# **QQ**CATALYST<sup>™</sup>

# **Quick Start Guide**

Taking A Payment & Printing A Receipt

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# **Key Terms**

### **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**

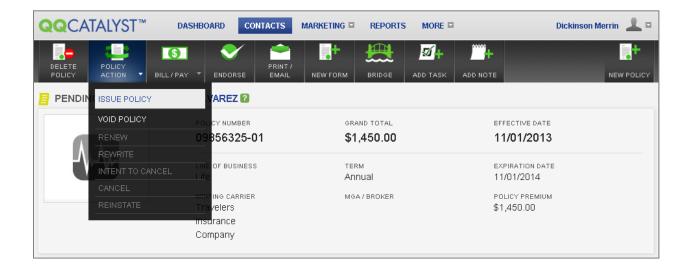
Fees charged by the agency to the customer for services

# Taking a Payment

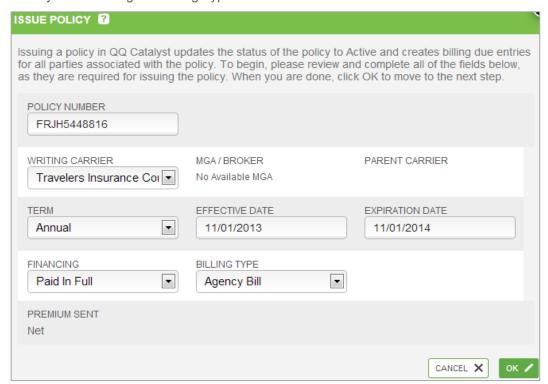
In Catalyst, payments can only be taken against bills. There has to be a due entry in order to create a received entry. Bills can be created automatically when a policy is issued or endorsed.

# When Issuing An Agency Bill Policy

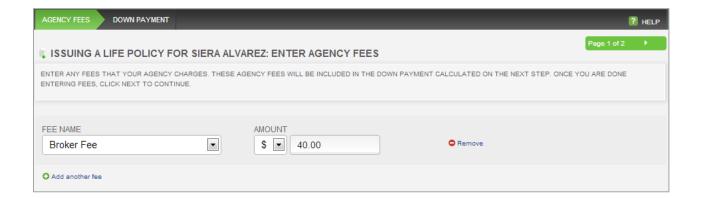
A billing entry for premium due on an Agency Bill policy is automatically created when the policy is issued. Select the Policy Action icon in the tool bar and select **Issue Policy**.



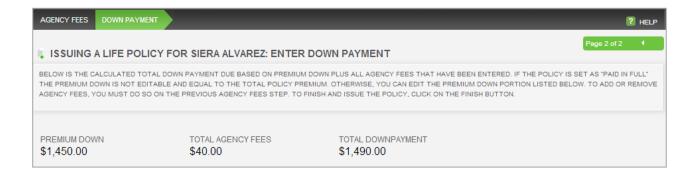
Make your Financing and Billing Type selections and click **OK** to continue.

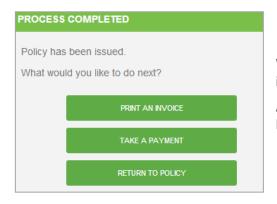


Agency fees can be added in the next step of the workflow. The list of agency fees comes from the Global Preferences section.



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.

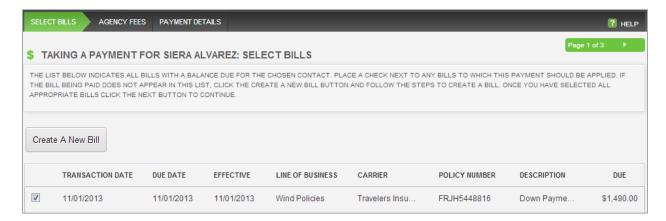




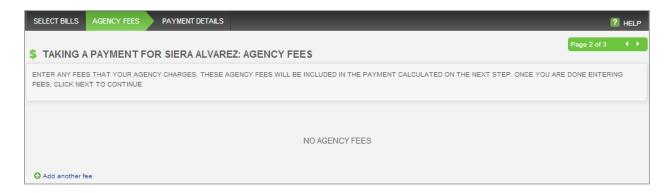
When you click Finish and confirm that you want the policy issued, the bill will be created.

