

Contacts

Lesson Objectives

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

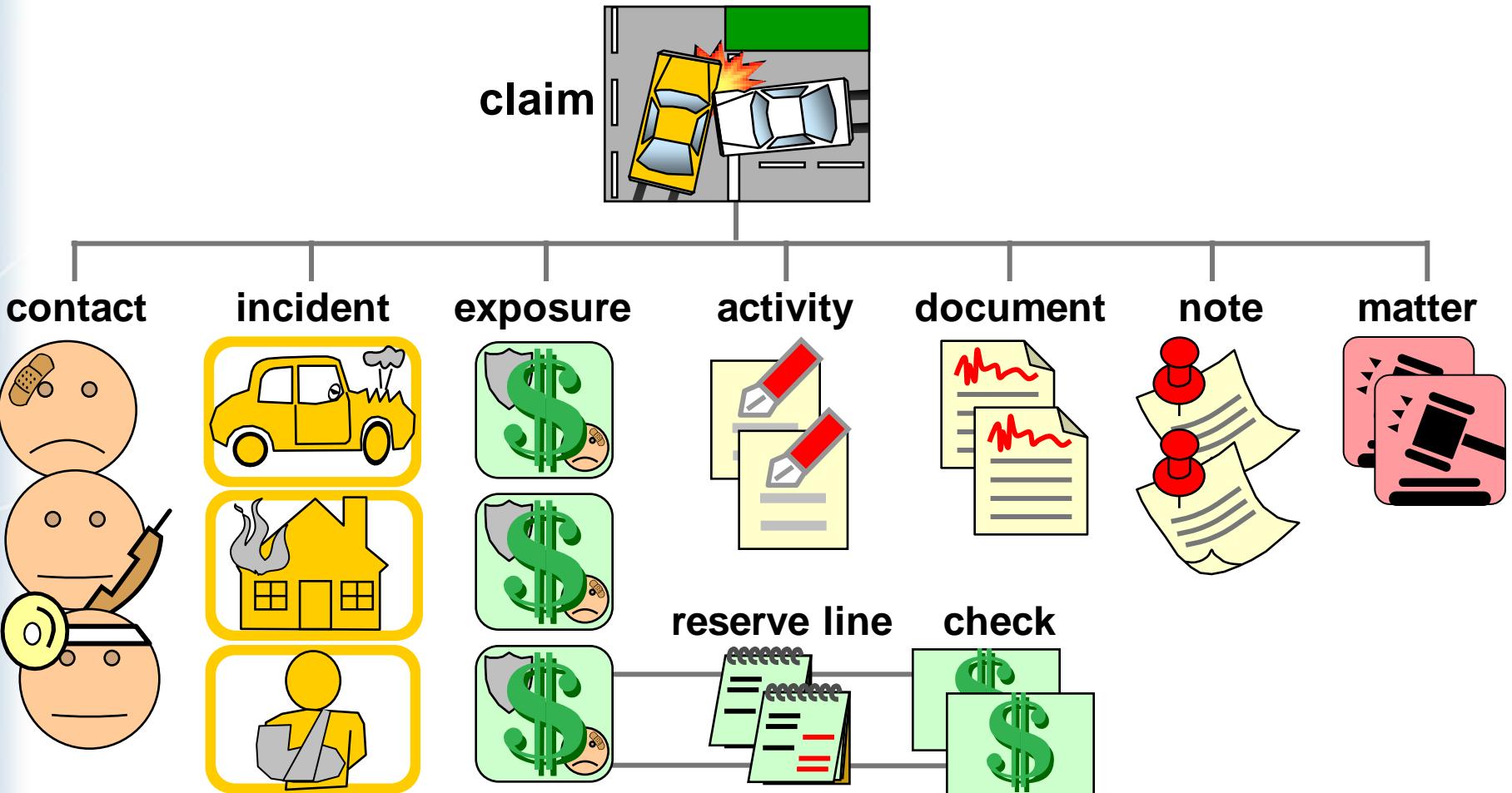
- Describe the functionality of contacts
- Describe the functionality of ContactCenter
- Create contacts in ClaimCenter
- Work with contacts in ClaimCenter
- Describe approaches to searching for contacts

This lesson uses the notes section for additional explanation and information.
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.
If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

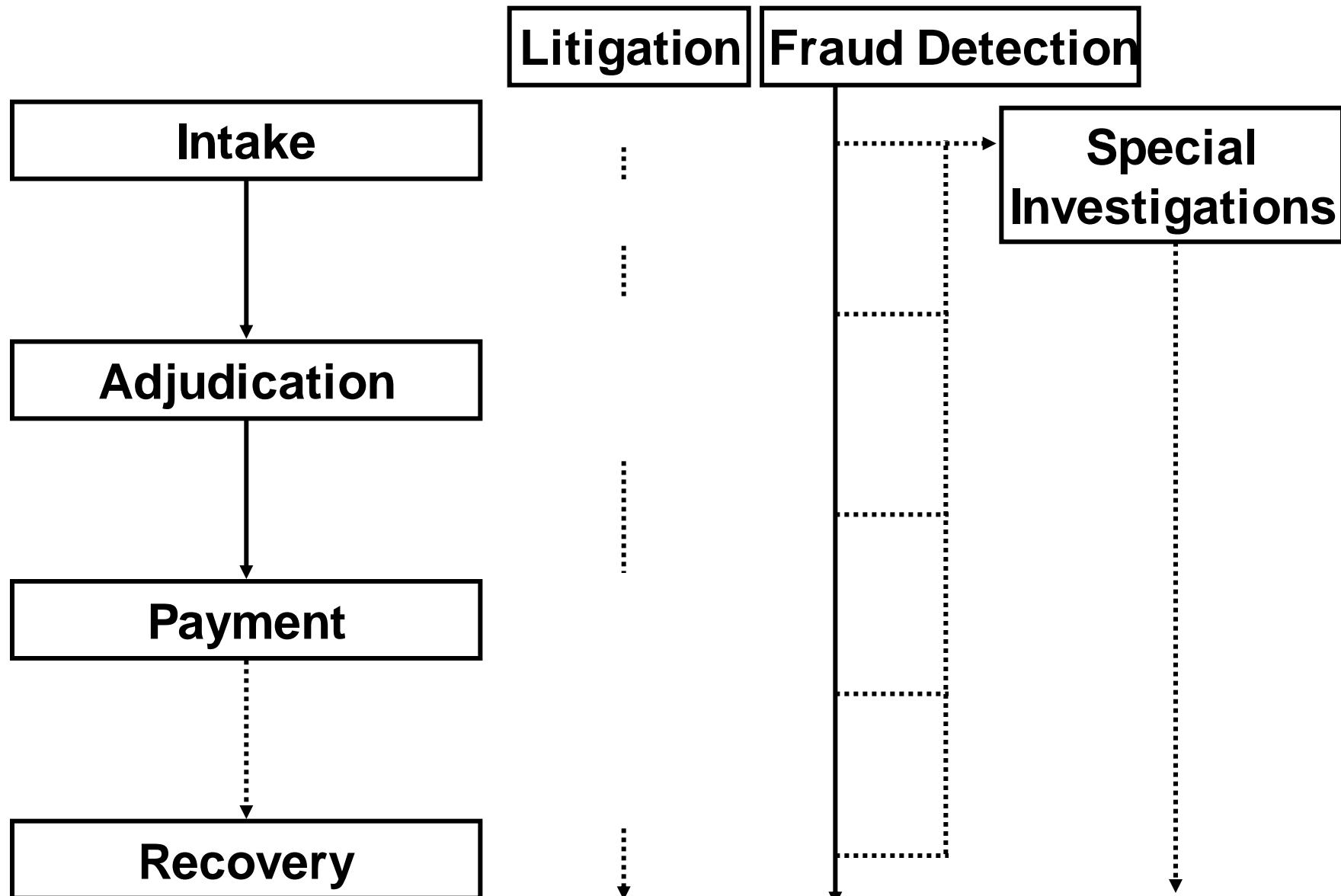
Lesson Outline

- ▶ Contact Basics
- ▶ ContactCenter
- ▶ Creating ClaimCenter Contacts
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

