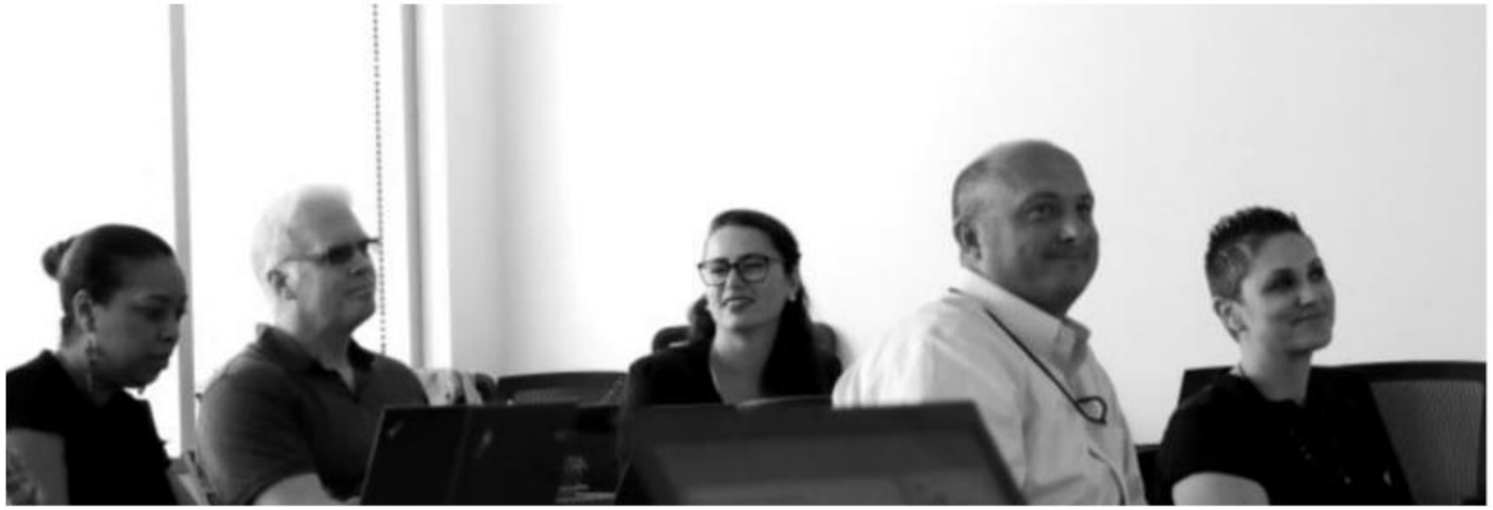
CONTACTS AND LOCATIONS

Source : Guidewire Educational Platform

Contacts and Locations



Source : Guidewire Educational Platform

Lesson objectives

By the end of this lesson, you will be able to:

- Describe contacts and contact roles
- Configure contact roles
- Describe and configure locations

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Contacts and contact roles

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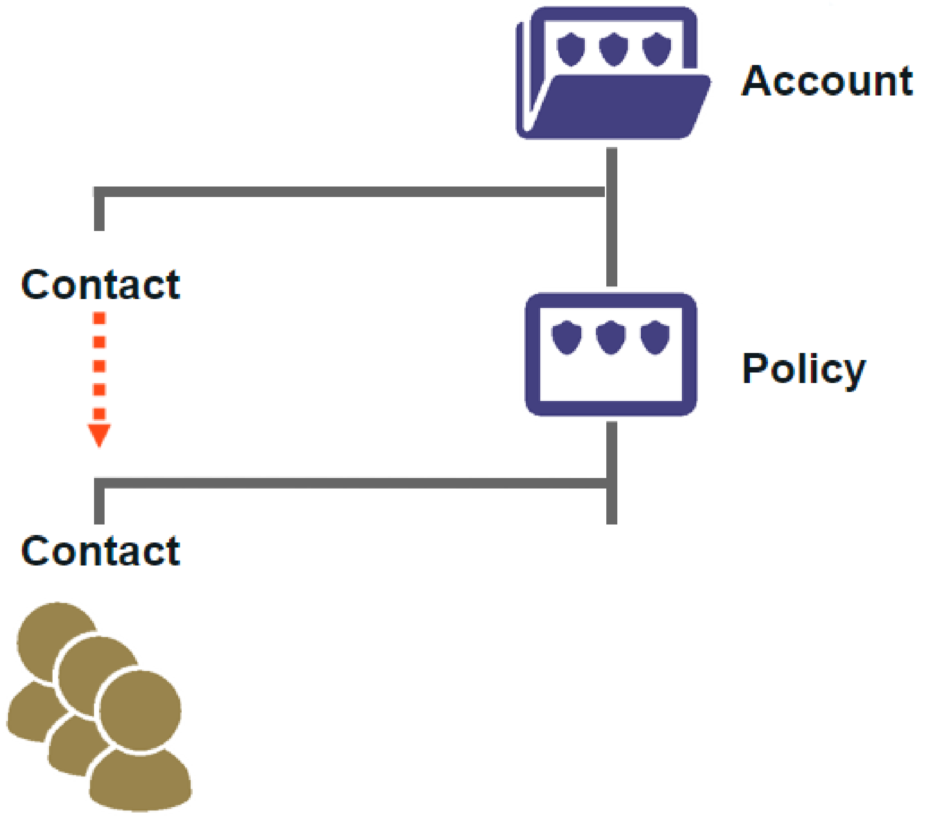
Contacts