At the end of the "Issue A Policy" workflow, select **Take A Payment.** 

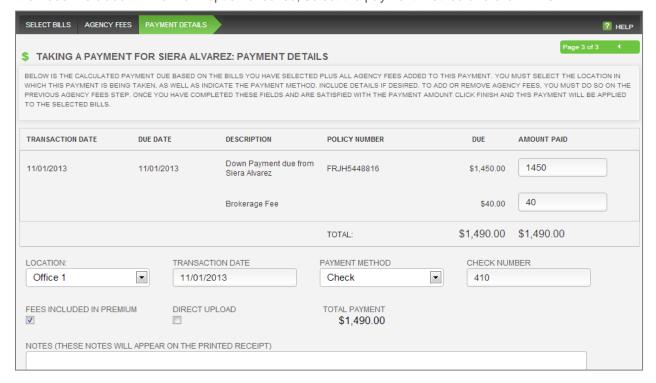
The bill will automatically be selected, but you do have the option of selecting other outstanding bills or creating a new bill.



If agency fees are charged for taking the payment they should be entered in the next tab.



If your customer is paying both the agency fee and the premium with the same payment method, leave the **Fees Included in Premium** option checked, select the payment method and click **Finish**.

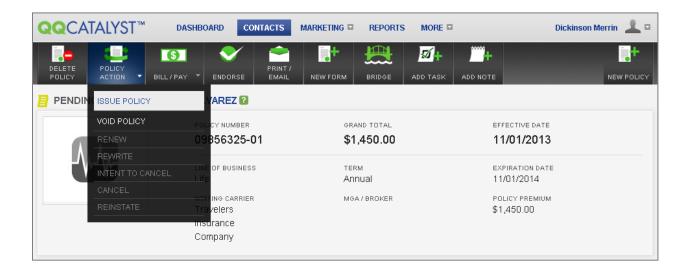


# PROCESS COMPLETED The payment has been received. Click here to view printed receipt. Click OK to return to Policy.

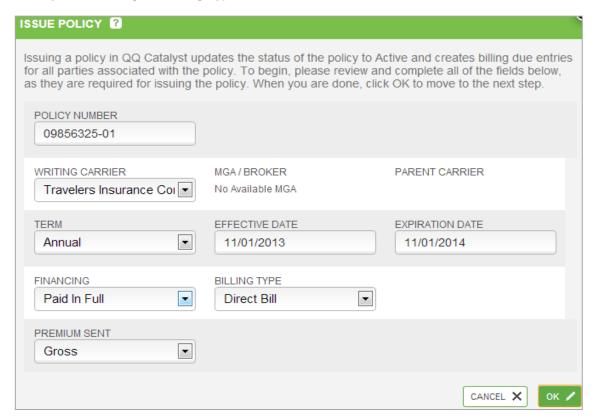
Click on the **Click here to view printed receipt** link to print the receipt. A copy is automatically attached to your customer's file.

# When Issuing A Direct Bill Policy

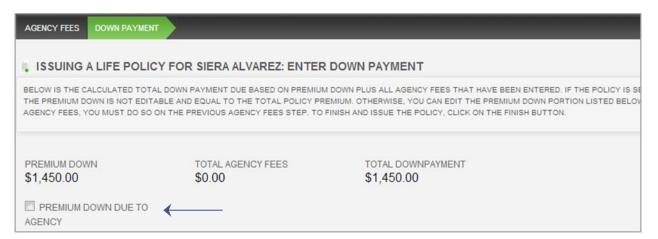
A billing entry for premium due on a Direct Bill policy can also be created when issuing the policy. Select the Policy Action icon in the tool bar and select **Issue Policy**.