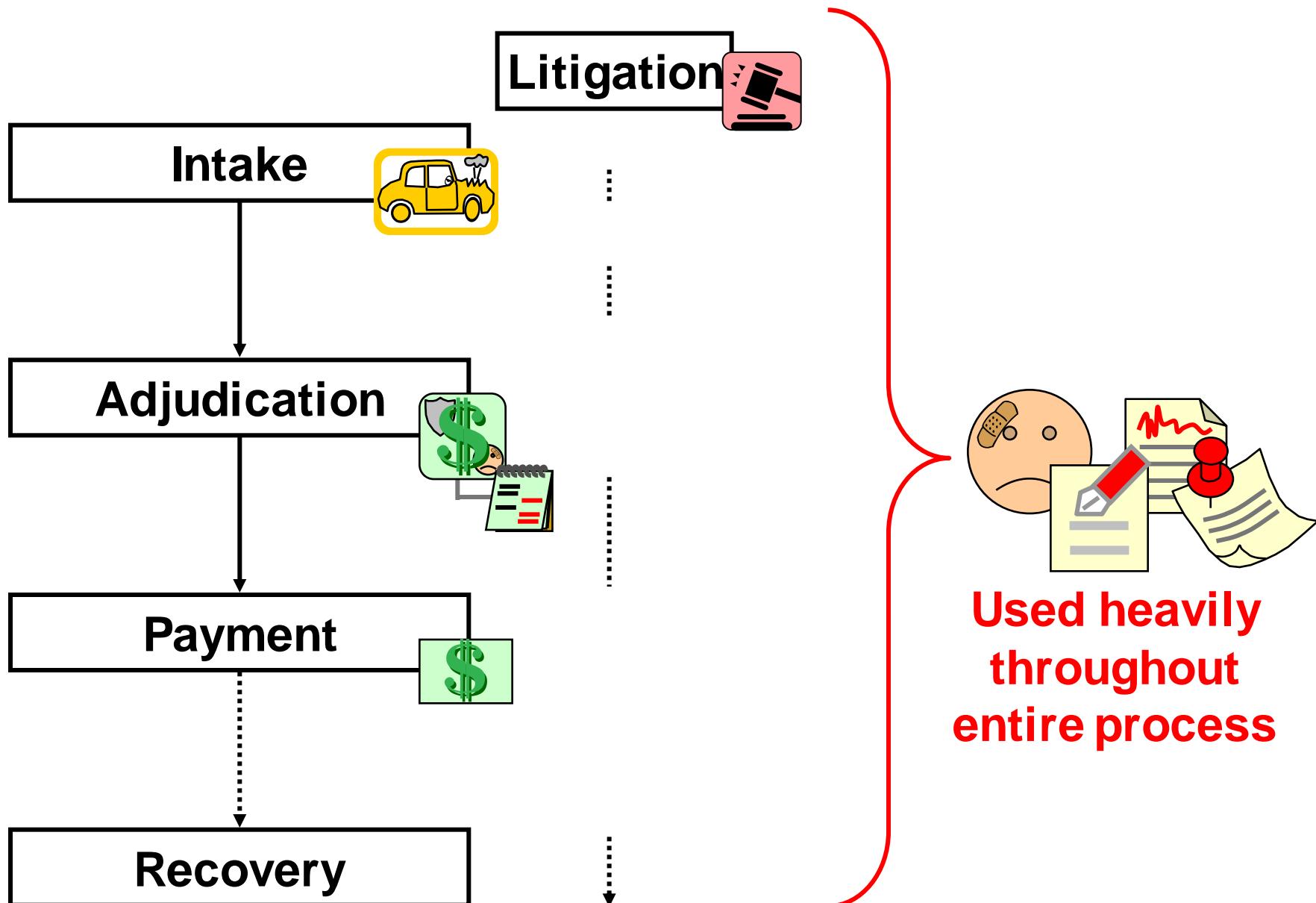
Review: Entities in the Claim File



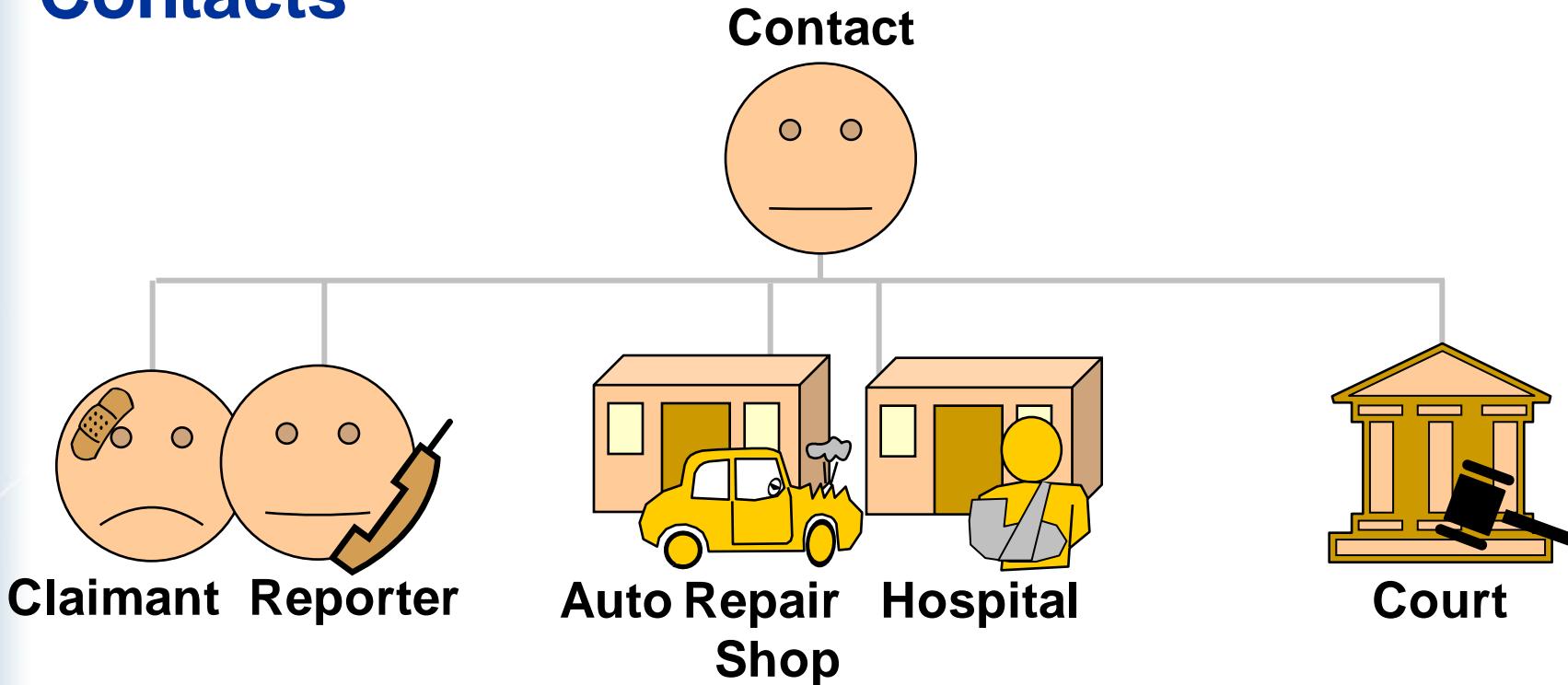
Review: The Claims Process



Mapping Entities to the Claims Process

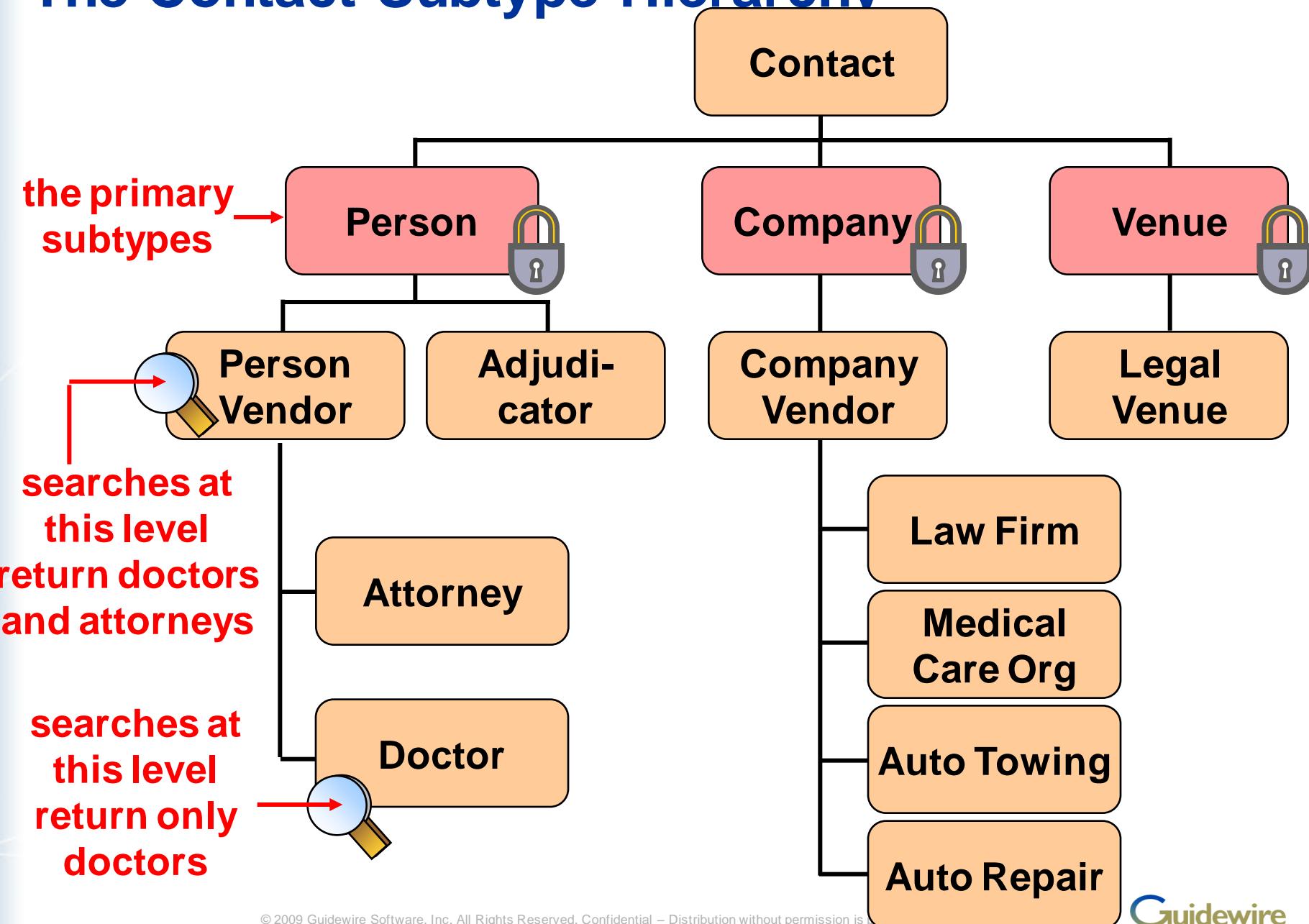


Contacts



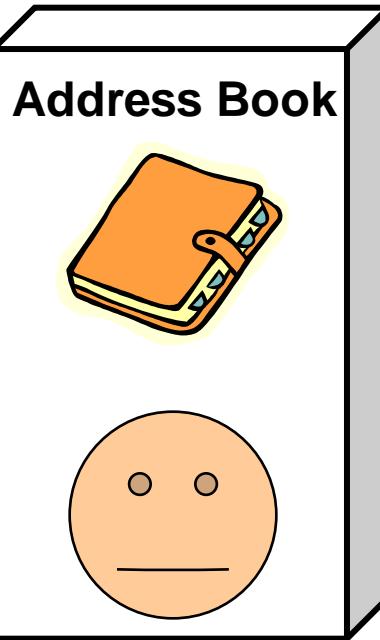
- ▶ A contact is a person, organization, or venue which is related to the claim, such as...
 - Someone who suffered a loss
 - Some company which repaired a damaged asset
 - Some place where disputes were resolved

The Contact Subtype Hierarchy



Two Applications Store Contacts

**contacts
relevant to
a single
claim**



**contacts
relevant to
multiple
claims**

- ▶ Two applications store contacts
 - ClaimCenter stores contact information as it pertains to a given claim
 - Address Book stores contacts that are (potentially) relevant to multiple claims

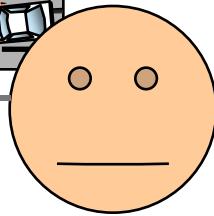
"Single Use" Contacts



Claim
000-00-002006



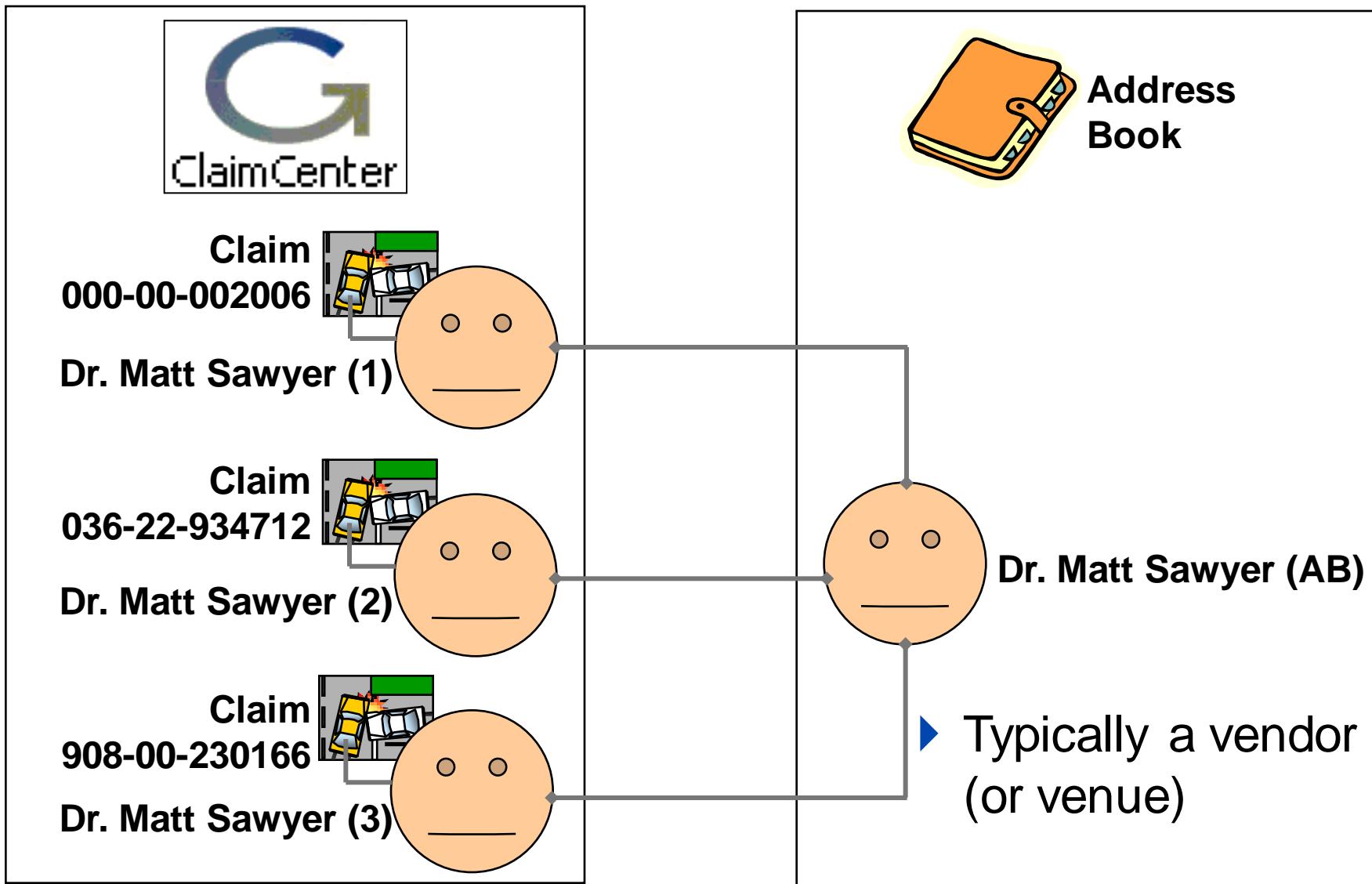
Doris Schwartz
(witness)



