

Lesson 5 Managing Contacts

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>.

5.1 Exercise: Adding contacts to a claim



Activity

In this exercise, you add two person contacts and one vendor to the Kevin SmithXX claim.

1. **Log in to ClaimCenter as Sam TudentXX (user: studentXX, password: gw).**
2. **Navigate to the Kevin SmithXX claim.**
3. **Add the following person contacts to the claim:**
 - a) Jennifer CashmanXX was a passenger in Michael CashmanXX's car (Ford Fiesta).
 - b) Jeff SmithXX was a passenger in Kevin SmithXX's car (Honda Civic).
4. **Add the following existing vendor to the claim.**
 - a) Express Auto in San Francisco, California. (This vendor is being used temporarily. You will create one in Waukegan in a later lesson)
 - b) The vendor is for repair of Kevin SmithXXs' auto (Honda Civic).

5.2 Solution: Adding contacts to a claim



Solution

Use the Parties Involved screen to add the contacts. For the person contacts, use New Contact → Person. For the vendor contact use Add Existing Contact and search for the vendor.

When you have added the 3 contacts to the claim, the Parties Involved should look something like the following.

Contacts

New Contact ▾		Add Existing Contact	Delete	All
<input type="checkbox"/>	Name ▲	Roles		
<input type="checkbox"/>	Jennifer Cashman99	Passenger		
<input type="checkbox"/>	Michael Cashman99	Check Payee, Claimant, Driver, Injured Party		
<input type="checkbox"/>	Express Auto	Repair Shop		
<input type="checkbox"/>	Jeff Smith99	Passenger		
<input type="checkbox"/>	Kevin Smith99	Check Payee, Claimant, Driver, Injured Party, Insured, Main Contact, Reporter		

5.3 Exercise: Contacts review



Activity

Complete this exercise as Sam TudentXX

1. How many contacts are now on the Kevin SmithXX claim?
2. How many of the contacts are claimants?
3. Is Express Auto linked to Address Book?
4. If so, how could you tell (name two ways)?
5. How did it get linked?
6. Can you remove the Passenger role from Jennifer CashmanXX? Why or why not?

5.4 Solution: Contacts review



1. How many contacts are now on the Kevin SmithXX claim?

5

2. How many of the contacts are claimants?

2

3. Is Express Auto linked to Address Book?

Yes

4. If so, how could you tell (name two ways)?

There is a message on the Basics tab. There is a button to view the contact in Address Book (ContactManager).

5. How did it get linked?

It was linked automatically when the contact was added from Address Book (ContactManager).

6. Can you remove the Passenger role from Jennifer CashmanXX? Why or why not?

No, because each contact must have at least one role to exist on a claim. If I removed the role from Jennifer the contact would be removed from the claim.