- A contact is a person or a company
- A contact may need to be contacted for policy information
- Contacts can be:
  - Created on account and reused on policy
  - Created on policy



Source : Guidewire Educational Platform

Contacts and Contact Roles

- Account File Contacts page lists all contacts on an account
- Policy may have some or all of the Account contacts
- Some contact information is shared across PolicyPeriods and some is PolicyPeriod specific
- Contacts are identified by the role they fill
  - One contact can fill multiple roles on the account and policy

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Configuring contact role

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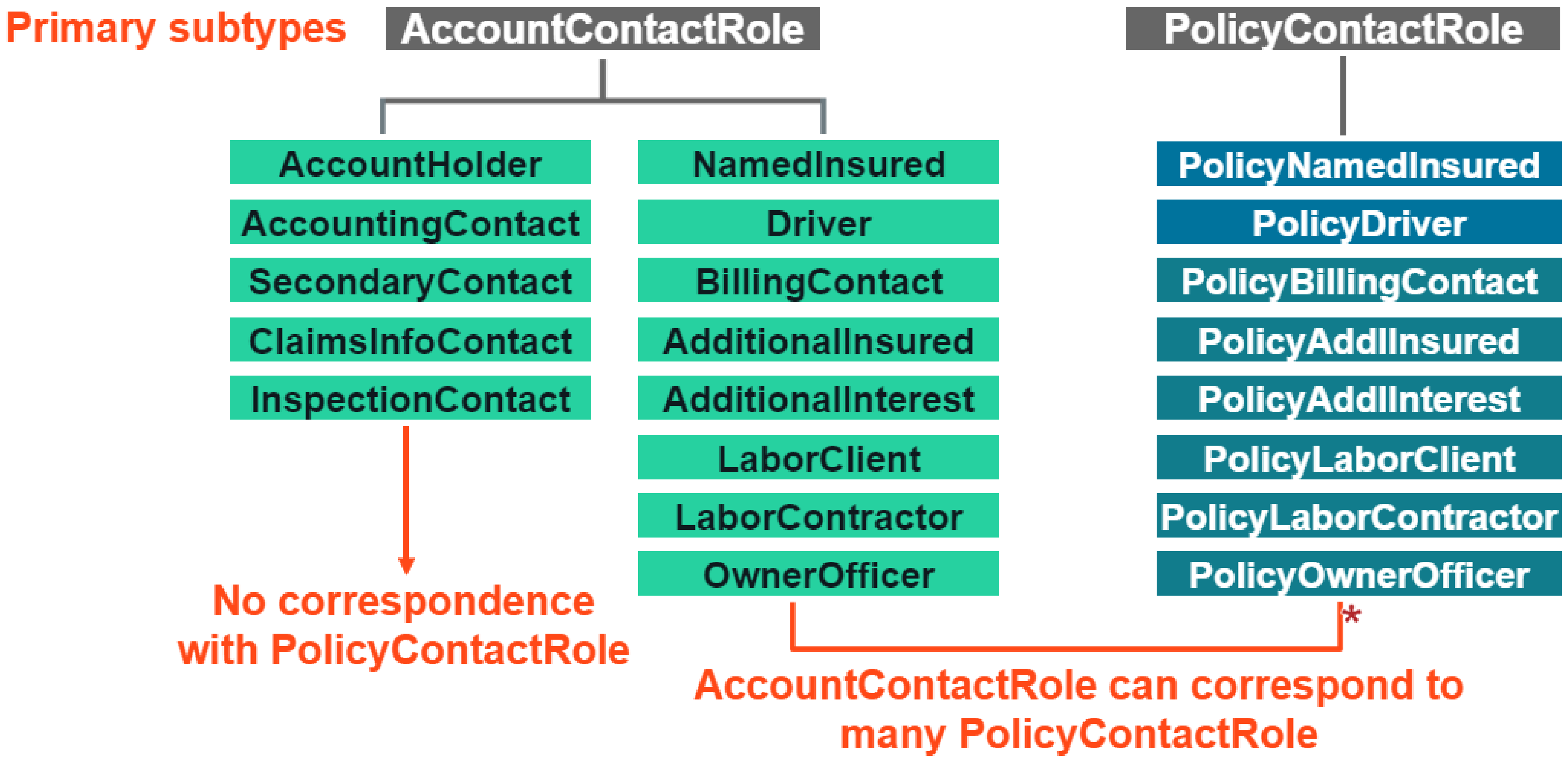
Contact roles for Accounts and Policies