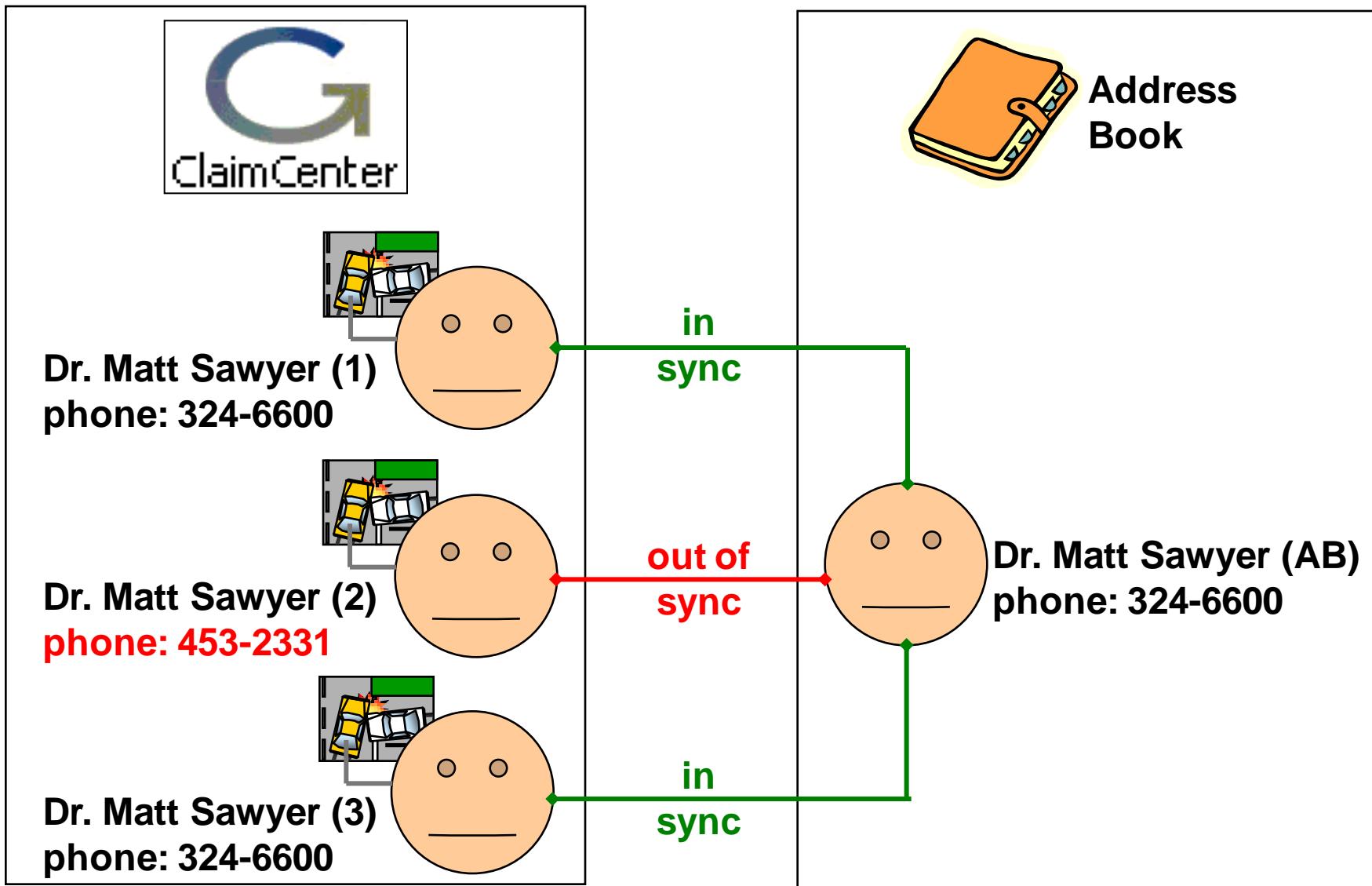
Address
Book

- ▶ Typically a non-vendor, non-venue contact, such as the insured, a claimant, or a witness

"Multi-Use" Contacts



Multi-Use Contacts Are Typically "Linked"

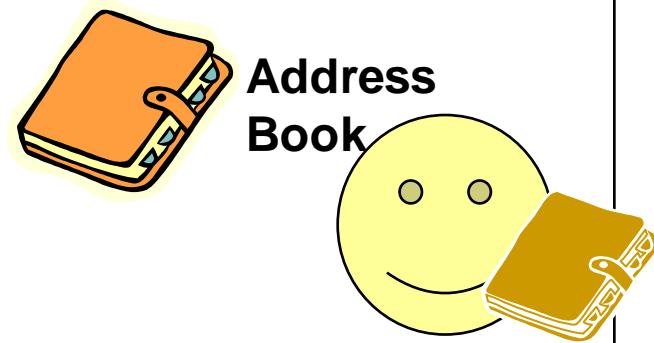


Types of Users That Work With Contacts



Adjusters...

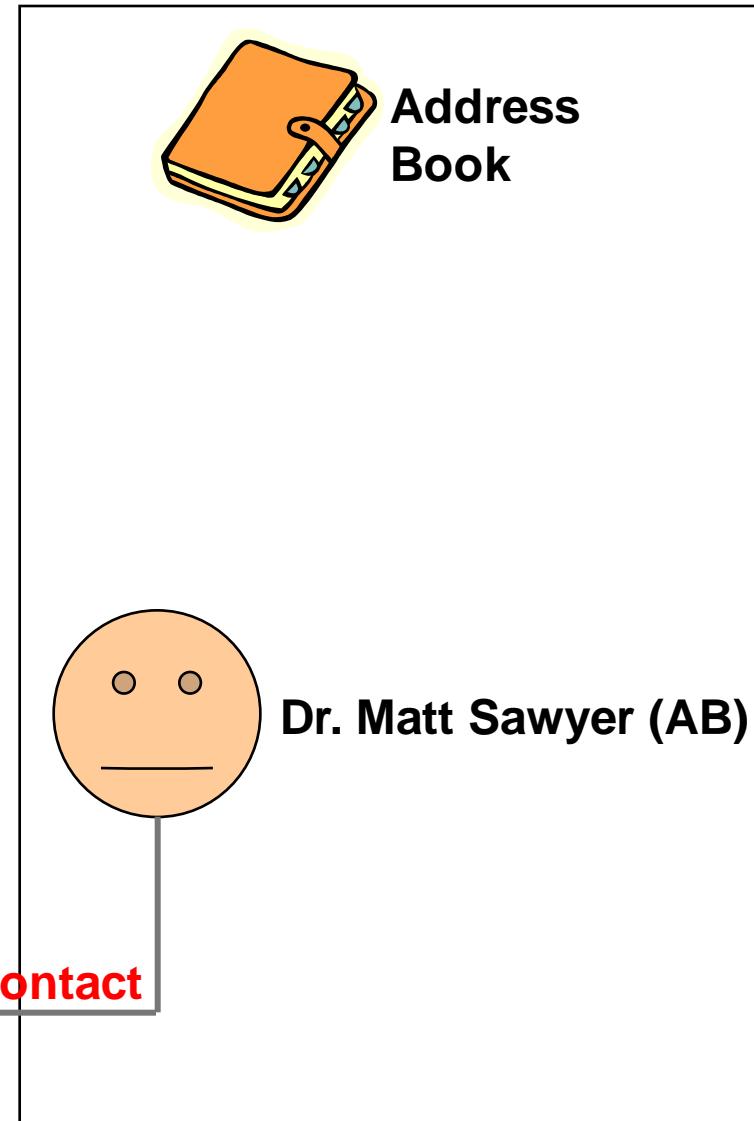
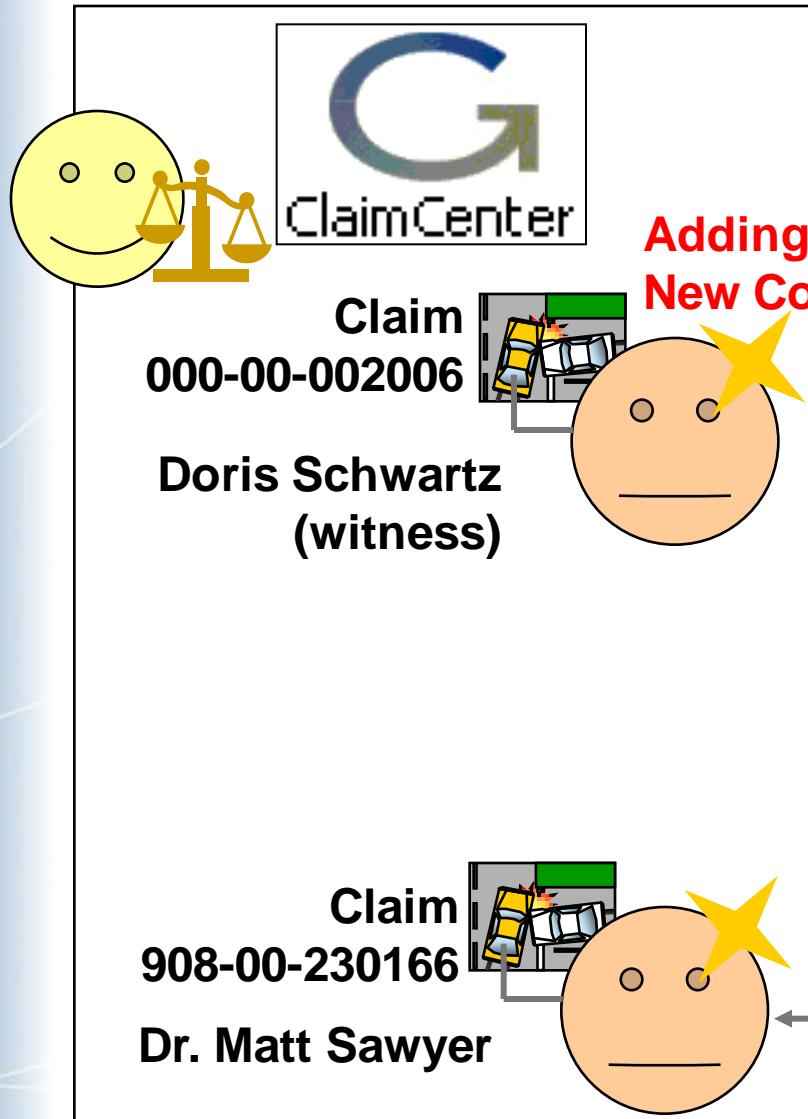
- ▶ Work in ClaimCenter
- ▶ Create "single-use" contacts
- ▶ Create "multi-use" contacts from AB contacts
- ▶ Sync information from AB to ClaimCenter



