Billing and Invoicing in Vertafore Sircon

As a Vertafore Sircon subscriber you incur certain charges each month, and each month Vertafore sends you a Summary Invoice via email or regular mail. In addition, a detailed invoice and a billing file spreadsheet both are available within the Sircon Platform to those with administrative access.

Note: Contact your Vertafore account representative if you wish to change the way you receive your Sircon statements each month.

Detailed Invoice

This invoice contains details about charges for your organization's Sircon account, including cost centers, previous balances, current charges, and total due.

To open the **Download Detailed Invoice** page, click the **Administration** menu link on the Compliance Express services panel on the left, or, click the **Administration** link from the **Express Services** menu within Producer Manager. Once the **Administration** menu page is open, click the **Download Detailed Invoice** link.

The page maintains links to all detailed invoices past and present, so you can view older invoices at any time.

Locate the invoice you want to download, and then click its Invoice ID number. The invoice will display as a PDF file, and will display charge totals broken out by state and cost center. This may help you and your accounting departments identify charges and the states to which those charges should be billed.

Billing File

Use the **Download Billing File** page to obtain a Microsoft® Excel® spreadsheet with all Sircon transactions and charges incurred during a specific billing period.

Click the **Click to download [Date]** billing file link you want to open. The **File Download** message box will appear. Choose to Open or Save the billing file.

Subscriber Cost Centers

Note: The steps below describe setting up accounting categories in Compliance Express only; cost centers used in Producer Manager and Producer Express override Compliance Express cost centers and are configured differently. Please see the Producer Manager online help for more information.

You can use cost centers to sort transactions for billing purposes or to summarize Sircon transactions as they appear on monthly statements.

Use the **Maintain Subscriber Cost Center** page to add, update, configure, or delete accounting categories or departments to which users can assign the cost of Sircon transactions.

To open the **Maintain Subscriber Cost Center** page, click the **Maintain Subscriber Cost Center** link on the **Administration** menu page.

Maintain Subscriber Cost Center

Manage your Cost Centers by setting your preferred options below.

Current Cost Centers

Delete	Cost Center Name
☐	ABC
☐	SSCRB CC1

[Delete]   [Cancel]

Add Cost Centers

Cost Center Name _____

[Save] [Cancel]

Configure Cost Centers

☑ A default Cost Center is required for subscriber representative and only pre-defined Cost Centers are allowed.

☐ A Cost Center is required for any request, such as license application and appointment request.

[Save] [Cancel]

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Current Cost Centers

All currently existing cost centers are listed in this section. Click the checkbox to select a cost center, and then click the **Delete** button to remove it from the system.

Add Cost Centers

Use this section to add new cost centers to your account.

Click the **Add New Cost Center** link in the upper right corner to add new cost centers, or simply type the new cost center name in the **Cost Center Name** field. Click the **Save** button to add the new cost center to the **Current Cost Centers** list.

Configure Cost Centers

This is where the real power of cost centers lies. Use the **Configure Cost Centers** section to set global requirements for the use of cost centers. Choose one or both of the following options:

- **A default Cost Center is required for subscriber representative and only pre-defined cost centers are allowed**: Click to checkmark to:
    - Require that transactions performed by all users are assigned only to an administrator-defined cost center (i.e., users cannot create their own cost centers)
    - Require that one cost center be selected as the default (if a user does not specifically

select a cost center, then the user's default cost center will be assigned to the transaction)

Vertafore Recommends: Choosing this option means that users have less to worry about when running a transaction. They simply choose one of the cost centers in the pre-defined list.

- **A Cost Center is required for any request, such as license application and appointment request**: Click to checkmark to require transactions to be assigned to a cost center.

Note: Leaving this option unchecked means that users may process transactions without assigning them to cost centers. On the invoice, all transactions not assigned to a cost center will be placed into a <NONE> cost center.

Click the **Save** button to save current cost center configuration settings.

One More Step

Before any of your users can use the cost centers that you have set up, you must assign cost centers to their accounts, so that they will have one or more cost centers available to them when running transactions.

Open the **Maintain Subscriber Rep Cost Center** page by clicking the **Maintain Subscriber Rep** link on the **Administration** menu page. From the list of users, click the name link of the user you wish to work with. On the user's **Maintain User Profile** page click the **Click here to maintain your cost centers** link at the bottom of the page.

The **Add/Update Cost Centers** page will open. Choose a cost center from the dropdown menu. To make this the default cost center for this user, click the **Default** checkbox. Click the **Save** button. The user can now select one or more cost centers when processing transactions.

Need More?

If you need further assistance with Vertafore Sircon products or services, contact your assigned account representative, send an email to plmsupport@vertafore.com, or open a case in the Self-Service Portal.