
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**.

The screenshot shows the QQ Catalyst software interface. At the top, there are navigation tabs: DASHBOARD, CONTACTS, MARKETING, REPORTS, and MORE. The user's name, Dickinson Merrin, is displayed in the top right. Below the navigation is a toolbar with icons for DELETE POLICY, POLICY ACTION, BILL / PAY, ENDORSE, PRINT / EMAIL, NEW FORM, BRIDGE, ADD TASK, ADD NOTE, and NEW POLICY. The 'POLICY ACTION' dropdown menu is open, showing options: ISSUE POLICY, VOID POLICY, RENEW, REWRITE, INTENT TO CANCEL, CANCEL, and REINSTATE. In the background, a table displays policy details:

POLICY NUMBER	GRAND TOTAL	EFFECTIVE DATE
09856325-01	\$1,450.00	11/01/2013
LINE OF BUSINESS	TERM	EXPIRATION DATE
Life	Annual	11/01/2014
WRITING CARRIER	MGA / BROKER	POLICY PREMIUM
Travelers Insurance Company		\$1,450.00

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

The 'ISSUE POLICY' dialog box contains the following information and fields:

Issuing a policy in QQ Catalyst updates the status of the policy to Active and creates billing due entries for all parties associated with the policy. To begin, please review and complete all of the fields below, as they are required for issuing the policy. When you are done, click OK to move to the next step.

POLICY NUMBER: FRJH5448816

WRITING CARRIER: Travelers Insurance Coi (dropdown)

MGA / BROKER: No Available MGA

PARENT CARRIER: (empty)

TERM: Annual (dropdown)

EFFECTIVE DATE: 11/01/2013

EXPIRATION DATE: 11/01/2014

FINANCING: Paid In Full (dropdown)

BILLING TYPE: Agency Bill (dropdown)

PREMIUM SENT: Net

Buttons: CANCEL (with X icon), OK (with pencil icon)

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

AGENCY FEES **DOWN PAYMENT** ? HELP

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ISSUING A LIFE POLICY FOR SIERA ALVAREZ: ENTER AGENCY FEES

ENTER ANY FEES THAT YOUR AGENCY CHARGES. THESE AGENCY FEES WILL BE INCLUDED IN THE DOWN PAYMENT CALCULATED ON THE NEXT STEP. ONCE YOU ARE DONE ENTERING FEES, CLICK NEXT TO CONTINUE.

FEE NAME	AMOUNT	
Broker Fee	\$ 40.00	Remove

[+ Add another fee](#)

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.

AGENCY FEES **DOWN PAYMENT** ? HELP

Page 2 of 2

ISSUING A LIFE POLICY FOR SIERA ALVAREZ: ENTER DOWN PAYMENT

BELOW IS THE CALCULATED TOTAL DOWN PAYMENT DUE BASED ON PREMIUM DOWN PLUS ALL AGENCY FEES THAT HAVE BEEN ENTERED. IF THE POLICY IS SET AS "PAID IN FULL" THE PREMIUM DOWN IS NOT EDITABLE AND EQUAL TO THE TOTAL POLICY PREMIUM. OTHERWISE, YOU CAN EDIT THE PREMIUM DOWN PORTION LISTED BELOW. TO ADD OR REMOVE AGENCY FEES, YOU MUST DO SO ON THE PREVIOUS AGENCY FEES STEP. TO FINISH AND ISSUE THE POLICY, CLICK ON THE FINISH BUTTON.

PREMIUM DOWN	TOTAL AGENCY FEES	TOTAL DOWNPAYMENT
\$1,450.00	\$40.00	\$1,490.00

PROCESS COMPLETED

Policy has been issued.

What would you like to do next?

PRINT AN INVOICE

TAKE A PAYMENT

RETURN TO POLICY

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**.