Contact role behavior patterns in PolicyCenter

- Normal
  - Array of contacts connected to an entity (additionalNamedInsured)
- Singleton
  - One and only one contact connected to an entity (BillingContact)
- Simple Details
  - One contact with array of details (AdditionalInsured)
- Join Details
  - Details join contact to another entity (Driver)

Source : Guidewire Educational Platform

Policy contact roles in default configuration

Policy Contact Role	Data Model Pattern	Attached to
Named Insured	Normal	Policy Period
Primary Named Insured	Singleton	Policy Period
Secondary Named Insured	Singleton	Policy Period
Location Named Insured	Join Details	Policy Period
Additional Insured	Simple Details	Policy Line
Billing Contact	Singleton	Policy Period
Driver	Join Details	PA Line
Additional Interest	Join Details	Policy Period
Owner Officer	Normal	WC Line
Labor Client	Simple Details	WC Line
Labor Contractor	Simple Details	WC Line

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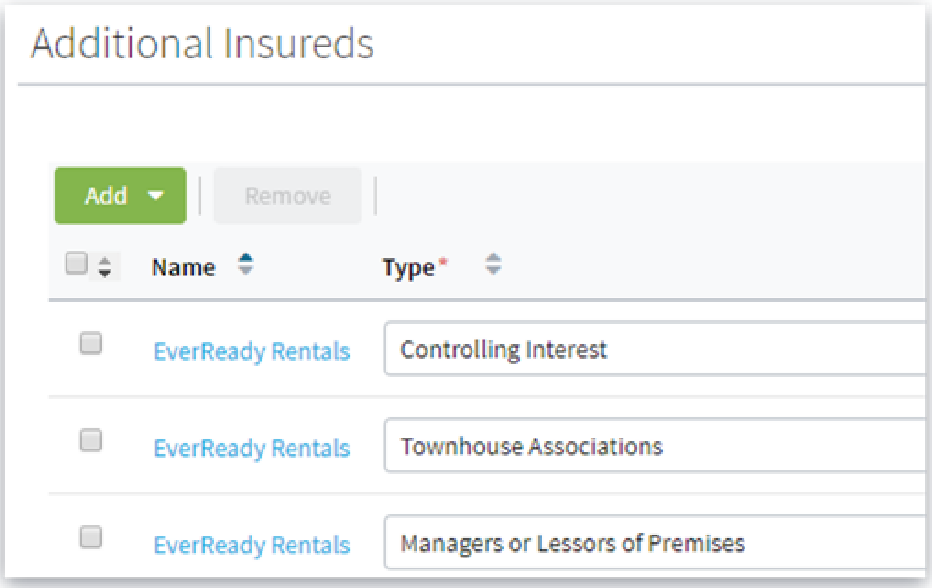
Example policy contact role pattern

