

QQCATALYST™

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**.

The screenshot shows the QQ Catalyst interface with the 'ISSUE POLICY' dropdown menu open. The menu options are: DELETE POLICY, POLICY ACTION, BILL / PAY, ENDORSE, PRINT / EMAIL, NEW FORM, BRIDGE, ADD TASK, ADD NOTE, and NEW POLICY. The 'POLICY ACTION' option is selected, and the 'ISSUE POLICY' option is highlighted. The background shows a policy summary table with the following data:

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 screenshot shows the 'ISSUE POLICY' form in QQ Catalyst. The form contains the following fields and values:

- POLICY NUMBER:** FRJH5448816
- WRITING CARRIER:** Travelers Insurance Co
- MGA / BROKER:** No Available MGA
- PARENT CARRIER:** (empty)
- TERM:** Annual
- EFFECTIVE DATE:** 11/01/2013
- EXPIRATION DATE:** 11/01/2014
- FINANCING:** Paid In Full
- BILLING TYPE:** Agency Bill
- PREMIUM SENT:** Net

At the bottom right of the form, there are two buttons: 'CANCEL' and 'OK'.

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

Page 1 of 2

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, 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.

SELECT BILLS **AGENCY FEES** **PAYMENT DETAILS** **HELP**

TAKING A PAYMENT FOR SIERA ALVAREZ: SELECT BILLS Page 1 of 3

THE LIST BELOW INDICATES ALL BILLS WITH A BALANCE DUE FOR THE CHOSEN CONTACT. PLACE A CHECK NEXT TO ANY BILLS TO WHICH THIS PAYMENT SHOULD BE APPLIED. IF THE BILL BEING PAID DOES NOT APPEAR IN THIS LIST, CLICK THE CREATE A NEW BILL BUTTON AND FOLLOW THE STEPS TO CREATE A BILL. ONCE YOU HAVE SELECTED ALL APPROPRIATE 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"/>	11/01/2013	11/01/2013	Wind Policies	Travelers Insu...	FRJH5448816	Down Payme...	\$1,490.00

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

SELECT BILLS **AGENCY FEES** **PAYMENT DETAILS** **HELP**

TAKING A PAYMENT FOR SIERA ALVAREZ: AGENCY FEES Page 2 of 3

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

NO AGENCY FEES

[Add another fee](#)

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**.

SELECT BILLS **AGENCY FEES** **PAYMENT DETAILS** **HELP**

TAKING A PAYMENT FOR SIERA ALVAREZ: PAYMENT DETAILS Page 3 of 3

BELOW IS THE CALCULATED PAYMENT DUE BASED ON THE BILLS YOU HAVE SELECTED PLUS ALL AGENCY FEES ADDED TO THIS PAYMENT. YOU MUST SELECT THE LOCATION IN WHICH THIS PAYMENT IS BEING TAKEN, AS WELL AS INDICATE THE PAYMENT METHOD. INCLUDE DETAILS IF DESIRED. TO ADD OR REMOVE AGENCY FEES, YOU MUST DO SO ON THE PREVIOUS AGENCY FEES STEP. ONCE YOU HAVE COMPLETED THESE FIELDS AND ARE SATISFIED WITH THE PAYMENT AMOUNT CLICK FINISH AND THIS PAYMENT WILL BE APPLIED TO THE SELECTED BILLS.

TRANSACTION DATE	DUE DATE	DESCRIPTION	POLICY NUMBER	DUE	AMOUNT PAID
11/01/2013	11/01/2013	Down Payment due from Siera Alvarez	FRJH5448816	\$1,450.00	<input type="text" value="1450"/>
		Brokerage Fee		\$40.00	<input type="text" value="40"/>
TOTAL:				\$1,490.00	\$1,490.00

LOCATION: TRANSACTION DATE: PAYMENT METHOD: CHECK NUMBER:

FEES INCLUDED IN PREMIUM: DIRECT UPLOAD: TOTAL PAYMENT: **\$1,490.00**

NOTES (THESE NOTES WILL APPEAR ON THE PRINTED RECEIPT)

PROCESS COMPLETED

The payment has been received.