The screenshot shows the QQ Catalyst software interface. At the top, there is a navigation bar with tabs for DASHBOARD, CONTACTS, MARKETING, REPORTS, and MORE. The user's name, Dickinson Merrin, is displayed in the top right corner. Below the navigation bar is a toolbar with various icons for actions like DELETE POLICY, POLICY ACTION, BILL / PAY, ENDORSE, PRINT / EMAIL, NEW FORM, BRIDGE, ADD TASK, ADD NOTE, and NEW POLICY. The 'POLICY ACTION' dropdown menu is open, showing options: ISSUE POLICY, VOID POLICY, RENEW, REWRITE, INTENT TO CANCEL, CANCEL, and REINSTATE. Below the menu, a policy summary table is visible:

POLICY NUMBER	09856325-01	GRAND TOTAL	\$1,450.00	EFFECTIVE DATE	11/01/2013
LINE OF BUSINESS	Life	TERM	Annual	EXPIRATION DATE	11/01/2014
WRITING CARRIER	Travelers Insurance Company	MGA / BROKER		POLICY PREMIUM	\$1,450.00

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

ISSUE POLICY ?

Issuing a policy in QQ Catalyst updates the status of the policy to Active and creates billing due entries for all parties associated with the policy. To begin, please review and complete all of the fields below, as they are required for issuing the policy. When you are done, click OK to move to the next step.

POLICY NUMBER		
<input type="text" value="09856325-01"/>		
WRITING CARRIER	MGA / BROKER	PARENT CARRIER
<input type="text" value="Travelers Insurance Co"/>	No Available MGA	
TERM	EFFECTIVE DATE	EXPIRATION DATE
<input type="text" value="Annual"/>	<input type="text" value="11/01/2013"/>	<input type="text" value="11/01/2014"/>
FINANCING	BILLING TYPE	
<input type="text" value="Paid In Full"/>	<input type="text" value="Direct Bill"/>	
PREMIUM SENT		
<input type="text" value="Gross"/>		

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.

AGENCY FEES
DOWN PAYMENT

ISSUING A LIFE POLICY FOR SIERA ALVAREZ: ENTER DOWN PAYMENT

BELOW IS THE CALCULATED TOTAL DOWN PAYMENT DUE BASED ON PREMIUM DOWN PLUS ALL AGENCY FEES THAT HAVE BEEN ENTERED. IF THE POLICY IS SET TO BE PAID BY THE CARRIER, THE PREMIUM DOWN IS NOT EDITABLE AND EQUAL TO THE TOTAL POLICY PREMIUM. OTHERWISE, YOU CAN EDIT THE PREMIUM DOWN PORTION LISTED BELOW. IF YOU WANT TO EDIT AGENCY FEES, YOU MUST DO SO ON THE PREVIOUS AGENCY FEES STEP. TO FINISH AND ISSUE THE POLICY, CLICK ON THE FINISH BUTTON.

PREMIUM DOWN	TOTAL AGENCY FEES	TOTAL DOWNPAYMENT
\$1,450.00	\$0.00	\$1,450.00

PREMIUM DOWN DUE TO AGENCY ←

PROCESS COMPLETED

Policy has been issued.

What would you like to do next?

PRINT AN INVOICE

TAKE A PAYMENT

RETURN TO POLICY

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.

EFFECTIVE	EXPIRATION	LINE OF BUSINESS	CARRIER	MGA / BROKER	POLICY NUMBER	PREMIUM	STATUS	AGENT
11/01/2013	11/01/2014	Wind Policies	Travelers Insu...		FRJH5448816	\$1,470.00	Active	Dickinson M...
11/01/2013	11/01/2014	Life	Travelers Insu...		09856325-01	\$1,450.00	Active	Dickinson M...
10/31/2013	10/31/2014	Package - Ho...	Travelers Insu...		PCKG4976793	\$3,100.00	Active	Dickinson M...
10/25/2013	10/25/2014	Crime	All Around Ins...		CRM99875	\$1,000.00	Active	Dickinson M...

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

USE THE OPTIONS BELOW TO INDICATE FOR WHOM THIS BILL SHOULD BE CREATED. EITHER A BILL FOR MONIES THE AGENCY TO AN INTERESTED PARTY. IF THE BILL IS ASSOCIATED WITH A POLICY, YOU MUST INDICATE WHET FINANCE COMPANY ON THE POLICY. ONCE YOU ARE FINISHED, CLICK THE NEXT BUTTON TO CONTINUE.

