



Hi Marley Accelerator v2.9.0 for ClaimCenter 10.12

Reference Implementation

A DETAILED DESIGN DOCUMENT

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Overview

Hi Marley accelerator for ClaimCenter will establish a baseline of packaged and deployable code for insurance carriers utilizing Guidewire ClaimCenter 10.12 and Hi Marley application. Carriers will have the ability to customize and configure ClaimCenter for Hi Marley API services using this accelerator.

The accelerator allows providers to quickly integrate their Guidewire ClaimCenter with Hi Marley, enabling operators (adjusters/underwriters/customer service reps/etc.) to seamlessly include communication via Hi Marley into their everyday life. There are many APIs built to help with this process and minimize any manual work for operators.

The accelerator will function with the out-of-the-box version of ClaimCenter. Included will be Entity Extensions, Web Services, Exception Handling and Validation Rules supporting processes for below use cases.

- Open Case in Hi Marley once claim is created with enroll in Hi Marley texting in ClaimCenter
- Opt-In/Opt-Out status update from Hi Marley to ClaimCenter
- Claim updates to Hi Marley when key fields are changed/updated in ClaimCenter Operator, Adjuster email, Phone number, Privacy)
- Reopen/close update to Hi Marley
- Display Hi Marley details section and navigate to Hi Marley application's text screen for specific case from ClaimCenter
- Send/Receive SMS messages from ClaimCenter
- Instant download of SMS transcript from Hi Marley within ClaimCenter
- Synchronize groups with Hi Marley

What is included in this accelerator

Following lists the aspects of the solution that will be included in the accelerator:

- Hi Marley Case Creation for claim participant
 - a. One claim can have multiple Hi Marley cases (one per claim participant)
- Reassign Hi Marley case(s) when claim owner changes
- Change Hi Marley case(s) when claim action is taken
 - b. Hi Marley case(s) closed when claim is closed
- Synchronize data from Hi Marley to Claims Center
 - c. New Messages
 - d. Download PDF Transcript on case closure or on-demand
 - e. Download multimedia files such as images and videos.
 - f. Opt-status of claim participant
 - g. Hi Marley Case Notes
- Synchronize groups from Claim Center to Hi Marley (only groups which have supervisor and at least one user which exist in Hi Marley)
- Send SMS Messages via Claims Center (template messages or new messages)

- Send Scheduled Messages via Claim Center
- Claims Center admin can configure accelerator in Claims Center
 - h. Enable/Disable functionality
 - i. Disable files download into claim
 - ii. Disable Case Transcript download button
 - iii. Disable Case Visibility Settings
 - 1. disables all features for setting case to public or private
 - 2. all cases are public
 - iv. Disable Case Notes integration
 - v. Disable Automatic Operator Creation
 - vi. Disable Send Message on Claim
 - vii. Disable SMS Notifications
 - viii. Disable Synchronize Groups with Hi Marley
 - ix. Disable Secondary operators
 - x. Disable Group Syncornize
 - xi. Disable Scheduled Messages
 - xii. Disable Parties Involved Tab
 - xiii. Disable Case Creation (FNOL)
 - xiv. Disable Brand
 - xv. Disable Lines of Business
 - xvi. Disable Override To Single Brand
 - xvii. Disable Brand to be Overwritten
 - xviii. Disable Case Closure - Download Transcript
 - xix. Disable Assign author for HiMarley Case event note
 - xx. Disable Data Enablement of Automation
 - i. Add new SMS template from Hi Marley to Claims Center
- b. Limit Hi Marley functionality based on Claims Center permissions
 - a. New permissions created for Hi Marley operations
 - b. New permissions can be added to new/existing ClaimCenter roles

Who should read this document

- Carrier Business Sponsors
- Carrier Technical Sponsors
- Carrier ClaimCenter Developers
- Carrier IT Architects

What is not included in this reference implementation

1. Business specific configurations / configurations for custom ClaimCenter implementations
2. Carrier's SFTP location implementation
3. Hi Marley's native user application
 - Note that for Guidewire's functional review, all non-functional requirement (NFR) testing such as Performance, Security, Reliability, Usability etc. is out of scope.

Applicable Product Versions

This accelerator has been developed to work with Guidewire ClaimCenter version 10.12. It has been tested on version-10.12 and should work with all minor versions of Version 10 with minimum changes. As currently designed, this version of accelerator will not work with ClaimCenter version 8 or version 9.

Terms of Use

We have made this document and accompanying accelerator files available to you as we thought that you might find them useful. As such, they are provided to you "as is", which means that we do not offer you any assurances with respect to them. You will be solely responsible for any changes made to your configuration as a result of you downloading and implementing any of our materials.

You also understand that we own the intellectual property rights to any accelerator documentation/file downloads we make available to you. You must not use them in any way that would adversely affect our rights under applicable law.

Further Assistance

You may wish to make changes to any of the accelerator content provided in this solution. For example, you might want to extend the solution, or to adapt it to suit your unique needs. If during your implementation you require assistance with any of these changes, please contact your Guidewire or partner Implementation Manager to discuss options for consulting assistance.

Things to check after starting the server for the first time

- 1) Login as Administrator - Administration Panel -> Utilities -> Runtime Properties

Check if the list of Runtime Properties contains elements which have the name Hi Marley in the column 'Group'.
On the list there should be 24 elements of this type.

Runtime Properties

New Property | Delete | Import | Export

Group	Name	Description	Value
Hi Marley	HiMarley.Endpoint.Url	Hi Marley API URL	https://integration.uat.marley.ai/api/case/
Hi Marley	HiMarley.Endpoint.Url.CellPhonePreExist	Hi Marley cell phone check Case API	https://integration.uat.marley.ai/api/mobile/
Hi Marley	HiMarley.Endpoint.Url.CloseCase	Hi Marley Close Case API	actions/close/
Hi Marley	HiMarley.Endpoint.Url.DownloadScript	Hi Marley Download Case API	actions/download/
Hi Marley	HiMarley.Endpoint.Url.Groups	Hi Marley Groups API	https://integration.uat.marley.ai/api/groups/
Hi Marley	HiMarley.Endpoint.Url.OpenCase	Hi Marley Open Case API	actions/open/
Hi Marley	HiMarley.Endpoint.Url.OptIn	Hi Marley Opt In Case API	actions/optin/id/
Hi Marley	HiMarley.Endpoint.Url.OptOut	Hi Marley Opt Out Case API	actions/optout/id/
Hi Marley	HiMarley.Endpoint.Url.OptStatus	Hi Marley Opt Status API	actions/status/id/
Hi Marley	HiMarley.Endpoint.Url.OptStatusByMobile	Hi Marley Opt Status By Mobile API	actions/status/mobile/
Hi Marley	HiMarley.Endpoint.Url.PushTranscript	Hi Marley push transcript Case API	actions/push-transcript/
Hi Marley	HiMarley.Endpoint.Url.ReOpenCase	Hi Marley ReOpen Case API	actions/reopen/
Hi Marley	HiMarley.Endpoint.Url.ResendWelcomeMessage	Hi Marley ReSend Welcome Message API	actions/resend-welcome/
Hi Marley	HiMarley.Endpoint.Url.SMSRequest	Hi Marley Sms Request Case API	actions/send-template-message/new_message
Hi Marley	HiMarley.Endpoint.Url.User	Hi Marley User API URL	https://integration.uat.marley.ai/api/user/

If a list of Runtime Properties is empty (that means the Runtime Properties were not loaded automatically) , then click the 'Import' button.

Find the path:\modules\configuration\config\runtimeproperties\HiMarleyRuntimeProperties.xml. Import that file into the ClaimCenter. After import the Runtime Properties should be visible on the list as in the image above.

- 2) Login as Administrator. Go to " panel (Alt+Shift+T). Find a bookmark named 'Cluster'-> 'Members' and check if on the list of ClusterMembers in the column 'Server Roles' there are roles which can be seen on the screen below - batch, workqueue, scheduler, messaging, startable, ui.

Cluster Members

[Download](#)

This Application Server instance

Host EC2AMAZ-Q447JJ4
 Server ID ec2amaz-q447jj4
 UUID b01024b8-d7a6-44e0-a6ca-455ee752846c
 Server Roles batch, messaging, scheduler, startable, ui, workqueue

If a cluster member appears to be missing, click the "Refresh Cluster Members" button. This will attempt to re-establish communication with missing members.

[Refresh Cluster Members](#)

Cluster Members (Application Server instances)											
Server ID	Status	Host	User Sessions	Run level	Version	Server Roles	Server Started	Connection Started	Last Update	Planned Shutdown	Actions
ec2amaz-q447jj4	Running	EC2AMAZ-Q447JJ4	1	MULTIUSER	10.1.2.1417. (8.103,13.520,187)	batch, messaging, scheduler, startable, ui, workqueue	01/16/2023 11:13:40 AM	01/16/2023 11:14:40 AM	01/17/2023 07:19:54 AM		Start planned shutdown

Server roles settings for the local environment are set up in the config.xml file and can be added or removed from roles list.

config.xml

```

1  <?xml version="1.0"?>
2
3  <config xmlns="http://guidewire.com/config">
4
5    <registry roles="batch, workqueue, scheduler, messaging, startable, ui" />

```

Functional Design

Functional Overview

Following describes the functional objective of this reference implementation:

- Integrate with Hi Marley APIs & Webhooks to give insurance carriers access to Hi Marley platform via Claims Center.

Following are functional features of this accelerator:

- Create case (case/actions/open) for any customer on the claim
- Direct link to the conversation in Hi Marley will be noted on the claim in GW after creating the case
- Reflect opt-in status in GW claims user interface (via Hi Marley's opt in web hook)
- Assign/reassign operator in Hi Marley based on actions in GW
- Close case in Hi Marley on claim closure
- Ability to show all Hi Marley cases in a tabular format with columns including Name, Claim Number, Consent Status, Case Status, Case Privacy
- Redirect to Hi Marley webapp via link URL
- Feature flags – certain integrations/functions that can be enabled/disabled based on carrier preference
- Ability to create message Templates as an Admin
- Live updates of SMS messages into the claim notes (enablement based on webhook subscription)
- Live update of Hi Marley Case Notes into ClaimsCenter in claim notes
- Download Case Transcript and storing into Claims File
- Download Hi Marley Transcript at any time within ClaimCenter
- Close all related cases upon claim closure
- Reopen all related cases upon claim reopen
- Option to change Hi Marley case visibility to either 'Private' or 'Public'
- Synchronize groups from Claim Center to Hi Marley (only groups which have supervisor and at least one user which exist in Hi Marley)
- User experiences changes ("UX Changes") in reference implementation
- New Reference Graphic User Interface
- New Administration Entries

Open Case in Hi Marley once claim is created with enroll in Hi Marley texting in ClaimCenter

Create Hi Marley Claims Case from FNOL Wizard

During FNOL, the ClaimCenter user has the option to enroll the FNOL reporter in Hi Marley texting. Upon selecting that option and completing FNOL, an asynchronous work item is created for Hi Marley case creation. The work queue processes the work item and once complete, a case is created in Hi Marley and stored in ClaimCenter.

- a) Click on Hi Marley Case in the Navigational Bar on the left of main Claim screen, the case summary screen will appear. Two links created, one for viewing case detail within ClaimCenter, the other for go to Hi Marley web application

Hi Marley Cases

[Open Case](#)

Contact Name	Claim Number	Case Number	Customer ID	Mobile No	Case Status	Opt Status	Hi Marley Case Link	Privacy
Allen Robertson	000-00-000203	545e1bfa-949b-4b55-ae77-4f7006ee12fa	1374e7d6-2cdd-4b29-84ae-c8b9738b540c	6503337522	Open	Requested	Go to Hi Marley Site	public

b) When open the Hi Marley Case Details screen, the case initially shown as Requested status. At this status, ClaimCenter user will not be able to do certain functions such as "Opt Out", "Send SMS" (is not visible), "Re-Open Case", etc.

Pol: 34897 Ins: Leon Cotton DoI: 12/20/2023 Adj: Andy Applegate (Auto1 - TeamA)

Fred Walter [Return to History](#)

Witness | 833-304-4449 | Last refreshed at 04/04/2024 14:48:24 | [Refresh](#)

1 Message | Time Stamp | Message Alerts

Marley AI
Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.

Send SMS

[Use Template](#) [Schedule Message](#) 0 Scheduled Messages [Send SMS](#)

[Download Transcript](#) | [Go to Hi Marley Site](#)

Current Case Status: Open
Marley Number: +17438004899
Case Alerts: [Re-Open Case](#) [Close Case](#)

Privacy Status: public
[Make Public](#) [Make Private](#)

Current Opt Status: Opted In
[Re-Send Welcome Message](#) [Opt Out](#)

Case Operator: Andy Applegate [Select Operator](#)
Active Operator in Hi Marley: Yes

Select Preferred Language: English [Edit](#)

Case Secondary Operators
Secondary Operators: Hi Marley User

Case Creation Error during FNOL

If the case creation fails, no data will be found in the Hi Marley Cases tab and an activity will be generated to describe the error.

Details

Subject	Hi Marley Case Creation Failed
Description	Case creation for the FNOL reporter has failed with the below error. Please take any corrective actions if indicated and retry case creation on the Hi Marley Case tab. User is opted out.
Related To	Claim
Due Date	
Escalation Date	
Priority	High

Create Hi Marley Claims Case on an Existing Claim

In Hi Marley Cases summary screen, click on the “Open Case” button will open the screen to open a new Hi Marley Case in existing claim.

Hi Marley Cases								Open Case	
Contact Name	Claim Number	Case Number	Customer ID	Mobile No	Case Status	Opt Status	Hi Marley Case Link	Privacy	
Allen Robertson	000-00-000203	545e1bfa-949b-4b55-ae77-4f7006ee12fa	1374e7d6-2cdd-4b29-84ae-c8b9738b540c	6503337522	Open	Requested	Go to Hi Marley Site	public	

Fill out the form and click on “Create New Case”, it will attempt to open a new case in Hi Marley.

Note: This operation could fail if:

- a. Then phone is not a mobile number
- b. The mobile has more than allowed limit of open cases in Hi Marley (across different claims)
- c. Customer was opt out from other claims

Check log for error detail, if the operation fails.

If the operator doesn't exist in Hi Marley and the flag 'Create or Change Operator is unchecked or the operator doesn't have the permission autocreateoperator, then the case will be created in Hi Marley chat as unassign and in Claim Center the following error will show up.

Create Cases with Brand & Line Of Business

This new feature allows mapping ClaimCenter Lines of Business to Hi Marley Lines of Business when creating a case in ClaimCenter.

It also includes enabling brands and setting a brand override from the Accelerator Admin panel.

A new “Case Creation Features” section was added to the Hi Marley Case Admin Items page.

Hi Marley Case Admin Items

HiMarley Admin Flag Feature

Case Creation Features

Enable Brand	<input checked="" type="checkbox"/>
Enable Lines Of Business	<input checked="" type="checkbox"/>

Override to Single Brand



Brand to Be Overwritten

Lovable Insurance

- Enable Brand: when this flag is enabled, ClaimCenter will pass brands and Line of Business in the case creation API call.
- Enable Lines of Business: when this flag is enabled, ClaimCenter will pass line of business during the case creation. This option is visible and can be modified only when the Enable Brand flag is enabled, since a line of business cannot be passed without a brand.
- Override to Single Brand: this flag indicates whether to override a single brand.

- Brand to Be Overwritten: user can type the brand name which will be used for override.

Error Handling

Brand Mismatch

When setting a brand in the Brand to Be Overwritten field, make sure this brand exists in Hi Marley. Otherwise, when setting a brand that does not exist in Hi Marley and creating a new case, the case will not be created, and the following error message will be displayed:

Open Case Return to History

Errors:

! Case Creation Failed: The following brand was not found in Hi Marley, Lovable Insurance. Contact an admin to add the brand in the Hi Marley Webapp. You can retry once this change is completed.

Name	* <input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 5px; margin-bottom: 5px;" type="text" value="Ann Taylor"/> ▼
Address	Alys Beach, FL 32461
Mobile	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 5px;" type="text" value="650-333-3012"/>
Email	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 5px;" type="text"/>

Edit Contact

No Matching Line of Business

When creating a claim, the selected line of business may not exist in Hi Marley. In this case, when attempting to create a case, it won't be created, and the following error message will be displayed:

Open Case Return to History

Errors:

! Case Creation Failed: Contact an admin to add the following LOB, commercial - auto, to the Hi Marley brand labelled Acme Insurance Parent Co. in the Hi Marley Webapp. You can retry once this change is completed.

Name	* <input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 5px; margin-bottom: 5px;" type="text" value="Ann Taylor"/> ▼
Address	Alys Beach, FL 32461
Mobile	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 5px;" type="text" value="650-333-3012"/>
Email	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 5px;" type="text"/>

Edit Contact

Duplicate Case Creation Handling

When an adjuster attempts to create a case with Hi Marley, a duplicated case error may occur if:

- A server timeout occurred in a previous case creation attempt but the case was created in the backend
- The case was created with the same claim number and mobile number in the Webapp

This new duplicated case handling functionality allows to process the duplicate case error with the following schema:

- Check if the Hi Marley Case exists in the ClaimCenter database.
- If the Hi Marley Case doesn't exist in the ClaimCenter database, it will be stored there.

If the case exists in ClaimCenter database, the user will see the following error message and the case won't be created:

Open Case

[Return to History](#)

Errors:

! Existing Case Found for Claim 000-00-000203. Please visit the Hi Marley Cases tab.

If the case doesn't exist in ClaimCenter database but exists in Hi Marley, the user will see the following error message and the case will be created:

Open Case

[Return to History](#)

Errors:

! Existing Case Found: Storing Case in ClaimCenter. Please refresh the Hi Marley Cases tab in the next few minutes.

Resend Welcome Message to Customer

Hi Marley, sends welcome text to the end user via SMS when case initiated. If required, user can also re-send the Welcome Message to Customer by clicking on the "Re-Send Welcome Message" button

The screenshot shows the Hi Marley web application interface. At the top, there are icons for a magnifying glass, a fire, and a document, followed by the text: Pol: 34897 Ins: Leon Cotton Dol: 12/20/2023 Adj: Andy Applegate (Auto1 - TeamA). Below this, the customer name 'Fred Walter' is displayed with a 'Return to History' link. The main area shows a message from 'Marley AI' to 'Fred Walter' with the text: 'Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.' Below the message, there is a 'Send SMS' button and a text input field. At the bottom of this section are 'Use Template' and 'Schedule Message' buttons, a '0 Scheduled Messages' count, and a 'Send SMS' button. To the right, there are sections for 'Download Transcript' and 'Go to Hi Marley Site', 'Current Case Status' (Open), 'Marley Number' (+17438004899), 'Case Alerts' (empty), 'Re-Open Case' and 'Close Case' buttons, 'Privacy Status' (public), 'Make Public' and 'Make Private' buttons, 'Current Opt Status' (Opted In), 'Re-Send Welcome Message' and 'Opt Out' buttons (the 'Re-Send Welcome Message' button is highlighted with a red box), 'Case Operator' (Andy Applegate), 'Select Operator' button, 'Active Operator in Hi Marley' (Yes), 'Select Preferred Language' (English), 'Edit' button, 'Case Secondary Operators' section (Secondary Operators: Hi Marley User), and a note 'No data to display'.

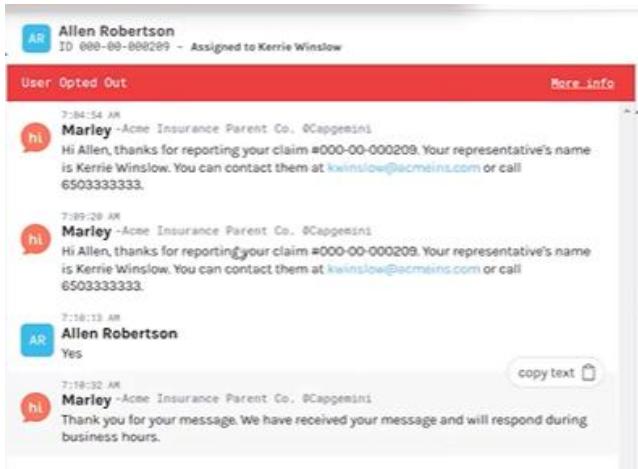
After clicking the button, Hi Marley will resend Welcome Message as shown below in Hi Marley web application:

The screenshot shows a message history between 'Allen Robertson' (AR) and 'Marley'. Allen's messages are in blue, and Marley's are in red. Allen's message reads: 'ID 000-00-000209 - Assigned to Kerrie Winslow'. Marley's message reads: '7:04:54 AM Marley -Acme Insurance Parent Co. #Capgemini Hi Allen, thanks for reporting your claim #000-00-000209. Your representative's name is Kerrie Winslow. You can contact them at kwinslow@acmeins.com or call 6503333333.' Allen's message reads: '7:09:28 AM Marley -Acme Insurance Parent Co. #Capgemini Hi Allen, thanks for reporting your claim #000-00-000209. Your representative's name is Kerrie Winslow. You can contact them at kwinslow@acmeins.com or call 6503333333.' A 'copy text' button is visible next to the second Marley message.

Reflect opt-status of each customer

- c) Hi Marley sends customer response as Opt-In status to ClaimCenter.

When customers text "Start" and then "Yes" from their phone, Hi Marley in turn sends Opt-in Status to ClaimCenter and ClaimCenter updates the Opt status.



Following screenshot displays the current opt status of all cases, still in Requested status.

Hi Marley Cases Open Case

Contact Name	Claim Number	Case Number	Customer ID	Mobile No	Case Status	Opt Status	Hi Marley Case Link	Privacy	Actions
Allen Robertson	000-00-000203	545e1bfa-949b-4b55-ae77-4f7006ee12fa	1374e7d6-2cdd-4b29-84ae-c8b9738b540c	6503337522	Open	Requested	Go to Hi Marley Site	public	

Once the customer has opted in, if ClaimCenter does not automatically refresh the status, selecting the "Refresh" button will update the case to show "opt-in".

Fred Walter Return to History

Witness

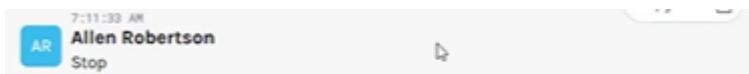
833-304-4449

Last refreshed at 04/04/2024 14:48:24

Refresh

d) Hi Marley, sends customer response as Opt-out status to ClaimCenter. (Opt out from phone)

When customers text "Stop", the Hi Marley then sends the opt Out Status to ClaimCenter and ClaimCenter updates it as seen in the screenshot below.



Following screen shows the case in Opt-out status:

Fred Walter [Return to History](#)

Witness | **833-304-4449** | Last refreshed at 04/04/2024 17:02:41 | **Refresh**

8 Messages Time Stamp Message Alerts

Andy Applegate original: Template message translated: Vorlagennachricht	04/04/2024 03:02:10 PM
Andy Applegate original: Hello! Could we set up a meeting for tomorrow? translated: Hallo! Könnten wir ein Treffen für morgen vereinbaren?	04/04/2024 03:01:36 PM
Marley Admin Hello from Hi Marley!	04/04/2024 03:00:26 PM
Marley AI Hi Fred, your claim has been reassigned to Andy Applegate . You can text them here, email them at aapplegate@acmeins.com or call 6503333333.	04/04/2024 02:58:59 PM
Marley AI Hi Fred, your claim has been reassigned to Betty Baker . You can text them here, email them at bbaker@acmeins.com or call 6503333333.	04/04/2024 02:58:30 PM

Send SMS

[Use Template](#) [Schedule Message](#) 0 Scheduled Messages [Send SMS](#)

Download Transcript | [Go to Hi Marley Site](#)

Current Case Status **Open**

Marley Number **+17438004899**

Case Alerts:

[Re-Open Case](#) [Close Case](#)

Privacy Status **public**

[Make Public](#) [Make Private](#)

Current Opt Status **Opted Out**

[Re-Send Welcome Message](#) [Opt Out](#)

Case Operator **Andy Applegate** [Select Operator](#)

Active Operator in Hi Marley **Yes**

Select Preferred Language **English** [Edit](#)

Case Secondary Operators

Secondary Operators	Hi Marley User
---------------------	----------------

No data to display

If status is not immediately updated, once the refresh button has been selected, the opt status is updated accordingly.

Sending SMS Messages

a) Send free text SMS from ClaimCenter

To send an SMS from ClaimCenter, in free text mode, the operator can type a text and hit the send button.

Fred Walter

[Return to History](#)

Witness

833-304-4449

Last refreshed at 04/04/2024 14:48:24

[Refresh](#)

1 Message

Time Stamp

Message Alerts

Marley AI

Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.

04/04/2024 12:47:59 PM

[Send SMS](#)

Hi from ClaimCenter

[Use Template](#)[Schedule Message](#)

0 Scheduled Messages

[Send SMS](#)

Hi Marley web application also shows this SMS transaction:

2:53:45 PM
AA Andy Applegate (Primary Operator) -Acme Insurance Parent Co. @Capgemini
 Hi from ClaimCenter

e) Send SMS using Templates

The second way to send an SMS is by selecting a template as seen in the screenshots below.

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Click on "Use Template", it will open the "Find SMS Template" screen.

Find SMS Template

[Return to Send SMS](#)

	Template ▾	Template Body ▾
<input checked="" type="checkbox"/> Select	Text After Missed Call	<%@ params(hiMarleyClaim: Claim) %> Hi \${hiMarleyClaim.Insured.DisplayName}, When would be a good time for us to talk on the phone to discuss your policy op
<input type="checkbox"/> Select	Learn More	<%@ params(hiMarleyClaim: Claim) %> Hi \${hiMarleyClaim.Insured.DisplayName}, if you'd like to learn more about your policy, click the link below. http://ABC.com/learn .

To use any of these templates, click the select button. The text box will be prefilled with the selected SMS template. In this example, the second SMS template has been selected.

[Send SMS](#)

Hi Allen Robertson, if you'd like to learn more about your policy, click the link below.
<http://ABC.com/learn>

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Once sent, Hi Marley will show the SMS with predefined content based on the template.

7:16:22 AM
 **Kerrie Winslow** -Acme Insurance Parent Co. #Capgemini
 Hi Allen Robertson, if you'd like to learn more about your policy, click the link below.
<http://ABC.com/learn>.
 thank you! hi marley :)

f) Receiving SMS in ClaimCenter

All SMS messages received in ClaimCenter will be shown as Notes in ClaimCenter. Notes will be added to the Case level as below:

Notes		Details
Info		
Edit Delete Print		Apr 4, 2024 12:53 PM
Author	Andy Applegate	HiMarley SMS Message from: Andy Applegate
Topic	Hi Marley SMS	Hi from ClaimCenter
Related To	b2627d92-d4e0-4a93-b0e3-f64e3fa29d84	
Edit Delete Print		Apr 4, 2024 12:47 PM
Author	Marley AI	Hi Marley SMS Message from: Marley AI
Topic	Hi Marley SMS	Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.
Related To	b2627d92-d4e0-4a93-b0e3-f64e3fa29d84	

Close Hi Marley Cases

g) Closing Cases individually by selecting “Close Case” button:

Fred Walter

[Return to History](#)

Witness	833-304-4449	Last refreshed at 04/04/2024 14:48:24	Refresh
2 Messages		Time Stamp ▾	Message Alerts ▾
Andy Applegate Hi from ClaimCenter		04/04/2024 12:53:45 PM	
Marley AI Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.		04/04/2024 12:47:59 PM	

Selecting the close case button will close the case. The case with the Claim number 000-00-000208 is the case that will be closed in this example.

Fred Walter	000-00-000208	b2627d92-d4e0-4a93-b0e3-f64e3fa29d84	aa98f457-e389-4eb2-b034-5a3e972d3319	8333044449	Close	Opted In	Go to Hi Marley Site	public
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The case status now shows the case as closed.

h) Closing a claim to all open Cases

To close a claim on open cases, select the 'Workplan' tab

Make sure complete/skip all open items

Workplan								Assign	Skip	Complete	Approve	Reject
<input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="All open activities"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="New"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Edit"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Delete"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Print"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Export"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Import"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Search"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Filter"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Sort"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Group"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="UnGroup"/> <input style="width: 100%; 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height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Reset"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Print"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Export"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Import"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Search"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Filter"/> <input style="width: 100%; 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height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Reset"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Print"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Export"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Import"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Search"/> <input style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="Filter"/> <input type="button" value="Sort" style="width: 100%; height: 100%; border: none; background-color: #f0f8ff; border: 1px solid #ccc; padding:												

Cases

[Create Case +](#)

Assigned: All ▾ Status: Closed ▾

Reference	Customer	Phone Number	Date Created	Assigned	Actions
000-00-000208	Walter, Fred	+1 (833) 304-4449	04/04/2024	Andy Applegate	Actions
000-00-000208	Cotton, Leon	+1 (650) 333-6092	12/20/2023	Andy Applegate	Actions

Note: Open/Close a claim does NOT affect the Opt status since it is associated at phone number level across multiple claims.

Re-Open Hi Marley Cases

- Reopen Cases individually

To re-open the case, select the “Re-Open Case” button.

Fred Walter [Return to History](#)

Witness	833-304-4449	Last refreshed at 04/04/2024 14:48:24	Refresh
2 Messages	Time Stamp	Message Alerts	Download Transcript Go to Hi Marley Site
Andy Applegate	04/04/2024 12:53:45 PM		Current Case Status: Close
Hi from ClaimCenter			Marley Number: +17438004899
Marley AI			Case Alerts:
Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.	04/04/2024 12:47:59 PM		Re-Open Case Close Case

The case status is now showing as opened.

Fred Walter	000-00-000208	b2627d92-d4e0-4a93-b0e3-f64e3fa29d84	aa08f457-e389-4eb2-b034-5a8e972d3319	8333044449	Open	Opted In	Go to Hi Marley Site	public
-------------	---------------	--------------------------------------	--------------------------------------	------------	------	----------	--------------------------------------	--------

- Reopening a claim to reopen cases

Select a closed claim, and clicking the “Reopen Claim” button will reopen the claim.

The screenshot shows the Hi Marley software interface. On the left, there is a vertical navigation menu with the following items: Summary, Workplan, Loss Details, Exposures, Parties Involved, and Policy. The 'Policy' item is currently selected. To the right of this menu is a 'New ...' section with options: Note, Email, Evaluation, Negotiation, Service, and a 'New Transaction' section containing Reserve and Check. Further to the right is a 'New Activity' section with options: Correspondence, New Mail, Reminder, Request, Warning, and a 'Claim Actions' section containing Assign Claim and Reopen Claim. The 'New Transaction' and 'Claim Actions' sections are highlighted in light blue.

After claim is reopened, all closed cases in the claim should be reopened as well.

Hi Marley Cases

[Open Case](#)

Contact Name	Claim Number	Case Number	Customer ID	Mobile No	Case Status	Opt Status	Hi Marley Case Link	Privacy
Allen Robertson	000-00-000203	545e1bfa-949b-4b55-ae77-4f7006ee12fa	1374e7d6-2cdd-4b29-84ae-c8b9738b540c	6503337522	Open	Requested	Go to Hi Marley Site	public

Hi Marley should also reflect on this change.

Cases

0118

Assigned: All ▾ Status: All ▾

Reference	Customer	Phone Number	Date Created	Assigned	Actions
000-00-000118	Egertson, Karen	+1 (650) 333-6745	03/11/2022	Thomas Sanders	Action
000-00-000118	Newton, Ray	+1 (488) 644-7115	03/11/2022	Thomas Sanders	Action

Ad Hoc Case Transcript Download

k) Downloading Transcripts

On Hi Marley Case Details screen, click on “Download Transcript” button

Fred Walter

[Return to History](#)

Witness | 833-304-4449 | Last refreshed at 04/04/2024 14:48:24 | [Refresh](#) | [Download Transcript](#) | [Go to Hi Marley Site](#)

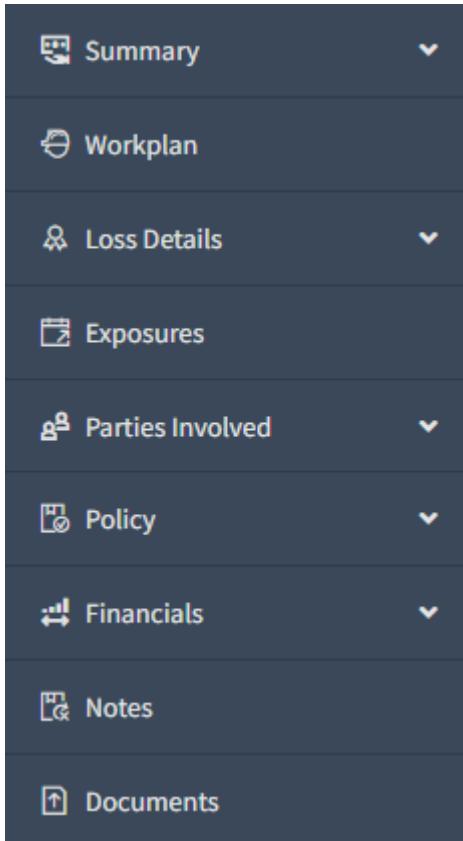
If download is successful, a Confirmation Screen will appear as below:

Confirmation

[Return to Hi Marley Case Details](#)

Transcript downloaded successfully under documents.