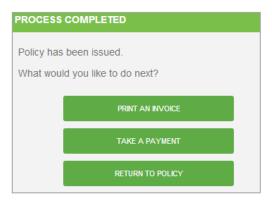


Make your Financing and Billing Type selections and click **OK** to continue.



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.

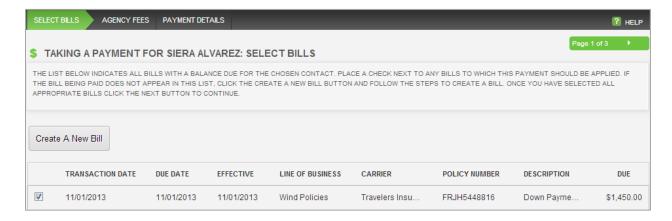




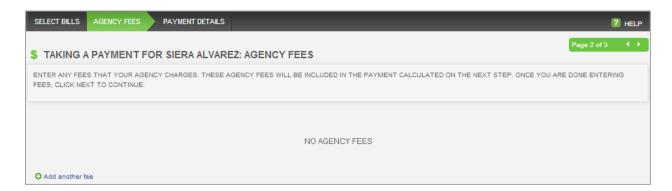
When you click Finish and confirm that you want the policy issued, the bill will be created.

At the end of the "Issue A Policy" workflow, select **Take A Payment.** 

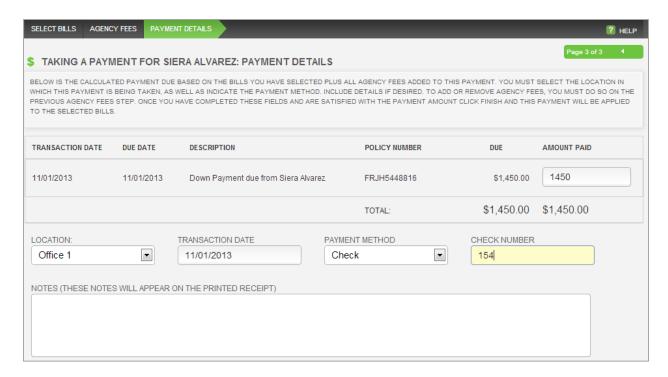
The bill will automatically be selected, but you do have the option of selecting other outstanding bills or creating a new bill.

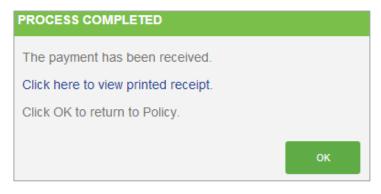


If agency fees are charged for taking the payment they should be entered in the next tab.



Select the payment method, add any notes and click Finish.

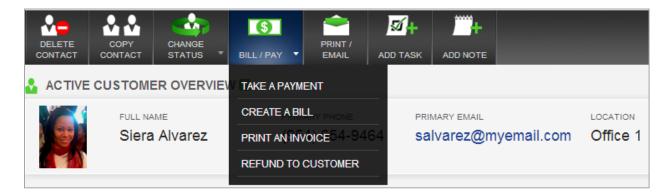




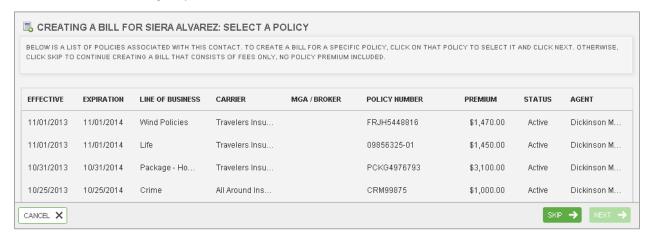
Click on the **Click here to view printed receipt** link to print the receipt. A copy is automatically attached to your customer's file.

