Billing – Great Roadmap Training Guide

Agents

Summary

This document highlights the navigation our newest platform **Great Roadmap** for **Trucking Agents** within our **Billing** system. The information throughout the document will focus on navigating the Billing module including **Dashboard Policy Information**, **Term Summaries**, **Export Function**, and **Financial Transactions**.

Logging into Great Roadmap

1. Open Internet Browser and paste the URL below:
    a. **gaigtrucking.cloudinsurer.com**
2. Enter your credentials:
    a. **Username:** Your current I360 Username
    b. **Password:** Your current I360 Password
3. Click **Sign In**

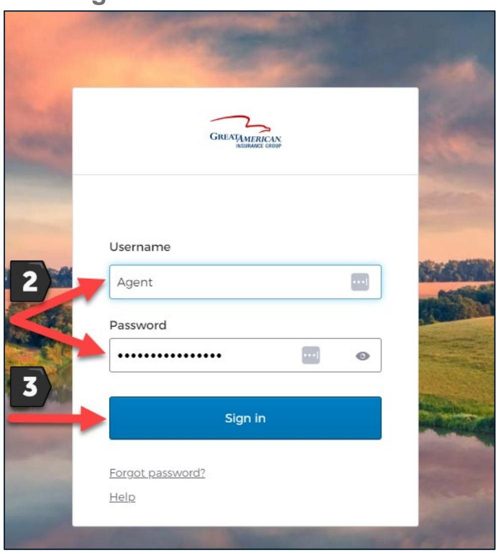


*Figure 1.1 **Login page for Great Roadmap.***

Billing Workbench

1. From the **Suite Home** screen, hover over the **Workbench** dropdown from the blue navigation menu.

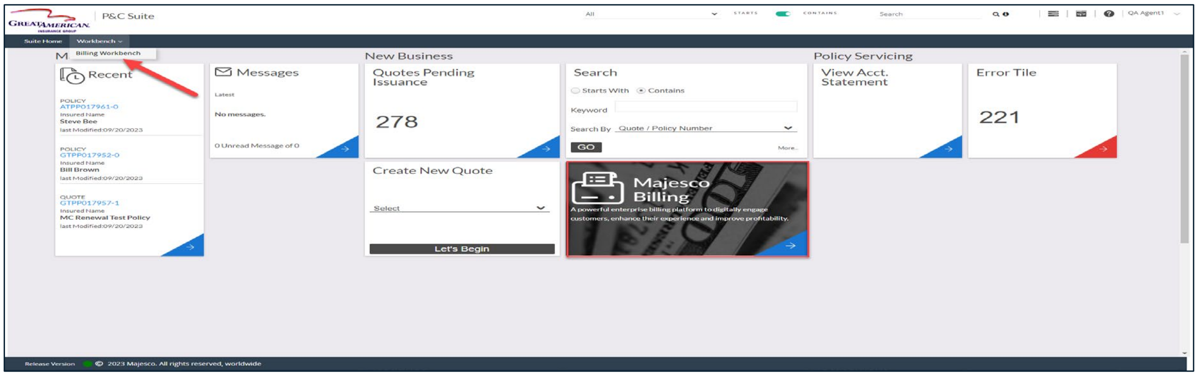


Figure 2.1 ***Selecting Billing Workbench.***

2. Select **Billing Workbench**.
   a. **Note!** If you **click** on **Workbench**, it will take you to another screen with the workbench tile. You can also choose the **Billing Workbench** option here as well.

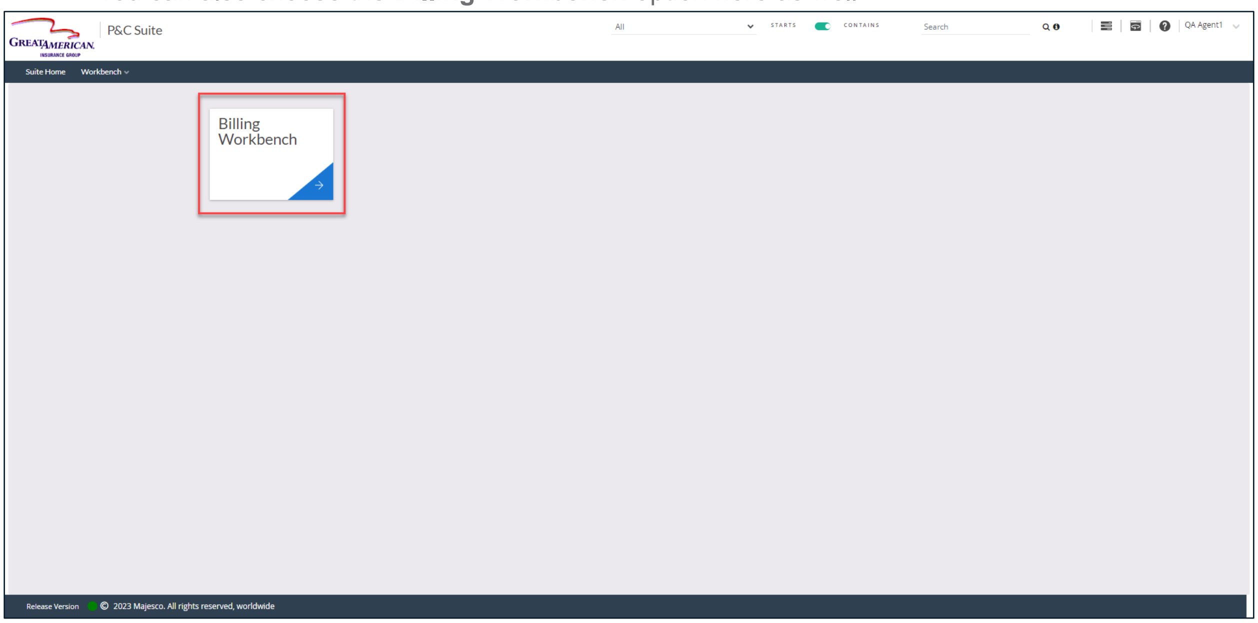


Figure 2.2 ***Clicked Workbench, then select Billing Workbench.***

Account/Policy Inquiry and Search Bar

There are two options to find an account or policy, either through the **Inquiry** menu or by using the **Search Bar** at the top of the window.

