

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.

```

BillingInstructionPreupdate.grs
BillingInstruction Pre-update
BIPU1000 – Create TroubleTicket
1  USES:
2  uses gw.api.util.DateUtil
3
4  CONDITION (billingInstruction : entity.BillingInstruction):
5  return billingInstruction.type is Renewal and
6  billingInstruction.PriorPolicyPeriod.Delinquent and
7  not billingInstruction.PriorPolicyPeriod.AgencyBill
8
9  ACTION (billingInstruction : entity.BillingInstruction, actions : gw.rules.Action):
10
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.