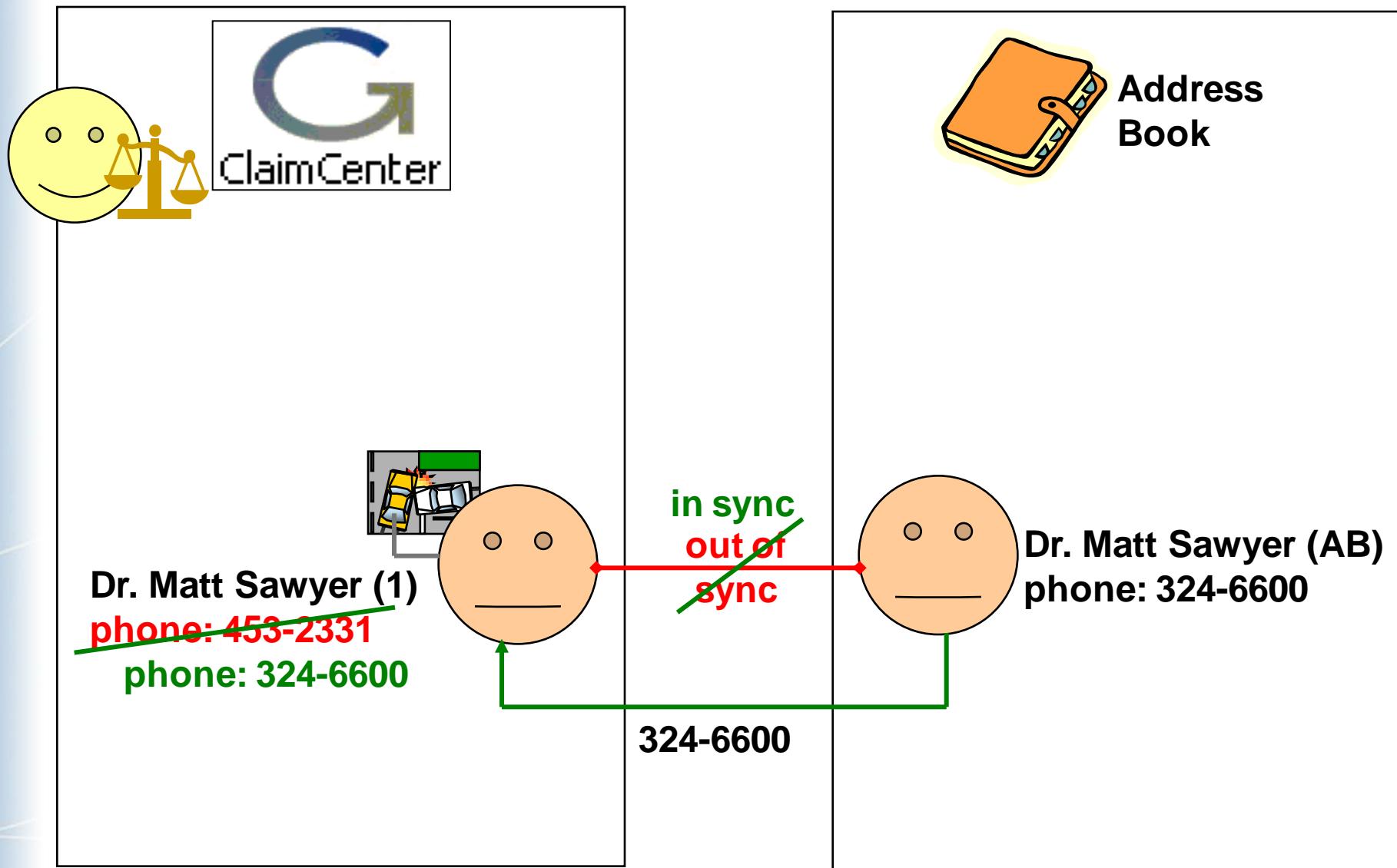
Vendor managers...

- ▶ Work in Address Book
- ▶ Create and edit reusable address book contacts

Adding a Contact within ClaimCenter



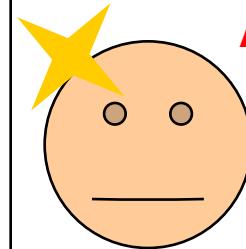
Syncing Contacts



Adding a Contact within Address Book



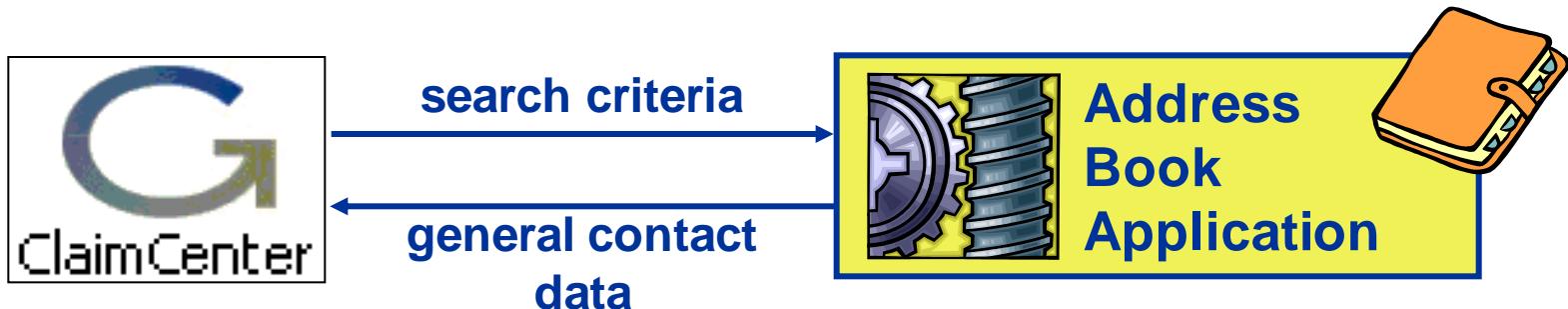
Address
Book



Adding a Contact

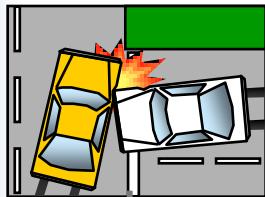
**Quake City
Explosives Inc. (AB)**

Address Book Integration

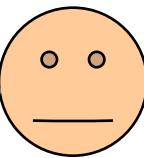


- ▶ Every instance of ClaimCenter has an integration point to an address book application
 - Nearly every implementation uses Guidewire ContactCenter as the address book application

Contact Roles

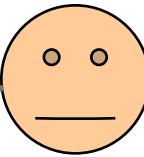


Auto Claim
036-22-934712



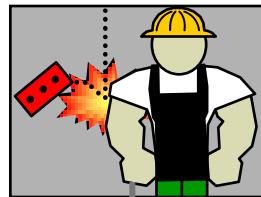
Ellen Lopez

- Insured (policy)
- Reporter (entire claim)
- Claimant (exposure 1)

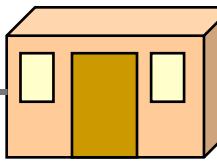


Matt Sawyer

- Doctor (entire claim)

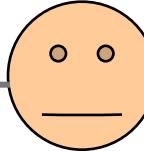


Workers' Com Claim
772-12-9000



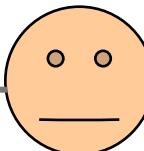
OmniTech Inc.

- Insured (policy)



Tommy Duke

- Claimant (exposure 1)



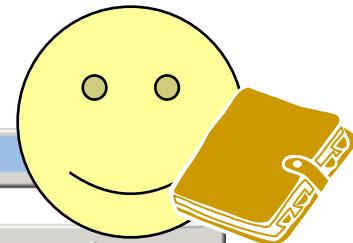
Matt Sawyer

- Doctor (entire claim)

Lesson Outline

- ▶ Contact Basics
- ▶ ContactCenter
- ▶ Creating ClaimCenter Contacts
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

Accessing ContactCenter



The screenshot shows two instances of Microsoft Internet Explorer. The top window is titled '[DEV mode] Guidewire ContactCenter - Windows Internet Explorer' and displays the Guidewire ContactCenter login page. The URL in the address bar is 'http://localhost:8280/ab/ContactCenter.do'. The login form has fields for 'User name' (containing 'mmaples') and 'Password' (containing '••'), a 'Remember me' checkbox, and a 'Log In' button. A red arrow points from the top address bar of the top window down to the address bar of the bottom window. The bottom window is also titled '[DEV mode] Guidewire ContactCenter - Windows Internet Explorer' and shows the same login page with the same URL in the address bar.

The ContactCenter Interface

The screenshot shows the 'Administration' tab selected in the top navigation bar. On the left, a sidebar titled 'Actions' contains a 'Search' button, which is highlighted with a blue background. The main content area is titled 'Search' and includes the following fields:

Contact Type	First Name	Location
* Person		City
		State
		ZIP Code
		Country

Other search fields include First Name, Last Name, Tax ID, Organization Name, and Minimum Score. Below the search fields are 'Search' and 'Reset' buttons. The 'Search Results (empty)' section contains a 'Delete' button and a header row with columns for Name, Address, City, State, ZIP, Phone #, and Contact T.

Creating New Contacts in ContactCenter

Contacts | Administration

Actions ►

Search

New Person ► Adjudicator
New Company ► User Contact
New Place ► Policy Person
Update Cancel Vendor ► Attorney
ABDoctor Other Doctor
First name Matt
Middle name
Last name Sawyer ★
Prefix <none selected>
Suffix <none selected>

Primary Address

Address Line 1
Address Line 2
City

Contacts

Attorney

Doctor

Other

Matt

Sawyer

<none selected>

<none selected>

Address Line 1

Address Line 2

City

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Creating Contacts from the New Claim Wizard

Step 2 of 5: Basic information

Cancel | < Back | Next >

Reported By

How Reported: Phone

Name: Brittany Turner

Relation to Insured: Self

Date of Notice: 05/15/2008

Verify Date of Birth

Date of Birth

Confirm Contact Info

Address: 2563 West Ave., Orange, CA 91357

Business Phone: 213-457-6378 x.....

Home Phone:-..... x.....

Mobile:-..... x.....