Newly downloaded transcript will be attached as Claim Level document. To view downloaded transcript, go to “Document” section of the claim by clicking on “Document” in the Navigational bar in the main claim screen.



The transcript that is downloaded will be attached inside the document section:
Documents

Actions	Document Type	Status	Author	Uploaded
View document content	Marley	Approved		03/15/2022 2:28 PM
View document content	Marley	Approved		03/14/2022 10:17 PM

Sample transcript will be a PDF file similar to below:

Transcript
 Insurance Brand: Acme Insurance Parent Co.
 Claim Number: 000-00-000118

March 11th, 2022

This conversation occurred between
 Thomas Sanders and Ray Newton

4:21:44 PM EST
Marley
 Hi Lisa, thanks for reporting your claim #000-00-000118. Your representative's name is Pam Vance. You can contact them at pvance@acmeins.com or call 6503333333.

4:27:17 PM EST
Marley
 Hi Lisa, thanks for reporting your claim #000-00-000118. Your representative's name is Pam Vance. You can contact them at pvance@acmeins.com or call 6503333333.

4:39:50 PM EST
Ray Newton
 Hi there! I'm texting from my mobile phone! :)

4:40:10 PM EST
Ray Newton

Note: Every Carrier has its own implementation of document management. The transcript downloading approach here is assuming the OOTB document system, which is for reference purposes ONLY. Carrier should implement their own integration for Ad Hoc transcript downloading into their document management system.

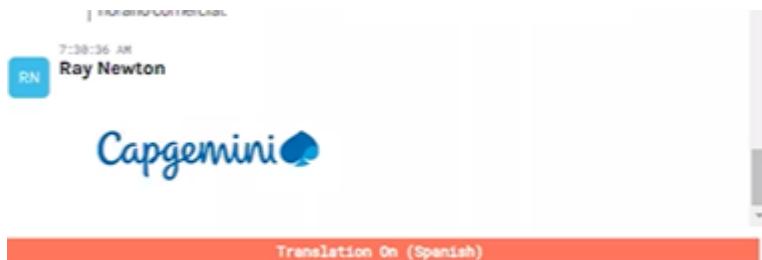
Receive Updates from Hi Marley

- I) ClaimCenter will receive updates from Hi Marley via Webhook. This function requires registration of ClaimCenter's API/Servlet End Points with Webhook. See technical section for registration details.
- m) Hi Marley will send SMS messages and Case updates to ClaimCenter. All text based SMS messages and Case updates will be stored as Notes at case level in the claim, as shown below:

Notes		
Info		Details
	Edit Delete Print	Apr 4, 2024 3:12 PM
Author	Marley Admin	HiMarley Case Note from: Marley Admin
Topic	Hi Marley Note	Note from Hi Marley
Related To	b2627d92-d4e0-4a93-b0e3-f64e3fa29d84	
	Edit Delete Print	Apr 4, 2024 12:53 PM
Author	Andy Applegate	HiMarley SMS Message from: Andy Applegate
Topic	Hi Marley SMS	Hi from ClaimCenter
Related To	b2627d92-d4e0-4a93-b0e3-f64e3fa29d84	
	Edit Delete Print	Apr 4, 2024 12:47 PM
Author	Marley AI	Hi Marley SMS Message from: Marley AI
Topic	Hi Marley SMS	Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.
Related To	b2627d92-d4e0-4a93-b0e3-f64e3fa29d84	

- n) Multimedia files such as images and videos will be stored as claim level documents and can be found in Document section.

A sample of image file as below:



Note: Every Carrier has its own implementation of document management. The multimedia file handling approach here is assuming the OOTB document system, which is for reference purposes ONLY. Carrier should implement their own integration of multimedia files into their document management system.

Change Case Visibility of Hi Marley case

- o) Changing the privacy of a case.

All Hi Marley Cases defaults to “Public” visibility

Fred Walter [\[Return to History\]](#)

Witness | 833-304-4449 | Last refreshed at 04/04/2024 14:48:24 | **Refresh**

2 Messages Time Stamp ▲ Message Alerts ▲

Andy Applegate Hi from ClaimCenter	04/04/2024 12:53:45 PM
Marley AI Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.	

Send SMS [...]

Use Template **Schedule Message** 0 Scheduled Messages **Send SMS**

Download Transcript | [Go to Hi Marley Site](#)

Current Case Status **Open**

Marley Number +17438004899

Case Alerts:

Re-Open Case **Close Case**

Privacy Status **public** public

Make Public **Make Private**

Current Opt In Status **Opted In**

Re-Send Welcome Message **Opt Out**

To change Visibility, choose “Make Private” or “Make Public” button

Privacy Status **public**

Make Public **Make Private**

The privacy status of the case will now be listed as private

Hi Marley Cases									Open Case
Contact Name ▲	Claim Number ▲	Case Number ▲	Customer ID ▲	Mobile No ▲	Case Status ▲	Opt Status ▲	Hi Marley Case Link ▲	Privacy ▲	
Karen Egertson	000-00-000118	6c53800f-004a-424e-b98a-ed99c20f795e	7604429b-2568-4f83-8ea0-33c17b2cca31	6503336745	ReOpen	Requested	Go to Hi Marley Site	public	
Lisa Shiu	000-00-000118	da12bd29-1e8d-436f-8d33-943fe86e956e	7c303954-bb32-48d3-b876-22a2a2a2a2a2	4086447115	ReOpen	OptIn	Go to Hi Marley Site	private-reddacted	

The case detail is only accessible to Super User and Assigned Operator of the Case.

Update operator of Hi Marley case from ClaimCenter

p) Change an operator individually

Click on the "Select Operator" button to change the operator

Fred Walter

[Return to History](#)

Witness | 833-304-4449 | Last refreshed at 04/04/2024 14:48:24 | Refresh

2 Messages

Andy Applegate
Hi from ClaimCenter

Marley AI
Hi Fred, thanks for reporting your claim #000-00-000208. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call 6503333333.

04/04/2024 12:53:45 PM | 04/04/2024 12:47:59 PM

Send SMS

Use Template | Schedule Message | 0 Scheduled Messages | Send SMS

Download Transcript | Go to Hi Marley Site

Current Case Status: Open

Marley Number: +17438004899

Case Alerts:

Re-Open Case | Close Case

Privacy Status: public

Make Public | Make Private

Current Opt Status: Opted In

Re-Send Welcome Message | Opt Out

Case Operator: Andy Applegate

Active Operator in Hi Marley: Yes

Select Operator

In next screen, choose new operator from the list of adjusters on the same team or 'Search for a User' to assign a user from different ClaimCenter groups.

click "Change Operator" when the selection is made:

Assign Hi Marley Operator [Return to Ethan Anderson](#)

Select how you would like to do the assignment

Select from list: Use automated assignment

Search for a User: <none>

Search for a User...

Select User...

When we change the operator and the selected operator is assigned as a secondary operator, then it will be removed from the list of secondary operators and set as an operator.

q) Operator change during re-assignment of Claim. When re-assign a claim from one Adjuster to a new Adjuster, all Hi Marley cases' operators will change to the new Adjuster if the original operator of the case was same as the previous adjuster. However, any case with non-adjuster operator should remain the same.

Note: Both operations may take a while for new operator to be reflect on Hi Marley side since if an operator does not exist in Hi Marley before, ClaimCenter will attempt to register the new operator with Hi Marley

first. This auto-registration will fail if this option is turned off in Admin tab hence causing the reassignment fail.

Hi Marley Admin Permissions

- r) Change system level permissions in the Admin tab.

Following are system level permissions than can be found under the new “Hi Marley Operator” entry under “Administration”

Hi Marley Case Admin Items

Case Creation Features			
Enable Brand	<input checked="" type="checkbox"/>	Override to Single Brand	<input type="checkbox"/>
Enable Lines Of Business	<input type="checkbox"/>	Brand to Be Overwritten	<input type="text" value="Lovable Insurance"/>
Case Update Features			
Create or Change Operator	<input checked="" type="checkbox"/>	Enable Secondary Operators	<input checked="" type="checkbox"/>
Case Visibility	<input checked="" type="checkbox"/>	Download Transcript	<input checked="" type="checkbox"/>
Case Closure - Download Transcript	<input checked="" type="checkbox"/>		
Messaging Features			
Enable Send Message UI	<input checked="" type="checkbox"/>	Enable Live SMS Update	<input checked="" type="checkbox"/>
Enable Send Template	<input checked="" type="checkbox"/>	Enable SMS Notification	<input checked="" type="checkbox"/>
Enable Scheduled Messages	<input checked="" type="checkbox"/>	Enable Live SMS Updates to Notes	<input checked="" type="checkbox"/>
...			
Case Note Features			
Automatic Sync Notes	<input checked="" type="checkbox"/>		
Assign author for HiMarley Case event note	<input checked="" type="checkbox"/>		
HiMarley Event note author	<input type="text" value="* <none>"/>	<input type="button" value="▼"/>	
Coaching			
Coaching Alerts	<input checked="" type="checkbox"/>		
Generate Assigned Adjuster Activity	<input type="checkbox"/>		
Generate Supervisor Activity	<input type="checkbox"/>		
Other Features			
Enable Group Synchronize	<input checked="" type="checkbox"/>	Parties Involved Tab	<input checked="" type="checkbox"/>
Enable FNOL Case Creation	<input checked="" type="checkbox"/>	Data Enablement of Automation	<input checked="" type="checkbox"/>

Each system level permission can be turned on/off by checking its checkbox.

Behaviors of these system level permissions are as follows:

Permission	Behavior
Case Visibility	Enable/Disable accessibility of Hi Marley cases

Create or Change Operator	Enable/Disable of change/create a case operator
Enable Send Message UI	Enable/Disable SMS to allow SMS to be sent from ClaimCenter
Enable Live Update	Enable/Disable ClaimCenter receiving SMS messages from Hi Marley via Web Hook
Download Transcript	Enable/Disable Ad Hoc Downloading of Transcript
Automatic Sync Notes	Enable/Disable ClaimCenter receiving Hi Marley case updates
Enable Send Template	Enable/Disable using template for sending SMS from ClaimCenter
Enable HiMarley Group Update	Enable/Disable synchronization of groups from Claim Center to HiMarley
Enable Secondary Operators	Enable/Disable adding/removing Secondary Operators
Parties Involved Tab	Enable/Disable HiMarley Cases Card in Parties Involved > Contacta
Enable Scheduled Messages	Enable/Disable creating scheduled messages
Enable Live SMS Update	Enable/Disable SMS update in HiMarley Case Detail sms list.
Enable Live SMS Updates to Notes	Enable/Disable SMS update to Notes in Claim Center
Parties Involved Tab	Enable/Disable HiMarley Tab at Parties Involved.
Enable FNOL Case Creation	Enable/Disable case creation checkbox in FNOL process.
Data Enablement of Automation	Enable/Disable Claim additional information in Payload.
Enable Brand	Indicates whether to send the brand to Hi Marley.
Enable Lines Of Business	Indicates whether to send the line of business to Hi Marley.
Override to Single Brand	Indicates overriding to a single brand.
Assign author for HiMarley Case event note	Allows to assign any user as the author of notes coming from Hi Marley.
Brand to Be Overwritten	Allows to enter the brand to be used for branding override

s) Change duration of “Automatically resend Welcome SMS”. This option is default to 24 hours after the first “Welcome SMS” is sent. User can adjuster this number to required duration by business.

Automatically Resend Welcome SMS

Automatically resend
Welcome SMS after (hours):

24

Note: By default, none of the permission is turned on. Please turn on these permissions when enabling Hi Marley in carrier’s implementation after deployment to an environment.

Sending SMS as "Super User" will throw an error

Fred Walter

[Return to History](#)

Errors:

- ! Please update your user email address in ClaimCenter.

Witness

833-304-4449

Last refreshed at 04/05/2024 14:07:00

[Refresh](#)

When logging in as "Super User" to send a message, the error message above will be received.

Disable Hi Marley messages in Claim Notes

Case Note Features

Automatic Sync Notes

Assign author for HiMarley
Case event note

Hi Marley Case Admin Items

[Save Settings](#)

To Disable Hi Marley Case notes in Case Details from syncing, uncheck the 'automatic sync notes' and then select the 'save settings button.'

Messaging Features

Enable Send Message UI

Enable Send Template

Enable Scheduled Messages

Enable Live SMS Update

Enable SMS Notification

Enable Live SMS Updates to
Notes

To disable Hi Marley messages in claim notes, uncheck the enable live update flag feature.

Hi Marley Permissions

t) Following Hi Marley permissions were created and can be added to any ClaimCenter role:

Permission	Code	Description
HiMarley - Ability to view Hi Marley Cases	viewcases_Acc	Permission to view Hi Marley Case Details
HiMarley - Automatic create operator	automaticcreateoperator_Acc	Automatically creates operator in Hi Marley case
HiMarley - Automatic sync notes	automaticsyncnotes_Acc	Enables automatic syncing of notes from Hi Marley
HiMarley - Coaching Alerts	coachingAlerts_Acc	Enable view coaching alerts
HiMarley - Fire Activity	fireactivity_Acc	Enable view fire activity
HiMarley - FireActivityToSupervisor	fireactivitytosupervisor_Acc	Enabled - an activity is created for the supervisor for the message alerts functionality
HiMarley - FNOL Case creation	caserecreationFnol_Acc	Enable to view 'enroll in Hi Marley' checkbox (FNOL)
HiMarley - Secondary Operators	secondaryoperator_Acc	Permission allows the user to modify the content of the table secondary operators.
HiMarley - TLA Issue Notifications	tlaisssuenotifications_Acc	Enables Total Loss Issue Activities when an Issue is opened.
HiMarley - View download transcript button	viewdownloadtranscript_Acc	Allows downloading of transcript
HiMarley - View live updates from Hi Marley	viewliveupdate_Acc	Enable viewing of live updates from Hi Marley
HiMarley - View send message UI	viewsendmessage_Acc	Enables viewing of send message UI
HiMarley - View send template	viewsendtemplate_Acc	Enable view send template
HiMarley - View group synchronize	viewgroupupdate_Acc	Enable view to synchronize groups with Hi Marley

Note: Although these permissions can be added to any ClaimCenter role, in order to show clear responsibility for handling Hi Marley cases, it is recommended that Carrier create a new “HiMarley Operator” role with these permission added during implementation time.

Administration of SMS Templates

u) Add/Remove SMS templates

Select new “Hi Marley Operator” entry under “Administration”, then choose “Hi Marley Case Admin Add/Remove Template” in Navigation bar on the left:

Template	Template Body
Text After Missed Call	<%@ params(hiMarleyClaim: Claim) %> Hi \${hiMarleyClaim.Insured.DisplayName}, When would be a good time for us to talk on the phone to discuss your policy options.
Learn More	<%@ params(hiMarleyClaim: Claim) %> Hi \${hiMarleyClaim.Insured.DisplayName}, if you'd like to learn more about your policy, click the link below. http://ABC.com/learn.

This will show the list of templates that can be used by SMS.

Select existing Template can allow it to be Deleted.

Hi Marley Case Admin Add / Remove Template

The screenshot shows a list of templates in a table format. The columns are 'Template' (checkbox), 'Template Body' (dropdown), and a preview area. The rows include:

- Learn More: Template Body dropdown shows <%@ params(hiMarleyClaim: Claim) %> and preview: Hi \${hiMarleyClaim.Insured.DisplayName}, if you'd like to learn more about your policy, click the link below. <http://ABC.com/learn>.
- Text After Missed Call: Template Body dropdown shows <%@ params(hiMarleyClaim: Claim) %> and preview: Hi \${hiMarleyClaim.Insured.DisplayName}, When would be a good time for us to talk on the phone to discuss your policy options.
- Test Template (checked): Template Body dropdown shows Hello There! and preview: Hello There!

Clicking on “Add Template” will open the “New Template” screen to add new template:

New Template [Return to Hi Marley Case Admin Add / Remove Template](#)

[Update](#) [Cancel](#)

Name	<input type="text" value="Hi Marley New Template"/>
Body	<input type="text" value="Hello!"/>

Note: SMS templates use the same syntax as ClaimCenter’s “Template” object.

Note: SMS templates can only be added/removed but NOT editable.

ClaimCenter Variables in Message Templates

- v) Usage of ClaimCenter variables to autofill message templates

Message template will be in this type of format

The screenshot shows a 'Template Body' section with the following content:

```

Template Body
<%@ params( hiMarleyClaim: Claim ) %>
Hi ${hiMarleyClaim.Insured.DisplayName}, if you'd like to learn more about your policy, click the link below. http://ABC.com/learn.
<%@ params( hiMarleyClaim: Claim ) %>
Hi ${hiMarleyClaim.Insured.DisplayName}, When would be a good time for us to talk on the phone to discuss your policy options.

```

Inside the left and right angle brackets (<%@ params() %>), you declare the parameters that the template would use

Ex: <%@ params(hiMarleyClaim: Claim) %>

In the next line, you would put the template with the parameter(s) and its associated variables.

Ex: Hi \${hiMarleyClaim.Insured.DisplayName}

This is getting the Display Name of the Insured under the Hi Marley Claim.

Some more examples include hiMarleyClaim.Insured.EmailAddress1.CityStateZip, hiMarleyClaim.Insured.HomePhone, and hiMarleyClaim.Insured.EmailAddress1.

For further reference, request a dictionary zip file from Guidewire for a list of all possible parameters:

CheckView
Citation
Claim
ClaimAbstractView
ClaimAccess
ClaimAccessData
ClaimAgreementLimitBot
ClaimAssignmentView
ClaimAssociation
ClaimAssociationSearchCriteria
ClaimCloseReopenInfo
ClaimContact
ClaimContactRole
ClaimContactRoleOwner
ClaimContactView
ClaimEventData
ClaimExecution
ClaimIndicator
ClaimIndicatorAssociation
ClaimIndicator
ClaimIndicatorAutomatedActivityHandler
ClaimIndicatorAutomatedNotificationHandler
ClaimIndicatorCriterion
ClaimIndicatorTrigger
ClaimInfo
ClaimInfoAccess
ClaimInfoCriteria
ClaimInfoSearchView
ClaimsMatchReport
ClaimMetric
ClaimMetricLimit
ClaimMetricRecalculationTime
ClaimRecentView
ClaimRef
ClaimSearchCriteria
ClaimSearchView
ClaimSnapshot
ClaimSyncStat

Claim (cc_claim) (delegates to [CCAssignable](#), [ClaimContactRoleOwner](#), [DestructionRootPinnable](#), [EventAware](#), [Extractable](#), [ISOReportable](#), [Retirable](#), [UserRoleOwner](#), [Validatable](#), [WorkloadDelegate](#))

► Description

Attributes: [Editable](#)[?], [Exportable](#)[?], [Extendable](#)[?], [Final](#)[?], [Keyed](#)[?], [Loadable](#)[?], [Sourceable](#)[?], [Versionable](#)[?]

Messaging Events: The application will generate these events for this entity.

- ClaimCreated
- ClaimReSync
- ClaimPurged
- ClaimAdded
- ClaimChanged
- ClaimRemoved

Integration programmers can write Event Fired rules to perform actions on these events. Refer to the [Integration Guide](#) for the complete list of events for all entities. Remember to configure a new or existing messaging destination in Studio to listen for desired events.

► **Concrete FK references:**

Show user interface details on all fields

Fields | Arrays | Unique Keys for Claim

Fields

ID [key](#) [nonnull](#)[?]
Internally managed primary key

ACCESS_PROP Derived property returning gw.pl.persistence.type.EntityPropertyInfoReference [\(virtual property\)](#)[?]

AccidentType type key to [AccidentType](#) using key filter [LossCause](#) [\(exportable\)](#)[?] [\(loadable\)](#)[?] [\(virtual\)](#)[?]
Defined accident type, augments LossCause.

► Show user interface details...

ACCIDENTTYPE_PROP Derived property returning gw.pl.persistence.type.EntityPropertyInfoReference [\(virtual property\)](#)[?]

ACTIVITIES_PROP Derived property returning gw.pl.persistence.type.EntityPropertyInfoReference [\(virtual property\)](#)[?]

ActivityPerformed Derived property returning java.lang.String [\(virtual property\)](#)[?] [\(writable\)](#)[?]

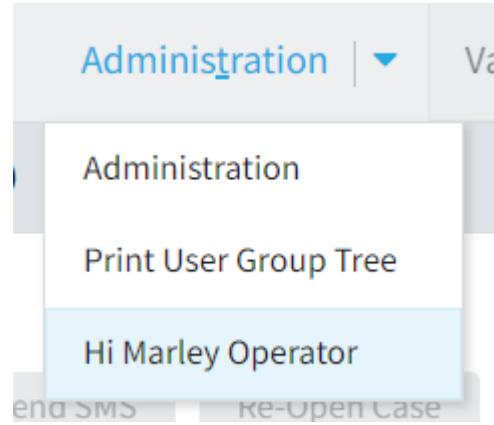
AddressOwner Derived property returning gw.api.address.CCAddressOwner [\(virtual property\)](#)[?]

Generated and Disable Activities

w) Activities that are generated by accelerator

The accelerator can send SMS, translate SMS through multiple languages, change case privacy, download transcript, close case manually, resend welcome message, set it so it automatically resends welcome message if user is not opted in, and receive SMS, notes, opt status, claim status through webhooks and synchronizing groups with HiMarley

x) To disable some of the features, navigate to the Hi Marley Operator page.



Under “Hi Marley Case Admin Items”, disable and enable the activities you want. To change the auto welcome resend, change the parameter under “Automatically Resend Welcome SMS.”

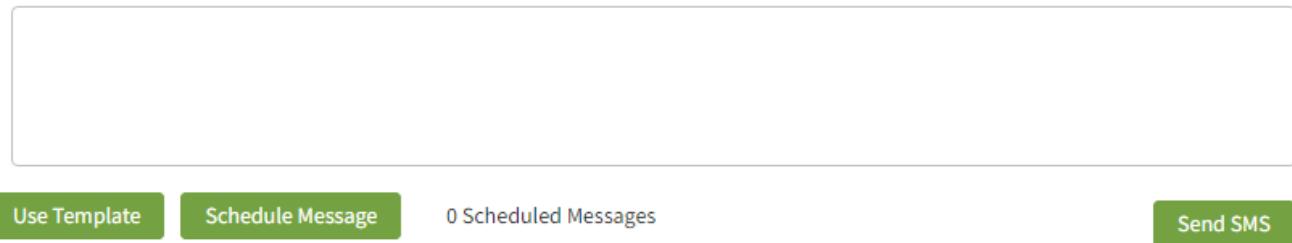
Hi Marley Case Admin Items

Case Creation Features		
Enable Brand	<input checked="" type="checkbox"/>	Override to Single Brand <input type="checkbox"/>
Enable Lines Of Business	<input type="checkbox"/>	Brand to Be Overwritten <input type="text" value="Lovable Insurance"/>
Case Update Features		
Create or Change Operator	<input checked="" type="checkbox"/>	Enable Secondary Operators <input checked="" type="checkbox"/>
Case Visibility	<input checked="" type="checkbox"/>	Download Transcript <input checked="" type="checkbox"/>
Case Closure - Download Transcript	<input checked="" type="checkbox"/>	
Messaging Features		
Enable Send Message UI	<input checked="" type="checkbox"/>	Enable Live SMS Update <input checked="" type="checkbox"/>
Enable Send Template	<input checked="" type="checkbox"/>	Enable SMS Notification <input checked="" type="checkbox"/>
Enable Scheduled Messages	<input checked="" type="checkbox"/>	Enable Live SMS Updates to Notes <input checked="" type="checkbox"/>
Case Note Features		
Automatic Sync Notes	<input checked="" type="checkbox"/>	
Assign author for HiMarley Case event note	<input checked="" type="checkbox"/>	
HiMarley Event note author	<input type="text" value="* <none>"/>	<input type="button" value="▼"/>
Coaching		
Coaching Alerts	<input checked="" type="checkbox"/>	
Generate Assigned Adjuster Activity	<input type="checkbox"/>	
Generate Supervisor Activity	<input type="checkbox"/>	
Other Features		
Enable Group Synchronize	<input checked="" type="checkbox"/>	Parties Involved Tab <input checked="" type="checkbox"/>
Enable FNOL Case Creation	<input checked="" type="checkbox"/>	Data Enablement of Automation <input checked="" type="checkbox"/>

Implement Send SMS API

Code to implement the Send SMS API call into any ClaimCenter workflows for automated SMS notifications during an event.

Send SMS



```
function sendSMS() {  
    if (messageText != null) {  
        successMessage = HiMarleyUtil.loadSmsMessage(HiMarleyCase, messageText)  
  
        if (successMessage == "Message successfully sent") {  
            if (messageText != null) {  
                messageText = null  
            }  
  
            LocationUtil.addRequestScopedInfoMessage("Message successfully sent")  
        }  
  
    } else {  
        isEmptyMessage()  
    }  
}
```

Send button will trigger an activity run the send SMS API.

```

/*
 * @param hiMarleyCase HiMarleyCaseData_Acc
 * @param smsMessage String
 * @return String
 */
public static function sendSMSFromGW(hiMarleyCase: HiMarleyCaseData_Acc, smsMessage : String): String {
    var successMessage: String
    var adjuster = hiMarleyCase.Claim.AssignedUser.Contact as Person
    if (smsMessage.isEmpty()){
        successMessage = "Message cannot be empty"
    } else {
        smsMessage = StringEscapeUtils.escapeHtml(smsMessage)
        var messageJsonObject = new JSONObject()
        messageJsonObject.put("caseId", hiMarleyCase.CaseID)
        var templateValuesJsonObject = new JSONObject()
        templateValuesJsonObject.put("message", smsMessage)
        messageJsonObject.put("templateValues", templateValuesJsonObject)
        LOGGER.debug("json payload: " + messageJsonObject.toString())

        //if operator exists in Hi Marley or it'll return an error and it will default to "Marley" if does not exist
        if (HiMarleyClient.isOperatorExist(adjuster)) {
            var sourceJsonObject = new JSONObject()
            if ((User.util.CurrentUser.getContact().EmailAddress1) == null || (User.util.CurrentUser.getContact().EmailAddress1) == " "){
                sourceJsonObject.put("email", "unknown")
            } else {
                sourceJsonObject.put("email", HiMarleyUtil.getSafeString(User.util.CurrentUser.getContact().EmailAddress1))
            }
            messageJsonObject.put("source", sourceJsonObject)
            LOGGER.debug("sourceJson: " + sourceJsonObject.toString())
        }
        var responseCode = HiMarleyClient.sendSMS(hiMarleyCase, messageJsonObject.toString())
        if (responseCode == 201 or responseCode == 200) {
            successMessage = "Message successfully sent"
        }
    }
    return successMessage
}

```

ClaimCenter will check if the user currently logged in exists in Hi Marley before sending the SMS from ClaimCenter. If logged in as “su”/super user, then it will return an “unknown” email does not exist notification.

```

/**
 * Method handles Send SMS Message call with Hi Marley System
 *
 * @param jsonPayload String
 * @return int
 */
public static function sendSMS(hiMarleyCase: HiMarleyCaseData_Acc, jsonPayload : String) : int {
    var sendSMSURL = HiMarleyHelper.HiMarleySMSRequest_URL
    LOGGER.debug("\n URL: " + sendSMSURL + " | jsonPayload: " + jsonPayload)
    var responseCode = populateAndPostData(hiMarleyCase, sendSMSURL, "Send SMS", jsonPayload)

    return responseCode
}

```

If the email exists within Hi Marley, then the sendSMS function will be called and the send SMS API URL is generated.

```

    /**
     * Common method to handle POST operation code to Hi Marley System
     *
     * @param url          String
     * @param operationName String
     * @param jsonPayload  String
     * @return int
     */
    public static function populateAndPostData(hiMarleyCase : HiMarleyCaseData_Acc, url : String, operationName : String, jsonPayload : String) : int {
        var httpclient : CloseableHttpClient
        var response : CloseableHttpResponse
        var responseString : String
        var customErrorMessage = ""
        try {
            httpclient = HttpClients.createDefault()
            var request = new HttpPost(url)
            request.Entity = new StringEntity(jsonPayload)
            request.setHeader(HttpHeaders.CONTENT_TYPE, HiMarleyConstants.CONTENT_TYPE)
            request.setHeader(HiMarleyConstants.API_HEADER, HiMarleyHelper.HiMarley_API_KEY)
            request.setHeader(HttpHeaders.ACCEPT, HiMarleyConstants.CONTENT_TYPE)
            request.setHeader("Strict-Transport-Security", "max-age=31536000; includeSubDomains")
            request.setHeader("Cache-Control", "no-store, max-age=0")
            request.setHeader("Content-Security-Policy", "self")
            LOGGER.debug( "Hi Marley ${operationName}:\n" + request.Entity)
            LOGGER.debug( "Hi Marley ${operationName} request payload:\n" + jsonPayload)
            response = httpclient.execute(request)
            responseString = EntityUtils.toString(response.Entity)
            LOGGER.debug( "Hi Marley ${operationName} response:\n" + responseString)
            var responseCode = response.StatusLine.StatusCode
            LOGGER.debug("The response code is: = " + responseCode)

            LOGGER.debug("The response code is: = " + responseCode)

            if (HiMarleyConstants.CLIENT_ERROR.contains(responseCode)) {
                LOGGER.error("Client Error occurred with Hi Marley, Error code : ${responseCode}", null)
                var respJSON = new org.json.JSONObject(responseString)
                var errors = respJSON.getJSONArray("errors")
                if (errors.length() > 0) {
                    var error = errors.getJSONObject(0)
                    var errorMessage = error.get("detail")
                    var errorCategory = error.get("category")

                    LOGGER.error(error.toString(), null)
                    LOGGER.error(("Hi Marley ${operationName} ${errorCategory}: ${errorMessage}" + error.toString()), null)

                    customErrorMessage = errorMessage.toString()
                    LOGGER.error(customErrorMessage, null)

                    throw new DisplayableException(customErrorMessage)
                } else {
                    LOGGER.error(("Client Error occurred with , Error code : ${responseCode}"), null)

                    throw new HiMarleyException("Client Error occurred with , Error code : ${responseCode}")
                }
            } else if (HiMarleyConstants.SERVER_ERROR.contains(responseCode)) {
                LOGGER.error("Server Error occurred with Hi Marley, Error code : ${responseCode}", null)
                throw new HiMarleyException("Server Error occurred with Hi Marley, Error code : ${responseCode}")
            } else if (HiMarleyConstants.SUCCESS.contains(responseCode)) {
                var respJSON = new org.json.JSONObject(responseString)
                LOGGER.debug("respJSON: " + respJSON.toString())
                LOGGER.debug("Hi Marley API call processed successfully with code: ${responseCode}")
            }
        }
    }
}

```

```

        LOGGER.debug("RESPONSE: " + response.toString())
        LOGGER.debug("Hi Marley API call processed successfully with code: ${responseCode}")
    }
} catch (ex : Exception) {
    throw ex
} finally {
    httpClient.close()
}

}
return response.StatusLine.StatusCode
}

```

The JSON payload for the API call gets populated and using the generated URL, the SMS message gets posted to Hi Marley using RESTful API.

Error Handling

y) Common error handling patterns in accelerator.