Additional Insured contact follows a *Simple Details* pattern



Additional Insureds

Name	Type*
EverReady Rentals	Controlling Interest
EverReady Rentals	Townhouse Associations
EverReady Rentals	Managers or Lessors of Premises

Contact has multiple types of *AdditionalInsured roles*

Source : Guidewire Educational Platform

Contact configuration plugin

- Implements IContactConfigPlugin
  - Example: **ContactConfigPlugin, WC7ContactConfigPlugin**
  - Registered in config/plugin/registry/IContactConfigPlugin
- Configures the Contact entity
  - Maps PolicyContactRole to AccountContactRole
  - Controls contact subtypes allowed for each role
  - Disables roles by setting first argument to false
- Syntax:
  - new ContactConfig(*enable, { contactType }, AccountContactRole , { PolicyContactRole1, PolicyContactRole2, … }*)

Extending the contact role data model

- Contact role entities that are extendable include:
  - PolicyContactRole and AccountContactRole
  - All other roles in the default configuration
- You can define roles for:
  - Person or
  - Company or
  - Both
- Roles can be disabled when not needed

Source : Guidewire Educational Platform

Strategy to configure a new contact role

- For a contact role that does not exist in base application:
  - Add a new contact role and
  - Configure it to follow the implementation of an existing contact role
- Compare desired behavior of contact to roles in base application and find role with most similar behavior:
  - How many of them can be created?
  - How the match attaches to other roles or objects?

Adding new contact role

- New contact roles can be configured by defining new subtypes of PolicyContactRole and AccountContactRole
- Steps to extend these entities:

1. Add extension file (*_Ext.eti) that defines the new subtype
2. Modify the registered Contact Config Plugin file to map new subtypes to each other
3. Add display keys as needed
4. Create entity name for new contact role
5. Reference display name as needed
6. Modify PCFs and Gosu classes as needed
7. Restart server to load new entities and entity names