Primary Phone: Business

Email:

Edit Contact

Insured

Name: Brittany Turner

Address: 2563 West Ave., Orange, CA 91357

Primary Phone: 213-457-6378

Main Contact

Same Person?: Same as reporter Different person

Name: <none selected>

Relation to Insured: <none selected>

New Person

Search

Contacts added on the Main Contacts step have a pre-defined role

Actions | Parties Involved

< Back

New Claim Wizard

Find Policy

Basic Info

Loss Details

Services

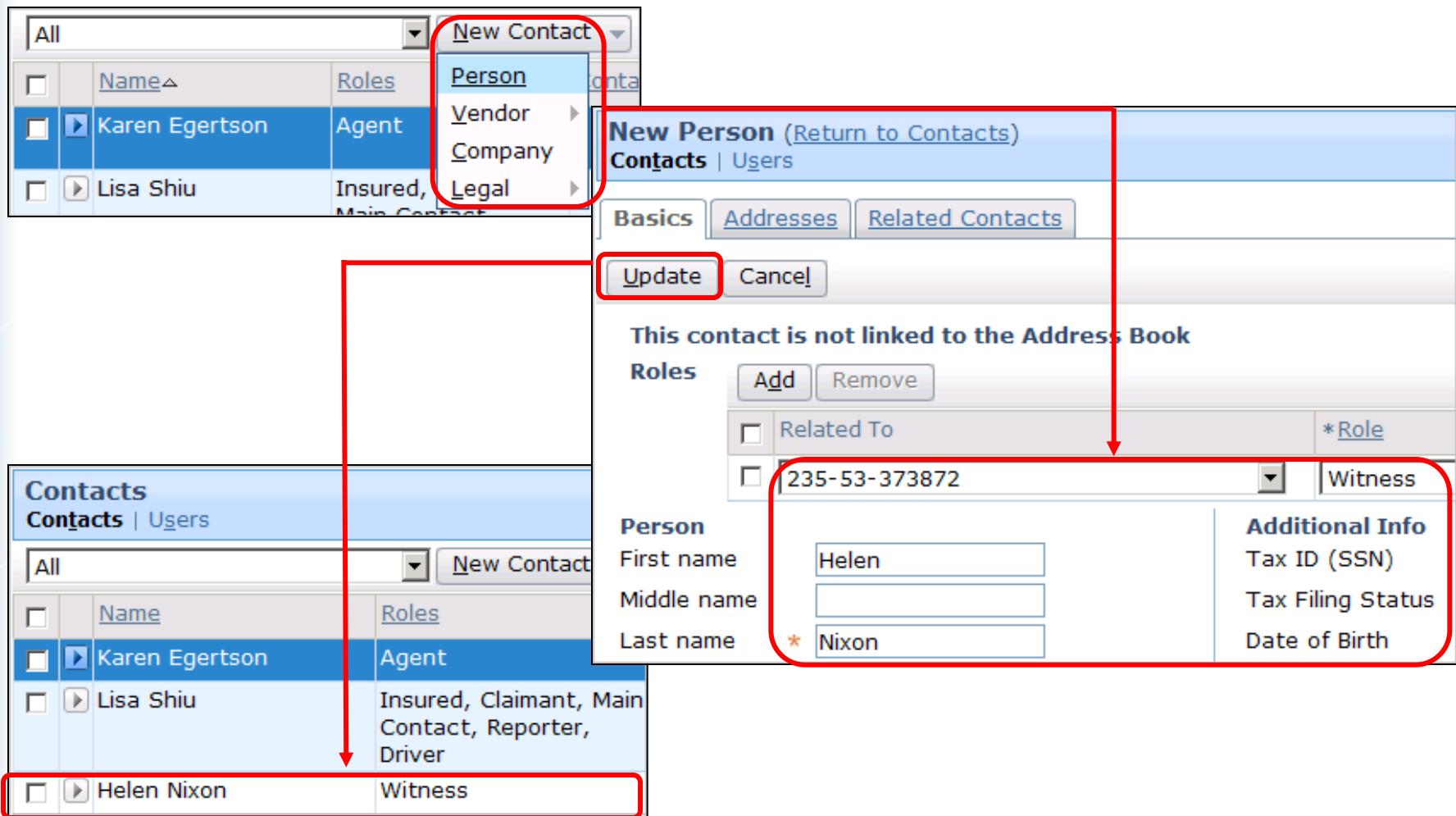
Save & Assign Claim

Parties Involved

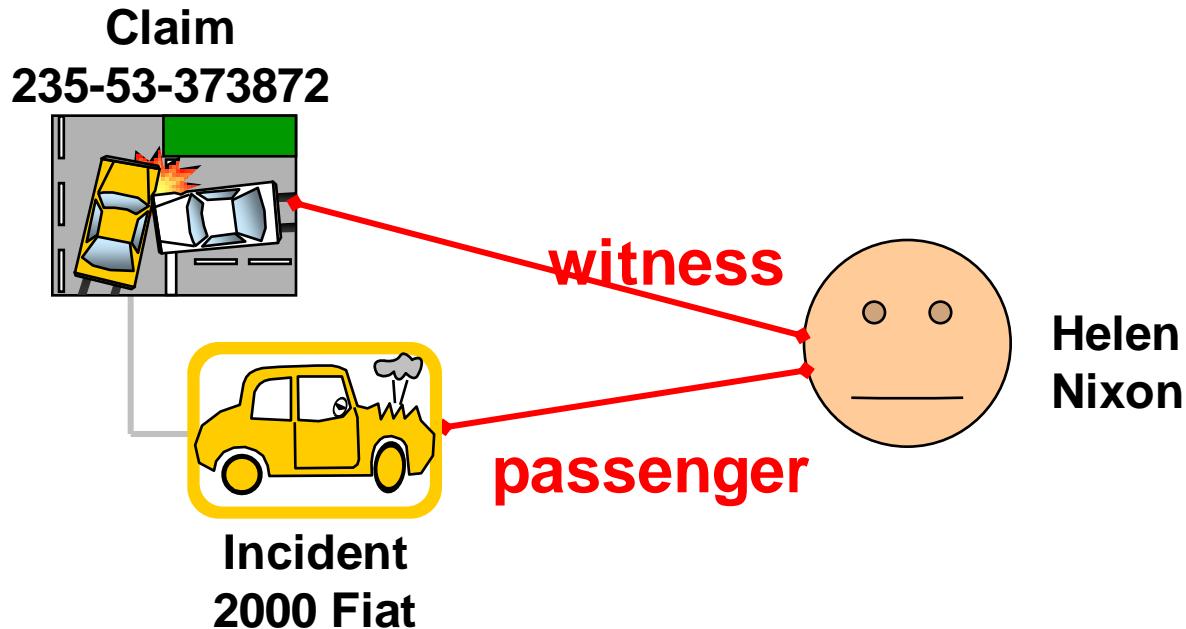
Name	Roles
Karen Egertson	Agent
Scott Shiu	Covered Pa
Brittany Turner	Insured, Re

Contacts added on the Parties involved step can have any role

Adding a New "Single Use" Contact



Roles



Roles	Add	Remove
<input type="checkbox"/> Related To	<input type="checkbox"/> 235-53-373872 (entire claim)	
<input type="checkbox"/>	<input type="checkbox"/> 2000 Fiat Cinquecento (7FDG745 / Califor	
	*Role	
	Witness	
	Passenger	

Adding an Existing "Multi-Use" Contact

The screenshot illustrates the workflow for adding an existing "Multi-Use" contact. It consists of four main windows:

- Main Contacts List:** Shows a grid of contacts with columns for Name, Roles, and Contact Prohibited. A red box highlights the "Add Existing Contact..." button in the top right corner.
- Search Address Book:** A modal window for searching the address book. It includes fields for Type (set to "Auto Repair Shop"), Name ("European"), Tax ID, Preferred Vendors Only? (radio buttons for Yes or No), Minimum Score, and search buttons. A red arrow points from the "Add Existing Contact..." button in the main list to the "Select" button in this window.
- New Auto Repair Shop:** A modal window for creating a new contact. It has tabs for Basics, Addresses, Related Contacts, Activities, Claims, and Email. The Basics tab is active. It includes an "Update" button (highlighted with a red box), a "Save to Claim and Address Book" button, and a note stating "This contact is linked to the Address Book and is in sync". The "Roles" section shows "Related To" and a phone number "235-53-373872". A red box highlights the "Update" button.
- Contact Details View:** A modal window showing the details of the selected contact, "European Autoworks". It displays the Name, Primary Address (Address Line 1: 9721 Whistler Dr), and a list of roles: Repair Shop, Agent, and Insured, Claimant.

Red boxes highlight the "Add Existing Contact..." button, the "Update" button, and the "Select" button. Red arrows indicate the flow from the main list to the search dialog and from the search dialog to the contact details view.

Name	Roles	Contact Prohibited?
Karen Egertson	Agent	No
Lisa Shiu	Insured, Claimant,	No

Name	Type	Tax ID	Preferred Vendors Only?	Minimum Score
European	Auto Repair Shop		<input type="radio"/> Yes <input type="radio"/> No	<none selected>

Name	Address
European Autoworks	9721 Whistler Dr

Name	Roles	Contact Prohibited?
European Autoworks	Repair Shop	No
Karen Egertson	Agent	No
Lisa Shiu	Insured, Claimant,	No

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Review: Viewing Contacts

Actions

Summary

Workplan

Loss Details

Exposures

Parties Involved

Policy

Financials

Notes

Contacts

Contacts | Users

All

New Contact

	Name	Roles
<input type="checkbox"/>	European Autoworks	Repair Shop
<input type="checkbox"/>	Karen Egertson	Agent
<input type="checkbox"/>	Lisa Shiu	Insured, Claimant, Main Contact, Reporter, Driver
<input type="checkbox"/>	Helen Nixon	Passenger, Witness

Identifying If a Contact Is Linked

Contacts
Contacts | Users

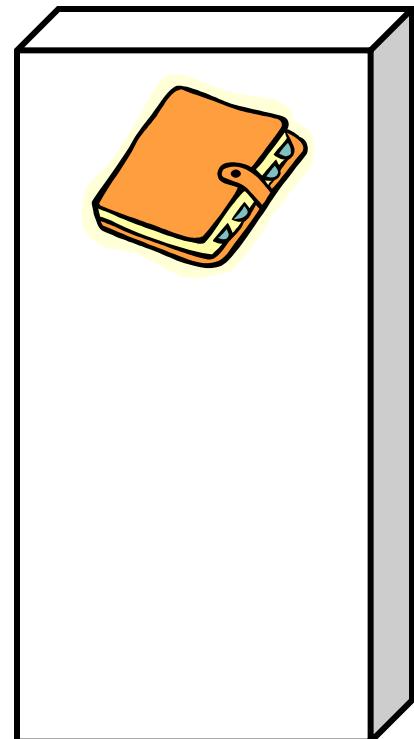
All

	Name ▲	Roles
<input type="checkbox"/>	<input checked="" type="checkbox"/> Karen Egertson	Agent
<input type="checkbox"/>	<input checked="" type="checkbox"/> European Autoworks	Repair Shop
<input type="checkbox"/>	<input checked="" type="checkbox"/> Helen Nixon	Passenger, Witness
<input type="checkbox"/>	<input checked="" type="checkbox"/> Lisa Shiu	Insured, Claimant, Contact, Reporter, Driver

Basics **Addresses** **Related Contacts**

This contact is not linked to the Address Book

Roles	Related To
	54-586897



Editing an Unlinked Contact

Basics Addresses Related Contacts

Edit Link

This contact is not linked to the Address Book

Roles Related To
54-586897

Person

First name	Karen
Middle name	
Last name	Egertson
Prefix	
Suffix	
Former name	

Phone

Business	213-457-6378
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Basics Addresses Related Co

Update Cancel!