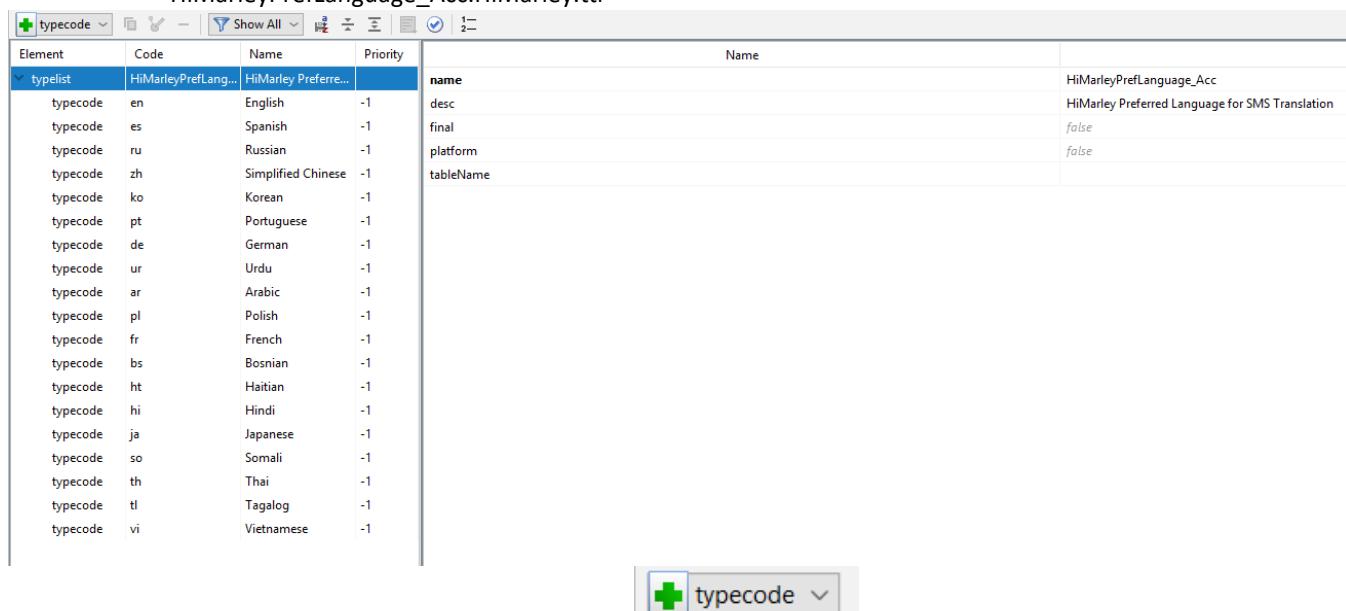
All errors will be logged. However, there are some that will show errors in the ClaimCenter UI:

- o Duplicate combination of customer mobile + claim number
- o Reached max open case limit
- o Operator (Hi Marley PrimaryContact) doesn't exist in org
- o Customer mobile is a landline
- o Brand name mismatch
- o Customer is Opted Out
- o Sending SMS as "Super User" will throw an "unknown" does not exist error
- o PrimaryContact doesn't exist in org

Adding new languages

z) Adding a new language supported by Hi Marley to the Case Creation and Update APIs.

To add a new language supported by Hi Marley, go to Guidewire Studio and open the file "HiMarleyPrefLanguage_Acc.HiMarley.tti"



Element	Code	Name	Priority	
typecode	en	English	-1	
typecode	es	Spanish	-1	
typecode	ru	Russian	-1	
typecode	zh	Simplified Chinese	-1	
typecode	ko	Korean	-1	
typecode	pt	Portuguese	-1	
typecode	de	German	-1	
typecode	ur	Urdu	-1	
typecode	ar	Arabic	-1	
typecode	pl	Polish	-1	
typecode	fr	French	-1	
typecode	bs	Bosnian	-1	
typecode	ht	Haitian	-1	
typecode	hi	Hindi	-1	
typecode	ja	Japanese	-1	
typecode	so	Somali	-1	
typecode	th	Thai	-1	
typecode	tl	Tagalog	-1	
typecode	vi	Vietnamese	-1	

Click on the "+ typecode" button.

Name	Value
code	<required>
name	<required>
desc	
identifierCode	
priority	-1
retired	false

Fill out the following table. Use the existing typecodes as a reference on how to add the new language.

Name	Value
code	en
name	English
desc	English preference
identifierCode	
priority	-1
retired	false

Parties Involved - Contacts - Hi Marley Cases card

On the claim, in the Parties involved - contacts tab, you will find a list of contacts. Each contact has a 'HiMarley Cases' tab. If a case is created for a given contact, it will be visible on the list. Only one case can be created for each contact.

Case Number	Customer ID	Mobile No	Case Status	Last Message Sent	Last Message Received	Hi Marley Case Link	Privacy
9b3b6d4d-3f23-4491-4ab1-9f5d-a54d3540b039	fc5ed63e-7299-4ab1-9f5d-a54d3540b039	6503333001	Open	04/12/2023 9:48 AM	04/12/2023 9:48 AM	Go to Hi Marley Site	public

If the contact is not assigned to any case, we can open a new case for this contact. To open a new case, click the 'Open Case' button. Then you will be redirected to the new case creation page.

<input type="checkbox"/> Brian Newton	Excluded Party	No	818-446-1206	867 Mann Ave.	Alhambra	California	91352
<input type="checkbox"/> Ray Newton	Alternate Contact, Check Payee, Claimant, Insured, Main Contact, Reporter, Service Participant	No	818-446-1206	287 Kensington Rd. #1A	South Pasadena	California	91145
<input type="checkbox"/> Stan Newton	Claimant, Covered Party, Driver, Injured Party	No	818-446-1206	8356 Mountain View Rd.	San Bernadino	California	91112
<input type="checkbox"/> Bo Simpson	Claimant, Driver, Injured Party	No	619-275-2346	435 Duarte Ave	Arcadia	California	91006

Basics Addresses Related Contacts **Hi Marley Cases**

Open Case

Case Number Customer ID Mobile No Case Status Last Message Sent Last Message Received Hi Marley Case Link Privacy

No data to display

Pol: 54-123456 Ins: Ray Newton DoL: 02/25/2023 Adj: Andy Applegate (Auto1 - TeamA)

Open Case [Return to Contacts](#) [Create New Case](#) [Cancel](#)

Name: Brian Newton

Address: 867 Mann Ave., Alhambra, CA 91352

Mobile: 650-333-3333

Email: 0000@guidewire.com

[Edit Contact](#)

The "Open Case" button will be unavailable if the contact already has a case assigned to it or if the contact is not the "person" type. (screen below)

<input type="checkbox"/> Name	Roles	<input type="checkbox"/> Name	Roles
<input type="checkbox"/> Karen Egertson	Agent	<input type="checkbox"/> Karen Egertson	Agent
<input type="checkbox"/> Fred Jones1678374110758	Responsible Party	<input type="checkbox"/> Fred Jones1678374110758	Responsible Party
<input type="checkbox"/> Mike's Auto detailing shop	Service Vendor	<input type="checkbox"/> Mike's Auto detailing shop	Service Vendor
<input type="checkbox"/> Brian Newton	Excluded Party	<input type="checkbox"/> Brian Newton	Excluded Party
<input type="checkbox"/> Ray Newton	Alternate Contact, Check Payee, Claimant, Insured, Main Contact, Reporter, Service Participant	<input type="checkbox"/> Ray Newton	Alternate Contact, Check Payee, Claimant, Insured, Main Contact, Reporter, Service Participant
<input type="checkbox"/> Stan Newton	Claimant, Covered Party, Driver, Injured Party	<input type="checkbox"/> Stan Newton	Claimant, Covered Party, Driver, Injured Party
<input type="checkbox"/> Bo Simpson	Claimant, Driver, Injured Party	<input type="checkbox"/> Bo Simpson	Claimant, Driver, Injured Party

Basics Addresses Related Contacts **Hi Marley Cases** Basics Addresses Related Contacts **Hi Marley Cases** Reviews

Open Case **Open Case**

Case Number Customer ID Mobile No Case Status Last Message Case Number Customer ID Mobile No Case Status Last Message

fc5ed63e-7299-4ab1-9f5d-a54d3540b039 6503333001 Open 04/12/2023 9: No data

Synchronize groups

The groups can be sent from Claim Center to Hi Marley. It can be done when the user enabled activity 'Enable Group Synchronize' and added permission 'HiMarley - View group synchronize'.

Enable synchronizing groups with Hi Marley

Other Features

Enable Group Synchronize

Enable FNOL Case Creation

Parties Involved Tab

Data Enablement of Automation

To enable a synchronization of groups with Hi Marley, mark the 'Enable Group Synchronize' and then select the 'save settings' button.

Hi Marley Case Admin Items

[Save Settings](#)

Hi Marley - view group update permission

Add 'HiMarley - View group synchronize' permission.

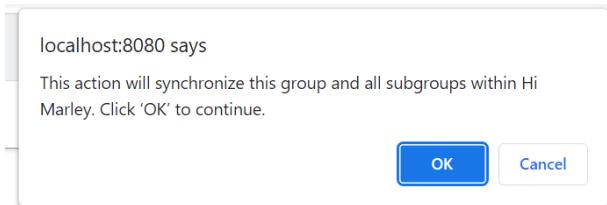
Permission	Code	Description
HiMarley - Ability to view Hi Marley Cases	viewcases_Acc	Permission to view Hi Marley Case Details
HiMarley - Automatic create operator	automaticcreateoperator_Acc	Automatically creates operator in Hi Marley case
HiMarley - Automatic sync notes	automaticsyncnotes_Acc	Enables automatic syncing of notes from Hi Marley
HiMarley - View download transcript button	viewdownloadtranscript_Acc	Allows downloading of transcript
HiMarley - View live updates from Hi Marley	viewliveupdate_Acc	Enable viewing of live updates from Hi Marley
HiMarley - View send message UI	viewsendmessage_Acc	Enables viewing of send message UI
HiMarley - View send template	viewsendtemplate_Acc	Enable view send template
HiMarley - View group synchronize	viewgroupupdate_Acc	Enable view to synchronize groups with Hi Marley

Using 'Synchronize Group' button

Go to Administration, click on any group. There is a 'Hi Marley Group Sync' button. By default this button is grayed out. It will be visible only when the user enabled activity 'Enable Group Synchronize' and added permission 'HiMarley - View group synchronize'.

The screenshot shows a group management screen for 'Acme Insurance'. At the top, there is a green button labeled 'Hi Marley Group Sync'. To the right of this button are 'Edit' and 'Delete' buttons. Below the main title, there are three tabs: 'Profile' (which is selected and highlighted in blue), 'Queues', and 'Regions'. The 'Profile' tab likely contains the 'Hi Marley Group Sync' configuration settings.

After clicking on synchronize group button, the following pop up will show up to confirm the action:



This button will synchronize the group which is currently highlighted and all the subgroups. The data will be sent asynchronously via HiMarleyGroupWorkQueue. The creation of the work items is implemented in the class HiMarleyAddonHelper. The work queue will send to HiMarley only those groups which have Supervisor which already exists in HiMarley and at least one user which is HiMarley user.

When the work item will be processed, requests will be sent to HiMarley to check the current status of the supervisor and each of the users. Each user has a new indicator 'User is Active in HiMarley' which by default is set up to 'No', it will be updated automatically after the Claim Center receives the response from HiMarley.

User is Active in HiMarley No

This indicator can be also changed manually when editing the user's data.

The table below shows what actions can be performed when processing work items:

Group has the supervisor which is active in HiMarley and at least one user which exists in HiMarley	Group already exists in HiMarley	Action
yes	no	group created in HiMarley
no	no	group not created in HiMarley
yes	yes	group updated in HiMarley
no	yes	group removed from HiMarley

After creation of the group in HiMarley, or update of the group in HiMarley, the indicator 'Enable GroupSync' on the group will be set to 'Yes'. By Default this indicator is set up to 'No'.

Group Synchronize with Hi Marley

Enable Group Sync

Each group in HiMarley, will have a name which contains a path with all names of parent groups. This is a way to show the structure of groups which exist in the Claim Center.

Creating new Group

Go to Administration -> Action -> New Group

On this screen there are two new indicators 'User active in Hi Marley' and 'Enable Group Sync'.

New Group Update Cancel

Name	*	<input type="text"/>																				
Type	*	<none>																				
Parent	*	Acme Insurance																				
Supervisor	*	<none>																				
Security Zone	*	<none>																				
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Users Add Remove </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <td>User</td> <td>User active in Hi Marley</td> <td>Member</td> <td>Active</td> <td>Manager</td> <td>Load Perm</td> <td>Load Factor</td> <td>Vacation Status</td> <td>Backup User</td> <td>Proximity Search Status</td> </tr> <tr> <td colspan="10">No data to display</td> </tr> </table>			User	User active in Hi Marley	Member	Active	Manager	Load Perm	Load Factor	Vacation Status	Backup User	Proximity Search Status	No data to display									
User	User active in Hi Marley	Member	Active	Manager	Load Perm	Load Factor	Vacation Status	Backup User	Proximity Search Status													
No data to display																						
Assignment Rules																						
Load Factor	*	<input type="text" value="100"/>																				
Group Synchronize with Hi Marley																						
<input type="checkbox"/> Enable Group Sync																						

Indicator 'User active in Hi Marley' can be edited manually (during creation of the user and on the page with edition of the user's data) and automatically (each time before the group synchronization is sent to HiMarley).

Indicator 'Enable Group Sync' can be edited manually (during creation of the group and on the page with edition of the group's data) and automatically (during the synchronization with the usage of 'Hi Marley Group Sync' button).

The checkbox 'Enable Group Sync' can be marked only when the group contains Supervisor which exists in HiMarley and at least one user which also exists in HiMarley. When you hover the cursor over the checkbox, then the information about that will show up.

Check the box to synchronize this group in Hi Marley. The group will need the supervisor or/and at least user to be active in Hi Marley.

Business Settings

Enable Group Sync

The table below shows what actions can be performed when processing the group:

Group has the supervisor which is active in HiMarley or at least one user which exists in HiMarley	Group Synchronize HiMarley Checkbox	Action
yes	no	group created in CC, group not migrated to HiMarley
no	no	group created in CC, group not migrated to HiMarley
yes	yes	group created in CC, group migrated to HiMarley
no	yes	group created in CC, group not migrated to HiMarley

The creation of the group in HiMarley uses messaging. Clicking on the button 'Update' will trigger the rule 'GroupAdded'.

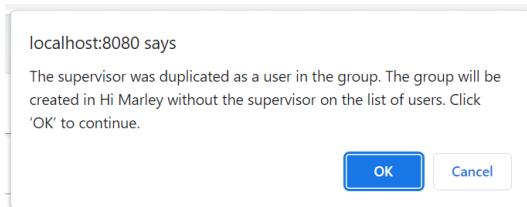
```

1 USES:
2
3 uses ...
4
5
6 CONDITION (messageContext : entity.MessageContext):
7     return messageContext.EventName == GROUP_ADDED
8
9 ACTION (messageContext : entity.MessageContext, actions : gw.rules.Action):
10    var group = (messageContext.Root as entity.Group)
11    var payload = HiMarleyHelper.generateNewGroupPayload(group, false)
12    var msg = messageContext.createMessage(payload)
13    msg.Contact = group.CreateUser.Contact
14
15 END
16
17
18
19
20

```

Then the code goes to HiMarleyAsyncGroupTransPlug class, to the method 'send'. The messageRoot is a type of group in this case, so the code goes to the method process group where based on the conditions described above, the program decides which action should be taken with a group in HiMarley. All methods which are responsible for open, updating or removing a group from HIMarley during the synchronization are defined in the class HiMarleyAddonClient.

If 'Enable Group Sync' is checked and the list of users contains the supervisor, the following confirmation message will be shown:



When the user clicks the 'OK' button the group will be created in HiMarley chat, but without the supervisor on the list of users. In the Claim Center the user will be saved as a supervisor and the user.

Updating an existing Group

Click on the group -> Edit

User	Active	Member	Manager	Load Perm	Load Factor	Vacation Status	Backup User	Proximity Search Status
DataProtection Officer	No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<none>	At work	<none>	Not Yet Searchable
Default Owner	No	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<none>	0	At work	<none>
Super User	No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<none>	0	At work	<none>

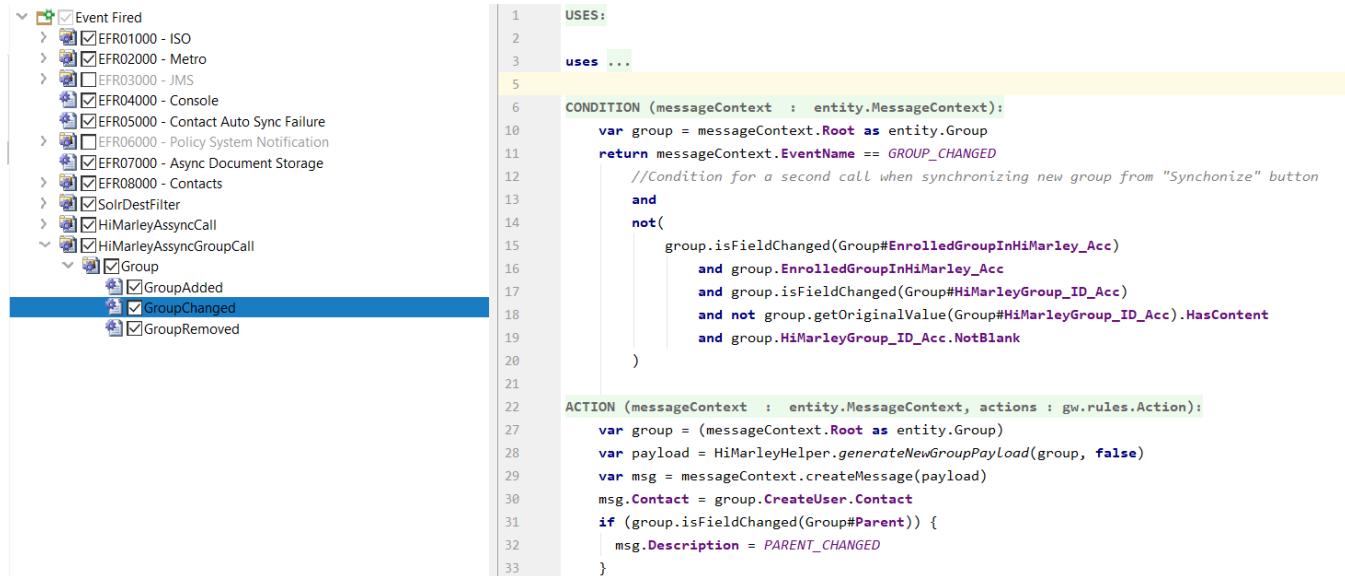
On this page there are also the new indicators - 'User active in Hi Marley' and 'Group Synchronize HiMarley' which have been described in the previous section.

The table below shows what actions can be performed when processing the group:

Group has the supervisor which is active in HiMarley or at least one user which exists in HiMarley	Group already exists in HiMarley	Group Synchronize HiMarley Checkbox	Action
yes	no	yes	group created in HiMarley
yes	no	no	group not created in HiMarley
no	no	no	group not created in HiMarley
yes	yes	no	not updated in HiMarley
yes	yes	yes	group updated in HiMarley
no	yes	no	group removed from HiMarley

Additionally, if you update the parent of the group in the Claim Center, then the parent group will be also updated in HiMarley chat - this group will be assigned to the new parent.

The update of the group in HiMarley uses messaging. Clicking on the button 'Update' will trigger the rule 'GroupChanged'.



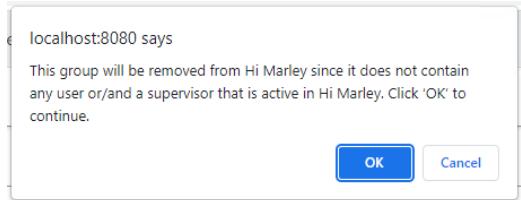
```

1  USES:
2
3  uses ...
4
5
6  CONDITION (messageContext : entity.MessageContext):
7      var group = messageContext.Root as entity.Group
8      return messageContext.EventName == GROUP_CHANGED
9      //Condition for a second call when synchronizing new group from "Syncronize" button
10     and
11     not(
12         group.isFieldChanged(Group#EnrolledGroupInHiMarley_Acc)
13         and group.EnrolledGroupInHiMarley_Acc
14         and group.isFieldChanged(Group#HiMarleyGroup_ID_Acc)
15         and not group.getOriginalValue(Group#HiMarleyGroup_ID_Acc).HasContent
16         and group.HiMarleyGroup_ID_Acc.NotBlank
17     )
18
19
20
21  ACTION (messageContext : entity.MessageContext, actions : gw.rules.Action):
22      var group = (messageContext.Root as entity.Group)
23      var payload = HiMarleyHelper.generateNewGroupPayload(group, false)
24      var msg = messageContext.createMessage(payload)
25      msg.Contact = group.CreateUser.Contact
26      if (group.isFieldChanged(Group#Parent)) {
27          msg.Description = PARENT_CHANGED
28      }
29
30
31
32
33

```

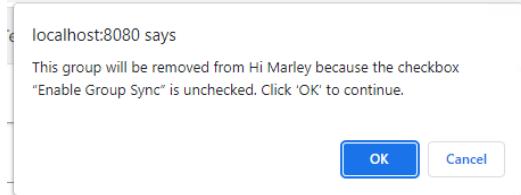
Then the code goes to HiMarleyAsyncGroupTransPlug class, to the method 'send'. The messageRoot is a type of group in this case, so the code goes to the method process group where based on the conditions described above, the program decides which action should be taken with a group in HiMarley. During the update of a group, the code can update or remove the group in HiMarley, through the methods updateGroup or removeGroup.

If the update is made on the group which already exists in HiMarley and the users which are active in Hi Marley will be removed or the supervisor will be changed to someone who doesn't exist in Hi Marley, then after clicking on the button 'Update', the following confirmation message will be shown:



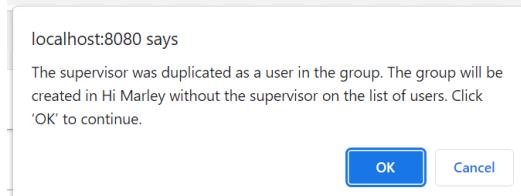
Only when 'OK' will be chosen, the group will be removed from Hi Marley and updated in the Claim Center. After clicking on 'Cancel', the group won't be updated neither in Claim Center nor in Hi Marley.

If the group exists in Hi Marley and 'Enable Group Sync' will be unchecked, then the following confirmation message will be shown:



Only when 'OK' will be chosen, the group will be removed from Hi Marley and updated in the Claim Center. After clicking on 'Cancel', the group won't be updated neither in Claim Center nor in Hi Marley.

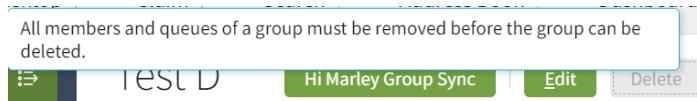
If 'Enable Group Sync' is checked and the list of users contains the supervisor, the following confirmation message will be shown:



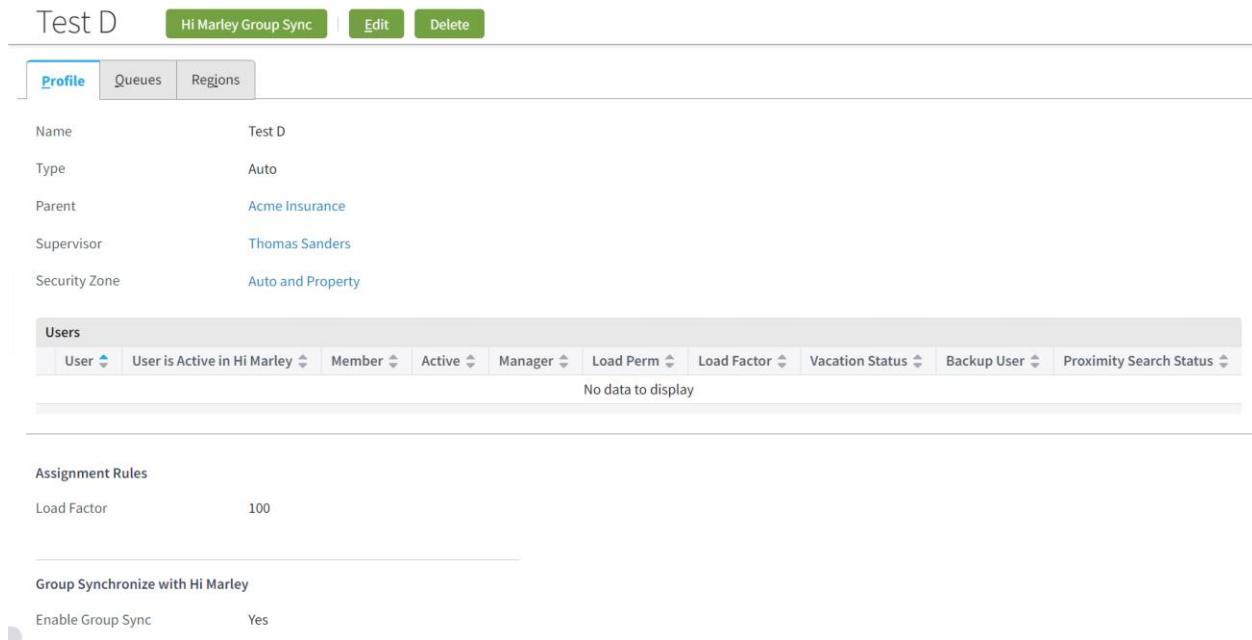
When the user clicks the 'OK' button the group will be updated in HiMarley chat, but without the supervisor on the list of users. In the Claim Center the user will be saved as a supervisor and the user.

Removing an existing Group

The group can be removed by clicking on the 'Delete' button. This button is available only when all the members and queues are removed from the group.



When all users and queues are removed, the user can click on the 'Delete' button.



The screenshot shows the 'Hi Marley Group Sync' interface for a group named 'Test D'. The group details are as follows:

- Name: Test D
- Type: Auto
- Parent: Acme Insurance
- Supervisor: Thomas Sanders
- Security Zone: Auto and Property

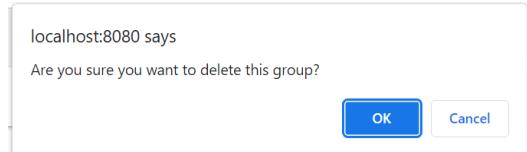
The 'Users' section shows a table with the following columns: User, User is Active in Hi Marley, Member, Active, Manager, Load Perm, Load Factor, Vacation Status, Backup User, and Proximity Search Status. The table displays the message 'No data to display'.

The 'Assignment Rules' section shows a 'Load Factor' of 100.

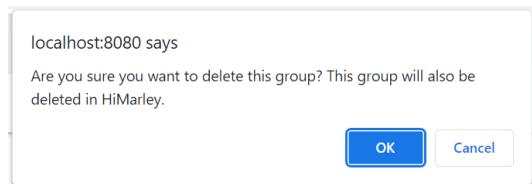
The 'Group Synchronize with Hi Marley' section shows 'Enable Group Sync' set to 'Yes'.

When the user clicks on the 'Delete' button, two types of confirmation messages can be shown.

One type of confirmation message is shown when the group doesn't exist in Hi Marley chat. Then there is a general question about deleting the group



The other type is shown, when the group was synchronized with HiMarley, then there is an additional question about removing the group also from there.



The removal of the group in HiMarley uses messaging. Clicking on the button 'Delete' will trigger the rule 'GroupRemoved'.

```

1   USES:
2
3   uses ...
4
5
6   CONDITION (messageContext : entity.MessageContext):
7       return messageContext.EventName == GROUP_REMOVED
8
9   ACTION (messageContext : entity.MessageContext, actions : gw.rules.Action):
10      var group = (messageContext.Root as entity.Group)
11      var payload = HiMarleyHelper.generateNewGroupPayload(group, false)
12      var msg = messageContext.createMessage(payload)
13      msg.Contact = group.CreateUser.Contact
14
15   END

```

Then the code goes to HiMarleyAsyncGroupTransPlug class, to the method 'send'. The messageRoot is a type of group in this case, so the code goes to the method process group. If the group existed in Hi Marley chat, it's removed from there and from the Claim Center. If the group doesn't exist in Hi Marley it's removed only from the Claim Center.

Message Alerts

In the 'Hi Marley Case Admin Items' panel there is a part called 'Coaching' which contains checkboxes.

Coaching Alerts – Turns on the UI changes on the message level table

Generate Assigned Adjuster Activity – Generates an activity for messages that need attention for the primary operator assigned to the case

Generate Supervisor Activity – Generates an activity for messages that need attention for the supervisor of the primary operator assigned to the case

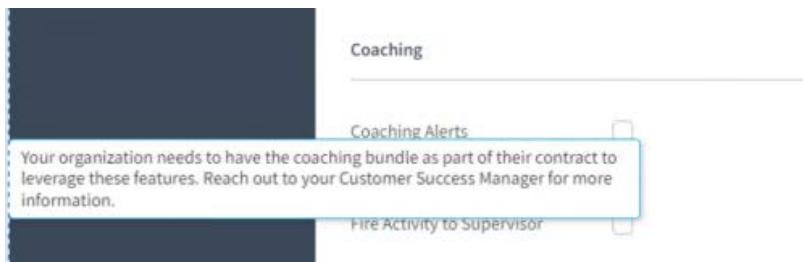
Coaching

Coaching Alerts

Generate Assigned Adjuster Activity

Generate Supervisor Activity

When a person hovers a cursor over one of the checkboxes there is information that the organization needs to have the coaching bundle as part of their contract in order to leverage these features and to reach out to their Customer Success manager for more information.



When a 'Coaching Alerts' checkbox is marked then on the screen 'Hi Marley case Details' in the table 'List View of All SMS Messages and Notes received from Hi Marley' there is an additional column 'Message Alerts'. Claim Center can receive a message with different types of message alerts. Currently there are two types of message alerts: 'needs attention' and 'needs action'. If this message was marked with message alerts in HiMarley, then the webhook receives another response from HiMarley which contains 'messageClassifications' with the flag/flags ('needsAttention' or 'needsAction'). Based on this flag the message is updated in the Claim Center and the information 'Needs attention' or 'Needs action' in red is shown in the column 'Message Alerts'. The color of this message is connected with the activities which are created when two other checkboxes ('Fire Activity', 'Fire Activity to Supervisor') are marked. It will be red as long as the activity is open. When the activity will be closed, the label 'Needs attention' will change color to black. If the other two checkboxes in 'Coaching' in the admin panel are unmarked, the label will be black from the beginning.

When the payload contains message alerts with the 'needsAttention' flag, or both flags - 'needsAttention' and 'needsAction', then the column 'Message Alerts' in the table 'List View of All SMS Messages and Notes received from Hi Marley' on 'Hi Marley Case Details' contains the information 'Needs Attention'

When the payload contains message alerts only with 'needsAction' flag, then the column 'Message Alerts' in the table 'List View of All SMS Messages and Notes received from Hi Marley' on 'Hi Marley Case Details' contains the information 'Needs Action'

*The flags 'Coaching Alerts' and 'Live SMS Updates' need to be enabled.

11 Messages	Time Stamp	Message Alerts
Fred Walter I'm getting my lawyer. When my car will be ready?	04/05/2024 12:06:06 PM	Needs Attention

Fred Walter

[Return to History](#)

Witness

833-304-4449

Last refreshed at 04/05/2024 14:07:00

[Refresh](#)

11 Messages

Time Stamp

Message Alerts

Fred Walter

I'm getting my lawyer. When my car will be ready?

04/05/2024 12:06:06 PM Needs Attention

Fred Walter

start

04/05/2024 11:32:20 AM

Fred Walter

stop

04/05/2024 11:32:16 AM

Andy Applegate

original: Template message
translated: Vorlagennachricht

04/04/2024 03:02:10 PM

Andy Applegate

original: Hello! Could we set up a meeting for tomorrow?
translated: Hallo! Könnten wir ein Treffen für morgen vereinbaren?