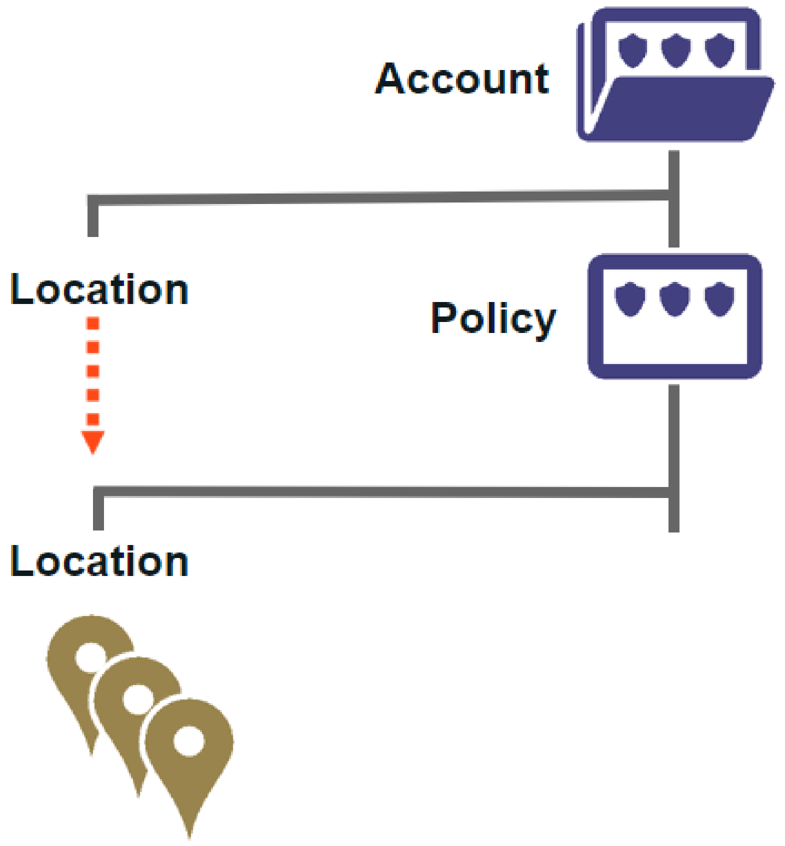
Source : Guidewire Educational Platform

Location overview

Source : Guidewire Educational Platform

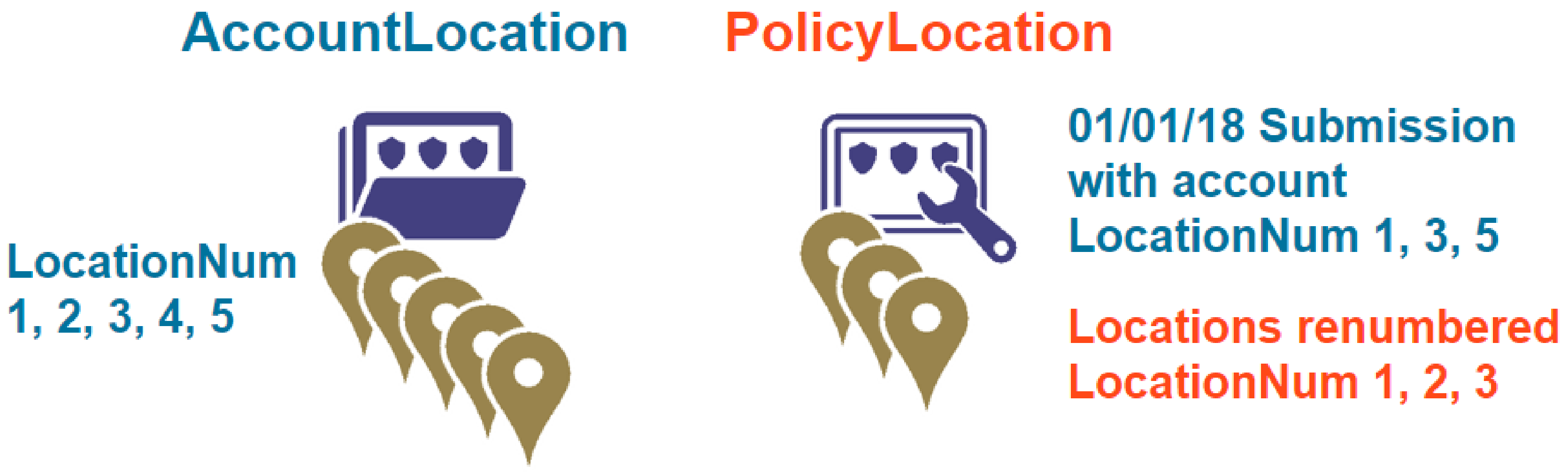
Locations

- A **location** is a physical location which may be referenced on a policy
- Locations can be:
  - Created on account and reused on policy
  - Created on policy



Location numbering

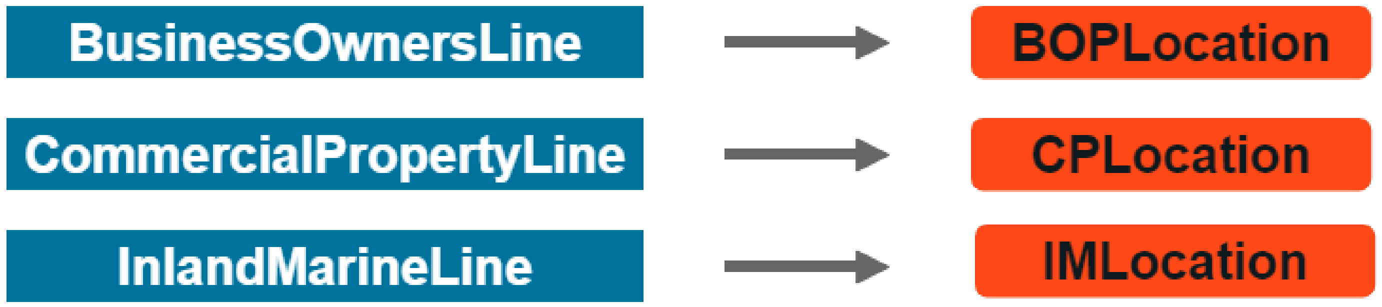
- System assigns each location a sequential number
  - AccountLocation and PolicyLocation are numbered separately
  - Stored in LocationNum field
- LocationNum can be configured based on how a carrier wants to number and renumber locations within policies


