

# Lesson 5 Configuring Trouble Tickets

## 5.1 Create a trouble ticket

If a policy is renewed and overdue invoices remain from the prior policy period, a trouble ticket should automatically be created to contact the customer.

### 5.1.1 Requirements

**Spec 1** A trouble ticket should be created when a policy period is renewed and the prior policy period is delinquent.

**Spec 2** This applies to policies that are not agency bill.

**Spec 3** The trouble ticket should:

- Be associated with the account that owns the policy
- Be of type "Automatically Generated"
- Have "Urgent" priority
- Have a title stating "Policy <policy number> is being renewed and there are overdue invoice items"
- Have a detailed description stating "Customer has overdue installments on current policy period. Please follow up with the customer regarding renewing the policy"
- Have a due date set to 10 business days from the creation of the ticket
- Have an escalation date set to 3 business days from the due date of the ticket
- Be auto assigned

### 5.1.2 Tasks

The implementation team recommends creating the trouble ticket in the BillingInstruction Preupdate rule set.

1. Create a new BillingInstruction preupdate rule called BIPU1000 – Create TroubleTicket on Delinquent Renewal that implements the specifications.
2. Restart the server because a new rule was created.

### 5.1.3 Testing procedure

1. Create an account with one policy.
  - a. QuickJump: Run Account with1PolicyWithNoProducer
2. Change the delinquency plan on the account to DP03. (The reason for this is to avoid automatic policy cancellation due to non-payment.)
3. Bill the first invoice and then make it past due.
  - a. Advance the system date to the bill date of the first invoice
  - b. Run the Invoice batch process
  - c. Confirm that the invoice is in a billed status

- d. Advance the system date to one day after the due date of the first invoice
  - e. Run the Invoice Due batch process
  - f. Confirm that the invoice is now in a due status
  - g. Confirm that the account and policy are now in a past due delinquency
4. Renew the policy
- a. Go to the Policy→Summary screen and renew the policy with a \$1200 premium.
  - b. Policy Tab: Actions→Renew Policy
5. Confirm that a trouble ticket was created.
- a. Account Tab: Trouble Tickets

### 5.1.4 Solution



#### Solution

Exact details on how to complete the exercise.

1. Create a new BillingInstruction preupdate rule called BIPU1000 – Create TroubleTicket on Delinquent Renewal that implements the specifications.

```

1  USES:
2  uses gw.api.util.DateUtil
3
4  CONDITION (billingInstruction : entity.BillingInstruction):
5      return billingInstruction.typeis Renewal and
6          billingInstruction.PriorPolicyPeriod.Delinquent and
7              not billingInstruction.PriorPolicyPeriod.AgencyBill
8
9
10 ACTION (billingInstruction : entity.BillingInstruction, actions : gw.rules.Action):
11     var ttHelper = new CreateTroubleTicketHelper()
12     var pp = (billingInstruction as Renewal).PolicyPeriod
13     var today = DateUtil.currentDate()
14     // Create a trouble ticket associated to the account
15     var tt = ttHelper.createTroubleTicket(pp.Account)
16     // Set trouble ticket properties
17     tt.TicketType = TroubleTicketType.TC_AUTOMATIC
18     tt.Priority = Priority.TC_URGENT
19     tt.Title = "Policy ${pp.PolicyNumber} is being renewed and there are overdue invoice items"
20     tt.DetailedDescription = "Overdue installments on current policy period. Please follow-up with" +
21         " the customer re: Policy Renewal"
22     tt.TargetDate = today.addBusinessDays(10)
23     tt.EscalationDate = tt.TargetDate.addBusinessDays(3)
24     // Auto assign the trouble ticket
25     tt.autoAssign()
26
27 END

```

2. Restart the server because a new rule was created.