Account Summary: Renee Wells01

Details

Renee Wells01

|	
Account No	1752860144
Account Holder	Renee Wells01
Home Address	601 Stanyan St San Francisco, CA 94101
Description	
Account Type	Person

Stop

1.4 Solutions

Solution

1. **Add an enhancement function to the** `Account` **entity to check if the account is test data.**

   a) In Studio, go to configuration/gsrc/gw/account.

   b) Right click on the account package (folder) and select **New → Gosu Enhancement.**

   c) Create `AccountTestDataEnhancement` that enhances the `Account` entity.
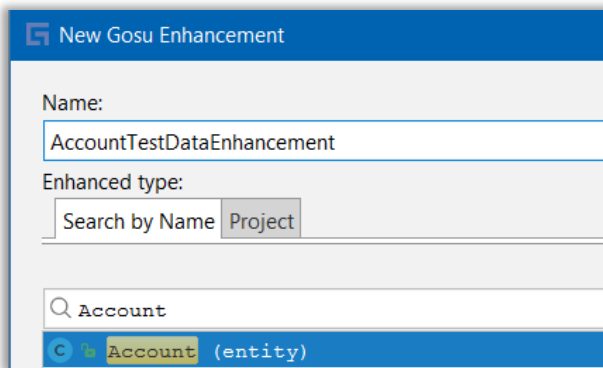
d) Add a function `isTestData_Ext()`.

```
package gw.account

enhancement AccountTestDataEnhancement : Account {
  function isTestData_Ext(): boolean {
    return this.AccountNumber.startsWith("A") or
        this.AccountNumber.startsWith("B") or
        this.AccountNumber.startsWith("C")
  }

}
```

2. **Add a label and a field to the Account Summary detail view.**

a) Press `CTRL + n` to open the file `AccountDetailsDetailViewTile.pcf` under config/web/pcf/account/overview .

b) Add a new label below the field Description.

c) Enter details such as ID, label, visible, etc.

```
Label = DisplayKey.get("Web.Dashboard.Tile.AccountDetails.TestData_Ext")

Visible = account.isTestData_Ext()
```

d) If the display key does not exist, put the mouse cursor on the display key and press ALT + Enter to create it.

```
Web.Dashboard.Tile.AccountDetails.TestData_Ext = Test Data
```
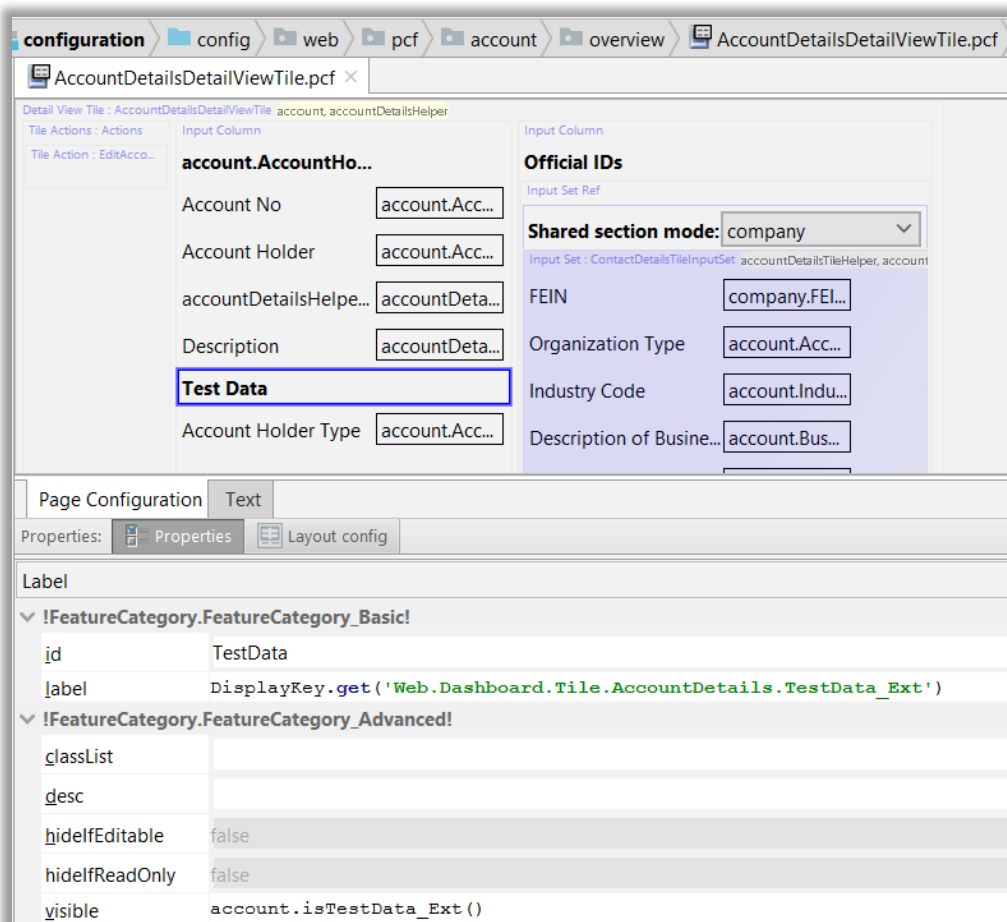
e) Add a Text Input element below the label `Test Data` to display the account holder contact type.

Text Input property:
```
value = account.AccountHolderContact.Subtype.DisplayName
```

DisplayKey:

```
Web.Dashboard.Tile.AccountDetails.AccountType_Ext = Account Type
```

3. **Go to the PolicyCenter application and press ALT + SHIFT + L to reload the PCF changes.**

1.5   References

Review

PolicyCenter Data Model

There are two primary entities in the PolicyCenter data model: `Policy` and `Account`. Including these two entities, there are about 25 major entities in the PolicyCenter data model. These entities can be broken down into five groups. See colored groups below. Each group can be thought of as answering a business question:

- What does each policy period look like? (Charcoal)
- What is covered on the policy? (coverables and coverages) (Burgundy)
- Who holds the policy? (account contacts and locations) (Brown)
- What is the work to be done for the policy? (activities and workflows) (Orange)
- Who is responsible for processing the policy? (the users and groups working for the carrier on the policy) (Blue)