

Lesson 5 Managing Contacts

Prerequisites

For this exercise, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the exercise.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

5.1 Exercise: Adding contacts to a claim



Activity

In this exercise, you add two person contacts and one vendor to the Kevin SmithXX claim.

1. **Log in to ClaimCenter as Sam TudentXX (user: studentXX, password: gw).**
2. **Navigate to the Kevin SmithXX claim.**
3. **Add the following person contacts to the claim:**
 - a) Jennifer CashmanXX was a passenger in Michael CashmanXX's car (Ford Fiesta).
 - b) Jeff SmithXX was a passenger in Kevin SmithXX's car (Honda Civic).
4. **Add the following existing vendor to the claim.**
 - a) Express Auto in San Francisco, California. (This vendor is being used temporarily. You will create one in Waukegan in a later lesson)
 - b) The vendor is for repair of Kevin SmithXXs' auto (Honda Civic).

5.2 Solution: Adding contacts to a claim



Solution

Use the Parties Involved screen to add the contacts. For the person contacts, use New Contact → Person. For the vendor contact use Add Existing Contact and search for the vendor.

When you have added the 3 contacts to the claim, the Parties Involved should look something like the following.

Contacts

| New Contact ▾ | | Add Existing Contact | Delete | All |
|--------------------------|--------------------|---|--------|-----|
| <input type="checkbox"/> | Name ▲ | Roles | | |
| <input type="checkbox"/> | Jennifer Cashman99 | Passenger | | |
| <input type="checkbox"/> | Michael Cashman99 | Check Payee, Claimant, Driver, Injured Party | | |
| <input type="checkbox"/> | Express Auto | Repair Shop | | |
| <input type="checkbox"/> | Jeff Smith99 | Passenger | | |
| <input type="checkbox"/> | Kevin Smith99 | Check Payee, Claimant, Driver, Injured Party, Insured, Main Contact, Reporter | | |

5.3 Exercise: Contacts review



Activity

Complete this exercise as Sam TudentXX

1. **How many contacts are now on the Kevin SmithXX claim?**
2. **How many of the contacts are claimants?**
3. **Is Express Auto linked to Address Book?**
4. **If so, how could you tell (name two ways)?**
5. **How did it get linked?**
6. **Can you remove the Passenger role from Jennifer CashmanXX? Why or why not?**