04/04/2024 03:01:36 PM

Send SMS

[Use Template](#)[Schedule Message](#)

0 Scheduled Messages

[Send SMS](#)[Download Transcript](#)[Go to Hi Marley Site](#)

Current Case Status

Open

Marley Number

+17438004899

Case Alerts:

[Re-Open Case](#)[Close Case](#)

Privacy Status

public

[Make Public](#)[Make Private](#)

Current Opt In Status

Opted In

[Re-Send Welcome Message](#)[Opt Out](#)

Case Operator

Andy Applegate

[Select Operator](#)

Active Operator in Hi Marley

Yes

Select Preferred Language

English

[Edit](#)

Case Secondary Operators

Secondary Operators ▾ Hi Marley User ▾

No data to display

When the checkbox 'Generate Assigned Adjuster Activity' is marked, then the activity will be created and assigned to the operator.

When the checkbox 'Generate Assigned Adjuster Activity' is marked, then the activity with the subject 'Conversation Needs Attention' will be created and assigned to the supervisor of the primary operator.

The activity has priority set up to High and due date set up as current date to alert the operator that the client is stressed out and action needs to be taken immediately.

For all the activities described above, when the payload contains message alerts with the 'needsAttention' flag, or both flags - 'needsAttention' and 'needsAction', then the 'Subject' of the activity will be set up to 'Conversation Needs Attention'. If the payload contains only the flag 'needsAction', then the 'Subject' will be set up to 'Conversation Needs Action'.

Workplan

[Assign](#) | [Skip](#) | [Complete](#) | [Approve](#) | [Reject](#)

All open activities		Due	Priority	Status	Subject	Exposures	External	Ext Owner	Assigned By	Assigned To
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	10/22/2022	High	Open	Send reservation of rights letter		No	ClaimCenter
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	11/03/2022	High	Open	Conversation Needs Attention		No	Super User
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	11/03/2022	High	Open	Conversation Needs Attention		No	Sue Smith

When the user clicks on the activity, the following screen will show up. For the activities with the subject 'Conversation Needs Attention' and 'Conversation Needs Action' there is an additional field - 'Case ID'. It opens the page with the mentioned case ID.

Activity

Activity Detail for Claim 235-53-365870

[Edit](#) | [Complete](#) | [Assign](#) | [Link Document](#) | [View Notes](#) | [Close Worksheet](#)

Details

Subject	Conversation Needs Attention
Description	There is a message that needs your attention
Case ID	50bcd6d-5bb4-4358-899b-65f7e2e45a43
Related To	Claim
Due Date	11/03/2022
Escalation Date	
Priority	High
Calendar Importance	High
Mandatory	Yes
Status	Open
Externally Owned	No

Documents

Name	Actions	Document Type	Status	Author	Uploaded
No data to display					

Activity Tracking

Completion/Skipped date

Completed by

Recurring No

Secondary Operators

Secondary operators in the Hi Marley chat are useful to show cases in the adjuster's inbox without being assigned as the primary operator.

- See all adjusters assigned as a secondary operator to the specific case
- Update the secondary operator table to add/remove adjusters
- Sync Operators added/removed from Guidewire to Hi Marley
- Sync Operators added/removed from Hi Marley to Guidewire

Enable Secondary Operators feature

In the Claim Center on the page 'Hi Marley Case Admin Items' in the section HiMarleyAdmin Flag Feature there is a flag 'Enable Secondary Operators'. It allows the admin to disable/enable secondary operators from being added/notified. Although it has no effect on refreshing the secondary operators from the Hi Marley chat.

Case Update Features

Create or Change Operator	<input type="checkbox"/>
Case Visibility	<input type="checkbox"/>
Case Closure - Download Transcript	<input type="checkbox"/>

Enable Secondary Operators	<input checked="" type="checkbox"/>
Download Transcript	<input type="checkbox"/>

There is also an additional role - 'Hi Marley - Secondary Operators', which can be assigned by admin to the chosen users. It allows the user to modify the content of the table secondary operators.

Hi Marley

[Up to Roles](#)[Basics](#)[Users](#)

Role

Name **Hi Marley**Description **Hi Marley permissions**

Permission	Code	Description
HiMarley - Ability to view Hi Marley Cases	viewcases_Acc	Permission to view Hi Marley Case Details
HiMarley - Automatic create operator	automaticcreateoperator_Acc	Automatically creates operator in Hi Marley case
HiMarley - Automatic sync notes	automaticsyncnotes_Acc	Enables automatic syncing of notes from Hi Marley
HiMarley - Coaching Alerts	coachingAlerts_Acc	Enable view coaching alerts
HiMarley - Fire Activity	fireactivity_Acc	Enable view fire activity
HiMarley - FireActivityToSupervisor	fireactivitytosupervisor_Acc	Enabled - an activity is created for the supervisor for the message alerts functionality
HiMarley - FNOL Case creation	casetcreationFnol_Acc	Enable to view 'enroll in Hi Marley' checkbox (FNOL)
HiMarley - Secondary Operators	secondaryoperator_Acc	Permission allows the user to modify the content of the table secondary operators.
HiMarley - TLA Issue Notifications	tlaisssuenotifications_Acc	Enables Total Loss Issue Activities when an Issue is opened.
HiMarley - View download transcript button	viewdownloadtranscript_Acc	Allows downloading of transcript
HiMarley - View live updates from Hi Marley	viewliveupdate_Acc	Enable viewing of live updates from Hi Marley
HiMarley - View send message UI	viewsendmessage_Acc	Enables viewing of send message UI
HiMarley - View send template	viewsendtemplate_Acc	Enable view send template
HiMarley - View group synchronize	viewgroupupdate_Acc	Enable view to synchronize groups with Hi Marley

Editing Secondary Operators

For each of the cases there is an additional option to assign not only the person who will be the operator. There is also a table which contains a list of secondary operators. Those operators are the users which have access to the case without being assigned to the case as a primary operator.

Fred Walter

[Return to History](#)

8 Messages

	Time Stamp	Message Alerts
Andy Applegate original: Template message translated: Vorlagennachricht	04/04/2024 03:02:10 PM	
Andy Applegate original: Hello! Could we set up a meeting for tomorrow? translated: Hallo! Könnten wir ein Treffen für morgen vereinbaren?	04/04/2024 03:01:36 PM	
Marley Admin Hello from Hi Marley!	04/04/2024 03:00:26 PM	
Marley AI Hi Fred, your claim has been reassigned to Andy Applegate . You can text them here, email them at aapplegate@acmeins.com or call 6503333333.	04/04/2024 02:58:59 PM	
Marley AI Hi Fred, your claim has been reassigned to Betty Baker . You can text them here, email them at bbaker@acmeins.com or call 6503333333.	04/04/2024 02:58:30 PM	

[Send SMS](#)

[Use Template](#) [Schedule Message](#) 0 Scheduled Messages [Send SMS](#)

Current Case Status Open

Marley Number +17438004899

Case Alerts:

[Re-Open Case](#) [Close Case](#)

Privacy Status public

[Make Public](#) [Make Private](#)

Current Opt Status Opted In

[Re-Send Welcome Message](#) [Opt Out](#)

Case Operator Andy Applegate [Select Operator](#)

Active Operator in Hi Marley Yes

Select Preferred Language English [Edit](#)

Case Secondary Operators

Secondary Operators	Hi Marley User

No data to display

The possibility to add/remove the secondary operators to the table is visible in the edit mode, when the user clicks on the 'edit'. To see those buttons the flag 'Enable Secondary Operators' on the Admin page should be set up to true and the role 'Hi Marley -Secondary Operators' has to be assigned to the user. The table Secondary Operators shows all the users which should be assigned as secondary operators. In the table 'Case Secondary Operators' there is a column 'HiMarley User' which shows if the user exists in Hi Marley. If not, the user can't be assigned as a Secondary Operator. When the additional user appears in the table, for each of the users the request is sent to Hi Marley to check if the user exists there. The flag EnrolledUserInHiMarley_Acc is also updated for each of the users.

Fred Walter

[Return to History](#)

Witness

833-304-4449

Last refreshed at 04/04/2024 17:02:41

[Go to Hi Marley Site](#)

8 Messages

Time Stamp

Message Alerts

Andy Applegateoriginal: Template message
translated: Vorlagennachricht

04/04/2024 03:02:10 PM

Andy Applegateoriginal: Hello! Could we set up a meeting for tomorrow?
translated: Hallo! Könnten wir ein Treffen für morgen vereinbaren?

04/04/2024 03:01:36 PM

Marley Admin

Hello from Hi Marley!

04/04/2024 03:00:26 PM

Marley AI

Hi Fred, your claim has been reassigned to Andy Applegate . You can text them here, email them at aapplegate@acmeins.com or call 6503333333.

04/04/2024 02:58:59 PM

Marley AI

Hi Fred, your claim has been reassigned to Betty Baker . You can text them here, email them at bbaker@acmeins.com or call 6503333333.

04/04/2024 02:58:30 PM

Send SMS

Current Case Status

Open

Marley Number

+17438004899

Case Alerts:

Privacy Status

public

Current Opt Status

Opted In

Case Operator

Andy Applegate

Active Operator in Hi Marley

Yes

Select Preferred Language

*

English

Update

Cancel

Case Secondary Operators

[Add](#) [Remove](#) Secondary Operators [Hi Marley User](#) Betty Baker Yes

After clicking on the 'add' button, the user will be redirected to the 'Search Users' page. After selecting the secondary operator, it goes back to the 'Hi Marley Case Details' page. The page allows the user to select multiple users at once. If the user is already assigned to this case as a secondary operator, he/she won't appear in the search results.

Search Users

[Return to Hi Marley Case Details](#)

User name

Location

First name

Country

Last name

City

Additional Restrictions

State

Role

[Search](#)[Reset](#)

Search Results

Select



Name	User name	Group Name

No data to display

After selecting an additional secondary operator the Claim Center sends requests to HiMarley to check if each of them exists in Hi Marley. For each of the users which don't exist in Hi Marley the following error will be shown. Each of the Secondary Operators which has the flag 'Hi Marley User' set up to false, needs to be removed from the table.

Errors on current page:

! Charles Arkle is not currently a Hi Marley user and is unable to be added as a Secondary Operator on this case.

Each of the Secondary Operators which has the flag 'Hi Marley User' set up to false, needs to be removed from the table, otherwise the following error will appear on the bottom of the page, after clicking the 'Update' button:

Validation Results

Clear

Errors:

! All Secondary Operators must be Hi Marley Users!

Case synchronization

Case synchronization from Hi Marley to Claim Center

On the page 'Hi Marley Case Details' there is a 'Refresh' button which allows the user to synchronize the data from Hi Marley to the Claim Center. Under this button there is a method which sends two requests to Hi Marley. First is responsible for the update of the field 'Current Opt Status' in the Claim Center, the second sends the request to check the current status of the case. After clicking on the 'Refresh' button, the following data will be updated:

- Case Operator
- Case Secondary Operators
- Current Opt Status
- Privacy Status
- SMS Translation
- Preferred Language (the field is visible only when the SMS translation is set up to yes)

Fred Walter [Return to History](#)

Witness	833-304-4449	Last refreshed at 04/04/2024 17:02:41	Refresh
8 Messages			
Andy Applegate original: Template message translated: Vorlagennachricht		Time Stamp	Message Alerts
		04/04/2024 03:02:10 PM	
Andy Applegate original: Hello! Could we set up a meeting for tomorrow? translated: Hallo! Könnten wir ein Treffen für morgen vereinbaren?		04/04/2024 03:01:36 PM	
Marley Admin Hello from Hi Marley!		04/04/2024 03:00:26 PM	
Marley AI Hi Fred, your claim has been reassigned to Andy Applegate . You can text them here, email them at aapplegate@acmeins.com or call 6503333333.		04/04/2024 02:58:59 PM	
Marley AI Hi Fred, your claim has been reassigned to Betty Baker . You can text them here, email them at bbaker@acmeins.com or call 6503333333.		04/04/2024 02:58:30 PM	
Send SMS <div style="border: 1px solid #ccc; height: 40px; margin-top: 10px;"></div>			
Use Template Schedule Message		0 Scheduled Messages	Send SMS

[Download Transcript](#) [Go to Hi Marley Site](#)

Current Case Status: Open

Marley Number: +17438004899

Case Alerts:

[Re-Open Case](#) [Close Case](#)

Privacy Status: public

[Make Public](#) [Make Private](#)

Current Opt Status: Opted In

[Re-Send Welcome Message](#) [Opt Out](#)

Case Operator: Andy Applegate

[Select Operator](#)

Active Operator in Hi Marley: Yes

Select Preferred Language: English [Edit](#)

Case Secondary Operators: Secondary Operators: Hi Marley User

No data to display

In the Claim Center there is also an automatic synchronization of the case data, when the .json file with the SMS message will be received from the webhook. It is possible when the flag 'Live updates' on the admin page are set to true.

When this payload is received, then the work item will be added to the work queue 'HiMarleyMessagingWorkQueue'. This synchronization updates the following fields on the case:

- Case Operator
- Case Secondary Operators
- Privacy Status
- SMS Translation
- Preferred Language

There is no information about the 'Current Opt Status' on this kind of payload. That's why, this field isn't updated.

Case synchronization from Claim Center to Hi Marley

The information from the Claim Center is sent to Hi Marley after clicking on the buttons which update individual fields/tables.

The field/table	The way of synchronization
Case Operator	The information is sent to Hi Marley, after clicking the button 'Select Operator'
Case Secondary Operators	The information is sent to Hi Marley, after clicking the button 'Update' in the edit mode.
Current Case Status	The information is sent to Hi Marley, after clicking the button 'Close Case' and 'Reopen Case'
Current Opt Status	The information is sent to Hi Marley, after clicking the button 'Opt Out'
Privacy Status	The information is sent to Hi Marley, after clicking the button 'Change Privacy'
SMS translation	The information is sent to Hi Marley, after clicking the button 'Update' in the edit mode.
Preferred Language	The information is sent to Hi Marley, after clicking the button 'Update' in the edit mode.

Case activity

For each case when the message is received in the Claim Center, the new activity is created (for the operator and the secondary operators). If the activity which is not completed exists for the given case, a new activity don't be created when the new message is received. After closing/completing the activities for all operators and secondary operators, the new activity is created, when the message is received.

Workplan

Assign Skip Complete | Approve Reject

All open activities				Exposures	External	Ext Owner	Assigned By	Assigned To
	Priority	Status	Subject					
<input type="checkbox"/>	☆ <input checked="" type="checkbox"/> 10/22/2022	High	Open	Send reservation of rights letter	No	ClaimCenter	Andy Applegate	
<input type="checkbox"/>	☆	Normal	Open	General reminder (diary)	No	Super User	Andy Applegate	
<input type="checkbox"/>	Normal	Open	Case#50dbcd6d-5bb4-4358-899b-65f7e2e45a43: New Claimant SMS from Hi Marley		No	System User	Heidi Johnson	
<input type="checkbox"/>	☆	Normal	Open	Case#50dbcd6d-5bb4-4358-899b-65f7e2e45a43: New Claimant SMS from Hi Marley	No	System User	Andy Applegate	
<input type="checkbox"/>	Normal	Open	Case#50dbcd6d-5bb4-4358-899b-65f7e2e45a43: New Claimant SMS from Hi Marley		No	System User	Thomas Sanders	
<input type="checkbox"/>	☆ 10/04/2022	Normal	Open	Determine fault rating	(1) 1st Party Vehicle - Ray Newton	No	ClaimCenter	Andy Applegate
<input type="checkbox"/>	☆ 10/06/2022	Normal	Open	Call witness		No	ClaimCenter	Andy Applegate
<input type="checkbox"/>	☆ 10/14/2022	Normal	Open	Review vendor quote		No	Super User	Andy Applegate
<input type="checkbox"/>	☆ 10/14/2022	Normal	Open	Review vendor quote		No	Super User	Andy Applegate
<input type="checkbox"/>	☆ 10/15/2022	Normal	Open	Get vehicle inspected	(1) 1st Party Vehicle - Ray Newton	No	ClaimCenter	Andy Applegate
<input type="checkbox"/>	☆ 10/15/2022	Normal	Open	Get vehicle inspected	(3) 3rd Party Vehicle - Bo Simpson	No	ClaimCenter	Andy Applegate
<input type="checkbox"/>	10/15/2022	Normal	Open	Review medical reports for claimant injuries	(4) 3rd Party Bodily Injury - Bo Simpson	No	ClaimCenter	Carla Levitt
<input type="checkbox"/>	☆ 10/16/2022	Normal	Open	Get police report	(3) 3rd Party Vehicle - Bo Simpson (4) 3rd Party Bodily Injury - Bo Simpson	No	ClaimCenter	Andy Applegate
<input type="checkbox"/>	☆ 10/16/2022	Normal	Open	Use injury evaluation system	(4) 3rd Party Bodily Injury - Bo Simpson	No	ClaimCenter	Carla Levitt
<input type="checkbox"/>	☆ 10/20/2022	Normal	Open	Put third party on notice of Subrogation Interest		No	Super User	Andy Applegate

Scheduled Messages

Enable Scheduled Messages with Hi Marley

Messaging Features

- Enable Send Message UI
- Enable Send Template
- Enable Scheduled Messages

- Enable Live SMS Update
- Enable SMS Notification
- Enable Live SMS Updates to Notes

The message scheduling is possible only when the user enables the 'Enable Scheduled Messages' activity. To enable a scheduled messages feature with Hi Marley, mark the 'Enable Scheduled Messages' and then click the 'save settings' button.

Schedule New Message

On the 'Hi Marley Case Details' page click on the 'Send SMS' button (which is available when the flag 'Enable Scheduled Messages' is set to true) and click on the 'Schedule Message' button. On the page Send SMS the content of the text message needs to be entered or template message needs to be chosen first.

Send SMS

Hi Aubra, your car will be ready tomorrow.

Use Template

Schedule Message

0 Scheduled Messages

Send SMS

If the field with the content of the message will be empty then the following error will show up.

Errors on current page:

- ! It looks like your message is currently blank. Please update your message before moving forward with sending.

On the next page, to schedule a message click the 'Schedule Message' button.

Send SMS

[Return to Hi Marley Case Details](#)

Schedule Message

Hi Aubra, your car will be ready tomorrow.

Date	06/30/2023	31
Time	09:00 AM	
Time Zone	(UTC-05:00) Eastern Time (US & Canada)	
<input style="background-color: #6a994e; color: white; border: 1px solid #6a994e; padding: 5px; border-radius: 5px; font-weight: bold; width: 150px; height: 30px;" type="button" value="Schedule Message"/>		

Before scheduling the message all the fields must be filled. If the fields will be empty, then the following errors for each of the fields will show up.

Errors on current page:

- ❗ It looks like your message is currently blank. Please update your message before moving forward with sending.
- ❗ It looks like you have not populated a date, please update the date to schedule your message for the future.
- ❗ It looks like you have not populated a time, please update the time to schedule your message.
- ❗ It looks like you have not populated a time zone, please update the time zone to schedule your message.

The date for the scheduled message must be in the future, if not the following error will show up.

Errors on current page:

- ❗ It looks like you have selected a date in the past, please update the date and time to schedule your message for the future.

The number of Scheduled Messages can be checked on the page 'Hi Marley Case Details' in the field 'Scheduled Messages'. This field is updated each time, when the user opens this page. The request GET is sent to HiMarley to get all Scheduled Messages, then the field is updated. This request also updates the scheduled messages assigned to the given case in the database.

When the flag 'Enable Scheduled Messages' is set to false then the 'Scheduled Message' button will be grayed-out and the 'View Scheduled Messages' button will disappear.

Send SMS

Use Template
Schedule Message
Send SMS

Update Scheduled Messages

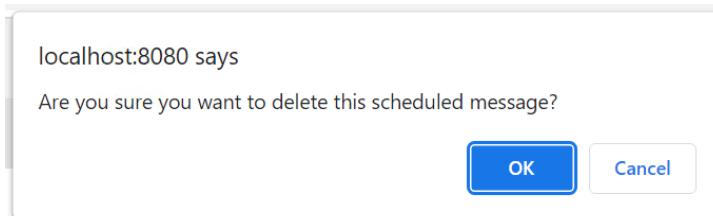
The list of the scheduled messages assigned to the case is available after clicking on the button 'Edit Scheduled Message'. On this Page each of the scheduled messages can be edited or deleted. They are sorted by scheduled date. The 'Delete' button is sending a DELETE request to HiMarley chat to remove the given scheduled message. When the scheduled message is successfully deleted in HiMarley, then the method removes this message from the CC database.

Schedule Message

[Return to Hi Marley Case Details](#)

Scheduled Messages		Edit	Delete
Author	Andy Applegate		
Message	Hi Aubra, your car will be ready tomorrow.		
Scheduled Date & Time (UTC)	06/30/2023 1:00 PM		

After clicking on the 'Delete' button, there is a confirmation message which checks if the user wants to delete the message.



After pressing the button 'Edit', the following page will be loaded:

Send SMS

[Return to Schedule Message](#)

Author	Andy Applegate
Message	<input type="text" value="Hi <u>Aubra</u>, your car will be ready tomorrow."/>
Date	<input type="text" value="06/30/2023"/> 
Time	<input type="text" value="02:00"/> <input type="text" value="PM"/>
Time Zone	<input type="text" value="(UTC) Coordinated Universal Time"/> 
<input type="button" value="Save"/>	

On this page, there is the same validation as on the page with scheduling messages. All the fields must be filled with data and the date and time can't be in the past.

Time Zone Support

Although the HiMarley SMS accelerator does not aim to modify the way ClaimCenter handles time-zone differences, in order to avoid potential errors, both the Schedule Message / Send SMS popup and the Edit Scheduled Message screen require datetimes to be associated with a time zone, forcing the user to be explicit about all intended send dates. Then, before a message is sent to HiMarley for further processing, all dates specified are converted to Coordinated Universal Time (UTC).

Send SMS

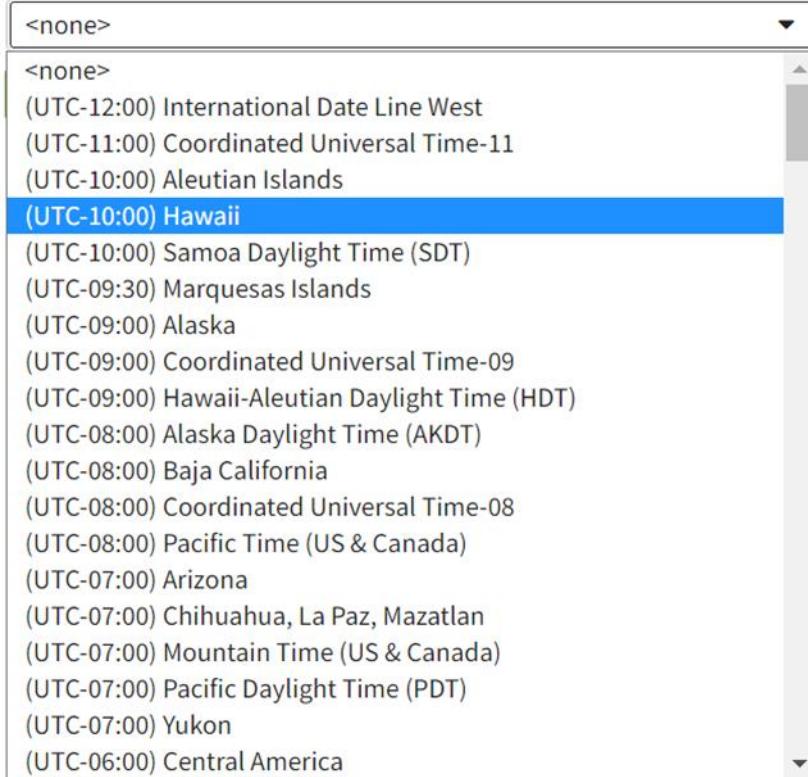
[Return to Hi Marley Case Details](#)

Schedule Message

Hi Aubra, your car will be ready tomorrow.

Date 06/30/2023 

Time 10:00 AM

Time Zone 
<none>
<none>
(UTC-12:00) International Date Line West
(UTC-11:00) Coordinated Universal Time-11
(UTC-10:00) Aleutian Islands
(UTC-10:00) Hawaii
(UTC-10:00) Samoa Daylight Time (SDT)
(UTC-09:30) Marquesas Islands
(UTC-09:00) Alaska
(UTC-09:00) Coordinated Universal Time-09
(UTC-09:00) Hawaii-Aleutian Daylight Time (HDT)
(UTC-08:00) Alaska Daylight Time (AKDT)
(UTC-08:00) Baja California
(UTC-08:00) Coordinated Universal Time-08
(UTC-08:00) Pacific Time (US & Canada)
(UTC-07:00) Arizona
(UTC-07:00) Chihuahua, La Paz, Mazatlan
(UTC-07:00) Mountain Time (US & Canada)
(UTC-07:00) Pacific Daylight Time (PDT)
(UTC-07:00) Yukon
(UTC-06:00) Central America

For example, in the window shown above, if the user selects “(UTC-10:00) Hawaii”, the date specified will be interpreted as 2023-06-04T08:00:00.000-10:00 (Hawaii Standard Time) – or, equivalently, 2023-06-04T18:00:00.000Z (UTC). Note, however, that most of the entries in the Time Zone drop-down are standard (winter) time zones; all adjustments for daylight (summer) time must be done by the user, e.g. if the region chosen by the user observes daylight saving time, the user should adjust their choice by selecting a designated DST time zone.

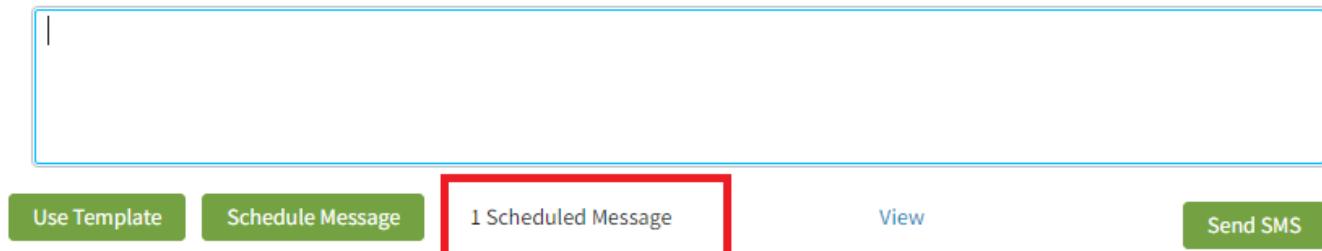
GET Scheduled Messages

ClaimCenter receives updates for new scheduled messages created via API or Webapp by polling Hi Marley when the following three actions are taken:

- Clicking the Refresh button on the Hi Marley Case Details page.
- Viewing Scheduled Messages by clicking the View button on the Hi Marley Case Details page.
- After a message is scheduled from ClaimCenter UI.

After performing any of these actions, the user can immediately see all the scheduled messages and their number in the ClaimCenter UI.

Send SMS



Hi Marley Custom Events

Loading data into entities

For events to work properly, two files must be loaded into Claim Center sequentially as follows:

Go to Administration -> Utilities -> Import Data

1. Import Custom Events.xml file with HiMarleyCustomEventsArray_Acc entity

Import Administrative Data

Please browse for an administrative data file to upload

[Browse...](#)

No conflicts were found with existing records. Click "Finish" to complete the import.

2. Import Custom Event.xml file with HiMarleyCustomEvents_Acc entity

After importing the files, the content of the 'Automated Notifications' table is visible in the HiMarley Case Admin Items tab.

Automated Notifications

IsActive*	Custom Event Name	Associated Templates
<input type="checkbox"/>	Claim Closed	<input type="text"/>
<input type="checkbox"/>	Claim Payment	<input type="text"/>
<input type="checkbox"/>	Claim Reopen	<input type="text"/>

Automation Notifications on Admin Items

It is possible to enable/disable events by checking/unchecking the checkbox 'IsActive'.

Automated Notifications

IsActive*	Custom Event Name	Associated Templates
<input checked="" type="checkbox"/>	Claim Closed	<input type="text"/>  
<input type="checkbox"/>	Claim Payment	<input type="text"/>  
<input type="checkbox"/>	Claim Reopen	<input type="text"/>  

The search button allows admin to select a template.

Automated Notifications

IsActive*	Custom Event Name	Associated Temp
<input checked="" type="checkbox"/>	Claim Closed	<input type="text"/>  
<input type="checkbox"/>	Claim Payment	<input type="text"/>  
<input type="checkbox"/>	Claim Reopen	<input type="text"/>  

The 'Search' button moves a user to the page 'Find SMS Template' where all templates are visible, so the user can select one of them by clicking the 'Select' button.

Find SMS Template

[Return to Hi Marley Case Admin Items](#)

[Cancel](#)

	Template	Template Body	
Select	Test	Test Template	
Select	Claim Closed	Claim Closed Template	
Select	Claim Payment	Claim Payment Template	
Select	Claim Reopen	Claim Reopen Template	

After selecting the template from the template list, the user can see the template name assigned to the event.

Automated Notifications

IsActive*	Custom Event Name	Associated Templates			
<input checked="" type="checkbox"/>	Claim Closed	Claim Closed			
<input type="checkbox"/>	Claim Payment				
<input type="checkbox"/>	Claim Reopen				

After pressing the 'Delete' button, 'Associated templates' field is cleared.

Automated Notifications

IsActive*	Custom Event Name	Associated Templates
<input checked="" type="checkbox"/>	Claim Closed	<input type="text"/>
<input type="checkbox"/>	Claim Payment	<input type="text"/>
<input type="checkbox"/>	Claim Reopen	<input type="text"/>

The changes can be saved by clicking on the button 'Save Settings' at the top of the screen.

When the changes are saved successfully there is a following information:

Hi Marley Case Admin Items

Successfully updated Admin Items

When nothing was changed and the user press 'Save Settings' button the following information will be displayed:

Hi Marley Case Admin Items

Nothing changed/to update

Validation

The changes can't be saved when the event is activated and doesn't contain any associated template. There is an error with a name of the event which needs to be corrected.

Hi Marley Case Admin Items

Errors on current page:

- ! Claim Closed needs to have an assigned template.

When the user tries to delete a template/templates on the 'Hi marley Case Admin Add/Remove Template' page there is additional confirmation after clicking on the button 'Delete Selected':

localhost:8080 says

This action will delete the template from Claimcenter. If the template is assigned to the custom event, that event will be deactivated.

OK

Cancel

After choosing 'OK' the selected templates will be deleted. If the template was assigned to the custom event, the assignment of this template to the event will be removed and this custom event will be deactivated. On the screen will appear the information for each of the custom events which was deactivated:

Hi Marley Case Admin Add / Remove Template

Information for the current page:

- i The template Claim Closed was removed. Since it was assigned to the Claim Closed customer event, that event has been deactivated.
- i The template Claim Payment was removed. Since it was assigned to the Claim Payment customer event, that event has been deactivated.
- i The template Claim Reopen was removed. Since it was assigned to the Claim Reopen customer event, that event has been deactivated.

Claim Closed

When the Claim Closed event is active, the notification will be sent during the closure of the claim. The message will be sent for each of the active cases. Closing the claim which has only one active case will create two types of event messages. They can be found in the Message Queue HiMarleyAsyncCall.

Claim Number: 000-00-000912

[Up to Destination: HiMarleyAsyncCall \(ID: 58\)](#)

Skip

Claim #:

<input type="checkbox"/>	Send Time	Event Name	Destination	Order	Sender Reference	Status	Retries	Response	Description	
<input type="checkbox"/>		ClaimClosed	HiMarleyAsyncCall	1		Pending Send	0			
<input type="checkbox"/>		ClaimChanged	HiMarleyAsyncCall	2		Pending Send	0			

First event is the example of the custom event - Claim Closed. It contains the payload which is sending the message from the template assigned to the event. The second is the event which is closing the case. For this event it is important that the messages are processed in this order, so the message can be sent before the case will be closed.

When the messages will be processed without any errors, the message will be sent into Hi Marley Chat.

Claim Payment

When the Claim Payment event is active, the notification will be sent after the new payment in the status 'awaiting submission' will be created. The message will be sent for each of the active cases. They can be found in the Message Queue HiMarleyAsyncCall.