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

Click OK to return to Policy.

OK

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**.

The screenshot shows the QQCATALYST™ dashboard with the 'POLICY ACTION' dropdown menu open. The menu options include: DELETE POLICY, POLICY ACTION (selected), BILL / PAY, ENDORSE, PRINT / EMAIL, NEW FORM, BRIDGE, ADD TASK, ADD NOTE, and NEW POLICY. The 'ISSUE POLICY' option is highlighted. In the background, a policy summary is visible for policy number 09856325-01, with a grand total of \$1,450.00 and an effective date of 11/01/2013. Other details include: Line of Business: Life, Term: Annual, Expiration Date: 11/01/2014, Writing Carrier: Travelers Insurance Company, and MGA / Broker: \$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 <input type="text" value="Travelers Insurance Co"/>	MGA / BROKER No Available MGA	PARENT CARRIER
TERM <input type="text" value="Annual"/>	EFFECTIVE DATE <input type="text" value="11/01/2013"/>	EXPIRATION DATE <input type="text" value="11/01/2014"/>
FINANCING <input type="text" value="Paid In Full"/>	BILLING TYPE <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 SE THE PREMIUM DOWN IS NOT EDITABLE AND EQUAL TO THE TOTAL POLICY PREMIUM. OTHERWISE, YOU CAN EDIT THE PREMIUM DOWN PORTION LISTED BELOW 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, 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.

SELECT BILLS
AGENCY FEES
PAYMENT DETAILS
? HELP

Page 1 of 3 ▶

TAKING A PAYMENT 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 TO WHICH THIS PAYMENT SHOULD BE APPLIED. IF THE BILL BEING PAID DOES NOT APPEAR IN THIS LIST, CLICK THE CREATE A NEW BILL BUTTON AND FOLLOW THE STEPS TO CREATE A BILL. ONCE YOU HAVE SELECTED ALL APPROPRIATE 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"/>	11/01/2013	11/01/2013	11/01/2013	Wind Policies	Travelers Insu...	FRJH5448816	Down Payme...	\$1,450.00

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

SELECT BILLS AGENCY FEES PAYMENT DETAILS ? HELP

Page 2 of 3

\$ TAKING A PAYMENT FOR SIERA ALVAREZ: AGENCY FEES

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

NO AGENCY FEES

[Add another fee](#)

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

SELECT BILLS AGENCY FEES PAYMENT DETAILS ? HELP

Page 3 of 3

\$ TAKING A PAYMENT FOR SIERA ALVAREZ: PAYMENT DETAILS

BELOW IS THE CALCULATED PAYMENT DUE BASED ON THE BILLS YOU HAVE SELECTED PLUS ALL AGENCY FEES ADDED TO THIS PAYMENT. YOU MUST SELECT THE LOCATION IN WHICH THIS PAYMENT IS BEING TAKEN, AS WELL AS INDICATE THE PAYMENT METHOD. INCLUDE DETAILS IF DESIRED. TO ADD OR REMOVE AGENCY FEES, YOU MUST DO SO ON THE PREVIOUS AGENCY FEES STEP. ONCE YOU HAVE COMPLETED THESE FIELDS AND ARE SATISFIED WITH THE PAYMENT AMOUNT CLICK FINISH AND THIS PAYMENT WILL BE APPLIED TO THE SELECTED BILLS.

TRANSACTION DATE	DUE DATE	DESCRIPTION	POLICY NUMBER	DUE	AMOUNT PAID
11/01/2013	11/01/2013	Down Payment due from Siera Alvarez	FRJH5448816	\$1,450.00	1450
TOTAL:				\$1,450.00	\$1,450.00

LOCATION: TRANSACTION DATE: PAYMENT METHOD: CHECK NUMBER:

NOTES (THESE NOTES WILL APPEAR ON THE PRINTED RECEIPT)

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.

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.

