

Lesson 4 Contacts and Locations

4.1 Requirements

Enigma Fire & Casualty requires that a contact with a role of Corporate Counsel can be added when required.

4.2 Configuration



Activity

Add a new contact role Corporate Counsel.

1. **Create CorporateCounsel_Ext for the account contact role.**
2. **Create PolicyCorporateCounsel_Ext for the corresponding policy contact role.**
3. **Map policy contact role to account contact role.**
 - a) Check the registered Contact Configuration Plugin in config/plugin/registry/IContactConfigPlugin.gwp.
 - b) Modify the registered file, for example ContactConfigPlugin.gs or WC7ContactConfigPlugin.gs.
4. **Define the entity name and display key.**
5. **Re-start the server.**

4.3 Verification

1. **Log in to PolicyCenter as Alice Applegate, aapplegate/gw.**
2. **Navigate to Account → Wright Construction → Contacts.**

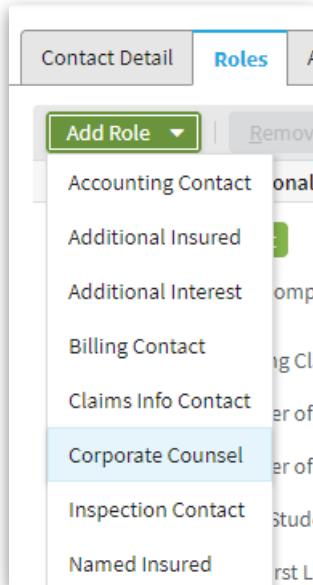
Verify that the Corporate Counsel role shows up in the Create New Contact Menu.

The screenshot shows a table of contacts with columns for Active status (checkbox), Name, and Contact Type (dropdown). The 'Create New Contact' dropdown menu is open, listing various contact types: Accounting Contact, Additional Insured, Additional Interest, Billing Contact, Claims Info Contact, Corporate Counsel, Driver, New Person, and From Address Book. The 'Corporate Counsel' option is highlighted with a blue selection bar.

Active	Name	Contact Type
Yes	Acta Moto	Accounting Contact
Yes	BlackBurr	Additional Insured
Yes	EverReady	Additional Interest
Yes	Harry's Tc	Billing Contact
Yes	John Smit	Claims Info Contact
Yes	Metals Un	Corporate Counsel
Yes	Ray Newt	Driver
Yes	Speedy G	New Person
		From Address Book

3. Add the new Corporate Counsel role to John Smith.

- a) In the list view, for the contact John Smith, click the Edit icon → Roles tab → Add Role button.
- b) Choose the Corporate Counsel role from the drop down and click Update to save.



4. The new role is displayed in the list view for John Smith on the Account File Contact page.

Account File Contacts			
	Active	Name	Role
<input type="checkbox"/>	Yes	Acta Motors	Named Insured
<input type="checkbox"/>	Yes	BlackBurn's Plumbing	Named Insured
<input type="checkbox"/>	Yes	EverReady Rentals	Named Insured
<input type="checkbox"/>	Yes	Harry's Towing	Named Insured
<input type="checkbox"/>	Yes	John Smith	Corporate Counsel, Driver
<input type="checkbox"/>	Yes	Metals Unlimited	Named Insured