Claim Number: 000-00-000912									Up to Destination: HiMarleyAsyncCall (ID: 58)	Skip	Claim #:
	Send Time	Event Name	Destination	Order	Sender Reference	Status	Retries	Response	Description		
<input type="checkbox"/>		ClaimPayment	HiMarleyAsyncCall	1		Pending Send	0				

For this case we have only one event type - ClaimPayment which is one of the custom events. It contains the payload which is sending the message from the template assigned to the event.

When the messages will be processed without any errors, the message will be sent into Hi Marley Chat.

Claim Reopen

When the Claim Reopen event is active, the notification will be sent after the reopen of the claim. The message will be sent for each of the cases which will be reopened (for each of the messages one event message ClaimReopen will be created). Reopening the claim which has only one close case will create two event messages. They can be found in the Message Queue HiMarleyAsyncCall.

Claim Number: 000-00-000912									Up to Destination: HiMarleyAsyncCall (ID: 58)	Skip	Claim #:
	Send Time	Event Name	Destination	Order	Sender Reference	Status	Retries	Response	Description		
<input type="checkbox"/>		ClaimChanged	HiMarleyAsyncCall	1		Pending Send	0				
<input type="checkbox"/>		ClaimReopen	HiMarleyAsyncCall	2		Pending Send	0		41059ef1-4d0f-470d-9b48-1f7681a05ec1		

First event is ClaimChanged. This is an event which reopens the claim and all the cases which were assigned to it. The second one is a custom event which sends the notification for the case which was assigned to the claim. For this event it is important that the messages are processed in this order, so the message can be sent after the case is reopened.

When the messages will be processed without any errors, the message will be sent into Hi Marley Chat.

Notes Screen

In the Notes screen, using the search area at the top, it is possible to find and list all notes entered by adjusters during claim adjudication.

Notes

[New Note](#)

Find Text:	Any	Date Range:	Since <input type="button" value="Today"/> <input type="button" value="From"/>	To <input type="button" value="MM/dd/yyyy"/> <input type="button" value=""/>	Sort By: <input type="button" value="Date"/> <input type="radio"/> Ascending <input checked="" type="radio"/> Descending																																										
Author:	Any																																														
Related To:	* Claim																																														
Topic:	Any																																														
<input type="button" value="Search"/> <input type="button" value="Reset"/>																																															
<table border="1"> <thead> <tr> <th colspan="2">Notes</th> <th colspan="4">Details</th> </tr> <tr> <th colspan="2">Info</th> <th colspan="4"> </th> </tr> </thead> <tbody> <tr> <td colspan="2"> Edit Delete Print Author Marley AI Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69 </td> <td colspan="4"> Jun 26, 2023 11:32 AM Hi Marley SMS Message from: Marley AI Thank you for your message. We have received your message and will respond during business hours. </td> </tr> <tr> <td colspan="2"> Edit Delete Print Author Aubra Atkins Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69 </td> <td colspan="4"> Jun 26, 2023 11:32 AM Hi Marley SMS Message from: Aubra Atkins Hi Andy, when my car will be ready? </td> </tr> <tr> <td colspan="2"> Edit Delete Print Author Marley Admin Topic Hi Marley Note Related To d79165ba-893f-45e9-a635-ae8a4ffce69 </td> <td colspan="4"> Jun 26, 2023 11:29 AM Hi Marley Case Note from: Marley Admin Please contact the customer. </td> </tr> <tr> <td colspan="2"> Edit Delete Print Author Marley AI Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69 </td> <td colspan="4"> Jun 26, 2023 11:15 AM Hi Marley SMS Message from: Marley AI Hi Aubra, thanks for reporting your claim #000-00-002106. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call +11823228295. </td> </tr> <tr> <td colspan="2"> Edit Delete Print Author Marley AI Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69 </td> <td colspan="4"> Jun 26, 2023 11:15 AM Hi Marley SMS Message from: Marley AI Hi Aubra, your claim has been reassigned to Andy Applegate. You can text them here, email them at aapplegate@acmeins.com or call +11823228295. </td> </tr> </tbody> </table>						Notes		Details				Info						Edit Delete Print Author Marley AI Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69		Jun 26, 2023 11:32 AM Hi Marley SMS Message from: Marley AI Thank you for your message. We have received your message and will respond during business hours.				Edit Delete Print Author Aubra Atkins Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69		Jun 26, 2023 11:32 AM Hi Marley SMS Message from: Aubra Atkins Hi Andy, when my car will be ready?				Edit Delete Print Author Marley Admin Topic Hi Marley Note Related To d79165ba-893f-45e9-a635-ae8a4ffce69		Jun 26, 2023 11:29 AM Hi Marley Case Note from: Marley Admin Please contact the customer.				Edit Delete Print Author Marley AI Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69		Jun 26, 2023 11:15 AM Hi Marley SMS Message from: Marley AI Hi Aubra, thanks for reporting your claim #000-00-002106. Your representative's name is Andy Applegate. You can contact them at aapplegate@acmeins.com or call +11823228295.				Edit Delete Print Author Marley AI Topic Hi Marley SMS Related To d79165ba-893f-45e9-a635-ae8a4ffce69		Jun 26, 2023 11:15 AM Hi Marley SMS Message from: Marley AI Hi Aubra, your claim has been reassigned to Andy Applegate. You can text them here, email them at aapplegate@acmeins.com or call +11823228295.			
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To limit the list to only show notes related to SMS messages received from Hi Marley, modify the search criteria by setting the topic to "Hi Marley SMS". To view ClaimCenter notes reflecting notes created by Hi Marley users, choose "Hi Marley Note". When enabled, the synchronization feature will track all Hi Marley activities in the form of notes, keeping a detailed record of all information, actions, and considerations related to the processing of each case.

Hi Marley Language translation

Hi Marley supports auto translation of following languages:

Language	Shorthand – <i>language Preference</i> value
English (Default)	en
Spanish	es
Russian	ru
Simplified Chinese	zh
Korean	ko
Portuguese	pt
German	de
Urdu	ur
Arabic	ar
Polish	pl

French	fr
Bosnian	bs
Haitian	ht
Hindi	hi
Japanese	ja
Somali	so
Thai	th
Tagalog	tl
Vietnamese	vi

English is the default preferred language. The preferred language can be changed by clicking the dropdown button and the other language options will be displayed.

Selecting Language Preference:

Fred Walter [Return to History](#)

Witness | 833-304-4449 | Last refreshed at 04/04/2024 17:02:41 |

8 Messages Time Stamp ▲ Message Alerts ▲

Andy Applegate original: Template message translated: Vorlagennachricht	04/04/2024 03:02:10 PM
Andy Applegate original: Hello! Could we set up a meeting for tomorrow? translated: Hallo! Konnten wir ein Treffen für morgen vereinbaren?	04/04/2024 03:01:36 PM
Marley Admin Hello from Hi Marley!	04/04/2024 03:00:26 PM
Marley AI Hi Fred, your claim has been reassigned to Andy Applegate . You can text them here, email them at aapplegate@acmeins.com or call 6503333333.	04/04/2024 02:58:59 PM
Marley AI Hi Fred, your claim has been reassigned to Betty Baker . You can text them here, email them at bbaker@acmeins.com or call 6503333333.	04/04/2024 02:58:30 PM

Send SMS

[Go to Hi Marley Site](#)

Current Case Status **Open**

Marley Number **+17438004899**

Case Alerts:

Privacy Status **public**

Current Opt Status **Opted In**

Case Operator **Andy Applegate**

Active Operator in Hi Marley **Yes**

Select Preferred Language * **English** ▾
 Update
Cancel

Case Secondary Operators Add Remove

<input type="checkbox"/> Secondary Operators ▾	Hi Marley User ▾
<input type="checkbox"/> Betty Baker	Yes

Fred Walter [\[Return to History\]](#)

Witness	833-304-4449	Last refreshed at 04/04/2024 17:02:41
8 Messages	Time Stamp	Message Alerts
Andy Applegate original: Template message translated: Vorlagennachricht	04/04/2024 03:02:10 PM	
Andy Applegate original: Hello! Could we set up a meeting for tomorrow? translated: Hallo! Könnten wir ein Treffen für morgen vereinbaren?	04/04/2024 03:01:36 PM	
Marley Admin Hello from Hi Marley!	04/04/2024 03:00:26 PM	
Marley AI Hi Fred, your claim has been reassigned to Andy Applegate. You can text them here, email them at aapplegate@acmeins.com or call 6503333333.	04/04/2024 02:58:59 PM	
Marley AI Hi Fred, your claim has been reassigned to Betty Baker. You can text them here, email them at bbaker@acmeins.com or call 6503333333.	04/04/2024 02:58:30 PM	
Send SMS		

Current Case Status: Open

Marley Number: +17438004899

Case Alerts: English (selected), Arabic, Bosnian, French, German, Haitian, Hindi, Japanese, Korean, Polish, Portuguese, Russian, Simplified Chinese, Somali, Spanish, Tagalog, Thai, Urdu, Vietnamese

Privacy Status:

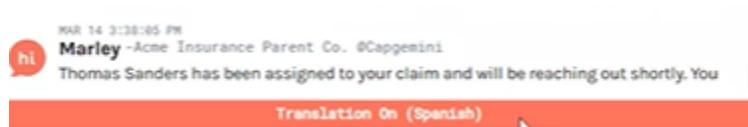
Current Opt Status:

Case Operator: Active Operator in Hi Marley:

Select Preferred Language: * English (dropdown menu)

[Update](#) [Cancel](#)

Once a language has been selected, the translation in Hi Marley will be displayed as seen in the screenshot below.



Text in English will change to Spanish on Customer's phone.

[Send SMS](#)

hello world! from hi marley

[Use Template](#)
[Schedule Message](#)
0 Scheduled Messages
[Send SMS](#)

The auto translation here is the result of the Spanish selection for preferred language.



Additionally, if the translation is on, then the message in webhook will contain the translations

```

"messages": [
  {
    "id": "dale36e4-b291-4c36-af07-f22cfe5cca10",
    "type": "text",
    "formatting": "standard",
    "data": "hello world from hi marley",
    "channelSource": "marley",
    "author": {
      "_id": "dc8d79e4-e19b-47a9-836a-13d3043dbe36",
      "role": "operator",
      "profile": {
        "firstName": "Marley",
        "lastName": "Admin"
      }
    },
    "createdAt": "2023-06-21T15:01:49.178Z",
    "dateFormatted": "06-21-2023",
    "timeFormatted": "11:01:49 AM EDT",
    "translations": [
      {
        "translatedMessage": "Hola mundo de Hi Marley",
        "sourceLanguage": "en",
        "destinationLanguage": "es"
      }
    ]
  }
]
```

In the Claim Center the message body will have the original and translated content of the message.

Author	Time Stamp	Message Alerts	Message Body
Marley Admin	06/21/2023 11:01:49 AM		original: hello world from hi marley translated: Hola mundo de Hi Marley

Also for each of the received messages, the proper note will be created. If the translation is on, then the note will also contain the original and translated content of the message:

Notes	
Info	Details
Edit Delete Print	Jun 21, 2023 11:01 AM
Author	Marley Admin
Topic	Hi Marley SMS
Related To	d79165ba-893f-45e9-a635-aee8a4ffce69
HiMarley SMS Message from: Marley Admin original: hello world from hi marley translated: Hola mundo de Hi Marley	

For languages using 16-bit, i.e. Chinese, Japanese, etc. User please make sure the database and Guidewire ClaimCenter must be configured to support these languages.

Additional Information in Payload

A functionality has been added that allows you to add additional information about the claim to the payload.

Below is a list of additional information:

- Claim System
- Claim System Version
- Claim Data
- Dwelling Incident
- Exposure Data

- Policy Data
- Service Request Data
- Vehicle Incident Data

It is possible to disable/enable the functionality from the admin panel on the "Hi Marley Case Admin Items" page.

Other Features	
Enable Group Synchronize	<input type="checkbox"/>
Enable FNOL Case Creation	<input type="checkbox"/>
Parties Involved Tab	<input type="checkbox"/>
Data Enablement of Automation	<input checked="" type="checkbox"/>

Hi Marley Event Notes Author

This feature allows the admin to choose an author of notes associated to events like Total Loss. By default, these notes are set to Super User.

Case Note Features

Automatic Sync Notes	<input checked="" type="checkbox"/>
Assign author for HiMarley Case event note	<input checked="" type="checkbox"/>
HiMarley Event note author	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> * Betty Baker <div style="float: right;">▼</div> </div>

Download Transcript when Hi Marley Case is closed

This new feature allows auto-downloading PDF transcript when the case is closed. The transcript will be downloaded under the following circumstances:

- when case is closed via ClaimCenter close case button
- when it's closed via ClaimCenter Claim Closure (which triggers HM case closure API)
- when the case is closed via Webapp (which triggers a webhook).

This functionality can be enabled/disabled on the Hi Marley Case Admin Items page:

Hi Marley Case Admin Items

HiMarley Admin Flag Feature

Case Update Features

- Create or Change Operator
- Case Visibility
- Case Closure - Download Transcript

- Enable Secondary Operators
- Download Transcript

Activity creation if case wasn't created on Post-FNOL

When creating a claim and checking the “Enroll in Hi Marley Texting” checkbox on the last screen of the FNOL, a case will be created after the claim creation. But if user sets brand or line of business that does not match Hi Marley's one, the case won't be created and the following activity indicating this issue will be created:

Activity Detail for Claim 000-00-000503

[Edit](#)[Complete](#)[Skip](#)[Assign](#)[Link Document](#)[View Notes](#)[Close Worksheet](#)

Details

Subject Hi Marley Case Creation Failed

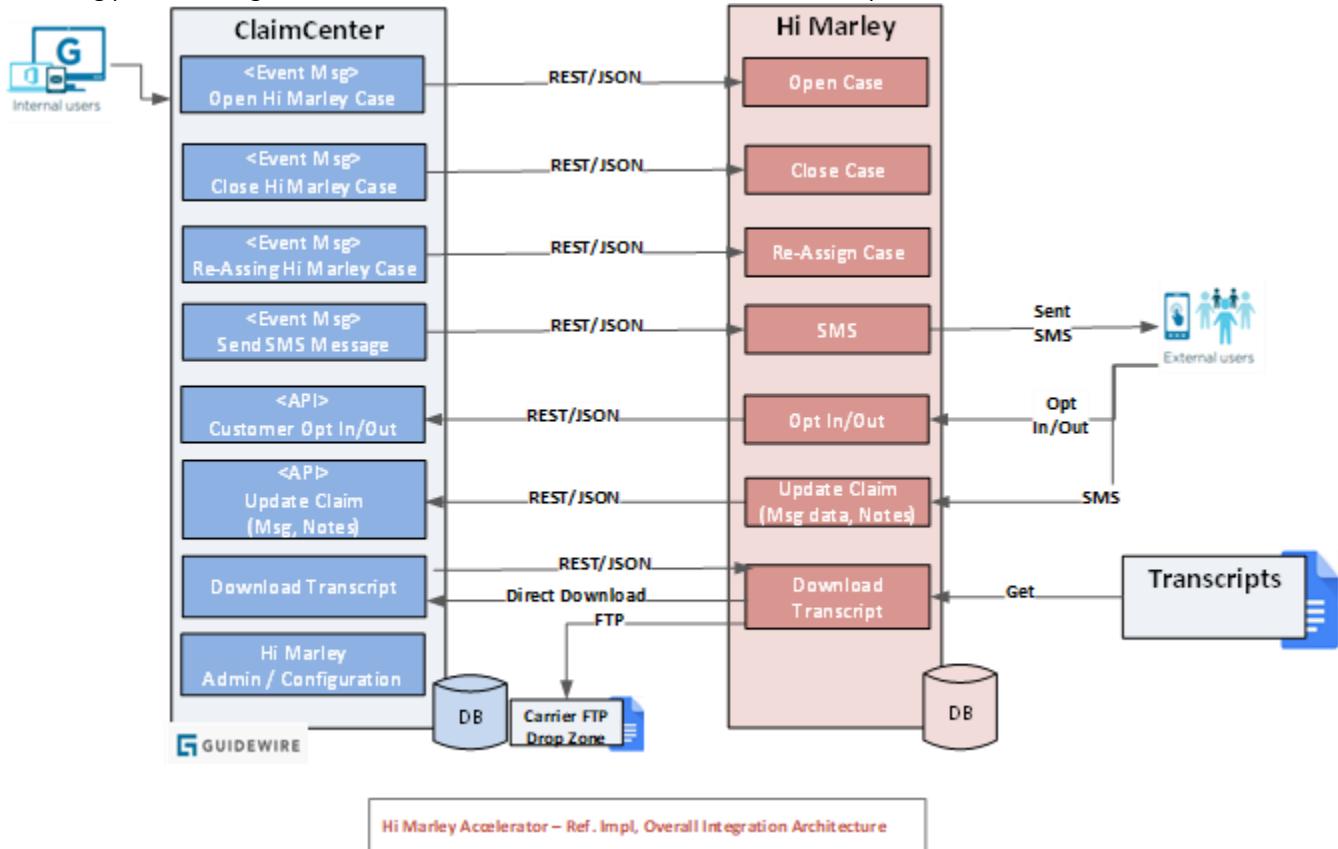
Description Case creation for the FNOL reporter has failed with the below error. Please take any corrective actions if indicated and retry case creation on the Hi Marley Case tab.
BrandingMismatch: The brand you provided does not match the

Related To Claim

Technical Design

Technical Overview

Following provides a high-level overview of the architecture of this reference implementation.



As shown in above reference implementation diagram, ClaimCenter and Hi Marley will be integrated via the Hi Marley accelerator leveraging a direct client-server architecture. Any middleware tier implementation will be the responsibility of carrier.

ClaimCenter will consume APIs exposed by Hi Marley to perform required functions (i.e. Open case, Close case, assigning case, send SMS, etc.)

ClaimCenter also will expose APIs and Plugins to allow Hi Marley to perform required functions (i.e. Send Customer data, Send messages, Download case transcripts, etc.)

Since this accelerator will be based on previous accelerator for ClaimCenter v9.x, for downward compatibility, this accelerator will inherit application and integration architecture from previous accelerator unless unique new features in ClaimCenter v9bb.x can significantly improve the functionality, reliability, and performance of the accelerator.

Open Case in Hi Marley

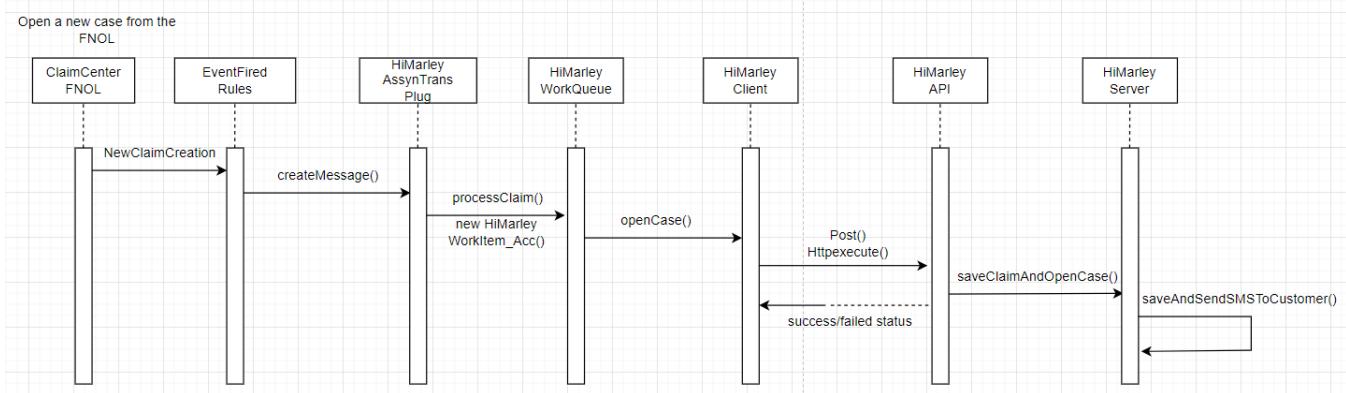
Open Case from FNOL

To be able to create a Hi Marley case from FNOL, make sure the “Enable FNOL Case Creation” checkbox in the Other Features section is checked on the Hi Marley Case Admin Items page:

Other Features

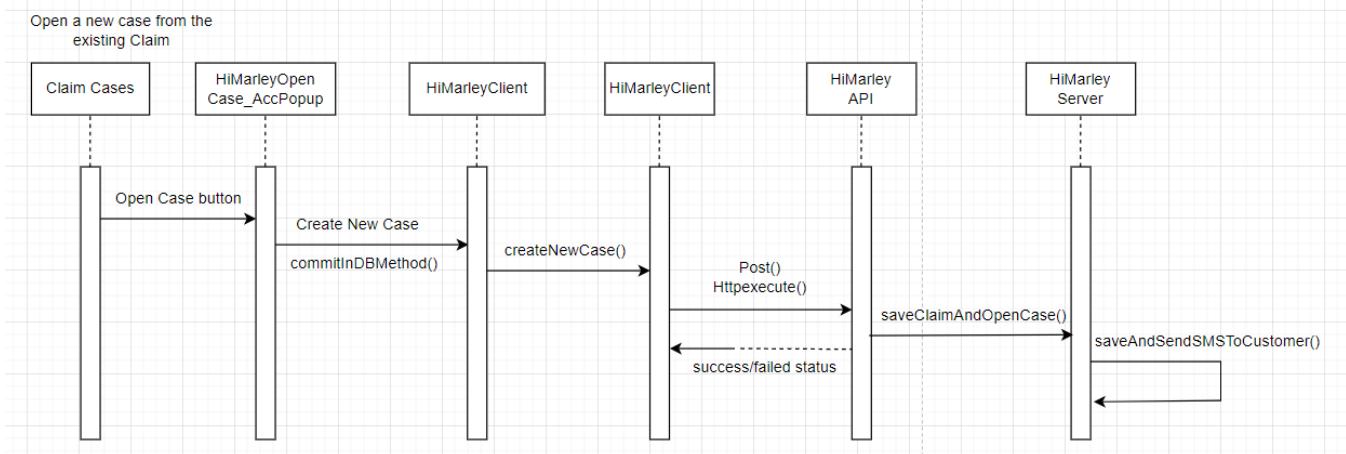
Enable Group Synchronize Enable FNOL Case Creation Parties Involved Tab Data Enablement of Automation

To create a case from the FNOL the user needs to check the Enroll in Hi Marley Texting checkbox during the claim creation. After the claim is created, the Claim Changed EventFired Rule creates a message with Case Opening description. Next, HiMarleyAsyncTransPlug runs the processClaim() method and creates a new work item for case opening, which is later processed by the HiMarleyWorkQueue class. This class calls the openCase() function inside the HiMarleyClient class. This function creates and sends a request for case opening to the HiMarley API. If the status is successful, a new Hi Marley case is created both in Hi Marley and in ClaimCenter.



Open Case from the existing Claim

To create a case from an existing Claim, the user needs to go to the Hi Marley Cases tab and click the Open Case button. This action redirects to the Open Case page where all the needed data can be filled in. After that, clicking the Create New Case button triggers the commitInDBMethod() which calls the createNewCase() method inside the HiMarleyClient class. Inside this function, a new request is created and sent to the HiMarley API. If the response is successful, a new Hi Marley case is created both in Hi Marley and in ClaimCenter.

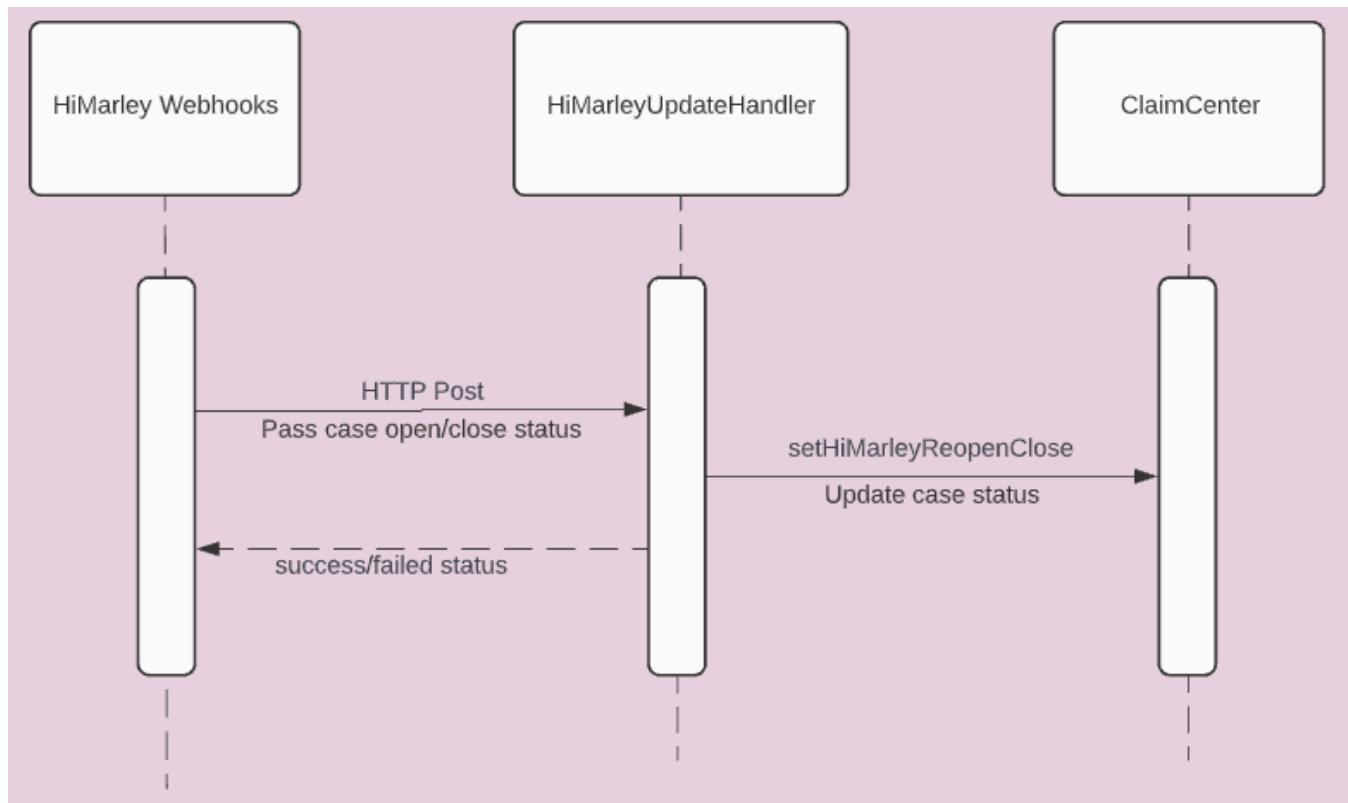


Case Close/Open status update from Hi Marley to ClaimCenter

Subscription to webhook sends updates back to carrier system based on changes in Hi Marley (case close/open).

Hi Marley sends update to ClaimCenter whether Hi Marley case is closed or reopened. Based on webhook status, ClaimCenter updates Hi Marley details in ClaimCenter.

Carrier has to subscribe to Hi Marley webhook to update Hi Marley case details in ClaimCenter.

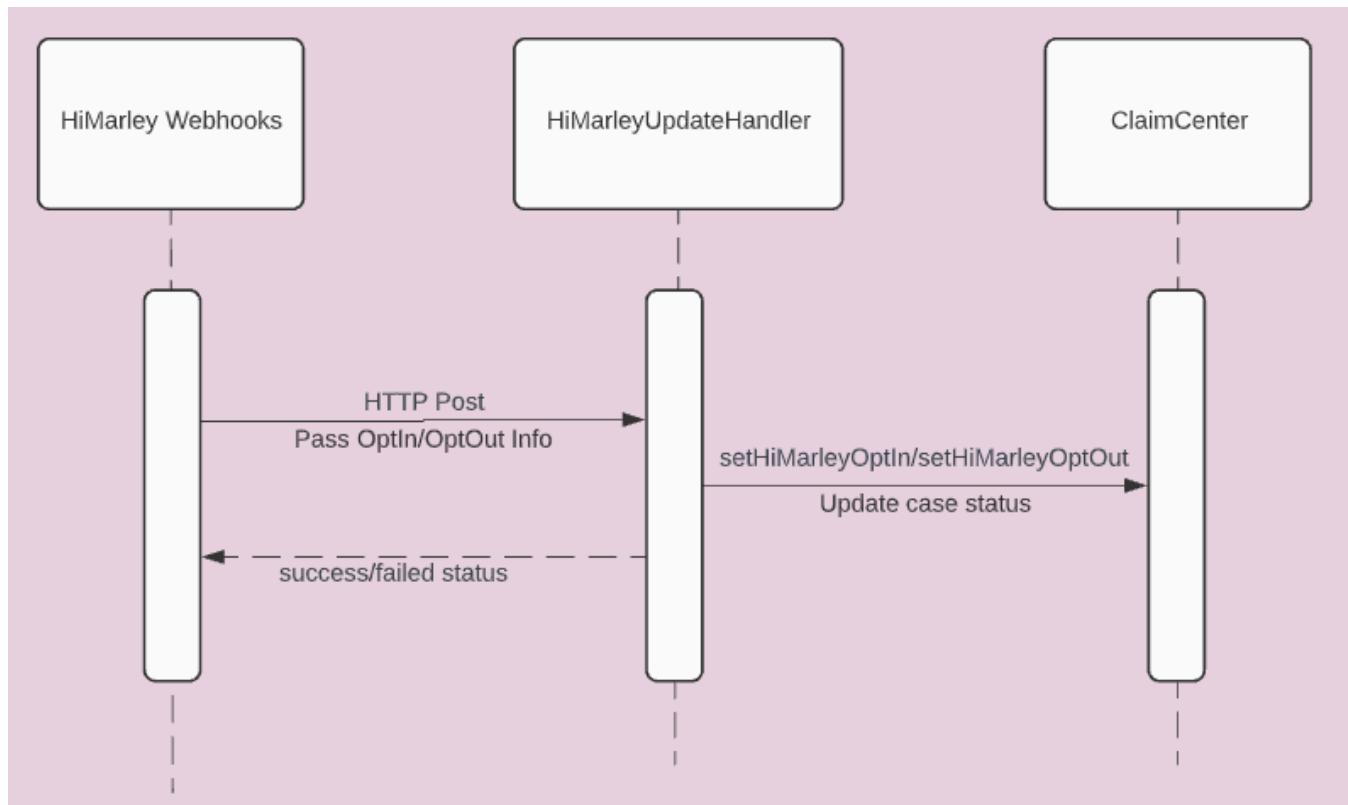


Opt-In/Opt-Out status update from Hi Marley to ClaimCenter

Subscription to webhook sends updates back to carrier system based on changes in Hi Marley (user opt in/out).

Hi Marley sends update to ClaimCenter whether Customer Opted or Opted out. Based on webhook status, ClaimCenter updates Hi Marley details in ClaimCenter.

Carrier has to subscribe to Hi Marley webhook to update Hi Marley case details in ClaimCenter.