ACTIVE CUSTOMER OVERVIEW

TAKE A PAYMENT

CREATE A BILL

PRINT AN INVOICE

REFUND TO CUSTOMER

FULL NAME
Siera Alvarez

PHONE
54-9464

PRIMARY EMAIL
salvarez@myemail.com

LOCATION
Office 1

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.

CREATING A BILL FOR SIERA ALVAREZ: SELECT A POLICY

BELOW IS A LIST OF POLICIES ASSOCIATED WITH THIS CONTACT. TO CREATE A BILL FOR A SPECIFIC POLICY, CLICK ON THAT POLICY TO SELECT IT AND CLICK NEXT. OTHERWISE, CLICK SKIP TO CONTINUE CREATING A BILL THAT CONSISTS OF FEES ONLY, NO POLICY PREMIUM INCLUDED.

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...

CANCEL X SKIP → NEXT →

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

CREATING A BILL FOR SIERA ALVAREZ: CHOOSE BILLING RECIPIENT

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.

The screenshot shows the 'AGENCY FEES' step of the workflow. The breadcrumb navigation includes 'POLICY LIST', 'CHOOSE BILLING RECIPIENT', 'AGENCY FEES', and 'BILL DETAILS'. The main heading is 'CREATING A BILL FOR SIERA ALVAREZ: AGENCY FEES'. Below the heading is a text box: 'ENTER ANY FEES THAT YOUR AGENCY CHARGES THE INSURED. THESE AGENCY FEES WILL BE INCLUDED IN THE AGENCY FEES, CLICK NEXT TO CONTINUE.' The form contains two fields: 'FEE NAME' with a dropdown menu showing 'Select A Fee', 'Broker Fee', 'Credit Card Payment Processing Fee', 'MVR Fee', and 'Processing Fee for PIP/PD Policies Only'; and 'AMOUNT (\$)' with a text input field containing '0.00'.

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

The screenshot shows the 'BILL DETAILS' step of the workflow. The breadcrumb navigation includes 'POLICY LIST', 'CHOOSE BILLING RECIPIENT', 'AGENCY FEES', and 'BILL DETAILS'. The main heading is 'CREATING A BILL FOR SIERA ALVAREZ: BILL DETAILS'. Below the heading is a text box: '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.' The form contains three fields: 'TRANSACTION DATE' with a text input field containing '11/01/2013'; 'DUE DATE' with a text input field containing '11/20/2013'; and 'BILL DESCRIPTION' with a dropdown menu showing 'Monthly Payment', 'Down Payment', 'Monthly Payment', 'Endorsement Additional Premium', 'Endorsement Return Premium', 'Cancellation Return Premium', 'Policy Premium', and 'Reinstatement Additional Premium'. To the right of the dropdown is a 'PREMIUM DUE' field with a text input field containing '260.00'.

The screenshot shows the 'PROCESS COMPLETED' screen. The heading is 'PROCESS COMPLETED'. Below the heading is a text box: 'The bill has been created. What would you like to do next?'. There are three green buttons: 'PRINT AN INVOICE', 'TAKE A PAYMENT', and 'RETURN TO CONTACT'.

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.

SELECT BILLS AGENCY FEES PAYMENT DETAILS HELP

Page 1 of 3

TAKING A PAYMENT 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 TO WHICH THIS PAYMENT SHOULD BE APPLIED. IF THE BILL BEING PAID DOES NOT APPEAR IN THIS LIST, CLICK THE CREATE A NEW BILL BUTTON AND FOLLOW THE STEPS TO CREATE A BILL. ONCE YOU HAVE SELECTED ALL APPROPRIATE 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"/>	11/01/2013	11/01/2013	11/01/2013	Wind Policies	Travelers Insu...	FRJH5448816	Monthly Paym...	\$260.00

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

SELECT BILLS AGENCY FEES PAYMENT DETAILS HELP

Page 2 of 3

TAKING A PAYMENT FOR SIERA ALVAREZ: AGENCY FEES

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

NO AGENCY FEES

[Add another fee](#)