1. From the **Billing** Workbench, select the **Inquiry** dropdown from the navigation menu.

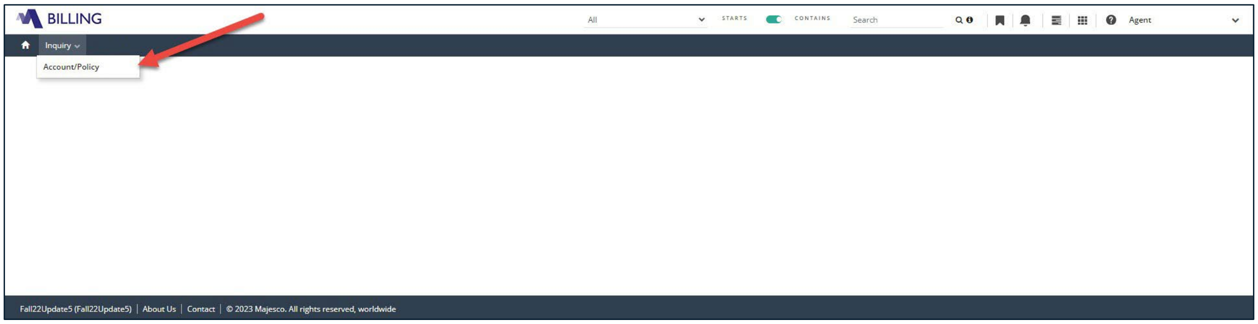


Figure 3.1 ***Selecting <u>Account/Policy</u> from the <u>Inquiry</u> dropdown.***

2. You will now see **Search Options** to enter the **Policy #**. Be sure to include the full policy number:
    a. For new policies, this includes **four alpha characters** followed by **6 digits** and the **modification #**). For example, GTPP123456-0.
    b. For current policies, this includes **three alpha characters** followed by **7 digits**. (modification # optional). For example, GTP1234567.
3. Click **Search** or hit **Enter.**

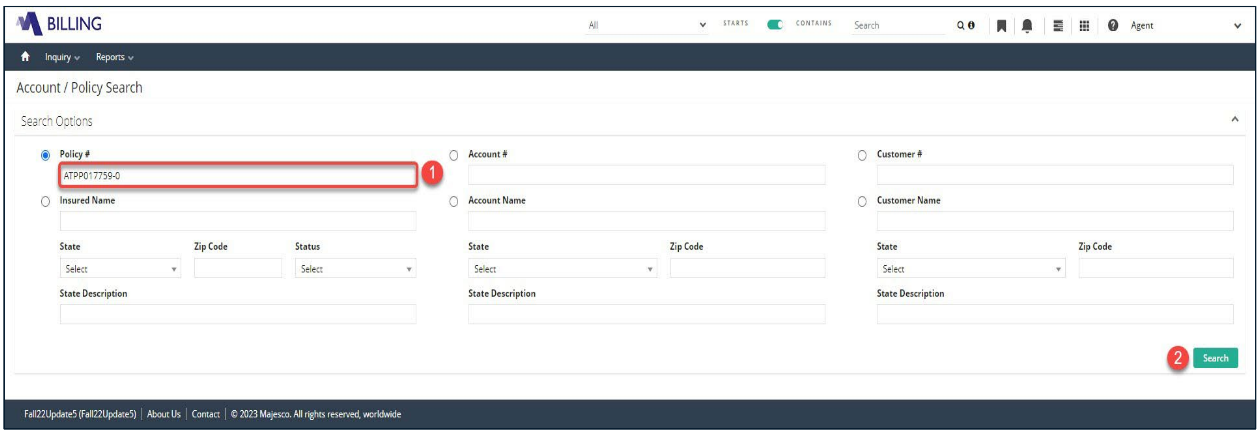


Figure 3.2 ***Entering the <u>Policy #</u> and clicking <u>Submit</u>.***

4. The Policy Dashboard window will appear, giving quick insight and information on the following:
    c. **Policy Information**
    d. **Customer Profile**
    e. **Cancellation**
    f. **Last Invoice**
    g. **Next Invoice**

