# Lesson 7  Managing Service Requests

## 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`.

## 7.1  Exercise: Creating and managing service requests

**Activity**

In this exercise you create several service requests for the Kevin Smith claim.

1.  **Log in to ClaimCenter as Sam Tudent*XX* (user: student*XX*, password: gw) and open the Kevin Smith claim.**

2.  **Create a service with the following details:**
    a)  1st Party Vehicle – Kevin Smith*XX*
    b)  The service needed is for towing.
    c)  You don't need a quote for this service.
    d)  Use Apple Towing*XX* (where *XX* is your student number) as the vendor.
    e)  The service address is Waukegan, IL.

3.  **Mark that the vendor has accepted the work, and set the expected service completion date to today's date.**

4.  **Mark that the vendor has completed the work.**

5.  **Add an invoice for $200.00.**

6.  **Are there any flags on the service? If so what are they and what do they mean?**

7.  **Create another service with the following details:**
    a)  1st Party Vehicle – Kevin Smith
    b)  The service needed is for auto body repair.
    c)  You want them to quote and perform this service.
    d)  Use M B Garage as the vendor (in California).
    e)  The service address is 2165 Palm Ave., San Mateo, CA 94404.
    f)  Add instructions that the vehicle was towed to their shop by Apple Towing.

g) Set the requested quote date to today's date.

8. **Set the Vendor Progress to Accepted Work and accept the default completion date.**

9. **What are the Vendor Progress options now?**

10. **Why is Vendor Completed not an option?**

11. **Add a quote with the following details.**

    a) Days to perform service: 5.

    b) Description: repair and paint front-end.

    c) Category: Parts, description "front-end parts", amount 800.00.

    d) Category: Labor, description "installation and paint labor", amount 500.00.

12. **Approve the quote and accept the default completion date.**

    **Assume there has been a passage of time.**

13. **Change the Vendor Progress to Vendor Completed Work.**

14. **What are the Vendor Progress options now? Why?**

15. **Add an invoice with the following details:**

    a) Description: Mr. Smiths' vehicle repaired and painted.

    b) Line Item: Parts, front-end parts, $700.00.

    c) Line Item: Labor, labor for install and paint, $500.00

16. **What happened to the invoice?**

17. **What is the Invoice Variance vs Quote percentage and what does that mean?**

## 7.2   Solution: Creating and managing service requests

**Solution**

1. **Log in to ClaimCenter as Sam Tudent*XX* (user: student*XX*, password: gw) and open the Kevin Smith claim.**

2. **Create a service with the following details:**
   a) 1st Party Vehicle – Kevin Smith*XX*
   b) The service needed is for towing.
   c) You don't need a quote for this service.
   d) Use Apple Towing*XX* (where *XX* is your student number) as the vendor.
   e) The service address is Waukegan, IL.

3. **Mark that the vendor has accepted the work, but set the expected service completion date to today's date.**

4. **Mark that the vendor has completed the work.**

5. **Add an invoice for $200.00.**

6. **Are there any flags on the service? If so what are they and what do they mean?**

   *Yes. The invoice could not be auto-paid because a suitable reserve line could not be determined.*

7. **Create another service with the following details:**
   a) 1st Party Vehicle – Kevin Smith
   b) The service needed is for auto body repair.
   c) You want them to quote and perform this service.
   d) Use M B Garage as the vendor (in California).
   e) The service address is 2165 Palm Ave., San Mateo, CA 94404.
   f) Add instructions that the vehicle was towed to their shop by Apple Towing.
   g) Set the requested quote date to today's date.

8. **Set the Vendor Progress to Accepted Work and accept the default completion date.**

9. **What are the Vendor Progress options now?**

   *Vendor Cancelled, Vendor Delayed, and Update Reference*

10. **Why is Vendor Completed not an option?**

    *Because the quote has not been received or approved.*

11. **Add a quote with the following details.**
    a) Days to perform service: 5.
    b) Description: Repair and paint front-end.
    c) Category: Parts, description "front-end parts", amount 800.00.
    d) Category: Labor, description "installation and paint labor", amount 500.00.

12. **Approve the quote and accept the default completion date.**


   **Assume there has been a passage of time.**

13. **Change the Vendor Progress to Vendor Completed Work.**

14. **What are the Vendor Progress options now? Why?**

    *Update Reference Number. Since the work is complete, it can't be delayed, waiting, or cancelled.*

15. **Add an invoice with the following details:**

    a) Description: Mr. Smiths' vehicle repaired and painted.

    b) Line Item: Parts, front-end parts, $700.00.

    c) Line Item: Labor, labor for install and paint, $500.00

16. **What happened to the invoice?**

    *It was paid immediately.*

17. **What is the Invoice Variance vs Quote percentage and what does that mean?**

    *(8%). The invoice was 8% lower than the quote.*