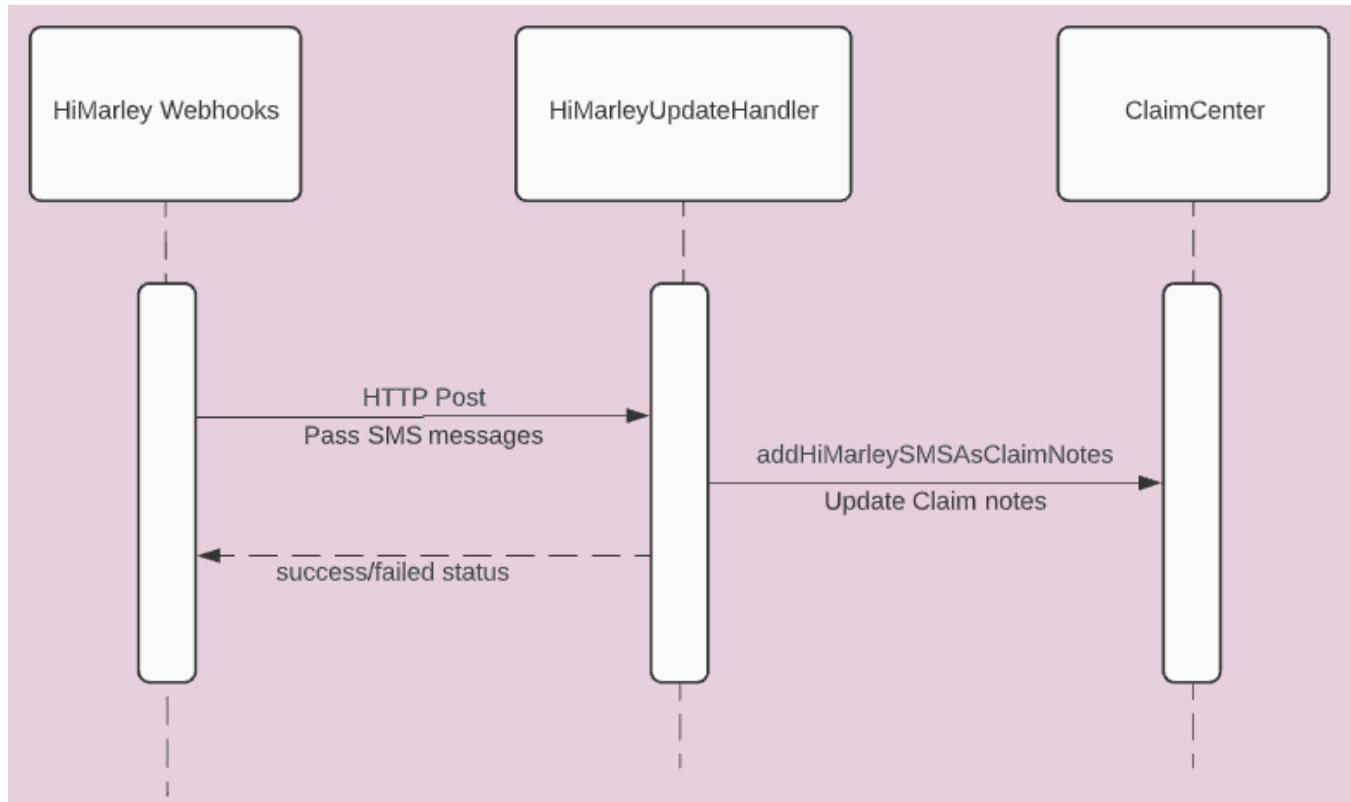


SMS Message update from Hi Marley to ClaimCenter

Subscription to webhook sends updates back to carrier system based on messages received and sent in Hi Marley.

Hi Marley sends update to ClaimCenter whenever Operator, Claimant, or Hi Marley AI sends or receives a message. Based on webhook status, ClaimCenter updates Claim Notes in ClaimCenter and adds to corresponding Case message list.

Carrier has to subscribe to Hi Marley webhook to update Hi Marley messages in ClaimCenter.

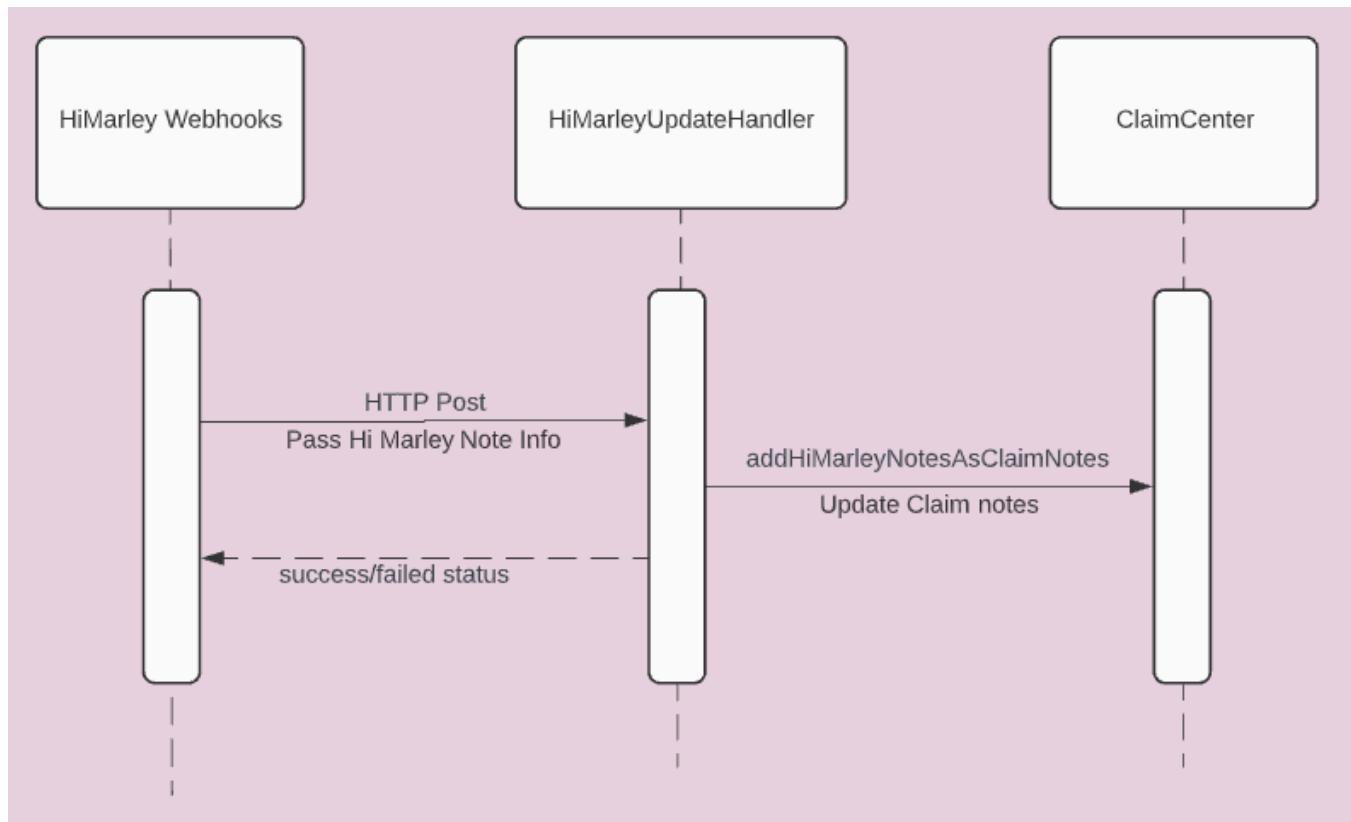


Hi Marley Note update from Hi Marley to ClaimCenter

Subscription to webhook sends updates back to carrier system based on notes updated in Hi Marley.

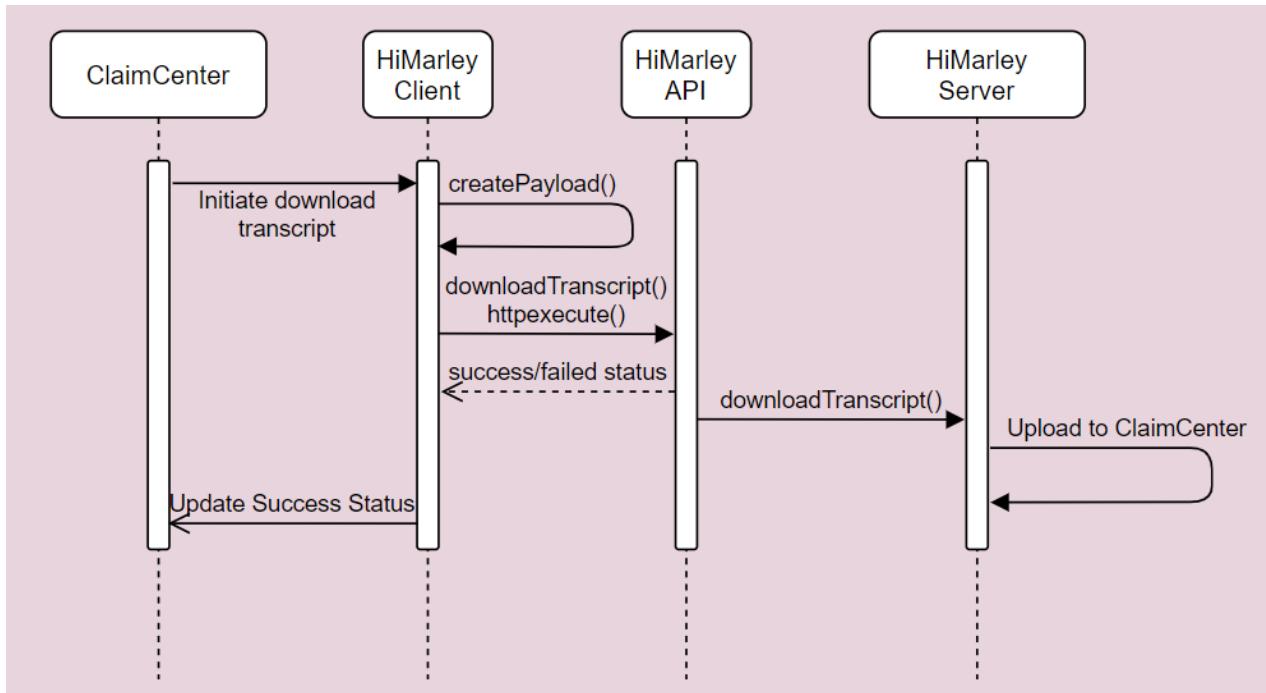
Hi Marley sends update to ClaimCenter whenever Operator makes a note. Based on webhook status, ClaimCenter updates Claim Notes in ClaimCenter.

Carrier has to subscribe to Hi Marley webhook to update Claim notes in ClaimCenter.



Update Claim transcript information to Hi Marley

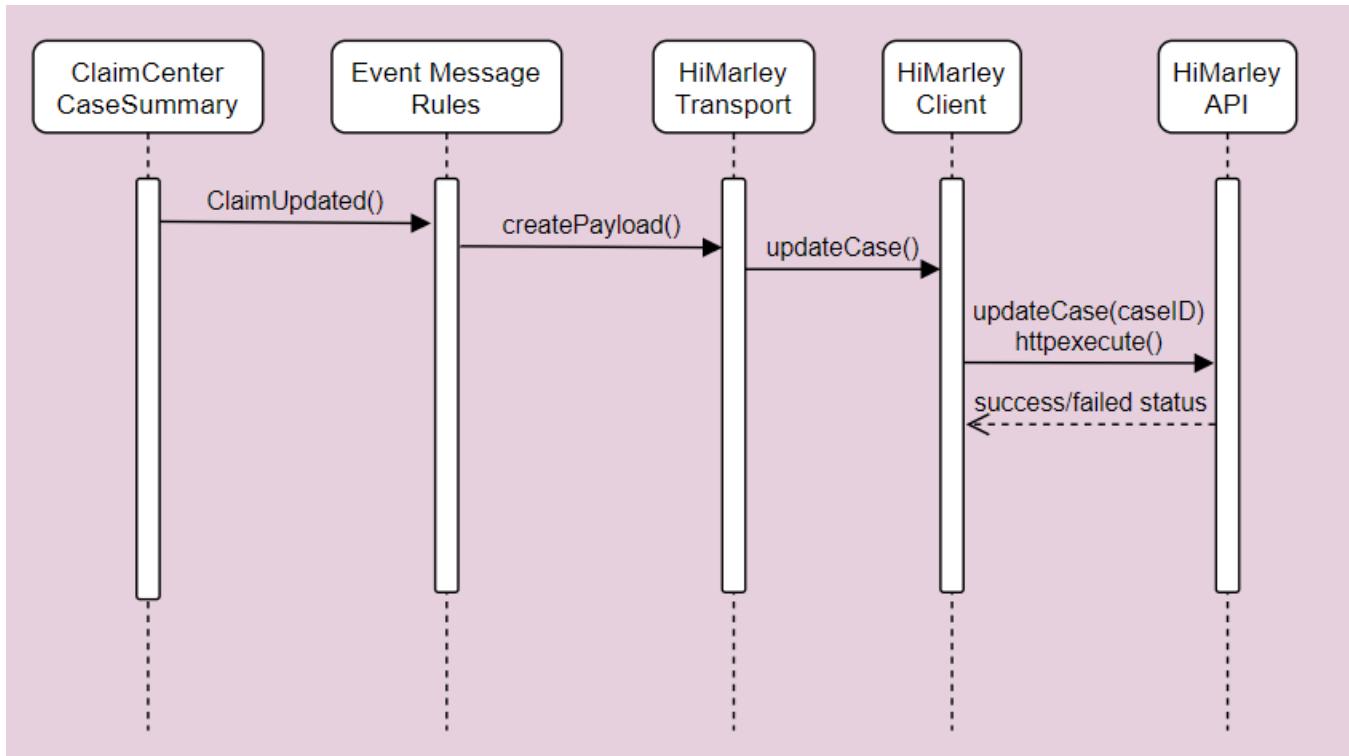
Download transcript – Initiates the download transcript call to save case transcript PDF to ClaimCenter Documents



Claim updates to Hi Marley

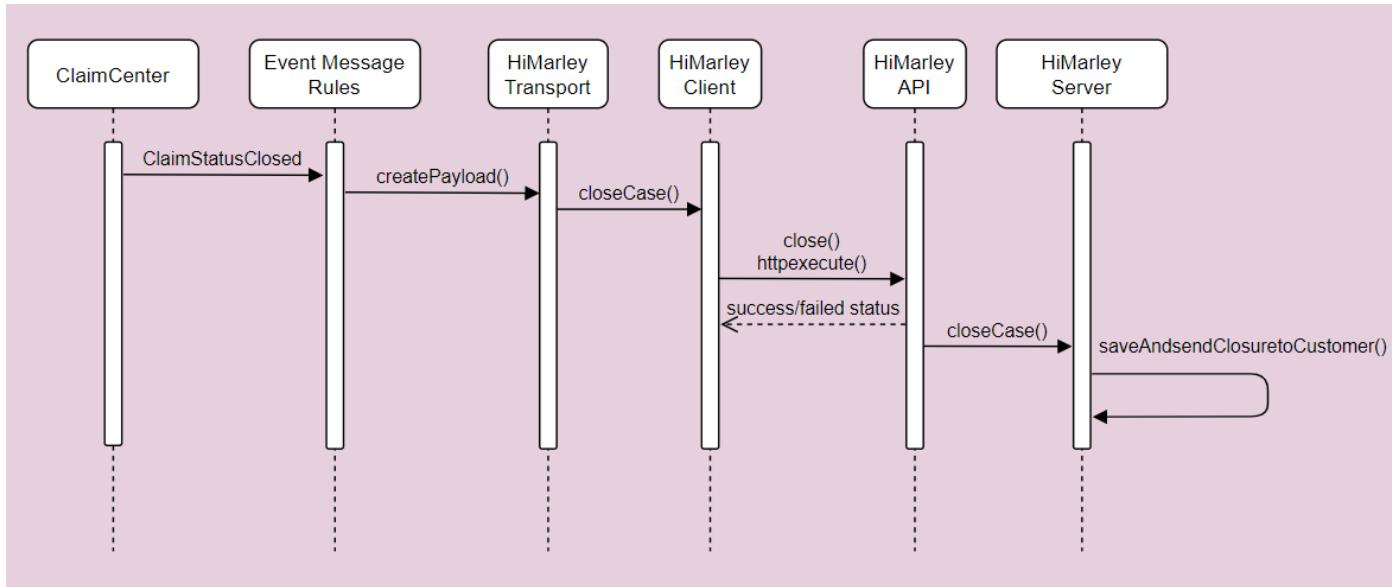
Assign/Reassign operator, Change Privacy, Turning On/Off Auto-Translation, Claimant OptOut Status, and Case Open/Close Status—triggers update to Hi Marley

The body of the request must include a primary Contact and one of email/mobile/id for that identity and the case id which may be required in the url parameter instead.



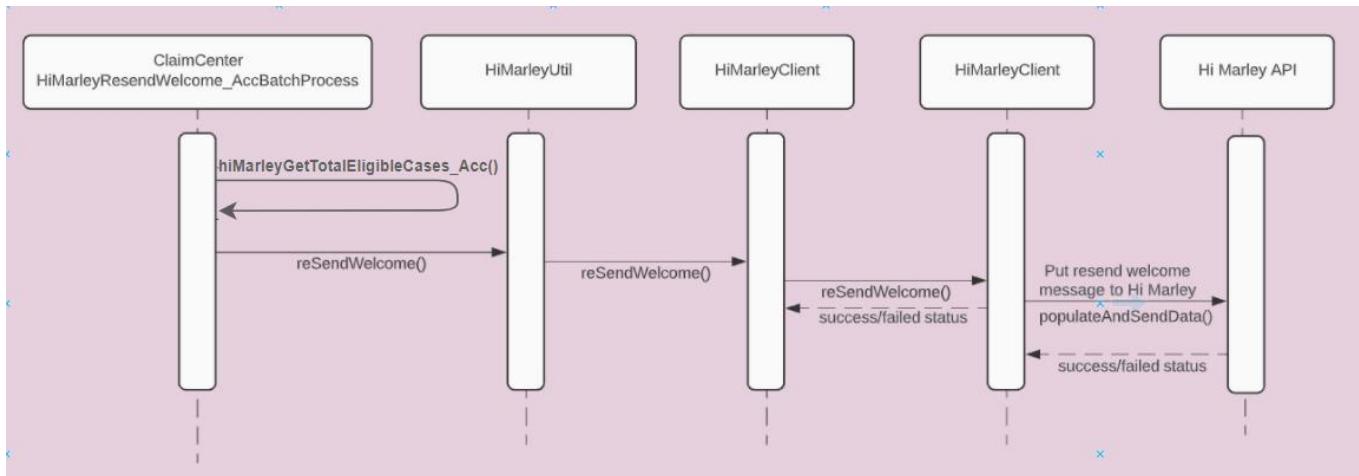
Send Claim Closure updates to Hi Marley

Close case – Once ClaimCenter closes a Claim, Claim Close request is sent to Hi Marley. Hi Marley closes the case in their application.



Automatic Resend Welcome Message to Hi Marley

Automatic Resend Welcome Message – Every period (default to 24 hours), Welcome message request is automatically sent to Hi Marley by batch process. Hi Marley Operator can change the time to resend Welcome message. Resend Welcome message is only sent to Claimants that have not opted in (in the request phase).



View Hi Marley Case transcript document in ClaimCenter

Once Hi Marley Transcript downloading Process is run, it creates a document entity, and attaches the document to Claim. ClaimCenter retrieves the document and displays it under Documents tab along with other documents.

Note: This approach is assuming an OOTB document management solution, and it is for reference only. Carrier must implement their own document management solution

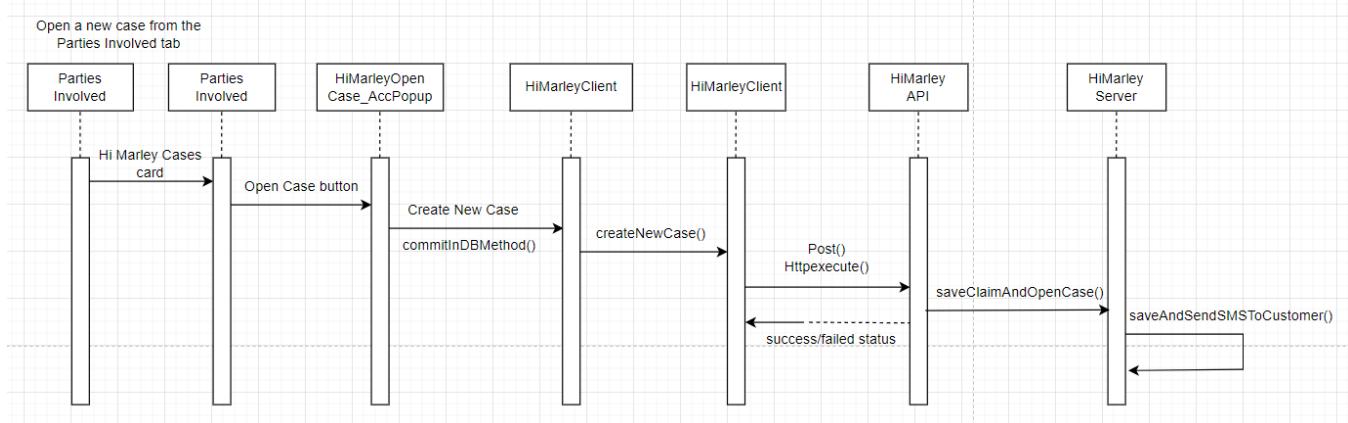
Parties Involved - Contacts - Hi Marley Cases card

To be able to create a Hi Marley case from the Parties Involved tab, make sure the “Parties Involved Tab” checkbox in the Other Features section is checked on the Hi Marley Case Admin Items page:



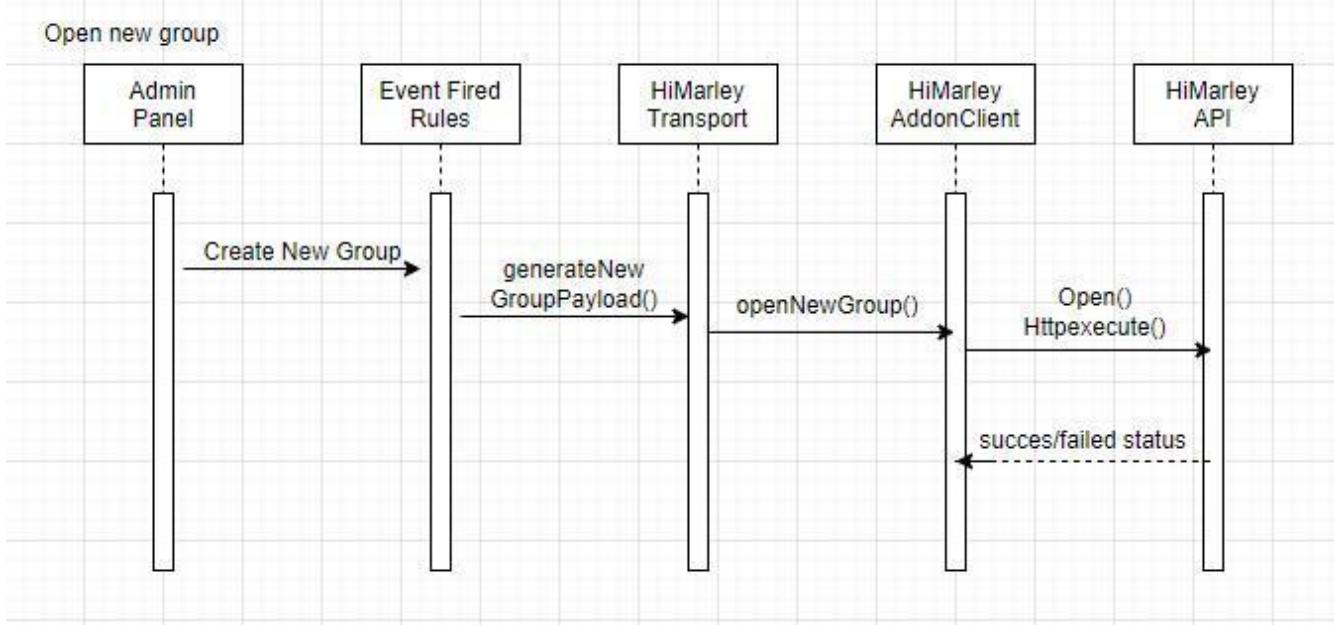
A new Hi Marley case can be opened from an existing Claim from the Parties Involved tab. To do this, a user needs to go to the Parties Involved Tab - Contacts and click the Hi Marley Cases card for the selected contact. If the selected contact doesn't have a Hi Marley case, the user can click the Open Case button. It will open the HiMarleyOpenCase_AccPopup page where all the case details can be filled in. After it's done, clicking the Create New Case button will trigger the commitInDBMethod() which calls the createNewCase() function inside the HiMarleyClient class. Inside this function, a new request is created and sent to the HiMarley API. If the response is successful, a new case is created in Hi Marley as well as in ClaimCenter.

Open Case from an existing Claim from the Parties Involved Tab

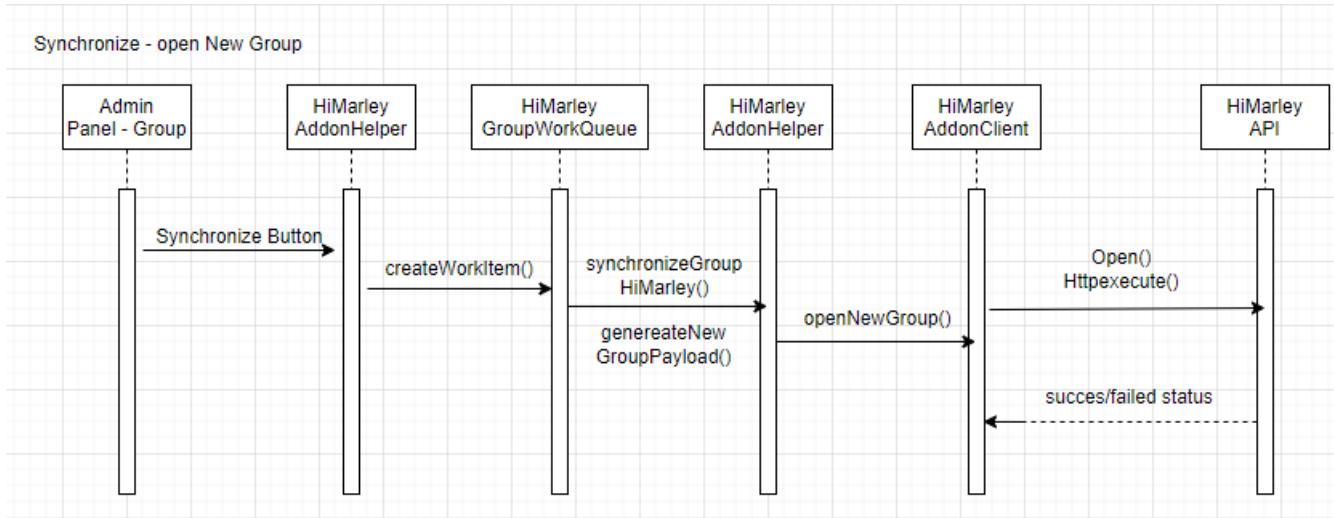


Synchronize groups

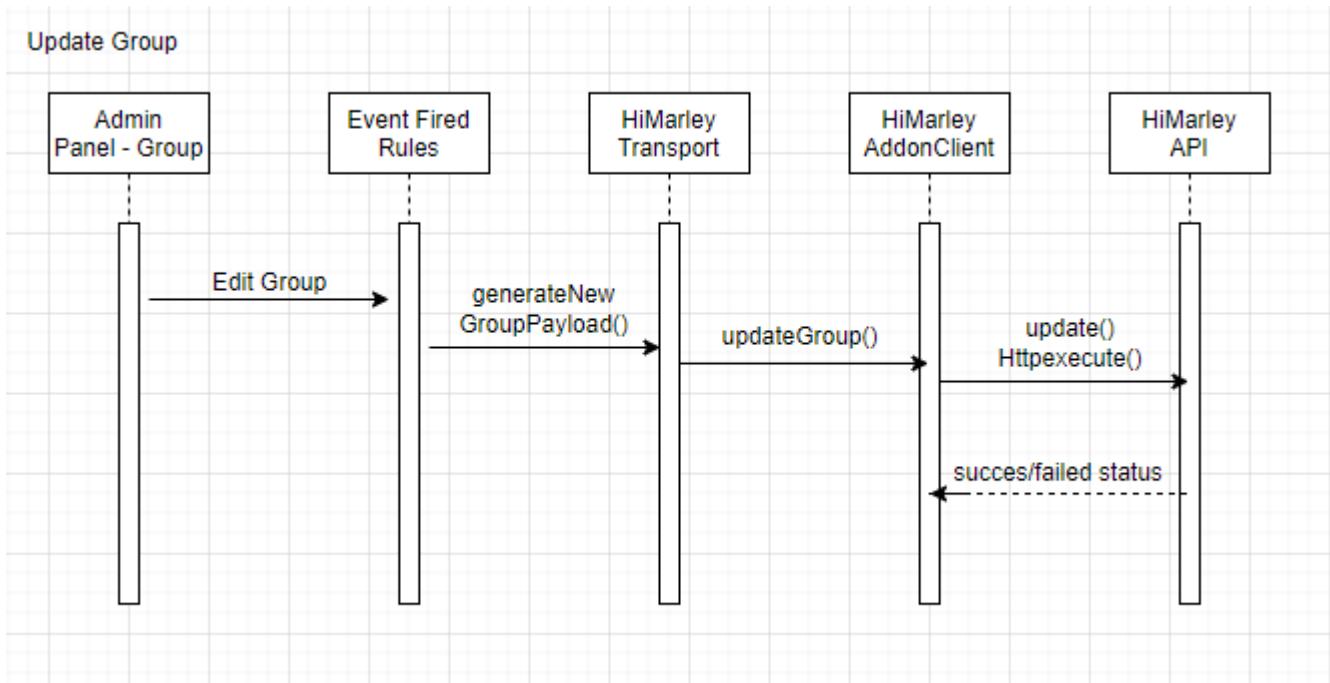
Open new group – When a new group is created in the Claim Center, a group creation request is sent to Hi Marley. Hi Marley creates a new group in their application.



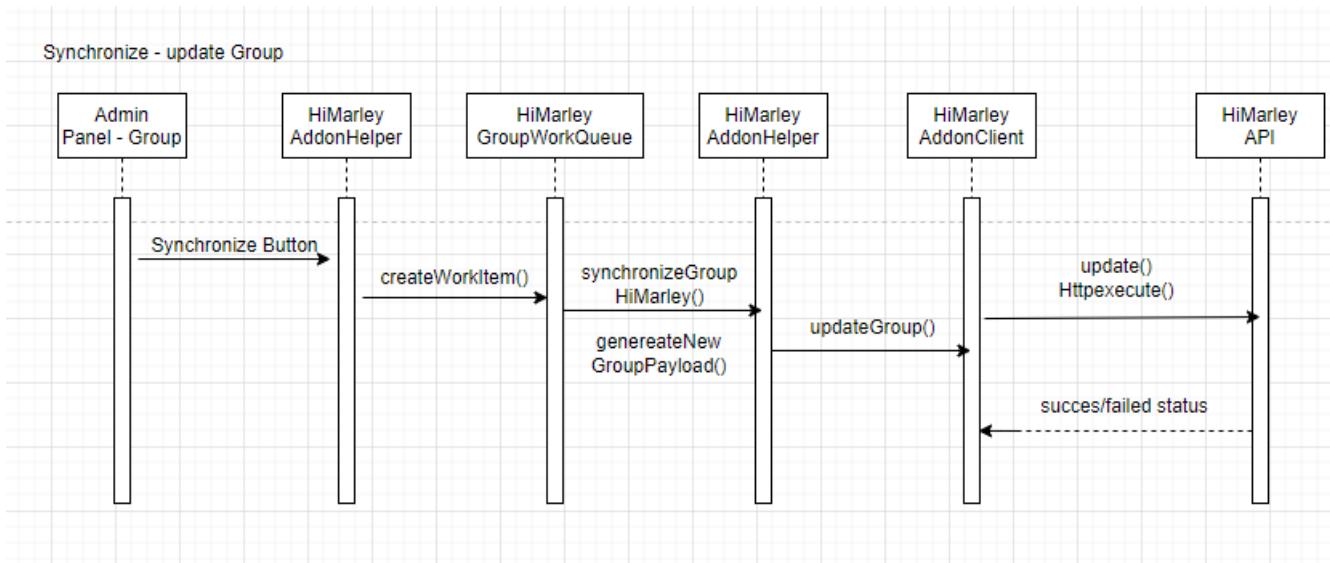
Synchronization - Open new group – For each group which was created in Claim Center and does not exist in Hi Marley, ClaimCenter sends a group creation request to Hi Marley. Hi Marley creates a new group in their application.