5. Select **View Policy.**

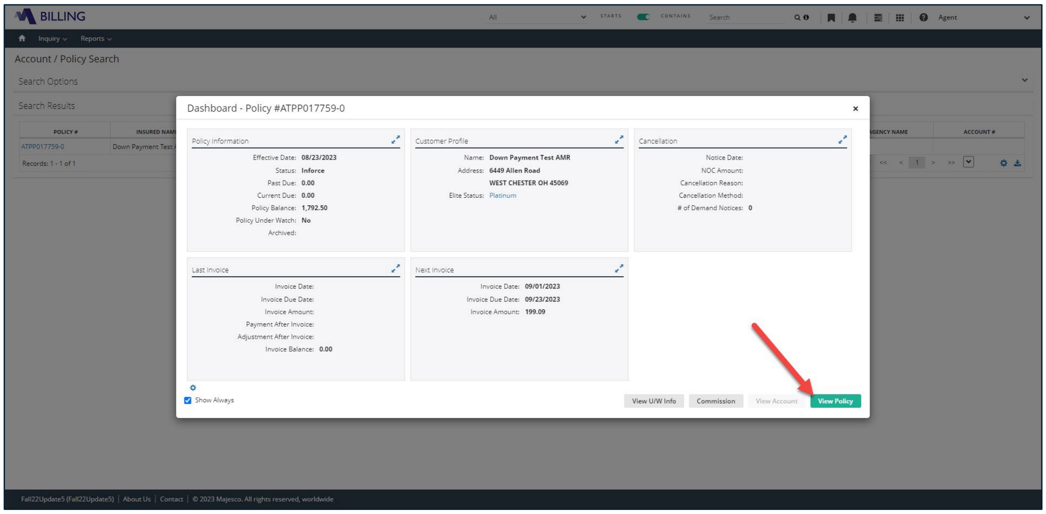


Figure 3.3 ***When searching for a policy, the <u>Dashboard</u> window will appear. To continue to the account, select <u>View Policy</u>.***

Dashboard: Policy Information

Once a policy number is selected, the next screen is the **Dashboard** which will provide the following features:

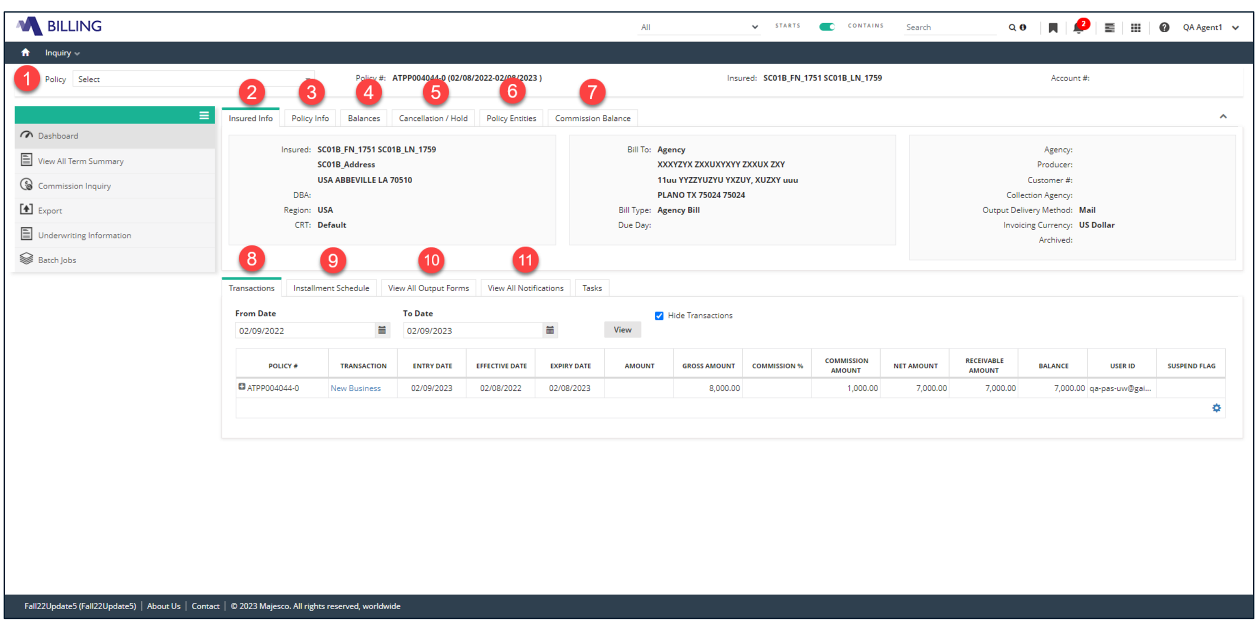


Figure 4.1 ***Illustrating the various tabs of information available on the <u>Dashboard</u> view.***

1. **Term Selection:** Utilize this dropdown to switch between terms for the policy.
2. **Insured Info**: This provides a brief overview of the insureds' information.
3. **Policy Info**: This provides a brief overview of the policy.
4. **Balances**: The balances tab provides a high-level view of premium, fee, and surcharge totals for the policy.
5. **Cancellation/Hold**: Provides information on cancellation details or holds on the account.
6. **Policy Entities**: You can view all entities associated with the policy; agency, insured, loss payee, etc.
7. **Commission Balance**: Highlights any commission details for the policy.
8. **Transactions**: Provides all transactions performed on the account.
    a. Each transaction is a hyperlink and allows you to see detailed information about the transaction on the policy.
9. **Installment Schedule:** Reviews the upcoming installments for the policy.
10. **View All Output Forms:** Populates generated forms for the policy/account (i.e. Draft notice, Welcome letter, etc.).
11. **View All Notifications:** Notifications are reminders or notes used for reference purposes. You can create these notifications for other agents to see and acknowledge.

Note! If a policy has any payments due or waiting to be processed, a blue banner will come across this screen as a notification to the agent.