# **Monthly Payment**

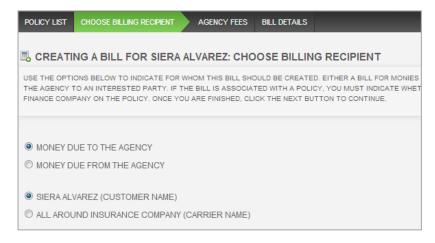
A bill for the payment has to be created before the payment can be received. Billing entries can be created manually on either the Customer Overview screen or the Policy Overview screen.



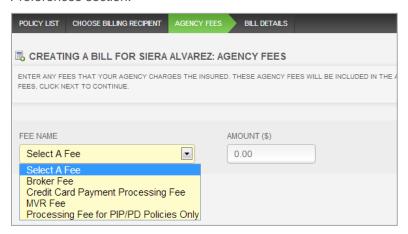
If originated from the Customer Overview screen, you will be prompted to select a policy. A policy has to be selected if you want to create a bill for policy premium. If you do not select a policy you will only be able to create a bill for agency fees.



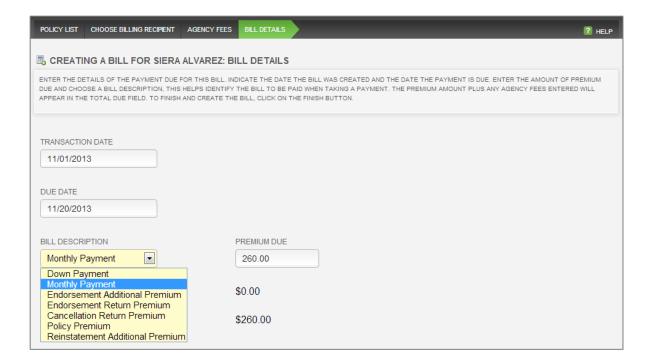
Money due to the agency from the customer will be the default selection but it can be changed.



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



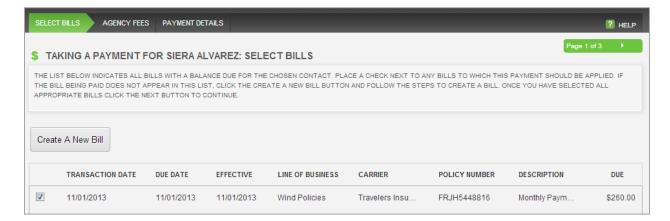
On the final step of the workflow you can enter your Due Date, the Bill Description and the amount of premium due.



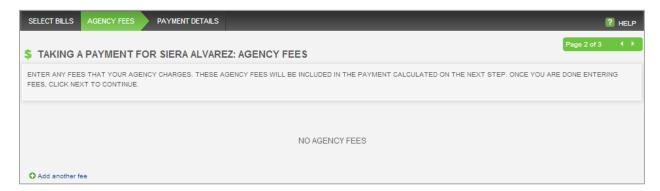


After you click Finish, select Take A Payment.

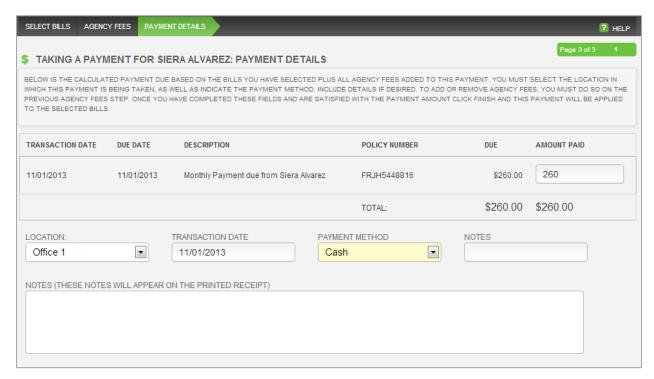
The bill will automatically be selected, but you do have the option of selecting other outstanding bills or creating a new bill.