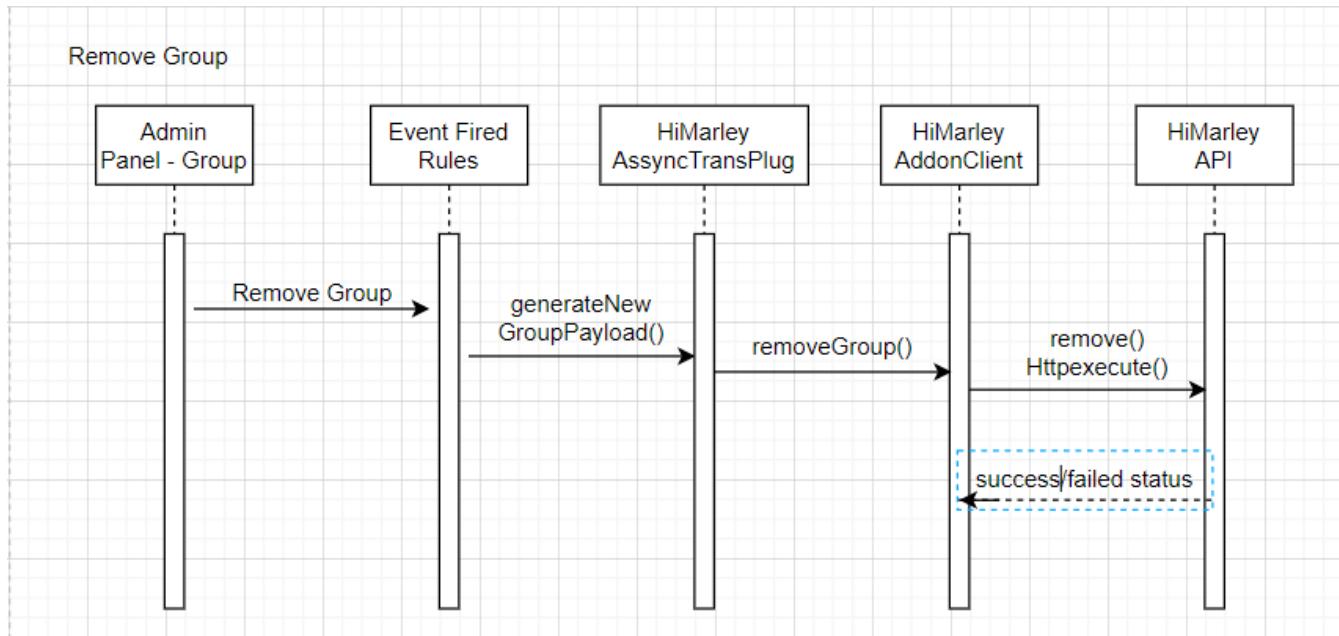
Update group – When a group is updated in the Claim Center, a group update request is sent to Hi Marley. Hi Marley updates a group in their application.



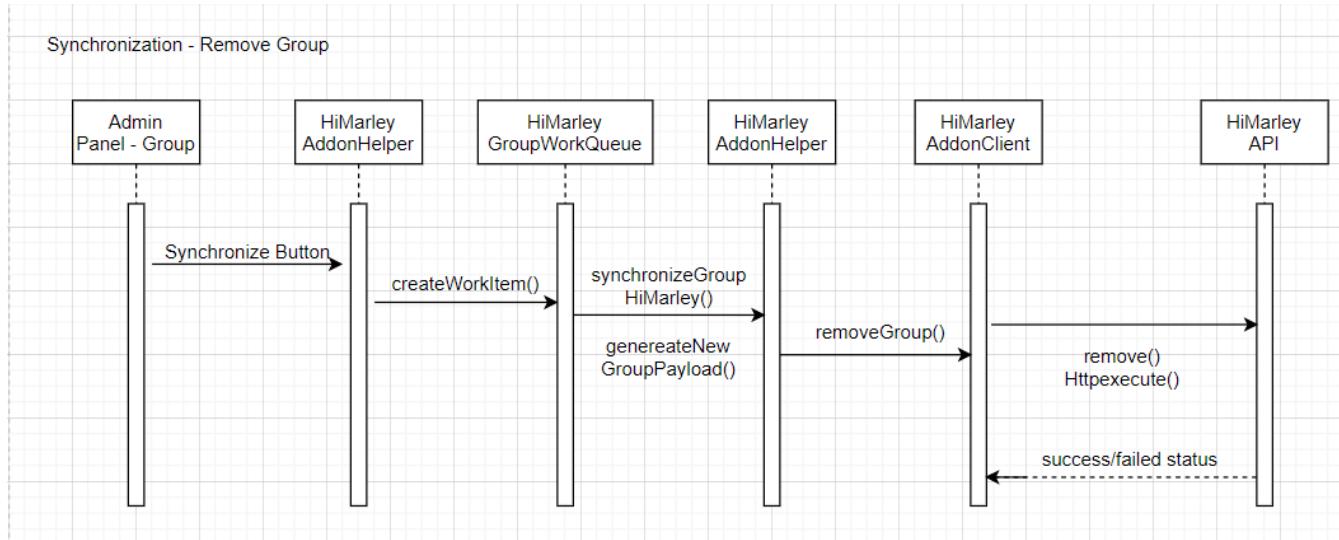
Synchronization - Update group – For each group which exists in Hi Marley and is updated in Claim Center,, ClaimCenter sends a group update request to Hi Marley. Hi Marley updates the group in their application.



Remove Group – Once ClaimCenter closes a Group, or a group doesn't have any active HiMarley users/supervisor, a group removal request is sent to Hi Marley from Claim Center. Hi Marley removes the group from their application.



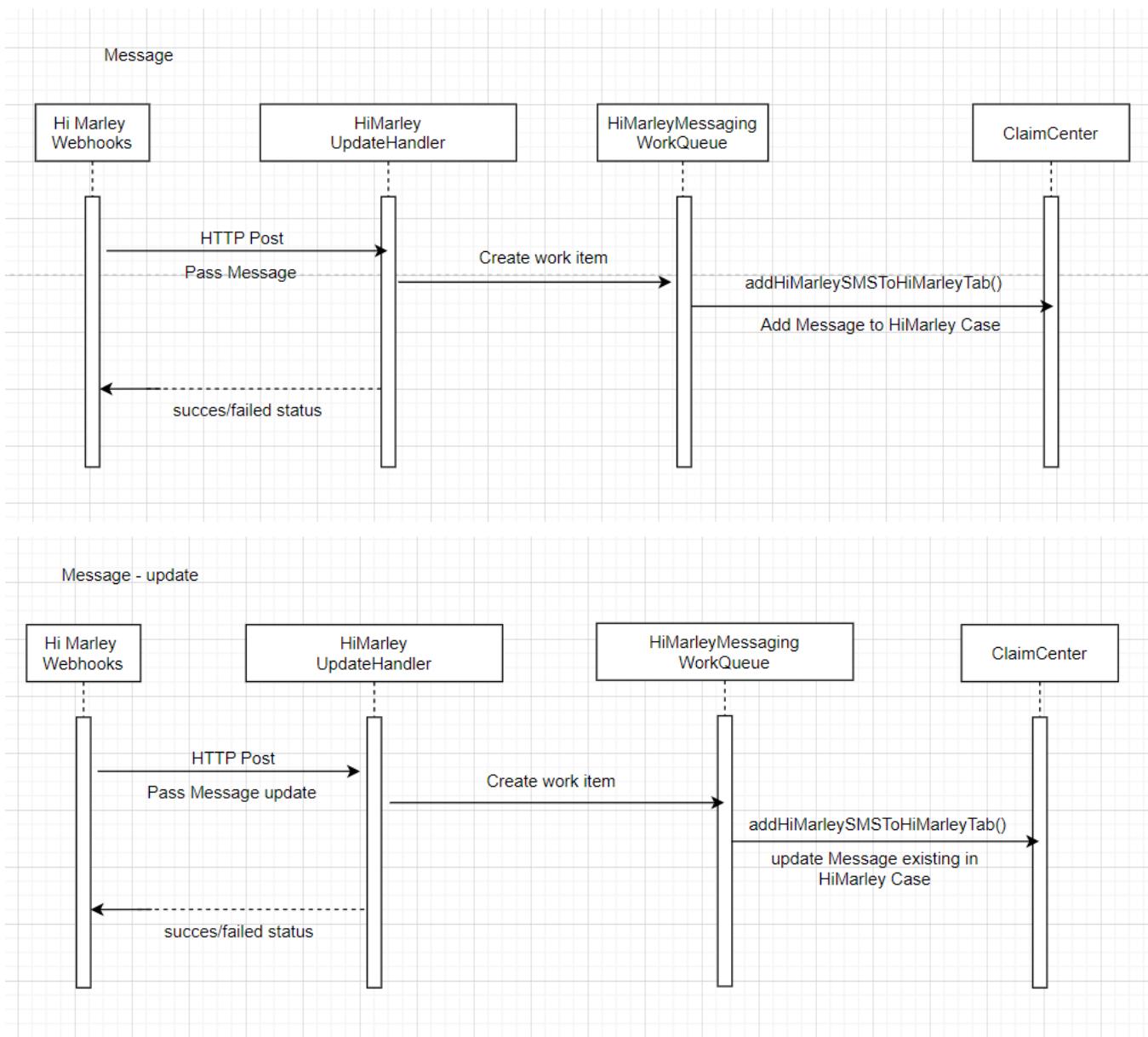
Synchronization - Remove Group – For each group which has been removed from Claim Center or doesn't have Hi Marley users/supervisor, Claim Center sends a group removal request to Hi Marley. Hi Marley removes the group from their application.



Message Alerts

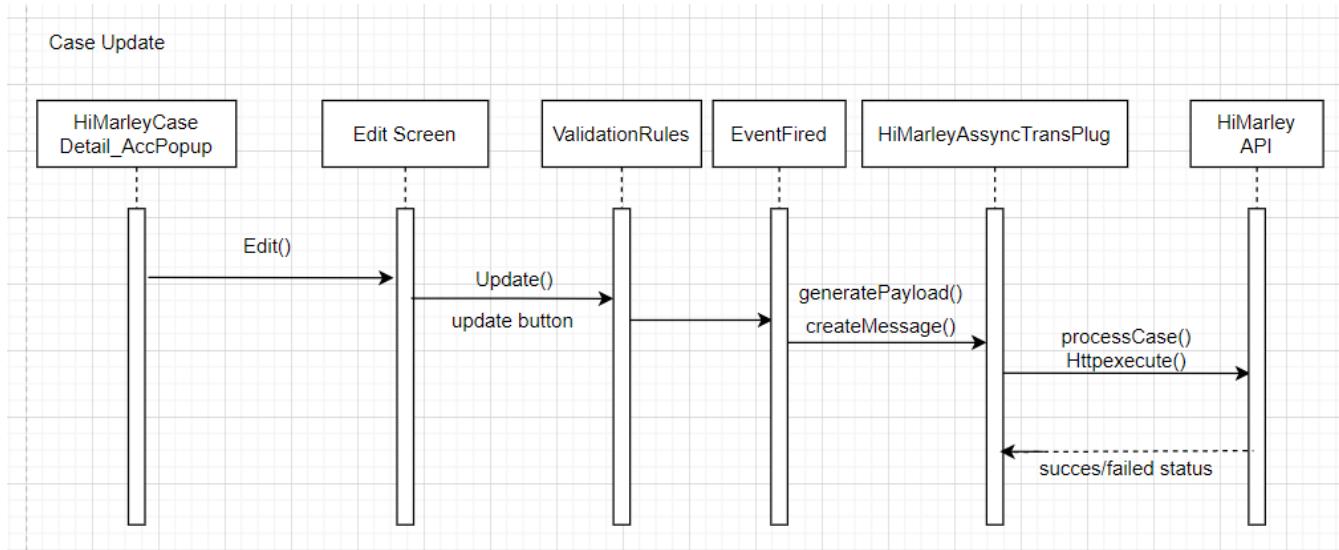
When the client sends the message, there is AI in HiMarley which recognizes if the message needs the attention. Each message is sent to the Claim Center. When the message needs attention, Hi Marley sends the second json with the needs attention flag. The messages can arrive to the Claim Center in the incorrect order (first message with the flag, the

original message), The Claim Center is using a work queue to avoid processing the message and the message update at the same time.

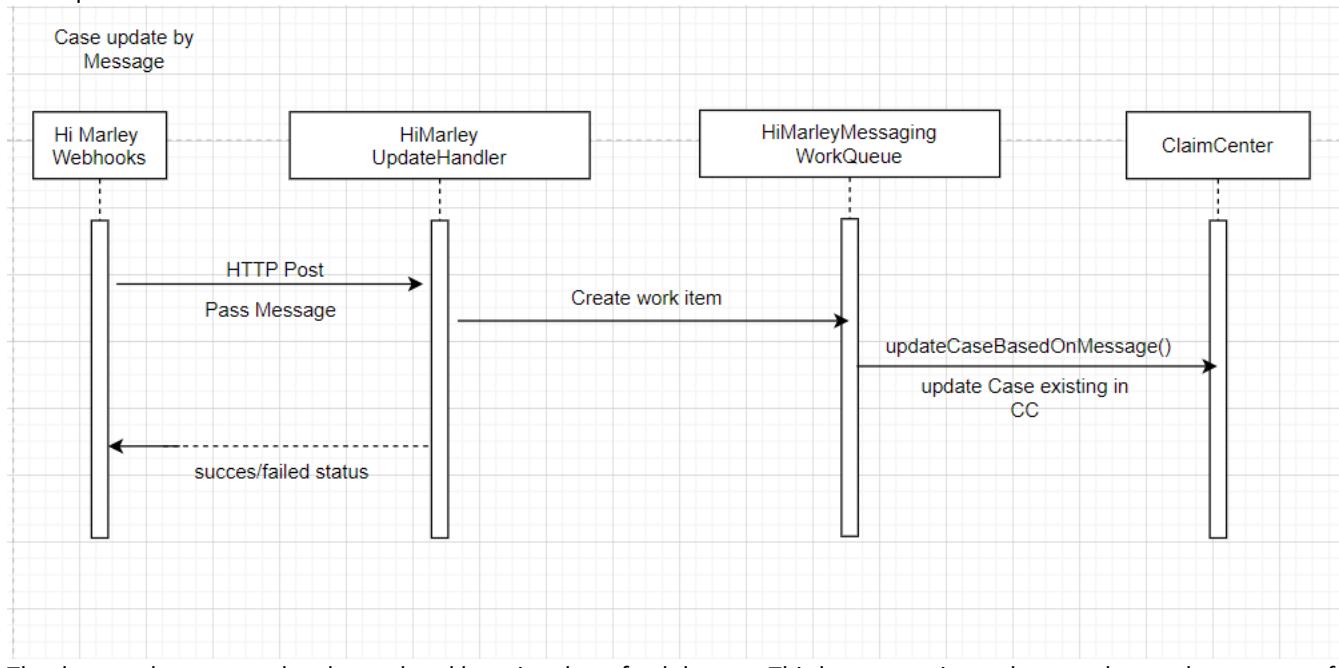


Case synchronization

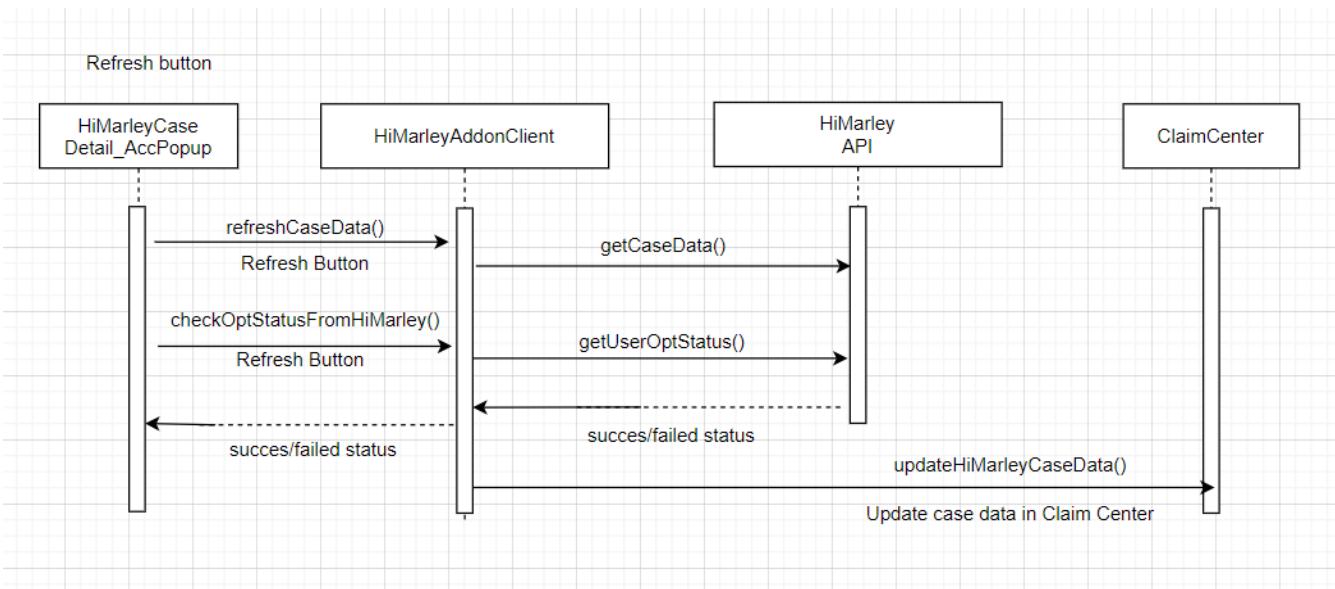
When the case is changed by using the 'Update' button in edit mode, first the data is validated inside ValidationRules, then inside the EventFired the payload and the message is created. If the previous steps are successful, the request is sent to HiMarley with the changes in payload. When the data is correct, the successful request is received from Hi Marley API.



When the SMS is received in the Claim Center, the Hi Marley webhook sends the request to HiMareyUpdateHandler. Inside this class the new work item is created for each message, which is later processed by HiMarleyMessagingWorkQueue. This work queue actualises the data of the case in the Claim Center.



The data on the case can be also updated by using the refresh button. This button retrieves the case data and opt status of the client from Hi Marley chat. When the response is successful, the data on the case is updated in the Claim Center.

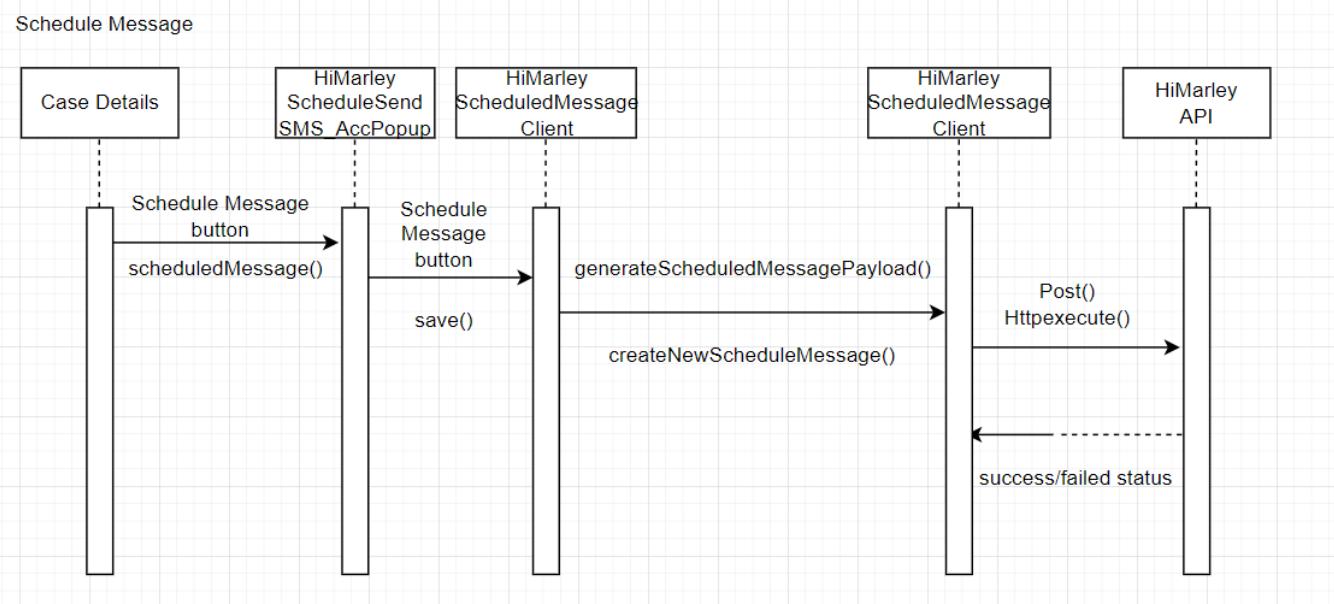


Schedule Message

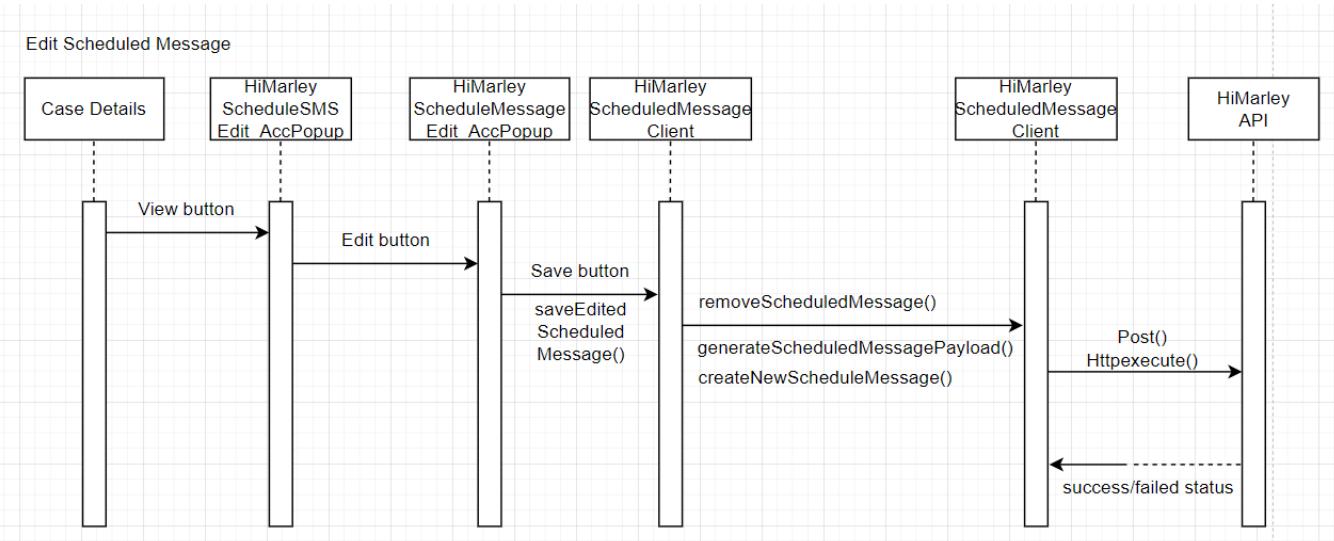
To enable scheduled messages creation and editing, make sure the “Enable Scheduled Messages” checkbox in the Messaging Features section is checked on the Hi Marley Case Admin Items page:

Messaging Features	
Enable Send Message UI	<input checked="" type="checkbox"/>
Enable Send Template	<input checked="" type="checkbox"/>
Enable Scheduled Messages	<input checked="" type="checkbox"/>
Enable Live SMS Update	<input checked="" type="checkbox"/>
Enable SMS Notification	<input checked="" type="checkbox"/>
Enable Live SMS Updates to Notes	<input checked="" type="checkbox"/>

To start creating scheduled messages, the user needs to navigate to the Case Details page, fill in the message field and click the “Schedule Message” button. After that, a new page opens where the message content, date and timezone can be modified. When all these fields are filled in, the user can click the “Schedule Message” button which triggers the `save()` function. This function calls the `generateScheduledMessagePayload()` and `createNewScheduledMessage()` methods inside the `HiMarleyScheduledMessageClient` class. Inside this class, a payload is generated, and a new scheduled message is created. Then the payload is sent to Hi Marley and Hi Marley sends back the success/failed status. If the status is successful, the scheduled message is saved in the HiMarley API and in the ClaimCenter.

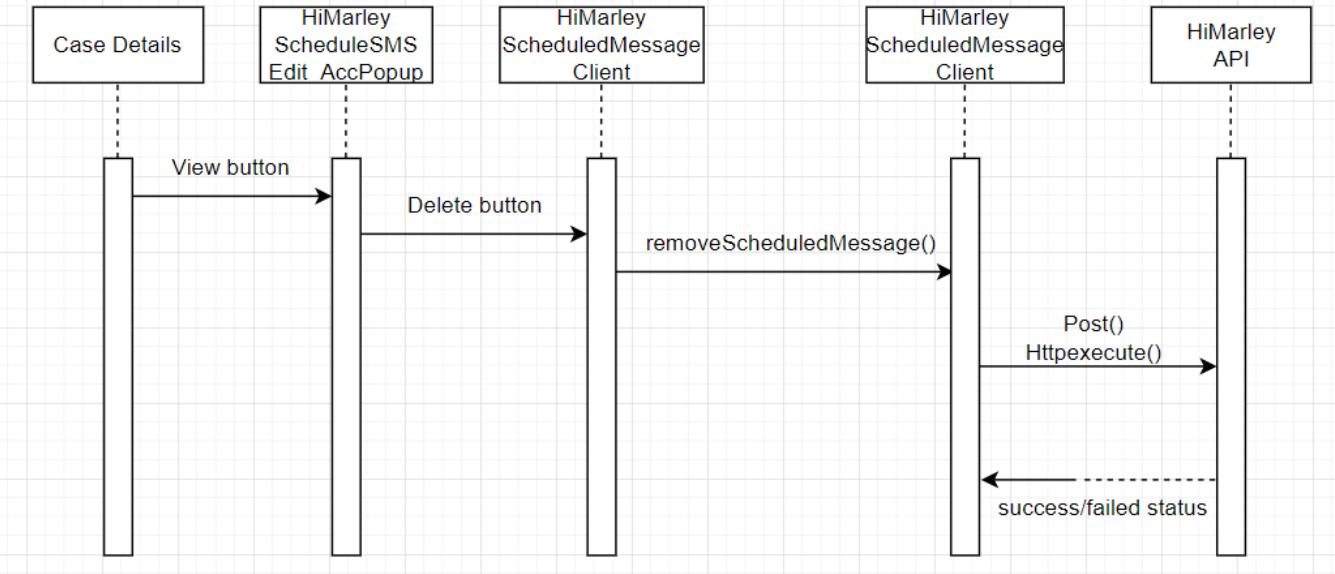


The first step to edit a scheduled message is to go to the Case Details page and click the “View” button next to the Number of Scheduled messages field. This action opens the HiMarleyScheduleSMSEdit_AccPopup page where all the scheduled messages can be found. Next, clicking the “Edit” button next to the message that should be modified will open the HiMarleyScheduleMessageEdit_AccPopup page. Here, after modifying the fields, clicking the “Save” button triggers the saveEditedScheduledMessage() function. This function calls the removeScheduledMessage(), generateScheduledMessagePayload() and createNewScheduleMessage() methods inside the HiMarleyScheduledMessageClient class to remove the existing scheduled message in the HiMarley API and create a new one with the updated data. After receiving the successful status, the scheduled message is also updated in the ClaimCenter.

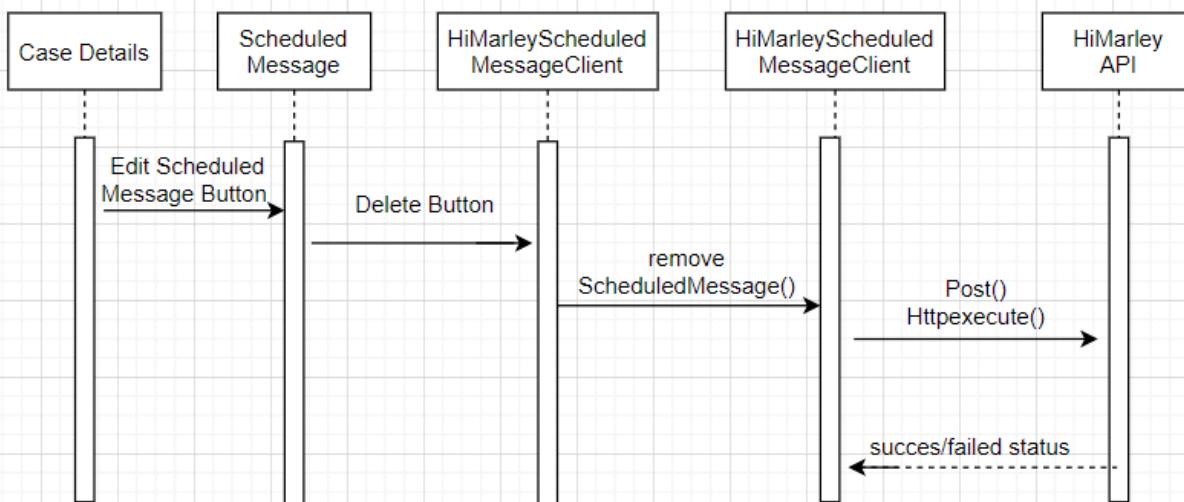


To delete a scheduled message, the user needs to go to the Case Details page and click the “View” button next to the Number of Scheduled messages field. This action opens the HiMarleyScheduleSMSEdit_AccPopup page where all the scheduled messages can be found. Clicking the “Delete” button next to the message that should be removed calls the removeScheduledMessage() method inside the HiMarleyScheduledClient class. This method removes the scheduled message in the HiMarley API and after receiving the successful status, it removes the scheduled message in the ClaimCenter as well.

Delete Scheduled Message



Delete Schedule Message

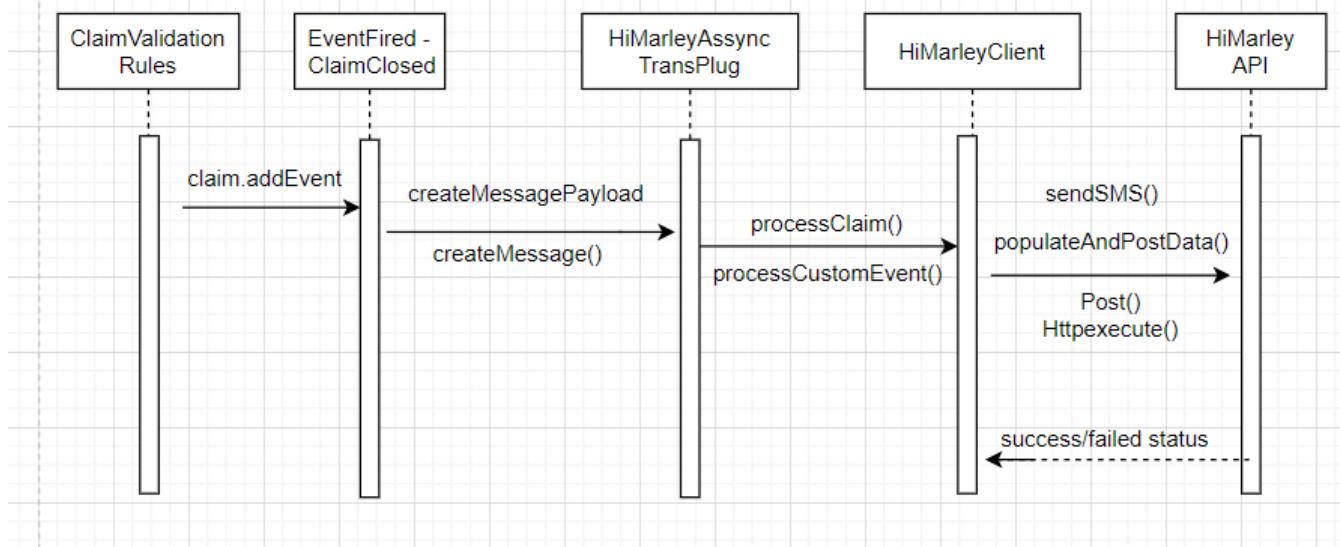


HiMarley Custom Events

Claim Closed

Users can trigger a claim closed event if the event is enabled. It will be done during closing the claim on which there is a case. The template assigned to this event is sent. After triggering the event, the payload will be sent to HiMarley chat. The send message will be visible in Hi Marley Chat. When the message will be received back from the webhook the table with the message in the 'Hi Marley Case Detail' page will be also updated.