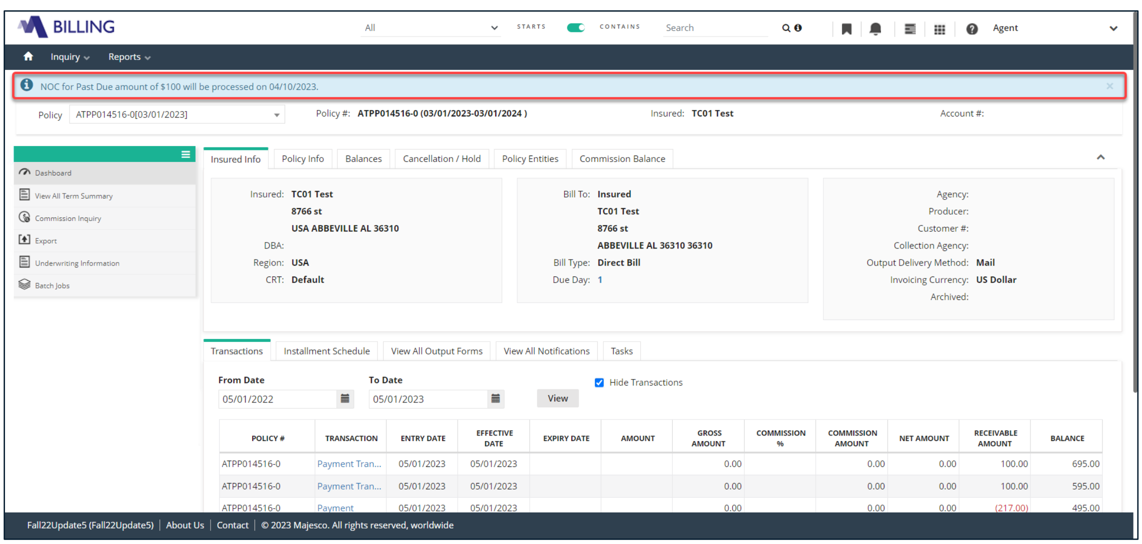


Figure 5.2 ***This image shows a banner notification of the policy if anything is in process.***

View All Term Summary

If the policy has multiple terms, this view will provide details such as the **Status**, **Term Balance**, and **Term Total** of the account.

1. When selecting **View All Term Summary**, a window will appear with details on the term. The system allows you to change some of the data columns.

Figure 5.1 ***Visual showing how to change the data columns by selecting the <u>Cog</u> icon.***

2. Click the **Cog** (located at bottom right of window) to enter the **Change Datagrid Preference.**
3. To change the columns, **Check** or **Uncheck** the boxes, then click **Save Preference.**

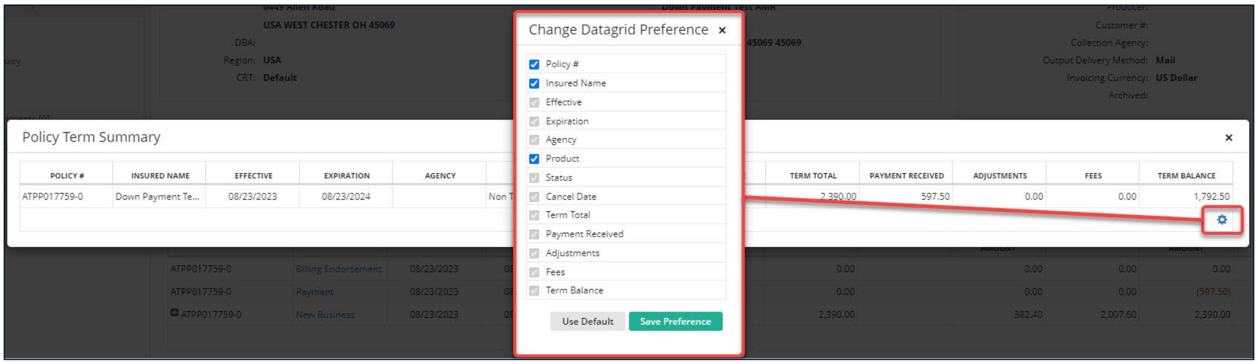
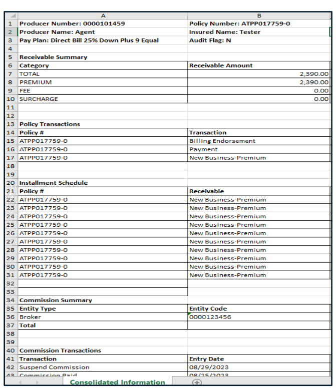


Figure 6.2 ***Select the <u>Cog</u> to change the <u>Datagrid</u> preferences.***

Export Function

The export function allows you to download a **consolidated** version of the policy which includes summaries of **account receivables**, **transactions**, **installment schedule**, **commission**, and **commission transactions**.

1. Click **Export** and proceed to extract the report from your local file folder.



	A	B
1	**Producer Number: 0000101459**	**Policy Number: ATPP017759-0**
2	**Producer Name: Agent**	**Insured Name: Tester**
3	**Pay Plan: Direct Bill 25% Down Plus 9 Equal**	**Audit Flag: N**
4		
5	**Receivable Summary**	
6	**Category**	**Receivable Amount**
7	TOTAL	2,390.00
8	PREMIUM	2,390.00
9	FEE	0.00
10	SURCHARGE	0.00
11		
12		
13	**Policy Transactions**	
14	**Policy #**	**Transaction**
15	ATPP017759-0	Billing Endorsement
16	ATPP017759-0	Payment
17	ATPP017759-0	New Business-Premium
18		
19		
20	**Installment Schedule**	
21	**Policy #**	**Receivable**
22	ATPP017759-0	New Business-Premium
23	ATPP017759-0	New Business-Premium
24	ATPP017759-0	New Business-Premium
25	ATPP017759-0	New Business-Premium
26	ATPP017759-0	New Business-Premium
27	ATPP017759-0	New Business-Premium
28	ATPP017759-0	New Business-Premium
29	ATPP017759-0	New Business-Premium
30	ATPP017759-0	New Business-Premium
31	ATPP017759-0	New Business-Premium
32		
33		
34	**Commission Summary**	
35	**Entity Type**	**Entity Code**
36	Broker	0000123456
37	**Total**	
38		
39		
40	**Commission Transactions**	
41	**Transaction**	**Entry Date**
42	Suspend Commission	08/29/2023
43	Commission Paid	08/25/2023

Consolidated Information

Figure 6.1 ***Screenshot of <u>consolidated information</u> from <u>Exporting</u>.***

Viewing Account Statements

Agents

Summary

This quick card will guide you through the process of navigating, viewing, and downloading account statements for your agency. Before continuing, please ensure you've received access to the **Great Roadmap** system.