AccountLocation
PolicyLocation
LocationNum 1, 2, 3, 4, 5
01/01/18 Submission with account LocationNum 1, 3, 5
Locations renumbered LocationNum 1, 2, 3

Configuring locations

LOB specific location types

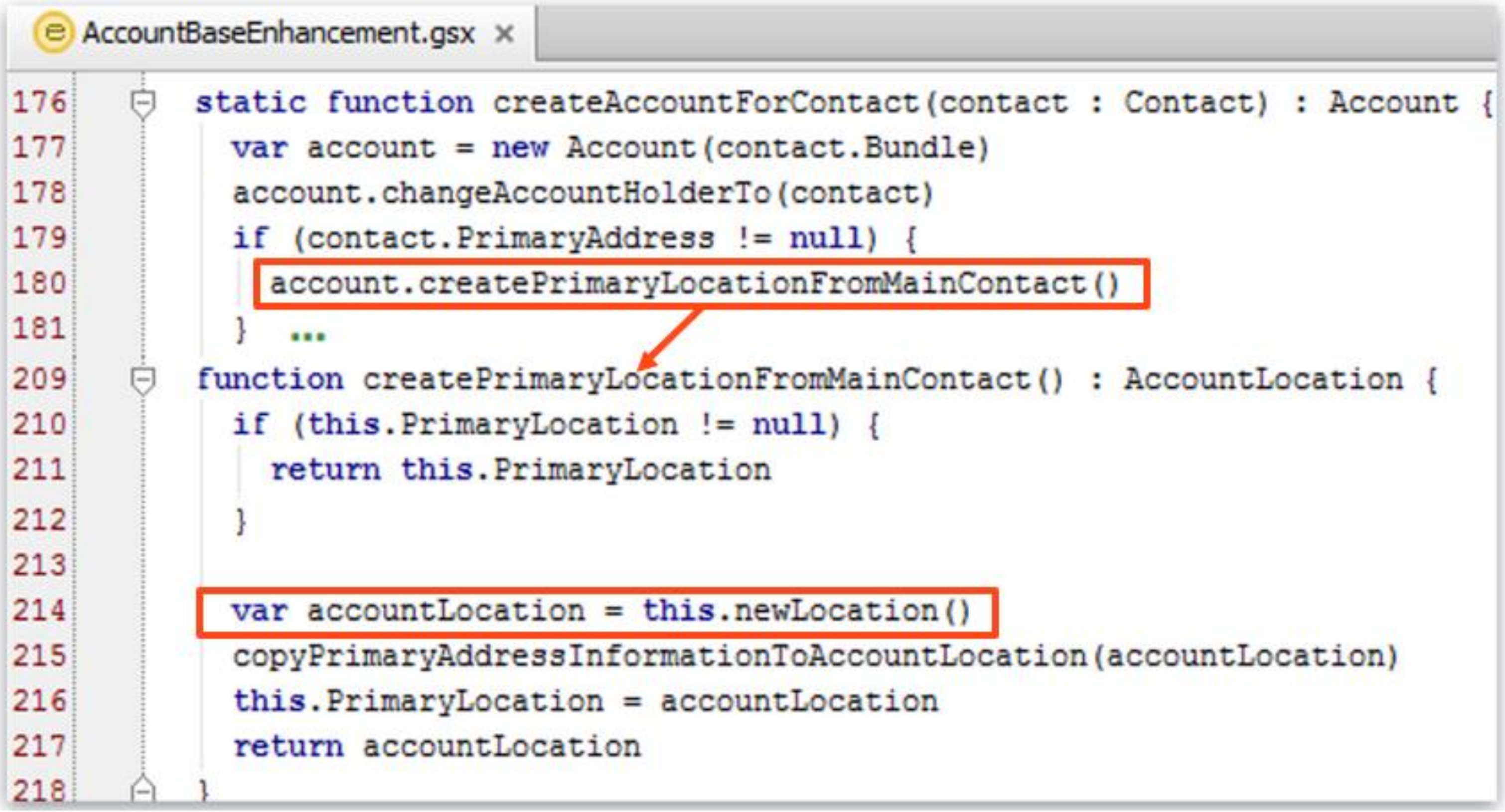
- Subtypes of *PolicyLine* entity have associated location type
- LOB location types have foreign key *Location*, that points to *PolicyLocation*