This contact is not linked to

Roles Add Remove

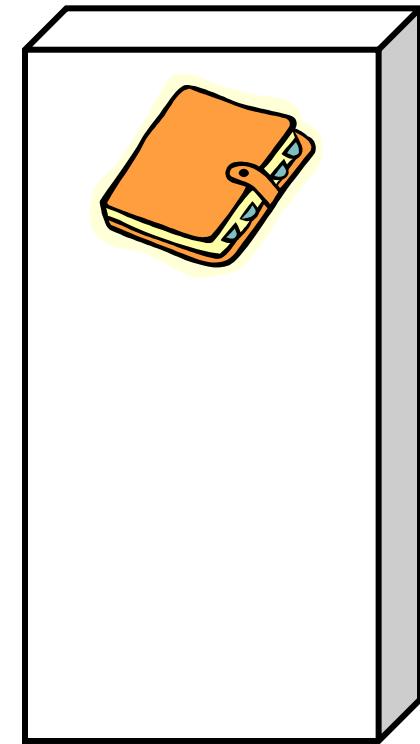
Related To
 54-586897

Person

First name	Karen
Middle name	
Last name	* Egertson
Prefix	<none selected>
Suffix	<none selected>
Former name	

Phone

Business	213-453-2331 x....
----------	----------------------



Linking an Unlinked Contact

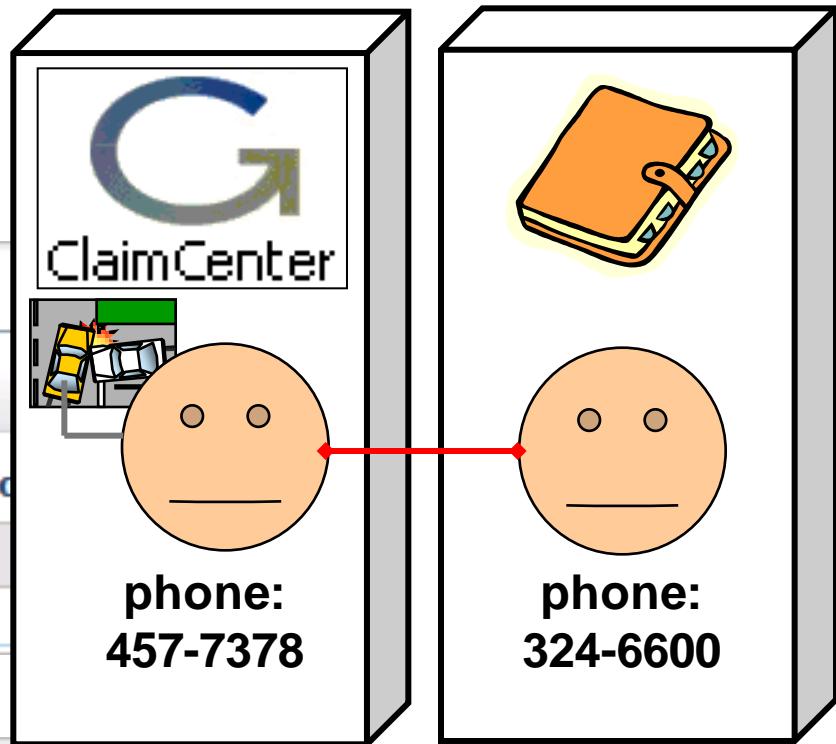
Basics Addresses Related Contacts

Edit Link

This contact is not linked to the Address Book

Roles

Related To
54- 586897



Basics Addresses Related Contacts

Edit Unlink Copy from Address Book View in Address Book

This contact is linked to the Address Book but is out of sync

Roles

Related To	Role
54- 586897	Agent

Identifying If a Contact Is Linked (In Sync)

Contacts
Contacts | Users

	Name	Roles	Contact Prohibited
<input type="checkbox"/>	Karen Egertson	Agent	No
<input type="checkbox"/>	European Autoworks	Repair Shop	No
<input type="checkbox"/>	Helen Nixon	Passenger, Witness	No
<input type="checkbox"/>	Lisa Shiu	Insured, Claimant, Main Contact, Reporter, Driver	No

Basics Addresses Related Contacts

Edit Unlink View in Address Book

This contact is linked to the Address Book and is in sync

Roles	Related To
	54-586897

Person

First name	Karen
Middle name	
Last name	Egertson
Prefix	
Suffix	
Former name	

Phone

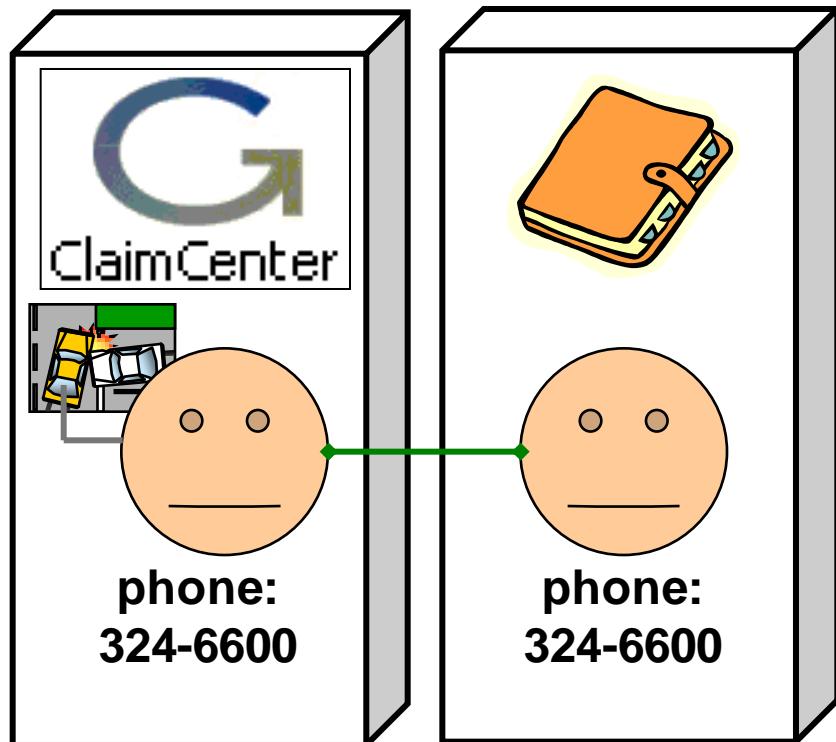
Business	213-324-6600
----------	--------------

Additio

Tax ID (
Tax Filin
Date of
Gender
Marital s
Guardian

Compa

Occupati



Identifying a Linked Contact (Out of Sync)

Contacts
Contacts | [Users](#)

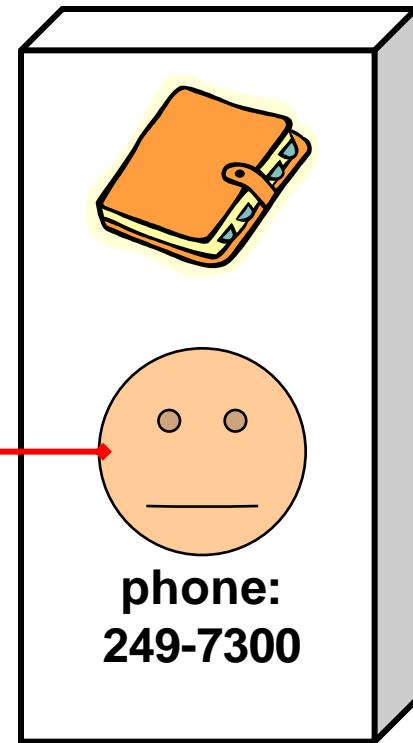
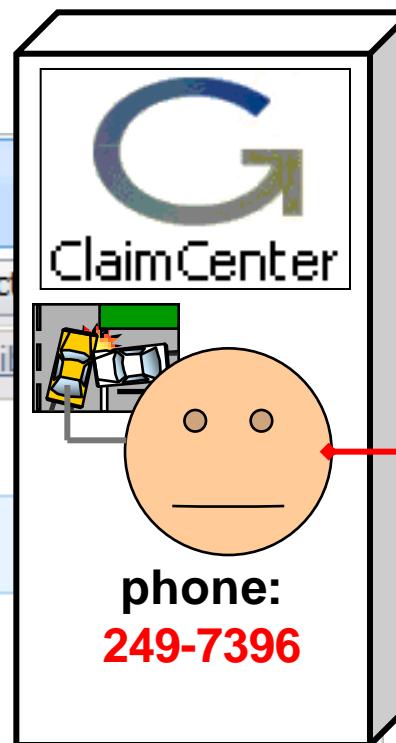
All [New Contact](#)

	Name	Roles	Contact Prohib.
<input type="checkbox"/>	Helen Nixon	Passenger, Witness	No
<input type="checkbox"/>	Karen Egertson	Agent	No
<input type="checkbox"/>	Lisa Shiu	Insured, Claimant, Main Contact, Reporter, Driver	No
<input type="checkbox"/>	European Autoworks	Repair Shop	No 514-249-7396

[Basics](#) [Addresses](#) [Related Contacts](#) [Reviews](#)

[Edit](#) | [Unlink](#) [Copy from Address Book](#) | [View in Address Book](#)

This contact is linked to the Address Book but is out of sync



Viewing Each Contact

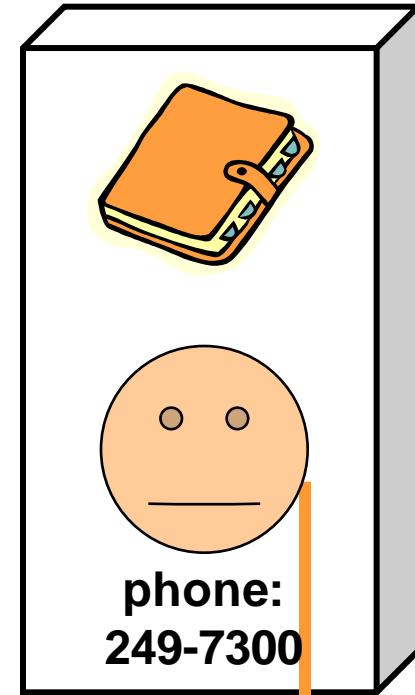
European Autoworks | Repair Shop | No | 514-249-7396

Basics Addresses Related Contacts Reviews

Edit Unlink Copy from Address Book View in Address Book

This contact is linked to the Address Book but is out of sync

Roles Related To Role
235-53-373872 Repair



European Autoworks (Return to Contacts)

Contacts | Users

Basics Addresses Related Contacts Activities Claims Exposures Matters Review

Print Edit Check for Duplicates

Auto Repair Shop

Name	European Autoworks
Primary Address	
Address Line 1	9721 Whistler Dr
Address Line 2	
City	San Francisco

Additional Info

Preferred Vendor?	No
Business License	

Contact Info

Primary Contact	
Business	514-249-7300

Viewing Objects Related to an AB Contact

The diagram illustrates the relationship between a contact object and its related objects. A central contact object (represented by a yellow circle with eyes and a mouth) is connected via green lines to two other objects: a claim object (represented by a blue circle with eyes and a mouth) and an insured object (represented by a red circle with eyes and a mouth). The claim object is further connected to a policy object (represented by a green circle with eyes and a mouth).

European Autoworks (Return to Contacts)

Contacts | Users

Basics Addresses Related Contacts Activities Claims Exposures Matters Re

All open Print

Claim	Policy	Insured	Claimant	Loss Date
235-53-373870	53-263535	Mark Henderson	Alecia Cole, Bill Henderson, Richard Jackson	01/26/2008
235-53-373872	54-586897	Lisa Shiu	Lisa Shiu	01/04/2008

Editing the ClaimCenter Contact

European Autoworks Repair Shop No 514-249-7300

Basics Addresses Related Contacts Reviews

Edit Unlink View in Address Book

This contact is linked to the Address Book and is in sync

Roles Related To Role
235-53-373872 Repair

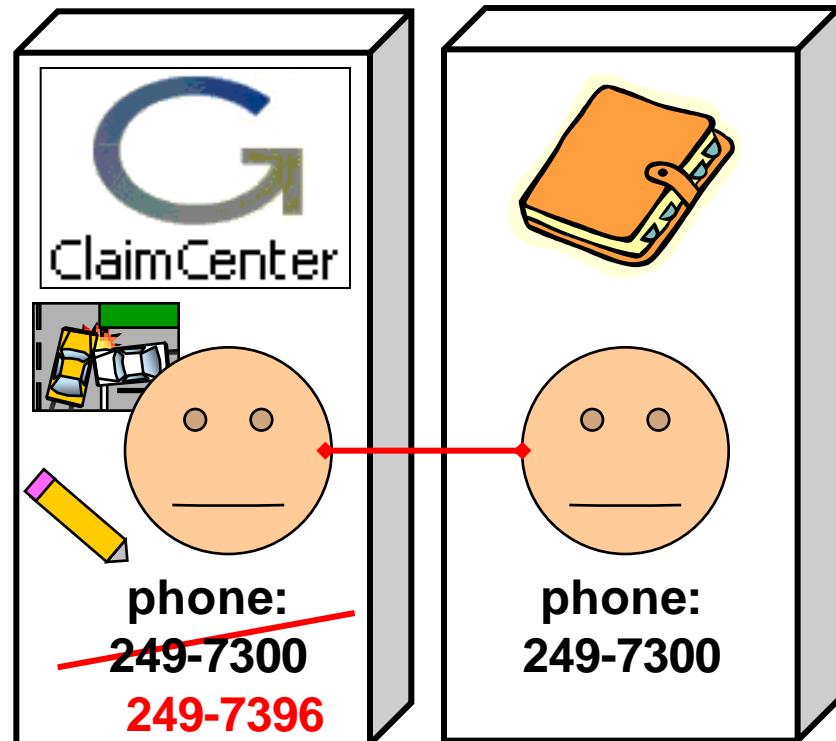
European Autoworks Repair Shop No 514-249-7396

Basics Addresses Related Contacts Reviews

Edit Unlink Copy from Address Book View in Address Book

This contact is linked to the Address Book but is out of sync

Roles Related To Role
235-53-373872 Repair



Editing the Address Book Contact

Screenshot of the Address Book contact editing interface:

Top navigation bar: Basics, Addresses, Related Contacts, Reviews.