Account Statements: Navigation

1. To access account statements in Great Roadmap, you'll navigate to the **Policy Servicing** section.

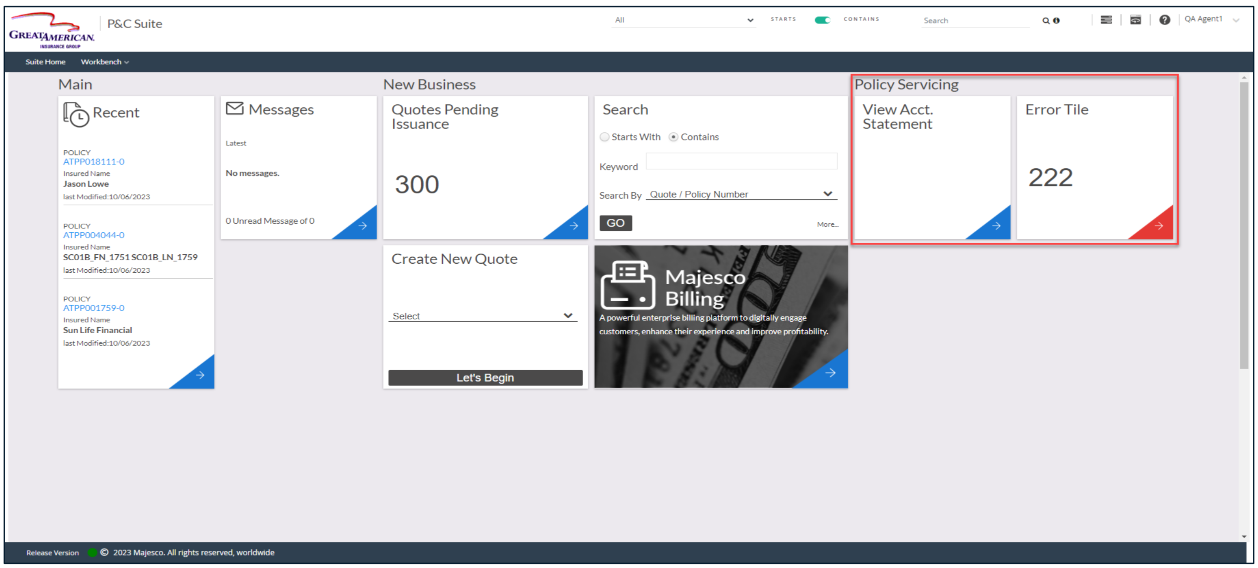


*Figure 1.1 **Highlighting the <u>Policy Servicing</u> section.***

2. Here, you'll select the tile **View Acct. Statement** to proceed to the next screen.

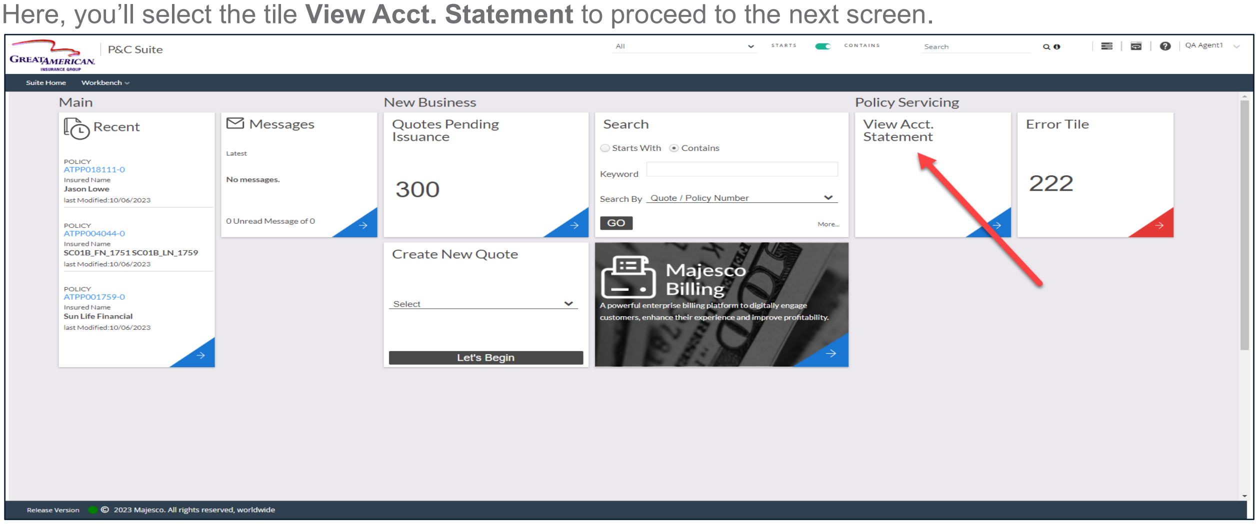


*Figure 1.3 **Selecting the <u>View Acct. Statement</u> tile.***

Account Statements: Data Entry

1. To create the account statement needed, enter the **Producer Code** or select the **Producer Name** from the drop-down. (**Important!** When entering the producer code, you must precede the six-digit code by 4 zeroes as shown below:

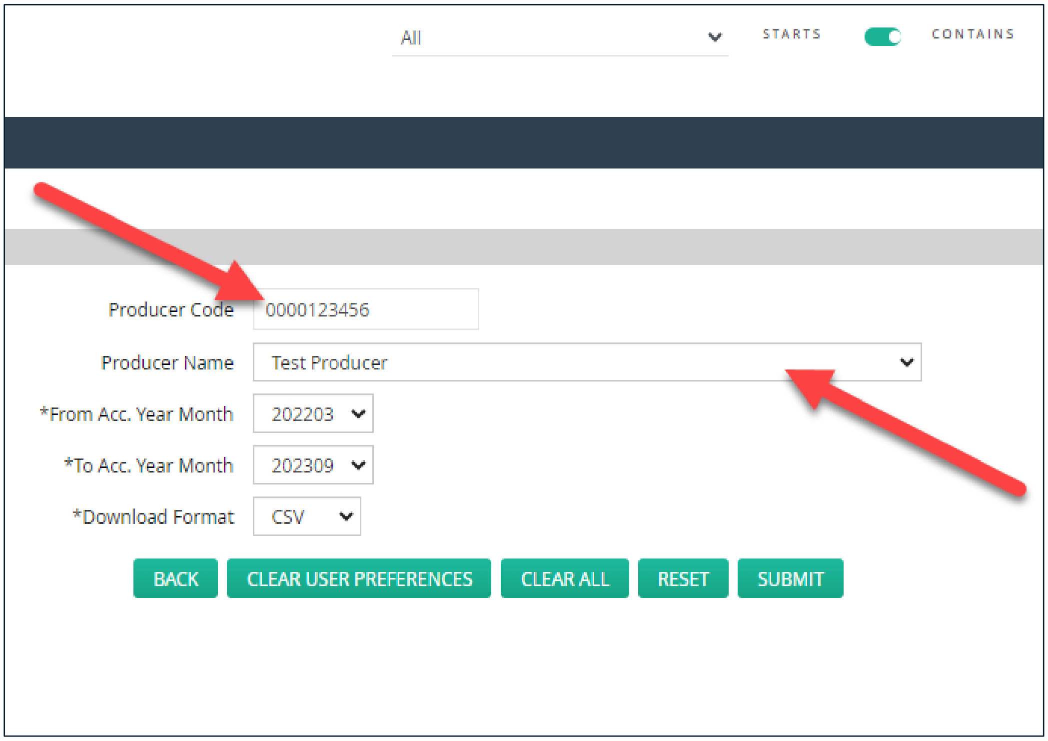


Figure 2.1 ***Illustration of proper Producer Code entry or use of Producer Name.***