Source : Guidewire Educational Platform

Creating a new account location

To add a new AccountLocation to the account, call the **newLocation()** method on account


AccountBaseEnhancement.gsx

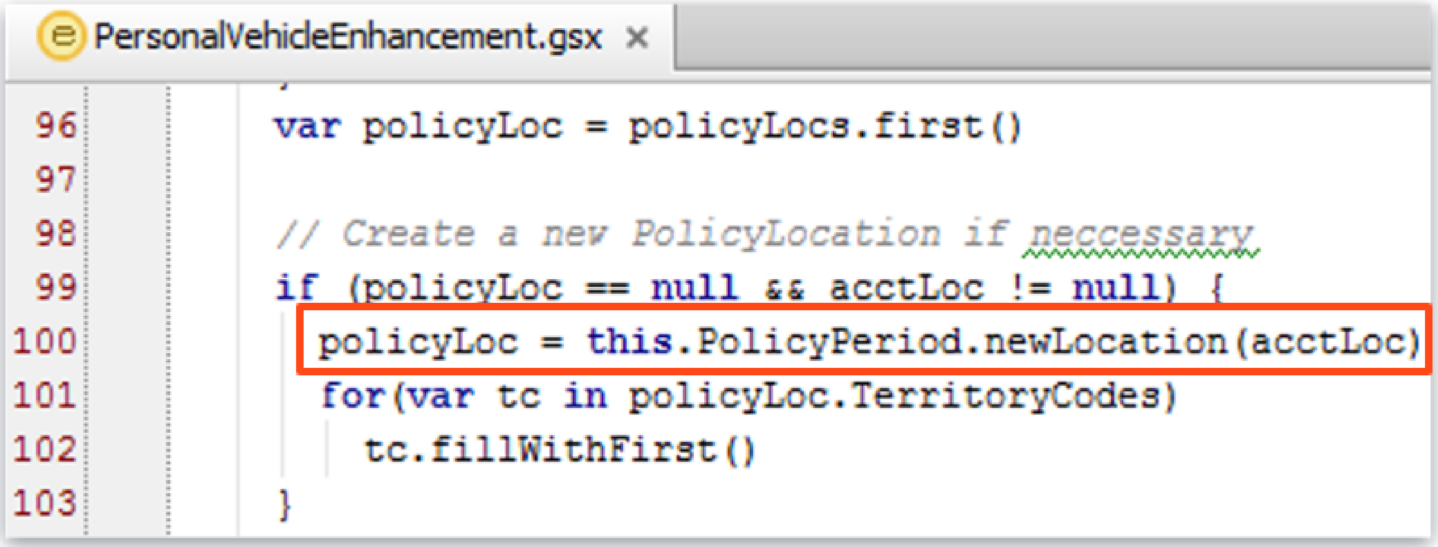
```
static function createAccountForContact(contact : Contact) : Account {
  var account = new Account(contact.Bundle)
  account.changeAccountHolderTo(contact)
  if (contact.PrimaryAddress != null) {
    account.createPrimaryLocationFromMainContact()
  }  ...
function createPrimaryLocationFromMainContact() : AccountLocation {
  if (this.PrimaryLocation != null) {
    return this.PrimaryLocation
  }

  var accountLocation = this.newLocation()
  copyPrimaryAddressInformationToAccountLocation(accountLocation)
  this.PrimaryLocation = accountLocation
  return accountLocation
}
```

Source : Guidewire Educational Platform

Creating a new policy location

- Add a new PolicyLocation using newLocation method on PolicyPeriod
  - **newLocation()** or
  - **newLocation(acctLoc : AccountLocation)**
    where:
    acctLoc - existing AccountLocation to which the new policy location is associated with



PersonalVehicleEnhancement.gsx

```
    var policyLoc = policyLocs.first()

    // Create a new PolicyLocation if neccessary
    if (policyLoc == null && acctLoc != null) {
      policyLoc = this.PolicyPeriod.newLocation(acctLoc)
      for(var tc in policyLoc.TerritoryCodes)
        tc.fillWithFirst()
    }
```

Lesson objectives review

You are now able to:

- Describe contacts and contact roles
- Configure contact roles
- Describe and configure locations

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