Action buttons: Edit, Unlink, View in Address Book (highlighted with a red box).

Status message: This contact is linked to the Address Book and is in sync.

Role section: Roles, Related To, 235-53-373872.

Auto Repair Shop section:

- Name: European Autoworks
- Contact Type: Auto Repair Shop
- Primary Address: European Autoworks

Bottom navigation bar: Basics, Addresses, Related Contacts, Reviews.

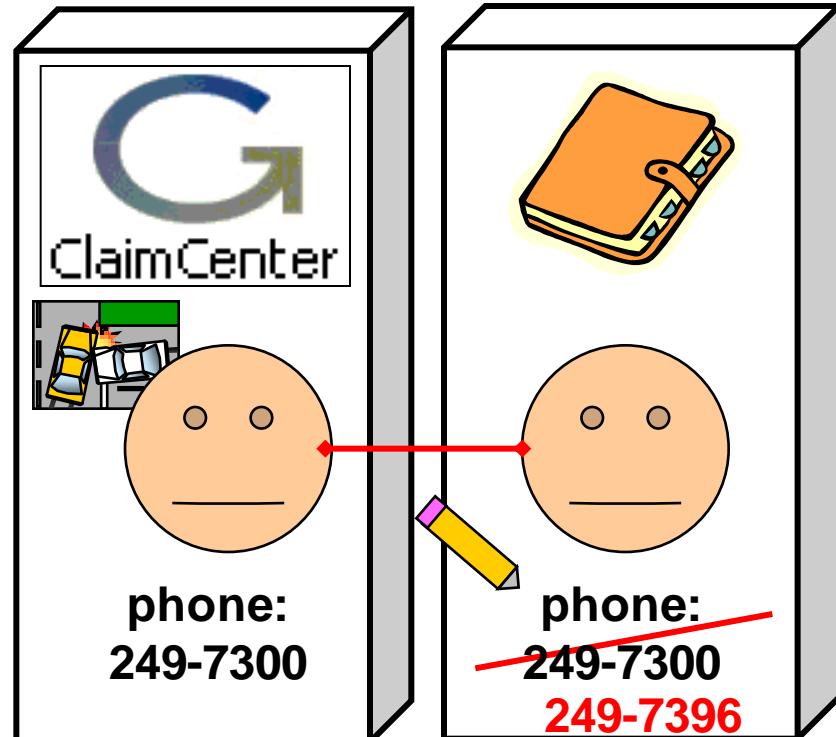
Action buttons: Edit, Unlink, Copy from Address Book, View in Address Book.

Status message: This contact is linked to the Address Book but is out of sync.

Role section: Roles, Related To, 235-53-373872.

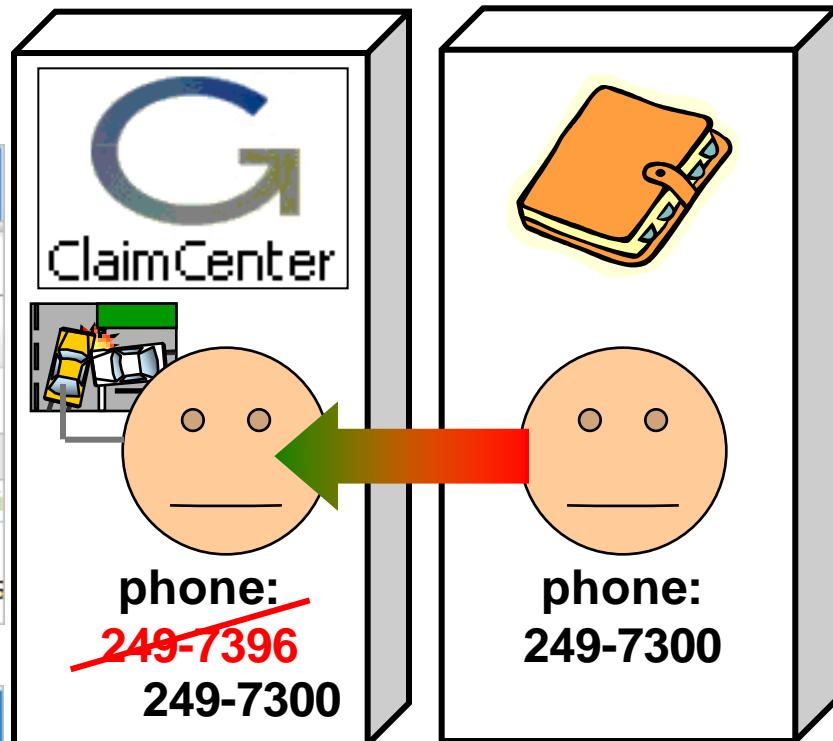
Auto Repair Shop section:

- Name: European Autoworks



Syncing a Linked Contact

European Autoworks	Repair Shop	No	514-249-7396
Basics Addresses Related Contacts Reviews			
Edit Unlink Copy from Address Book View in Address Book			
This contact is linked to the Address Book but is out of sync			
Roles			
Related To 235-53-373872		Role Repair	
Auto Repair Shop		Additional Info	
Name	European Autoworks	Overall Review S	Detailed View
European Autoworks	Repair Shop	No	514-249-7300
Basics Addresses Related Contacts Reviews			
Edit Unlink View in Address Book			
This contact is linked to the Address Book and is in sync			
Roles			
Related To 235-53-373872		Role Repair	
Auto Repair Shop		Additional Info	
Name	European Autoworks	Overall Review S	Detailed View



- ▶ Syncing can be
 - Manually initiated from CC
 - Automatically triggered from AB when an AB contact is updated

Lesson Outline

- ▶ Contact Basics
- ▶ ContactCenter
- ▶ Creating ClaimCenter Contacts
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

Searching for Address Book Contacts

- ▶ Searching for contacts can be done using different approaches to reduce time and improve quality of service. This includes searching
 1. by Name and/or Type of contact
 - For example, an Auto Repair Shop named Aamco Transmissions
 2. by Location and/or Proximity
 - For example, any Auto Repair Shop within 5 miles of the loss location
 3. by Preferred Status and/or by Performance Score
 - For example, an Auto Repair Shop who is a Preferred Vendor and whose Average Review Score is at least 80

Searching for a Specific Contact

Screenshot of the Guidewire Address Book search interface:

Search Address Book

- Type: Auto Repair Shop
- Name: European
- Tax ID: (empty)
- Preferred Vendors Only?: No
- Minimum Score: <none selected>

Search Results (1 - 1 of 1)

<input type="checkbox"/> Name	<input type="checkbox"/> Address	<input type="checkbox"/> City	<input type="checkbox"/> State	<input type="checkbox"/> ZIP	<input type="checkbox"/> Phone #
<input type="checkbox"/> European Autoworks	9721 Whistler Dr	Whistler	BC	V0A 1Z0	(604) 555-1234

European Autoworks (Return to Search Address Book)

Basics **Addresses** **Related Contacts** **Activities** **Claim**

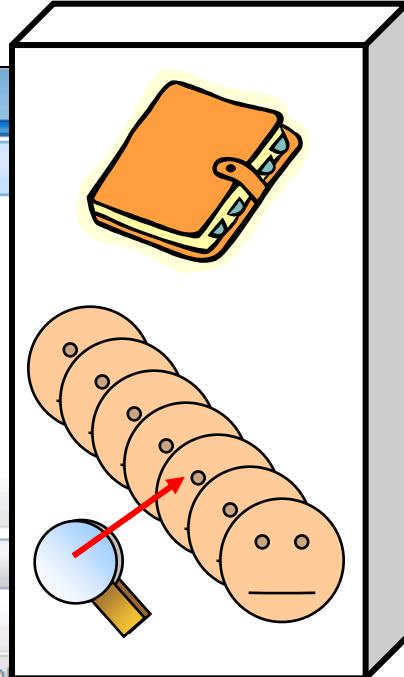
Print **Edit** **Check for Duplicates**

Auto Repair Shop

Name: European Autoworks

Primary Address

Address Line 1: 9721 Whistler Dr



The screenshot shows a search results table where the company name "European Autoworks" is highlighted with a red box. A red arrow points from this highlighted text to the magnifying glass icon in the illustration.

Searching Contacts Using Proximity Criteria

Search Address Book

The actual center address used for this proximity search

Type * Auto Repair Shop

Name

Tax ID

Preferred Vendors Only? Yes No

Minimum Score <none selected>

Search Radius 5 closest

Search for results close to this address

Line 1
Line 2
City
County
ZIP Code
Country

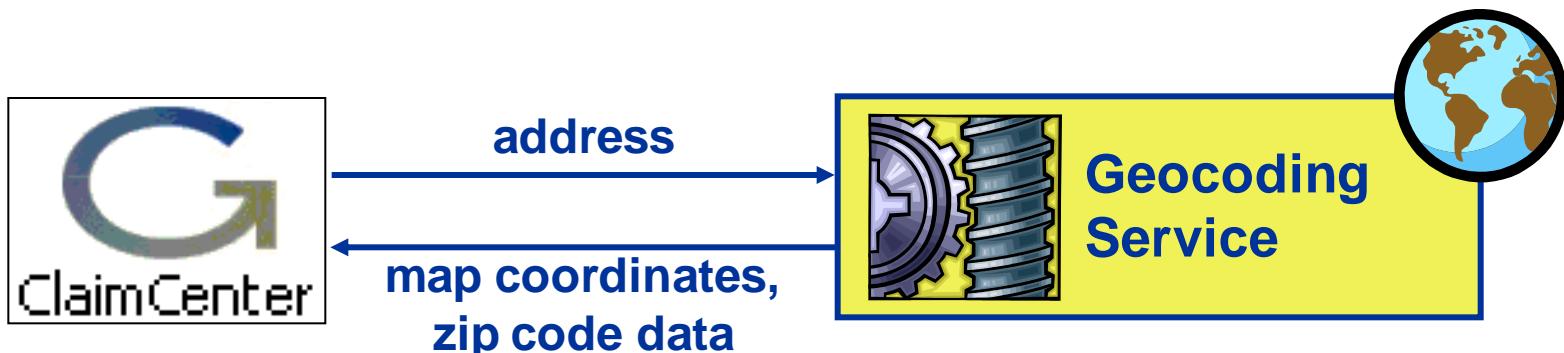
Search Results (1 - 5 of 5)