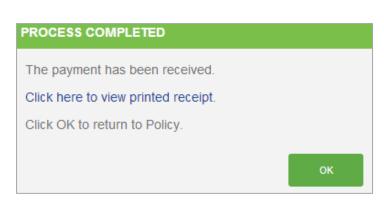


If agency fees are charged for taking the payment they should be entered in the next tab.



Select the payment method, add any notes and click Finish.





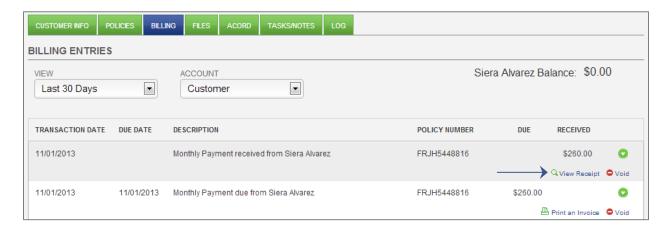
Click on the **Click here to view printed receipt** link to print the receipt. A copy is automatically attached to your customer's file.

# Reprinting A Receipt

Receipts are automatically generated and attached to your customer's file when a payment is received. You can reprint a receipt from four areas in Catalyst.

### **Billing Tab on Customer Overview Screen**

The receipt can be viewed and reprinted by clicking on the View Receipt link.



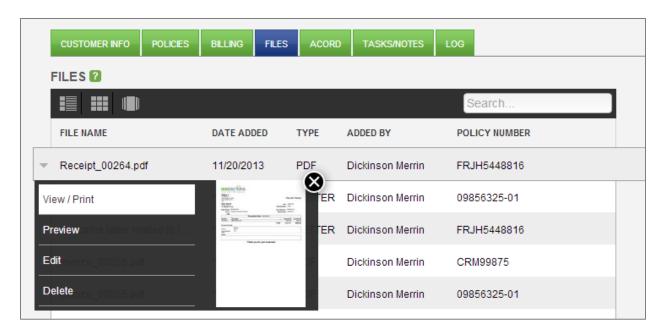
### **Billing Tab on Policy Overview Screen**

The receipt can be viewed and reprinted by clicking on the View Receipt link.



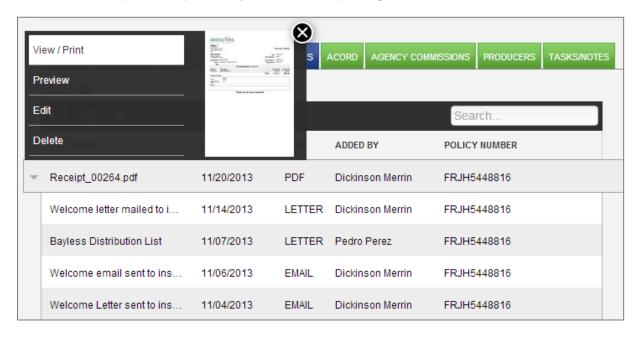
#### Files Tab on Customer Overview Screen

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



### Files Tab on Policy Overview Screen

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

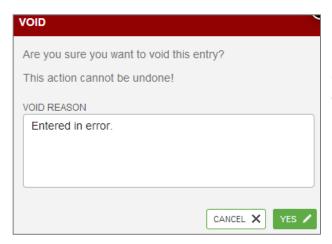


# Voiding A Payment

Any billing entry created for premium or agency fees in Catalyst can be voided if incorrect. The user has to have the void permission to void billing entries. Bills can be voided from either the Customer Overview screen or the Policy Overview screen.

Click on the Void link next to the billing entry.





You will receive a warning informing you that voided bills cannot be un-voided. Enter the Void Reason and click **Yes**.

The voided bill and the void reason will be listed on the Customer Overview screen in the Log tab.