- MONEY DUE TO THE AGENCY
- MONEY DUE FROM THE AGENCY
- SIERA ALVAREZ (CUSTOMER NAME)
- ALL AROUND INSURANCE COMPANY (CARRIER NAME)

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

POLICY LIST **CHOOSE BILLING RECIPIENT** **AGENCY FEES** **BILL DETAILS**

CREATING A BILL FOR SIERA ALVAREZ: AGENCY FEES

ENTER ANY FEES THAT YOUR AGENCY CHARGES THE INSURED. THESE AGENCY FEES WILL BE INCLUDED IN THE AGENCY FEES, CLICK NEXT TO CONTINUE.

FEE NAME	AMOUNT (\$)
Select A Fee	0.00
Select A Fee	
Broker Fee	
Credit Card Payment Processing Fee	
MVR Fee	
Processing Fee for PIP/PD Policies Only	

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

POLICY LIST **CHOOSE BILLING RECIPIENT** **AGENCY FEES** **BILL DETAILS** **HELP**

CREATING A BILL FOR SIERA ALVAREZ: BILL DETAILS

ENTER THE DETAILS OF THE PAYMENT DUE FOR THIS BILL. INDICATE THE DATE THE BILL WAS CREATED AND THE DATE THE PAYMENT IS DUE. ENTER THE AMOUNT OF PREMIUM DUE AND CHOOSE A BILL DESCRIPTION, THIS HELPS IDENTIFY THE BILL TO BE PAID WHEN TAKING A PAYMENT. THE PREMIUM AMOUNT PLUS ANY AGENCY FEES ENTERED WILL APPEAR IN THE TOTAL DUE FIELD. TO FINISH AND CREATE THE BILL, CLICK ON THE FINISH BUTTON.

TRANSACTION DATE
11/01/2013

DUE DATE
11/13/2013

BILL DESCRIPTION	PREMIUM DUE
Monthly Payment	260.00
Down Payment	
Monthly Payment	\$40.00
Endorsement Additional Premium	
Endorsement Return Premium	
Cancellation Return Premium	
Policy Premium	\$300.00
Reinstatement Additional Premium	

PROCESS COMPLETED

The bill has been created.

What would you like to do next?

PRINT AN INVOICE

TAKE A PAYMENT

RETURN TO CONTACT

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.

PROCESS COMPLETED

Policy has been issued.

What would you like to do next?

PRINT AN INVOICE

TAKE A PAYMENT

RETURN TO POLICY

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.

SELECT BILLS BILL INFORMATION HELP

PRINTING AN INVOICE FOR SIERA ALVAREZ: SELECT BILLS

THE LIST BELOW INDICATES ALL BILLS WITH A BALANCE DUE FOR THE CHOSEN CONTACT. PLACE A CHECK NEXT TO ANY BILLS THAT SHOULD BE ADDED TO THE INVOICE YOU ARE CREATING. ONCE YOU HAVE SELECTED ALL APPLICABLE BILLS, CLICK THE NEXT BUTTON TO CONTINUE.

Create A New Bill

	TRANSACTION DATE	DUE DATE	EFFECTIVE	LINE OF BUSINESS	CARRIER	POLICY NUMBER	DESCRIPTION	DUE
<input checked="" type="checkbox"/>	11/13/2013	11/13/2013	11/01/2013	Life	Travelers Insu...	09856325-01	Down Payment due from Sie...	\$1,450.00

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.

SELECT BILLS BILL INFORMATION HELP

PRINTING AN INVOICE FOR SIERA ALVAREZ: SELECT BILLS

THE LIST BELOW INDICATES ALL BILLS WITH A BALANCE DUE FOR THE CHOSEN CONTACT. PLACE A CHECK NEXT TO ANY BILLS THAT SHOULD BE ADDED TO THE INVOICE YOU ARE CREATING. ONCE YOU HAVE SELECTED ALL APPLICABLE BILLS, CLICK THE NEXT BUTTON TO CONTINUE.

