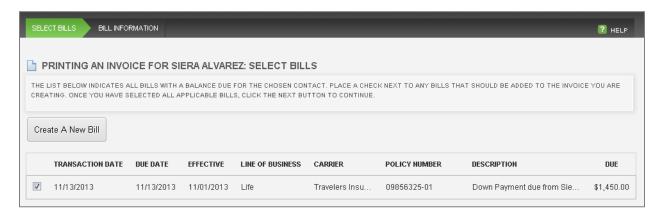
When you click finish, you have the option of printing an invoice, taking a payment or Returning to the Contact/Policy Line of Business

Printing An Invoice

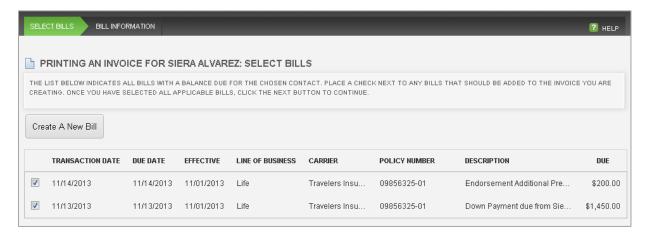
Invoices can only be printed for outstanding bills in Catalyst. On the last step of the Creating A Bill workflow, you will be prompted to either Print An Invoice, Take A Payment, or Return to Policy. Select **Print An Invoice** to view the outstanding bills.



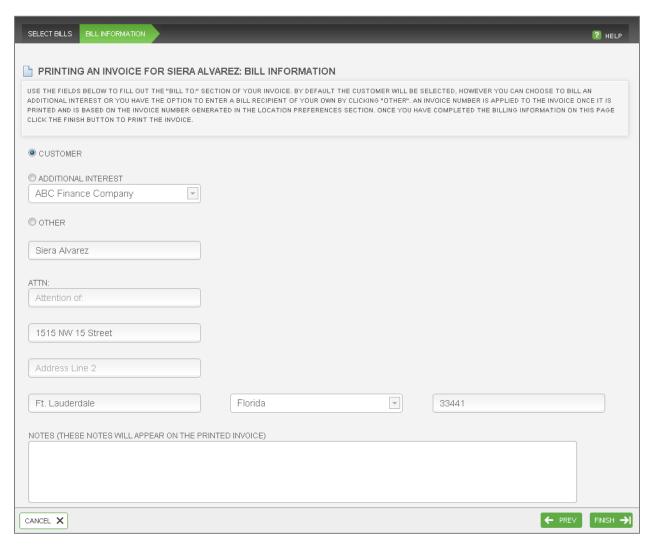
The bill that was created will automatically be checked, but you will see all outstanding bills listed. You also have the option of Creating A New Bill. Multiple bills can be represented on the same invoice.



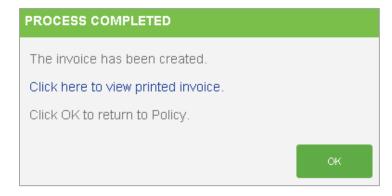
If you click on Create A New Bill, you will enter the Create A Bill workflow. When you exit, you will be presented with both bills available for printing on the invoice.



The invoice can be printed to the Customer, any Additional Interest (Certificate Holder or Lienholder), or you can manually enter the recipient by selecting Other.



Once you click finish the invoice will be generated and automatically attached to the customer's file. Click on the **Click here to view printed invoice** link to view and print the invoice.

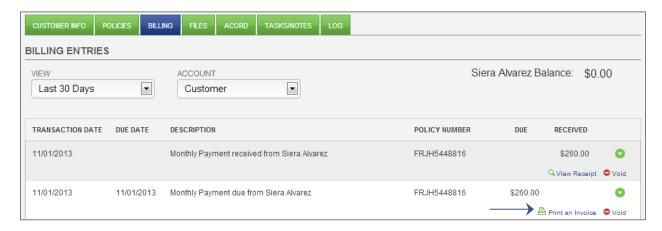


Reprinting An Invoice

Invoices are automatically attached to your customer's file when generated. You can reprint an invoice from four areas in Catalyst.

Billing Tab on Customer Overview Screen

The invoice can be viewed and reprinted by clicking on the View Invoice link.



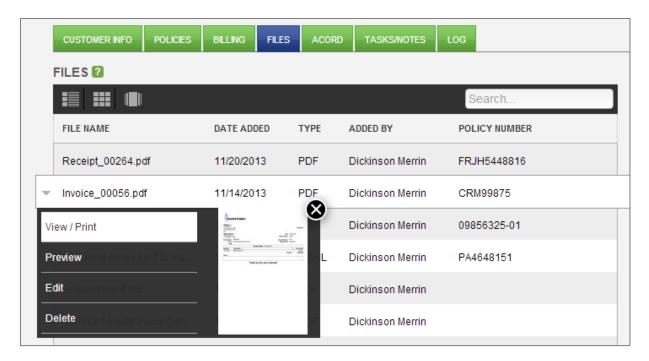
Billing Tab on Policy Overview Screen

The invoice can be viewed and reprinted by clicking on the View Invoice link.



Files Tab on Customer Overview Screen

Left click on the invoice you would like to print and you will see an expanded menu. If you select the View/Print option, the invoice will be downloaded to your computer for you to open and print. If you select Preview, the invoice will opened in your browser for printing.



Files Tab on Policy Overview Screen

Left click on the invoice you would like to print and you will see an expanded menu. If you select the View/Print option, the invoice will be downloaded to your computer for you to open and print. If you select Preview, the invoice will opened in your browser for printing.