2. Next, select the *From Acc. Year Month and *To Acc. Year Month.

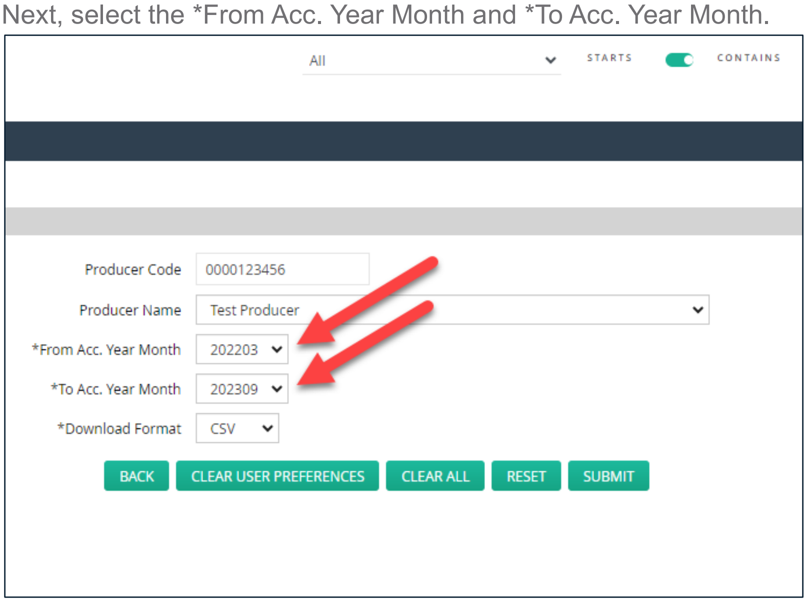


Figure 2.2 ***Identifies the From date and To date.***

3. Finally, select the format you'd like to use (CSV or PDF).

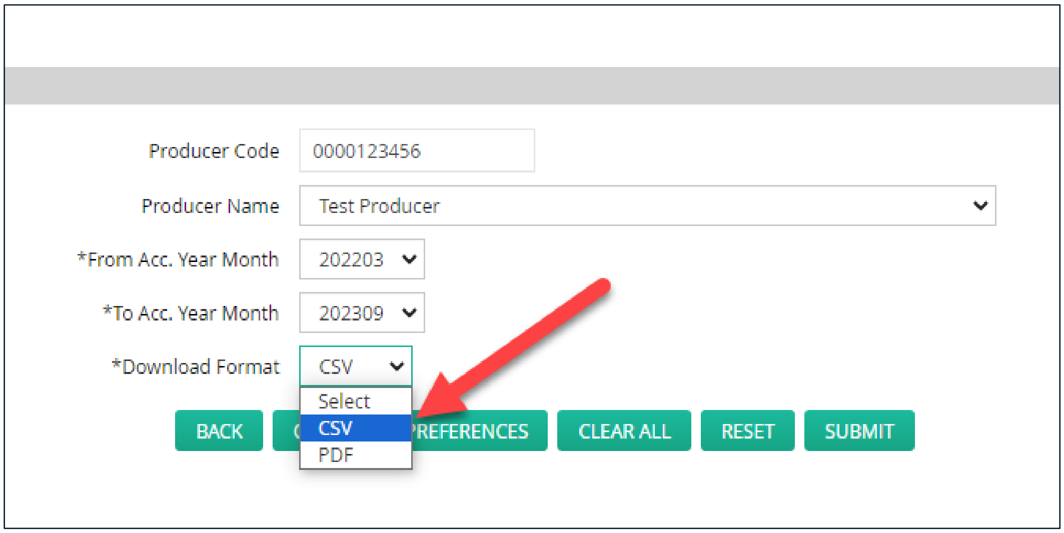


*Figure 2.3 **Clicking the drop down and selecting the <u>Download Format</u>**.*

4. Before hitting **Submit,** if the information you've entered is not correct, you can use the **CLEAR ALL** or **RESET** buttons to start over.
    a. **NOTE!** The system will save your preferences, but if you'd like to remove them, select **CLEAR USER PREFERENCES** to its' original form:

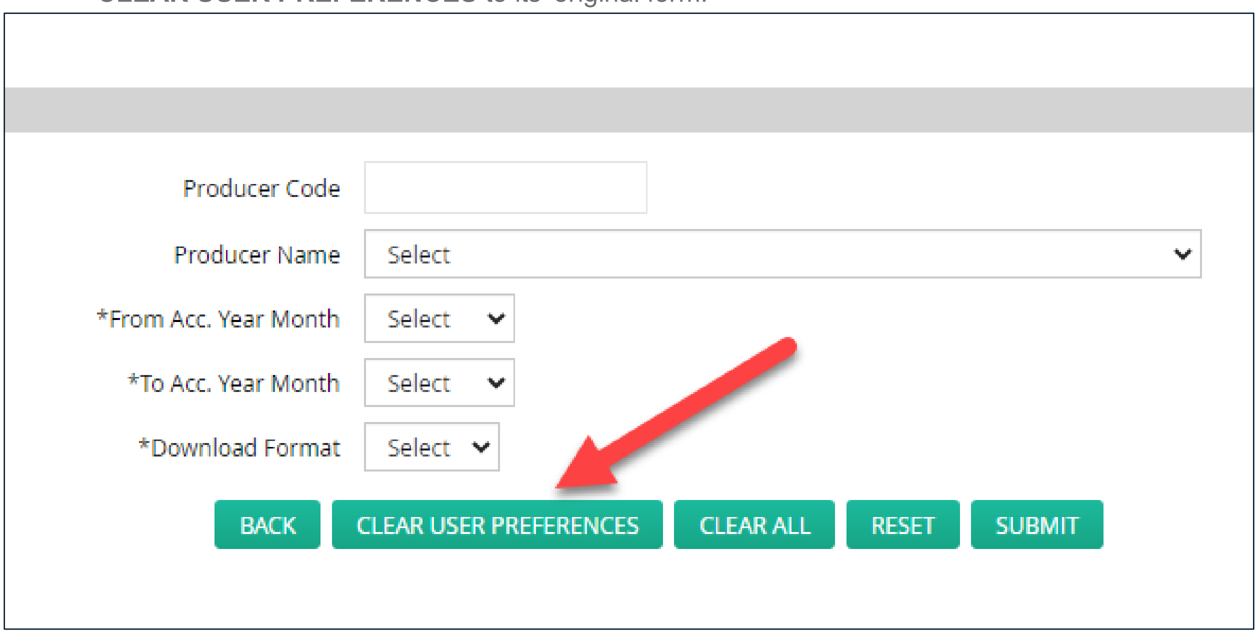


*Figure 2.4 **What occurs when selecting <u>CLEAR USER PREFERENCES</u>**.*

Account Statements: Downloading

1. After clicking submit, a new screen will appear with any available statements for the time-period selected. If a statement is available, the word **VIEW** will appear under its respective column as shown below.