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

SELECT BILLS AGENCY FEES PAYMENT DETAILS HELP

Page 3 of 3

TAKING A PAYMENT FOR SIERA ALVAREZ: PAYMENT DETAILS

BELOW IS THE CALCULATED PAYMENT DUE BASED ON THE BILLS YOU HAVE SELECTED PLUS ALL AGENCY FEES ADDED TO THIS PAYMENT. YOU MUST SELECT THE LOCATION IN WHICH THIS PAYMENT IS BEING TAKEN, AS WELL AS INDICATE THE PAYMENT METHOD. INCLUDE DETAILS IF DESIRED. TO ADD OR REMOVE AGENCY FEES, YOU MUST DO SO ON THE PREVIOUS AGENCY FEES STEP. ONCE YOU HAVE COMPLETED THESE FIELDS AND ARE SATISFIED WITH THE PAYMENT AMOUNT CLICK FINISH AND THIS PAYMENT WILL BE APPLIED TO THE SELECTED BILLS.

TRANSACTION DATE	DUE DATE	DESCRIPTION	POLICY NUMBER	DUE	AMOUNT PAID
11/01/2013	11/01/2013	Monthly Payment due from Siera Alvarez	FRJH5448816	\$260.00	<input type="text" value="260"/>
TOTAL:				\$260.00	\$260.00

LOCATION: TRANSACTION DATE: PAYMENT METHOD: NOTES:

NOTES (THESE NOTES WILL APPEAR ON THE PRINTED RECEIPT)

PROCESS COMPLETED

The payment has been received.

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

Click OK to return to Policy.

OK

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 ENTRIES

VIEW: Last 30 Days | ACCOUNT: Customer | Siera Alvarez Balance: \$0.00

TRANSACTION DATE	DUE DATE	DESCRIPTION	POLICY NUMBER	DUE	RECEIVED
11/01/2013		Monthly Payment received from Siera Alvarez	FRJH5448816		\$260.00
					View Receipt Void
11/01/2013	11/01/2013	Monthly Payment due from Siera Alvarez	FRJH5448816	\$260.00	
					Print an Invoice Void

Billing Tab on Policy Overview Screen

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

BILLING ENTRIES

VIEW: Last 30 Days | ACCOUNT: Customer | Siera Alvarez Balance: \$0.00

TRANSACTION DATE	DUE DATE	DESCRIPTION	POLICY NUMBER	DUE	RECEIVED
11/01/2013		Monthly Payment received from Siera Alvarez	FRJH5448816		\$260.00
					View Receipt Void
11/01/2013	11/01/2013	Monthly Payment due from Siera Alvarez	FRJH5448816	\$260.00	
					Print an Invoice Void

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.

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

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.

FILE NAME	DATE ADDED	TYPE	ADDED BY	POLICY NUMBER
Receipt_00264.pdf	11/20/2013	PDF	Dickinson Merrin	FRJH5448816
Welcome letter mailed to i...	11/14/2013	LETTER	Dickinson Merrin	FRJH5448816
Bayless Distribution List	11/07/2013	LETTER	Pedro Perez	FRJH5448816
Welcome email sent to ins...	11/06/2013	EMAIL	Dickinson Merrin	FRJH5448816
Welcome Letter sent to ins...	11/04/2013	EMAIL	Dickinson Merrin	FRJH5448816

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.

BILLING ENTRIES

VIEW: Last 30 Days | ACCOUNT: Customer | Siera Alvarez Balance: \$0.00

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	

Buttons: View Receipt, Void, Print an Invoice, Void

VOID

Are you sure you want to void this entry?
This action cannot be undone!

VOID REASON
Entered in error.

CANCEL X YES ✓

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.

SYSTEM ACTIVITY LOG

11/20/2013 at 02:33 PM by Dickinson Merrin

Voided Cash payment (Premium paid to Office) received in the amount of \$260.00 (Receipt Number: 00264)

Reason: Entered in error.

Policy Attached: Wind Policies - Travelers Insurance Company - FRJH5448816