Retrieve Requested Directions | Delete | Print/Export

<input type="checkbox"/>	Name	Address	#	Type	Overall Review Score	Proximate Distance
<input type="checkbox"/>	Austin Auto Glass	69 Cherry Circl	96-6092	Auto Repair Shop		0.0 kilometers
<input type="checkbox"/>	Edwards Performance Center	86 Chestnut St	65-1938	Auto Repair Shop		7.6 kilometers
<input type="checkbox"/>	Cook Performance Center	71 Park Avenue	80-7478	Auto Repair Shop		10.2 kilometers
<input type="checkbox"/>	Morgan Auto Care	85 Willow Cour	25-9260	Auto Repair Shop		12.7 kilometers
<input type="checkbox"/>	McMahon Service Center	77 Cherry Circl	18-1857	Auto Repair Shop		17.1 kilometers

- ▶ You can search either ClaimCenter or Address Book for contacts that meet a given proximity criteria

Geocoding Integration



- ▶ Many instances of ClaimCenter have an integration point to a geocoding service, such as Microsoft's MapPoint
 - This service provides longitude and latitude coordinates for a street address (or exchanges zip code for city/state and vice versa)

Service Provider Reviews

- ▶ Service Providers are contacts such as Auto Repair, Lawyers or Doctors
- ▶ You can review and track the performance of a service provider at the claim level for different categories of service
- ▶ Reviews are sent to ContactCenter which calculates aggregate review scores across different claims

Burlingame Saab (Up to Search)

Basics Addresses Related Contacts Reviews

Edit Delete

ABAutoRepairShop

Name Burlingame Saab

Primary Address

Address Line 1	825 N San Mateo Dr
Address Line 2	
City	Burlingame
County	
State	California
Postal Code	94401
Country	United States of America
Type	Business
Description	Full service
Valid Until	

Review Performance

Overall Review Score	74												
Category Scores	<table><thead><tr><th>Category</th><th>Overall Score</th></tr></thead><tbody><tr><td>Communication</td><td>79</td></tr><tr><td>Office Personnel</td><td>70</td></tr><tr><td>Quality of Work</td><td>70</td></tr><tr><td>Technicians</td><td>85</td></tr><tr><td>Timeliness</td><td>59</td></tr></tbody></table>	Category	Overall Score	Communication	79	Office Personnel	70	Quality of Work	70	Technicians	85	Timeliness	59
Category	Overall Score												
Communication	79												
Office Personnel	70												
Quality of Work	70												
Technicians	85												
Timeliness	59												



Searching Contacts Using Performance Scores

- ▶ Adjusters can search to only add providers that have a good track record

Search Address Book

Type	* <input type="text" value="Auto Repair Shop"/>
Name	<input type="text"/>
Tax ID	<input type="text"/>
Preferred Vendors Only?	<input type="radio"/> Yes <input type="radio"/> No
Minimum Score	<input type="text" value="70"/>

Location

City	<input type="text" value="Burlingame"/>
State	<input type="text" value="California"/>
ZIP Code	<input type="text" value=".....-...."/>
Country	<input selected>"="" type="text" value="<none"/>

Search Results (1 - 1 of 1)

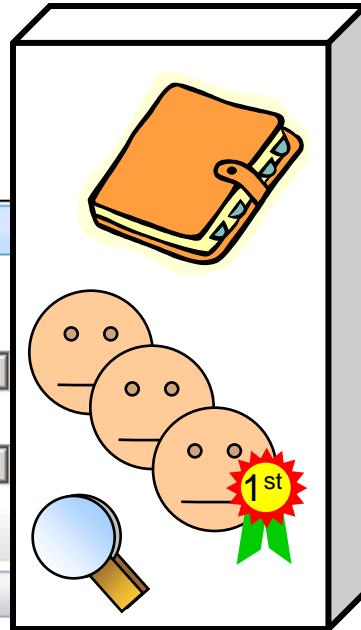
<input type="button" value="Delete"/>	<input type="button" value="Print/Export"/>						
<input type="checkbox"/> Name	<input type="checkbox"/> Address	<input type="checkbox"/> City	<input type="checkbox"/> State	<input type="checkbox"/> ZIP	<input type="checkbox"/> Phone #	<input type="checkbox"/> Type	<input type="checkbox"/> Overall Review Score
Burlingame Saab	825 N San Mateo Dr	Burlingame	California	94401		Auto Repair Shop	74

Preferred Vendors Only? Yes No

Minimum Score

Search Results (1 - 2 of 2)

<input type="button" value="Delete"/>	<input type="button" value="Print/Export"/>						
<input type="checkbox"/> Name	<input type="checkbox"/> Address	<input type="checkbox"/> City	<input type="checkbox"/> State	<input type="checkbox"/> ZIP	<input type="checkbox"/> Phone #	<input type="checkbox"/> Type	<input type="checkbox"/> Overall Review Score
Burlingame Saab	825 N San Mateo Dr	Burlingame	California	94401		Auto Repair Shop	74
Express Auto Repair	4701 El Camino Real	Burlingame	California	94401		Auto Repair Shop	



Viewing Performance Reviews

The screenshot displays two overlapping software windows. The top window, titled 'Claim (235-53-373871)', shows a 'Reviews' tab selected. A red box highlights the 'View in Address Book' button in the toolbar. The bottom window, also titled 'Address Book | Claim (235-53-373871)', shows a 'Reviews' tab selected. It lists reviews for 'Auto Repair Service' related to claim # 235-53-373871. One review is completed with a score of 82. A red arrow points from the 'View in Address Book' button in the top window to the 'Reviews' section of the bottom window.

Claim view

Contact view

Review Type	Related To	Claim #	Review Score	Last Updated	Status
Auto Repair Service	(1) 1st Party Vehicle - Jim Means	000-00-000203	82	06/14/2008	Completed
Auto Repair Service		235-53-373871	65	06/14/2008	Completed

Creating New Performance Reviews

The screenshot shows the 'Contacts' screen in the Guidewire application. At the top, there are tabs for 'Contacts' and 'Users'. Below the tabs is a search bar with dropdown menus for 'All', 'New Contact', and 'Add Existing'. A table lists contacts with columns for Name, Roles, Contact Prohibited?, and Phone. The contact 'Burlingame Saab' is selected, indicated by a blue row highlight. Below the table are tabs for 'Basics', 'Addresses', 'Related Contacts', and 'Reviews'. The 'Reviews' tab is selected, shown in a larger window below. This window has an 'Edit' button highlighted with a red box and a red arrow pointing from the 'Edit' button in the main contacts area to the 'Edit' button here. It also has 'Unlink' and 'View in Address Book' buttons. A dropdown menu 'All Reviews' is open, showing a list of reviews. One review, 'Auto Repair Service', is selected and highlighted with a red box. In the bottom right corner of this window, there is a dropdown menu with the option 'Add New Review' highlighted with a red box, and the value 'Auto Repair Service' is selected.

- ▶ You must be in edit mode in order to add a new review
- ▶ A drop down allows selection of service provider review types

Performance Review Question Sets

Category	Question	Options
Timeliness	How quickly was the service provider able to schedule the repair?	<input type="button" value="<none selected>"/>
	How long did it take to get an estimate?	<input type="button" value="<none selected>"/> Within 1 day of initial contact Within 3 days of initial contact More than 3 days from initial contact
	How timely were the repairs?	<input type="button" value="<none selected>"/>
Communication	How would you rate the service provider's explanation of the needed repairs?	<input type="button" value="<none selected>"/>
	Did the service provider obtain your authorization before beginning the repairs?	<input type="button" value="<none selected>"/>
	Did the service provider satisfactorily answer any questions you had?	<input type="button" value="<none selected>"/>
Office Personnel	Professionalism	<input type="button" value="<none selected>"/>
	Helpfulness	<input type="button" value="<none selected>"/>
	Knowledge	<input type="button" value="<none selected>"/>
Technicians	Professionalism	<input type="button" value="<none selected>"/>
	Helpfulness	<input type="button" value="<none selected>"/>
	Knowledge	<input type="button" value="<none selected>"/>
Quality of Work	How would you rate the quality of the service provider's work?	<input type="button" value="<none selected>"/>
	Were there any requotes?	<input type="button" value="<none selected>"/>

Completed Provider Review and Scores

Category Scores	Category	Score
	Communication	83
	Office Personnel	70
	Quality of Work	70
	Technicians	70
	Timeliness	33
Category Timeliness	How quickly was the service provider able to schedule the repair?	Within 3 days of initial contact
	How long did it take to get an estimate?	Within 3 days of initial contact
	How timely were the repairs?	More than 3 days past estimate
Communication	How would you rate the service provider's explanation of the needed repairs?	Satisfactory
	Did the service provider obtain your authorization before beginning the repairs?	Yes
	Did the service provider satisfactorily answer any questions you had?	Yes
Office Personnel	Professionalism	Good
	Helpfulness	Good
	Knowledge	Good
Technicians	Professionalism	Good
	Helpfulness	Good
	Knowledge	Good
Quality of Work	How would you rate the quality of the service provider's work?	Satisfactory
	Were there any requotes?	
Accuracy of Quote		

Checking for Duplicates in the Address Book

Screenshot of the Address Book interface showing the 'Check for Duplicates' feature.

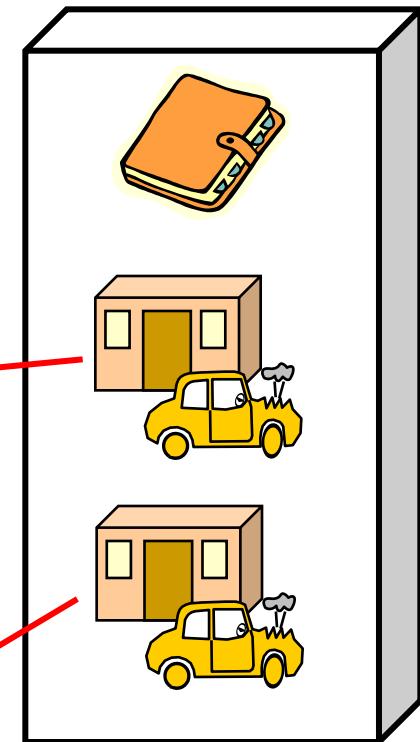
The main window title is "European Autoworks (Return to Contacts)". The tab bar includes "Basics", "Addresses", "Related Contacts", and "Activities". Below the tabs are buttons for "Print", "Edit", and "Check for Duplicates" (which is highlighted with a red box).

The contact details are as follows:

- Name:** European Autoworks
- Primary Address:**
 - Address Line 1: 9721 Whistler Dr
 - Address Line 2:
 - City: San Francisco
 - County:
 - State: California

Below the contact details, there is a section titled "Matching Contacts" which lists one contact entry:

<input type="checkbox"/>	Name	Address	City	State	ZIP	Phone
<input type="checkbox"/>	European Autoworks	Wistler	San Francsico	California		



Is this the
same auto
repair shop?

Lesson Objectives Review

You should now be able to:

- Describe the functionality of contacts
- Describe the functionality of ContactCenter
- Create contacts in ClaimCenter
- Work with contacts in ClaimCenter
- Describe approaches to searching for contacts

Review Questions

1. If "John Doe" is in the Address Book and is associated to three claims, how many contacts have the name "John Doe"?
2. Is it common or uncommon to have a contact that exists only in ClaimCenter? Only in Address Book?
3. What is true about a ClaimCenter contact when it is linked? When it is in sync?
4. What is the purpose of a contact role? A contact role "owner"?
5. How can you tell if a contact is linked and/or in sync?
6. How could you identify all the claims that a given contact is associated to?

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