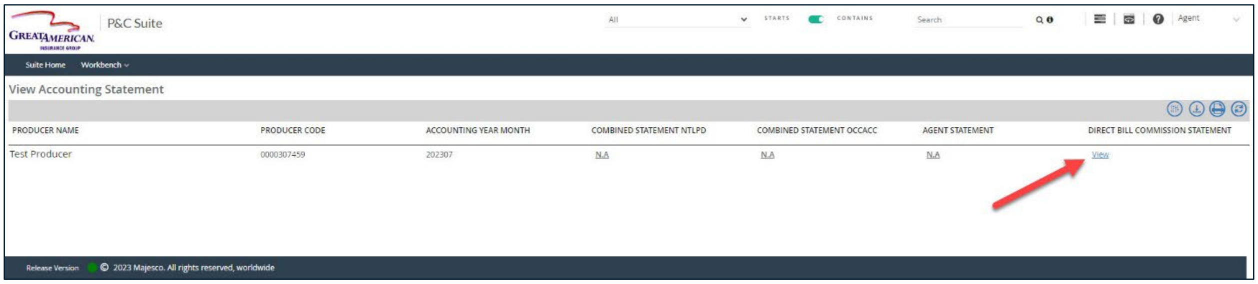


Figure 3.1 ***Select <u>VIEW</u> to open the statement.***

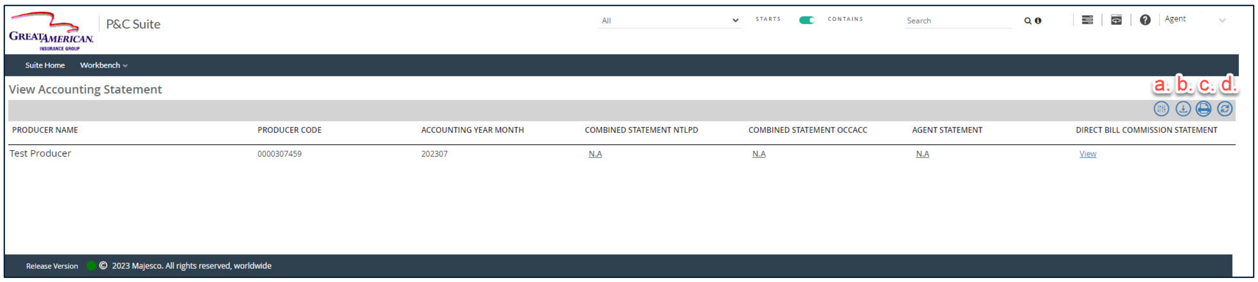
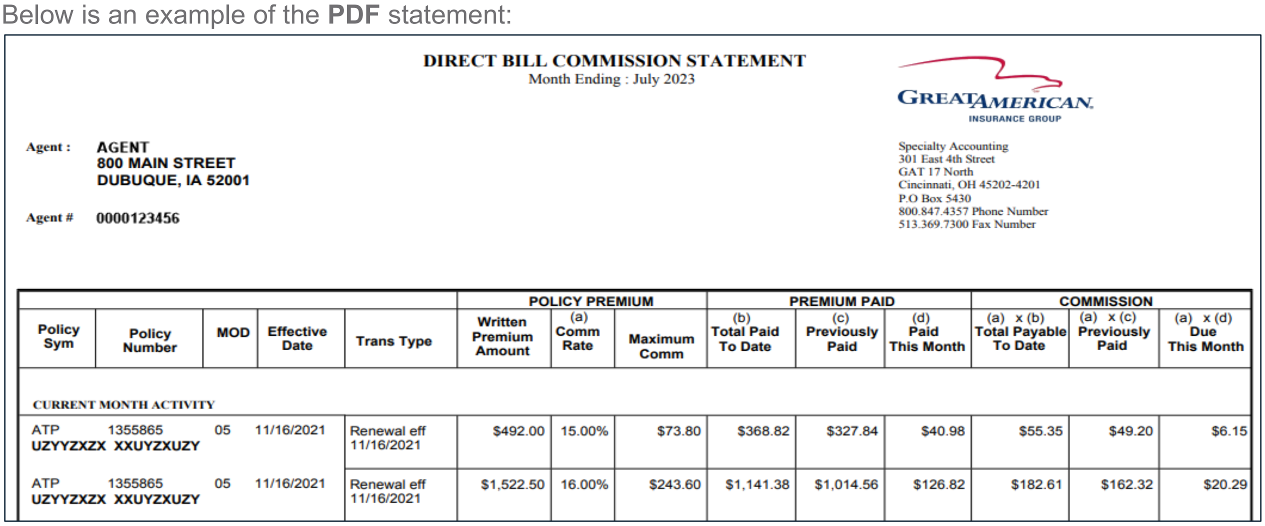


Figure 3.2 ***This image highlights the <u>icons</u> available from the statement screen.***

2. Additionally, there are four icons located on the upper righthand screen. that proceed to the right. Each icon does the following:
    a. This **filter** icon allows you to **update** your search information. Once you've downloaded your statement, simply click this icon to return to the **data entry screen**.
    b. The **down-arrow** icon will **download** the page you are **currently viewing** into an excel spreadsheet, highlighting the columns you see on the page such as **Producer Name, Producer Code,** etc.
    c. The **printer** icon allows you to print the **current page** you are viewing.
    d. The **refresh** icon allows you to **refresh the page** if any changes were made. If you need to update the search information once you've downloaded your statement, simply click this **icon** to return to the data entry screen.
3. Below is an example of the **PDF** statement:



DIRECT BILL COMMISSION STATEMENT
Month Ending : July 2023

GREAT AMERICAN INSURANCE GROUP

Specialty Accounting
301 East 4th Street
GAT 17 North
Cincinnati, OH 45202-4201
P.O Box 5430
800.847.4357 Phone Number
513.369.7300 Fax Number

Agent : **AGENT**
800 MAIN STREET
DUBUQUE, IA 52001

Agent # **0000123456**

					POLICY PREMIUM			PREMIUM PAID			COMMISSION		
Policy Sym	Policy Number	MOD	Effective Date	Trans Type	Written Premium Amount	(a) Comm Rate	Maximum Comm	(b) Total Paid To Date	(c) Previously Paid	(d) Paid This Month	(a) x (b) Total Payable To Date	(a) x (c) Previously Paid	(a) x (d) Due This Month
CURRENT MONTH ACTIVITY													
ATP UZYYZXZX	1355865 XXUYZXUZY	05	11/16/2021	Renewal eff 11/16/2021	$492.00	15.00%	$73.80	$368.82	$327.84	$40.98	$55.35	$49.20	$6.15
ATP UZYYZXZX	1355865 XXUYZXUZY	05	11/16/2021	Renewal eff 11/16/2021	$1,522.50	16.00%	$243.60	$1,141.38	$1,014.56	$126.82	$182.61	$162.32	$20.29

Figure 3.3 ***An <u>example</u> of a statement from <u>Direct Bill Commission</u>.***