Create A New Bill

	TRANSACTION DATE	DUE DATE	EFFECTIVE	LINE OF BUSINESS	CARRIER	POLICY NUMBER	DESCRIPTION	DUE
<input checked="" type="checkbox"/>	11/14/2013	11/14/2013	11/01/2013	Life	Travelers Insu...	09856325-01	Endorsement Additional Pre...	\$200.00
<input checked="" type="checkbox"/>	11/13/2013	11/13/2013	11/01/2013	Life	Travelers Insu...	09856325-01	Down Payment due from Sie...	\$1,450.00

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.

SELECT BILLS **BILL INFORMATION** HELP

PRINTING AN INVOICE FOR SIERA ALVAREZ: BILL INFORMATION

USE THE FIELDS BELOW TO FILL OUT THE "BILL TO:" SECTION OF YOUR INVOICE. BY DEFAULT THE CUSTOMER WILL BE SELECTED, HOWEVER YOU CAN CHOOSE TO BILL AN ADDITIONAL INTEREST OR YOU HAVE THE OPTION TO ENTER A BILL RECIPIENT OF YOUR OWN BY CLICKING "OTHER". AN INVOICE NUMBER IS APPLIED TO THE INVOICE ONCE IT IS PRINTED AND IS BASED ON THE INVOICE NUMBER GENERATED IN THE LOCATION PREFERENCES SECTION. ONCE YOU HAVE COMPLETED THE BILLING INFORMATION ON THIS PAGE CLICK THE FINISH BUTTON TO PRINT THE INVOICE.

CUSTOMER

ADDITIONAL INTEREST
ABC Finance Company

OTHER
Siera Alvarez

ATTN:
Attention of:
1515 NW 15 Street
Address Line 2
Ft. Lauderdale Florida 33441

NOTES (THESE NOTES WILL APPEAR ON THE PRINTED INVOICE)

CANCEL X PREV FINISH

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.

PROCESS COMPLETED

The invoice has been created.

[Click here to view printed invoice.](#)

Click OK to return to Policy.

OK

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.

TRANSACTION DATE	DUE DATE	DESCRIPTION	POLICY NUMBER	DUE	RECEIVED
11/01/2013		Monthly Payment received from Siera Alvarez	FRJH5448816		\$260.00
11/01/2013	11/01/2013	Monthly Payment due from Siera Alvarez	FRJH5448816	\$260.00	

Billing Tab on Policy Overview Screen

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

TRANSACTION DATE	DUE DATE	DESCRIPTION	POLICY NUMBER	DUE	RECEIVED
11/01/2013		Monthly Payment received from Siera Alvarez	FRJH5448816		\$260.00
11/01/2013	11/01/2013	Monthly Payment due from Siera Alvarez	FRJH5448816	\$260.00	

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 be opened in your browser for printing.

FILE NAME	DATE ADDED	TYPE	ADDED BY	POLICY NUMBER
Receipt_00264.pdf	11/20/2013	PDF	Dickinson Merrin	FRJH5448816
Invoice_00056.pdf	11/14/2013	PDF	Dickinson Merrin	CRM99875
			Dickinson Merrin	09856325-01
			Dickinson Merrin	PA4648151
			Dickinson Merrin	
			Dickinson Merrin	

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 be opened in your browser for printing.

FILE NAME	DATE ADDED	TYPE	ADDED BY	POLICY NUMBER
Invoice_00056.pdf	11/14/2013	PDF	Dickinson Merrin	CRM99875
Bayless Distribution List	11/07/2013	LETTER	Pedro Perez	CRM99875
Thank You Letter sent to in...	11/04/2013	EMAIL	Dickinson Merrin	CRM99875
Thank You Letter sent to in...	11/04/2013	EMAIL	Dickinson Merrin	CRM99875
Thank You Letter sent to in...	11/04/2013	LETTER	Dickinson Merrin	CRM99875