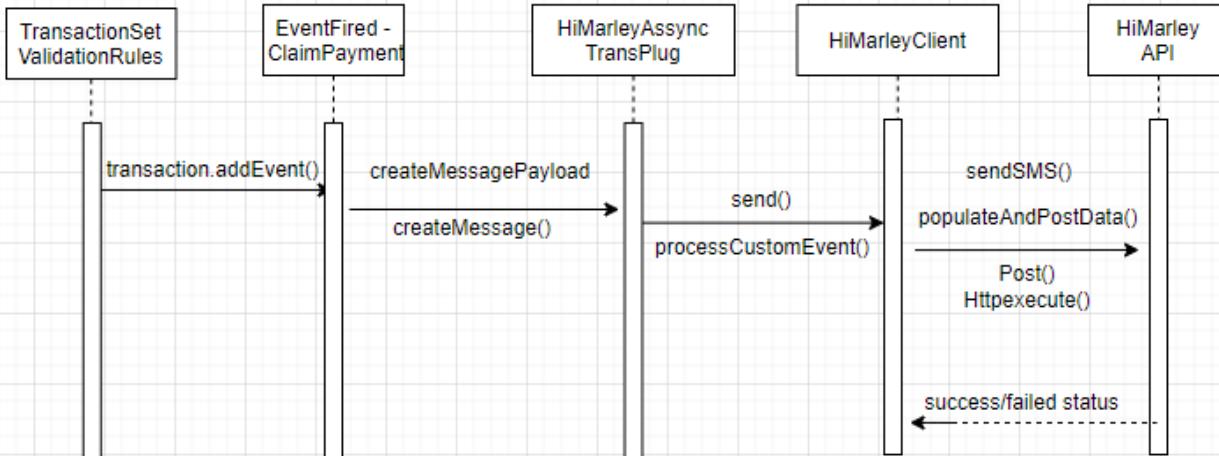
Event Trigger - Claim Closed



Claim Payment

Users can trigger a claim payment event if the event is enabled. If the claim case exists and the user will create a check (payment), the template assigned to this event will be sent. After the event is triggered, the message will be visible in Hi Marley chat. When the message will be received back from the webhook the table with the message in the 'Hi Marley Case Detail' page will be also updated.

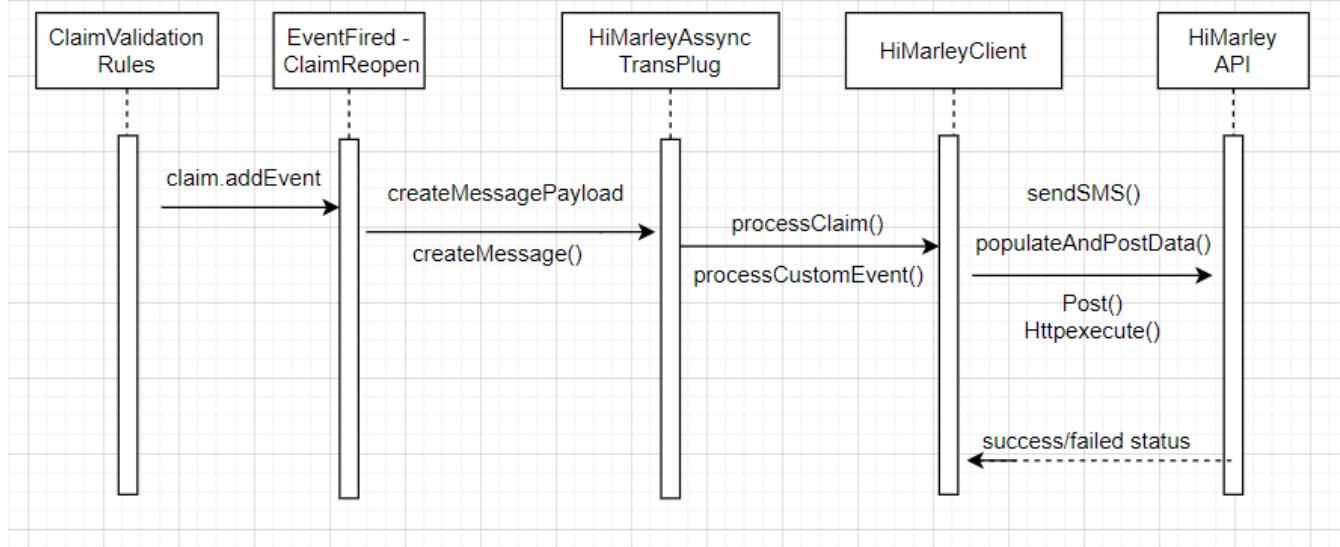
Event Trigger - Claim Payment



Claim Reopen

Users can trigger a claim reopen event if the event is enabled. It will be done during reopening the claim on which there is a case. The template assigned to this event is sent. After triggering the event, the payload will be sent to HiMarley chat. The send message will be visible in Hi Marley Chat. When the message will be received back from the webhook the table with the message in the 'Hi Marley Case Detail' page will be also updated.

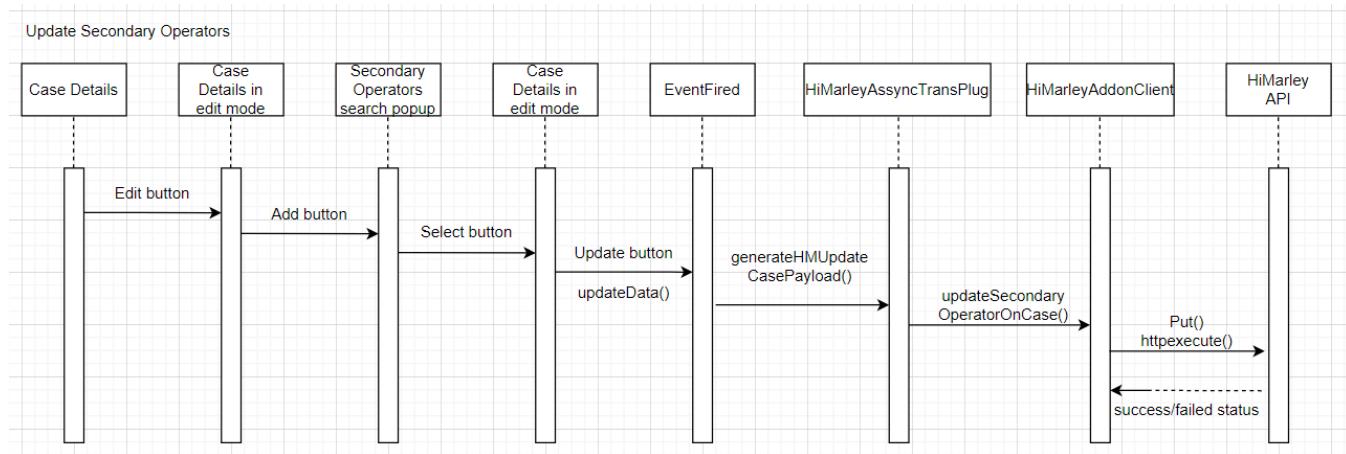
Event Trigger - Claim Reopen



Secondary Operators

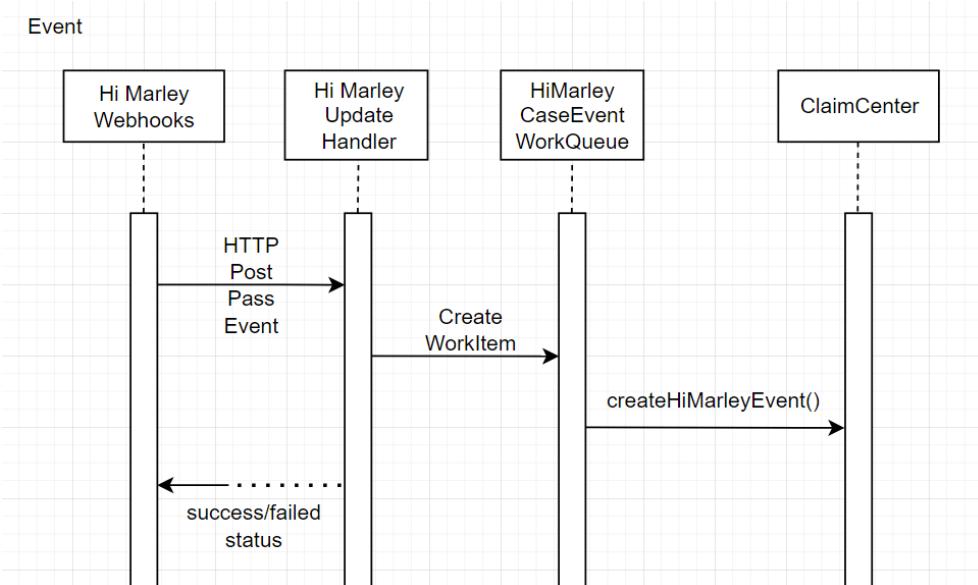
Update secondary operators - the user can update secondary operators for the case by clicking Edit button, selecting new or removing existing secondary operators and pressing Update button. After the Update button is clicked,

methods in HiMarleyAsyncTransPlug and HiMarleyAddonClient classes update information about secondary operators on the case. If the response is successful, secondary operators will be updated in ClaimCenter as well as in HiMarley.



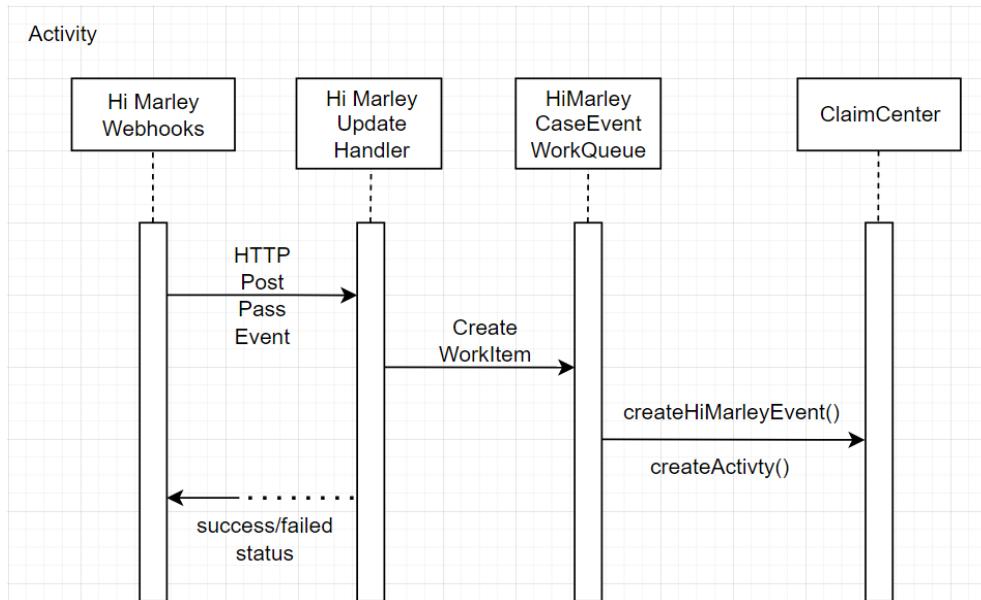
Case Event Integration (Total Loss)

When the event is received in the Claim Center, the Hi Marley Webhook sends the request to HiMareyUpdateHandler. Inside this class the new work item is created for the event, which is later processed by HiMarleyCaseEventWorkQueue. This work queue creates an event and a note in ClaimCenter.



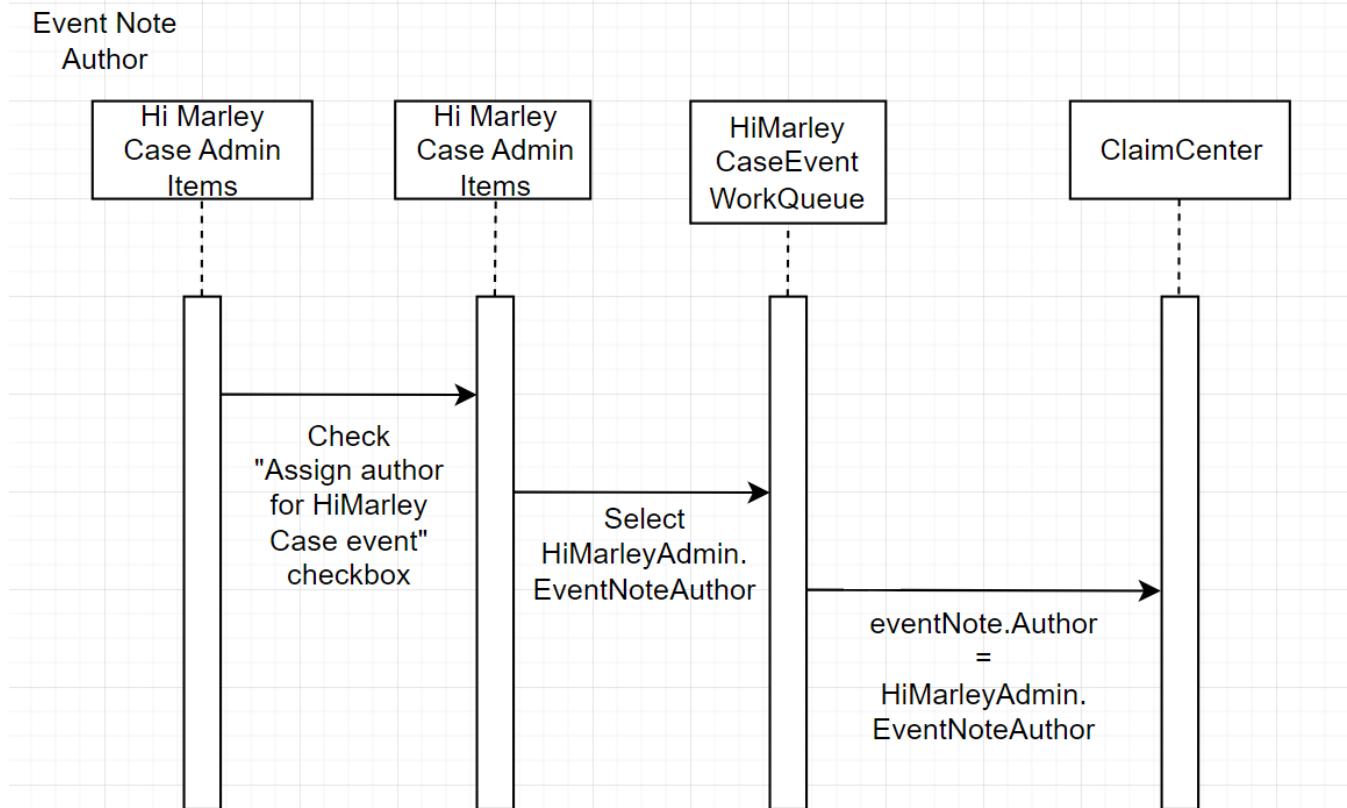
ClaimCenter Activities for Release Issue & Title Issue

When the event is received in the Claim Center, the Hi Marley Webhook sends the request to HiMareyUpdateHandler. Inside this class the new work item is created for the event, which is later processed by HiMarleyCaseEventWorkQueue. This work queue creates an event and activities for specific users in ClaimCenter.



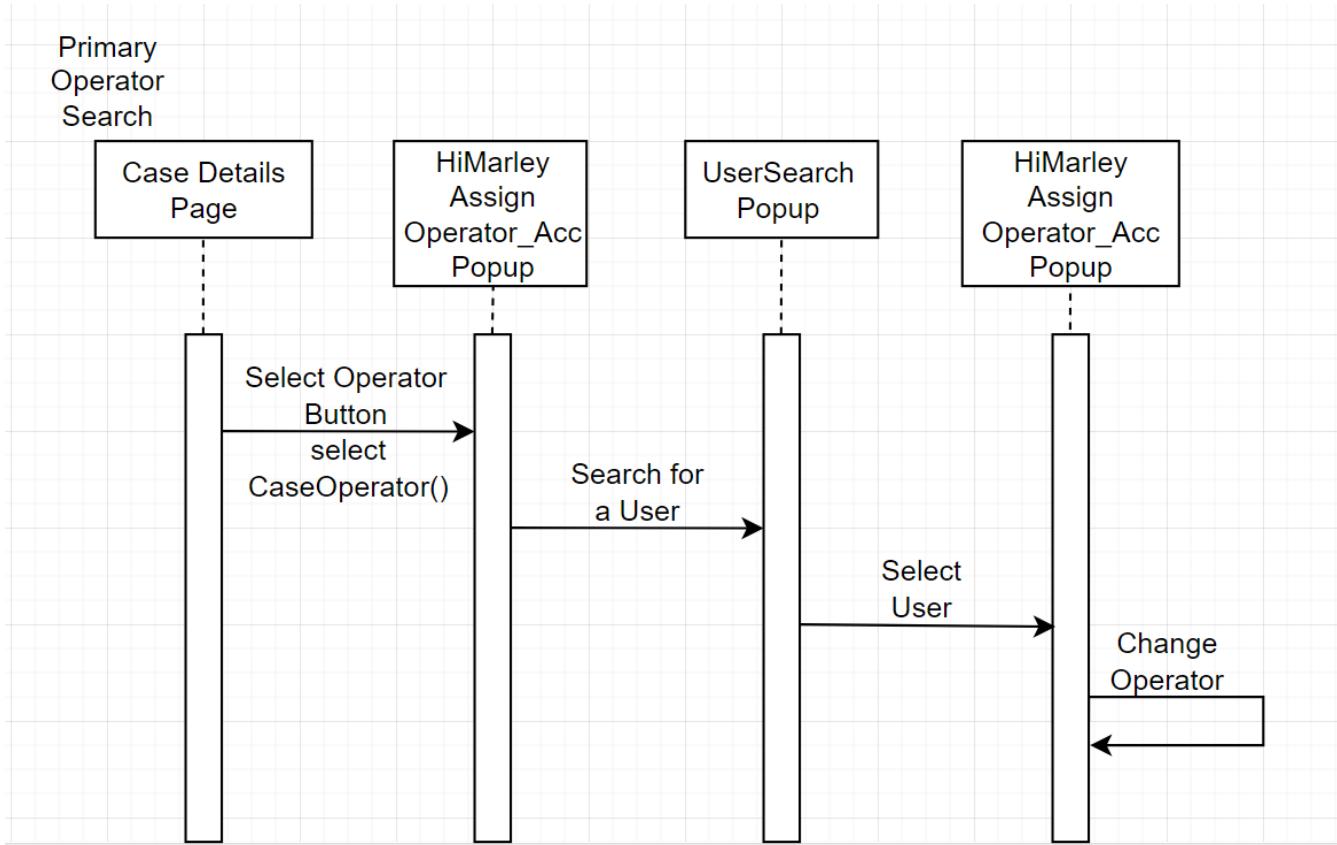
Event Notes Author

When checking the “Assign author for HiMarley Case event” on the Hi Marley Case Admin Items page, the HiMarleyAdmin.AssignAuthorCaseEvent field becomes set to true and a new field becomes visible. In this field, the admin can select/search for a user that will be assigned as event note author. This user will be set as a value for HiMarleyAdmin.EventNoteAuthor. Next, in HiMarleyCaseEventWorkQueue class, we check if HiMarleyAdmin.AssignAuthorCaseEvent is set to true. If it is true, the HiMarleyAdmin.EventNoteAuthor is set as a value for eventNote.Author.



Improved Search for Primary Operators

When clicking the Select Operator button on Case Details page, it fires the selectCaseOperator function. This function invokes HiMarleyAssignOperator_AccPopup page. There are 2 options of operator selection: from a predefined list with users within one group or from user search. By clicking the Search for User button, it opens the UserSearchPopup page where users can search for an operator from different groups. After selecting the user, we go back to HiMarleyAssignOperator_AccPopup, where we can confirm and set the selected user as a primary operator of the case by clicking the Change Operator button.



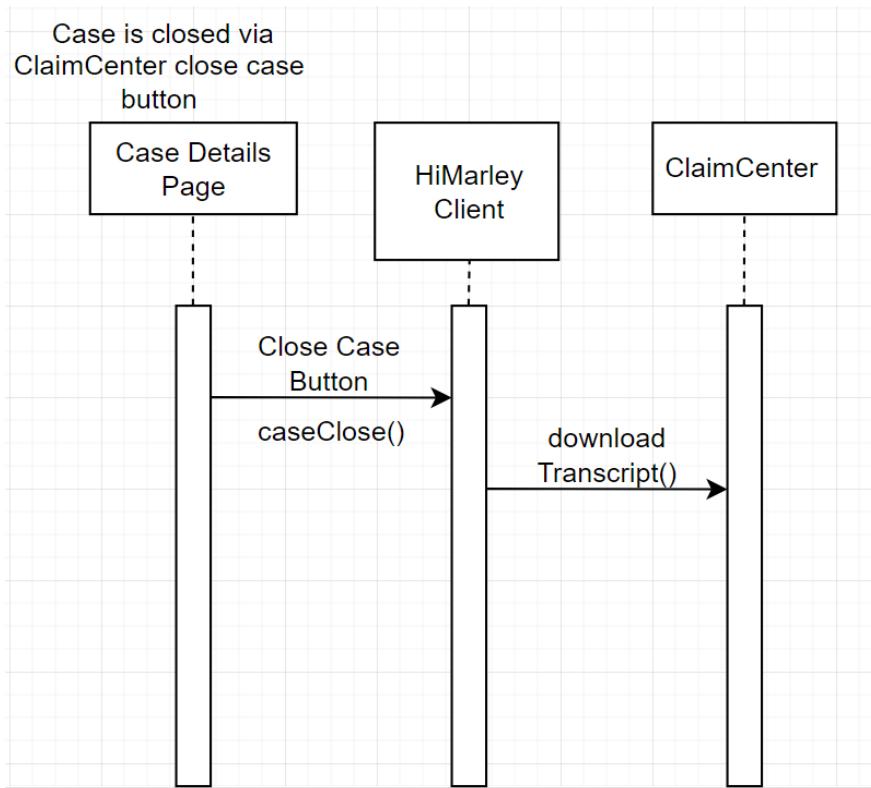
Download Transcript when Hi Marley Case is closed

There are 3 ways to close a case: via ClaimCenter close case button, via ClaimCenter Claim Closure (which triggers HM case closure API) and Webapp (which triggers a webhook).

When a Hi Marley case is closed by any method, the PDF transcript will be downloaded in the ClaimCenter Documents.

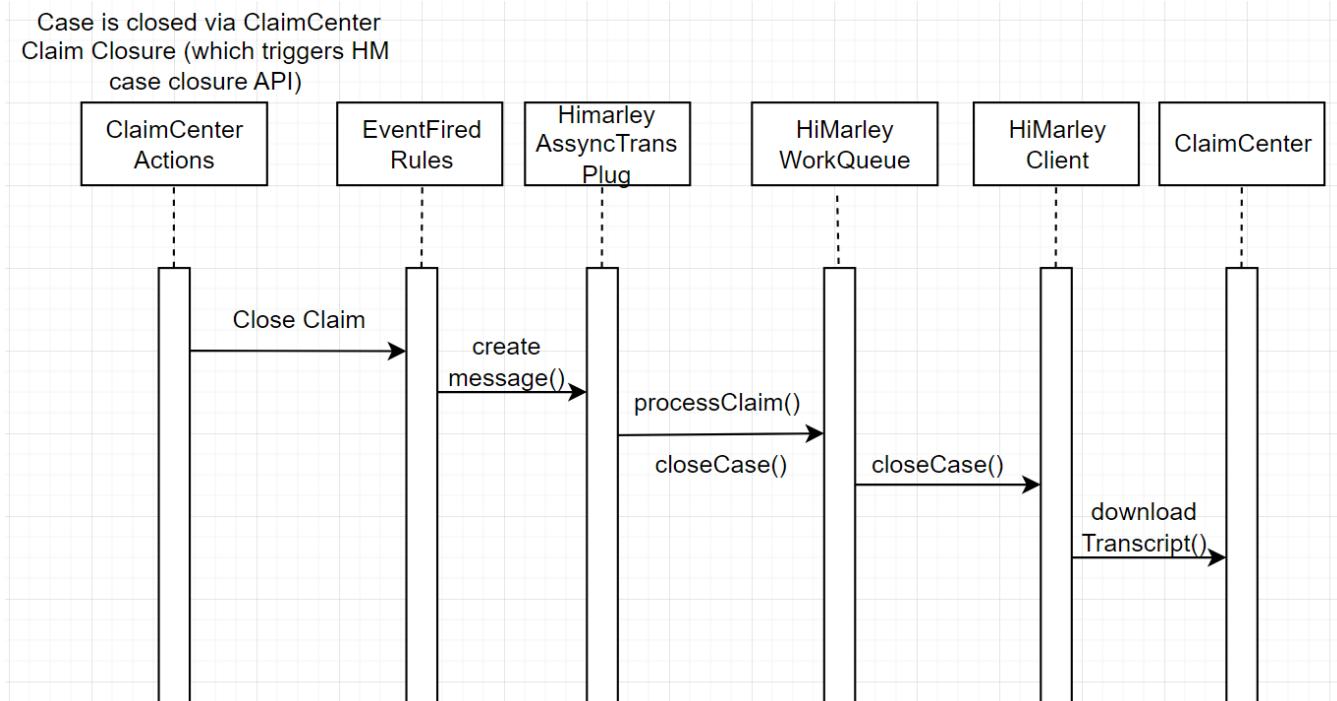
Download transcript when the case is closed via ClaimCenter close case button:

When clicking the Close Case button in Case Details page, it fires a `caseClose()` method. This method leads to `HiMarleyClient` class which has a `downloadTranscript` method which creates and saves the transcript under the Documents section in ClaimCenter.



Download transcript when the case is closed via ClaimCenter Claim closure:

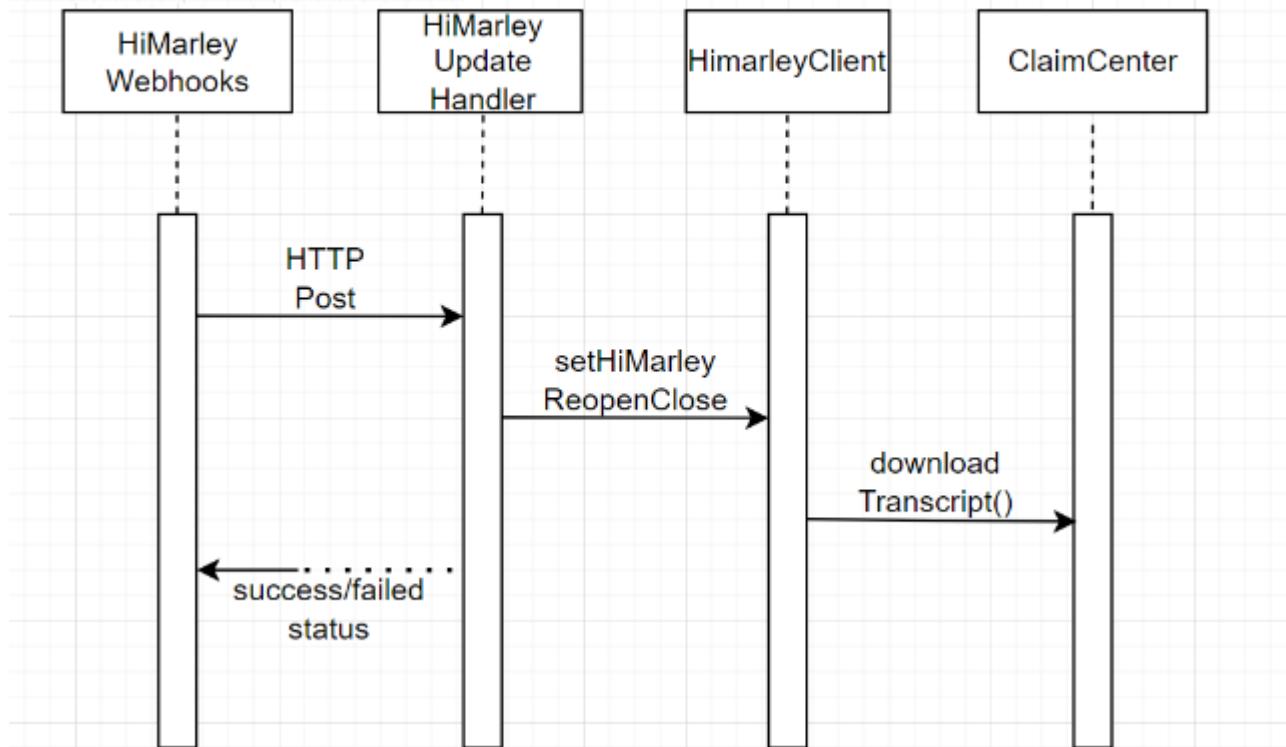
When closing a case from ClaimCenter Actions, it triggers the Claim Changed EventFired Rule which creates a message with Case Closing description. After that, HiMarleyAsyncTransPlug runs the processClaim and closeCase method. Inside this method, a new work item is created for the case closure, which is later processed by HiMarleyWorkQueue. This work queue closes the case and triggers the downloadTranscript method in HiMarleyClient class which creates and saves the transcript under the Documents section in ClaimCenter.



Download transcript when the case is closed via Webapp (which triggers a webhook):

When the case closure update is received in the Claim Center, the Hi Marley Webhook sends the request to HiMareyUpdateHandler. Inside this class, there's a setHiMarleyReopen method that fires the downloadTranscript method which creates and saves the transcript under the Documents section in ClaimCenter.

Case is closed via Webapp (which triggers a webhook)

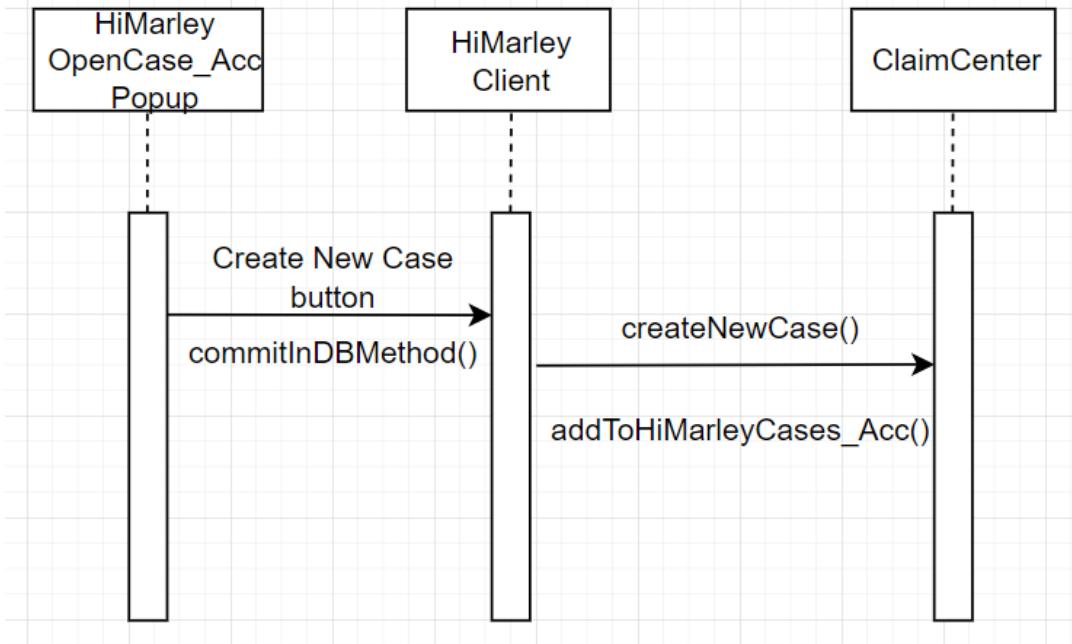


Duplicated Case Handling

When a user clicks the Create New Case Button on HiMarleyOpenCase_AccPopup page, it runs the `commitInDBMethod()`.

This method triggers the `createNewCase()` function inside the `HiMarleyClient` class. Inside this function, we check if there's any error from the Hi Marley server. If there's an error with code 400, we check if this error message contains data about case duplication. If this data is provided, the next step is to check whether the duplicated case exists in the ClaimCenter database. If the case is found in the ClaimCenter database, it won't be created there. But if the case is not found in the ClaimCenter database, it will be created and added to the claim cases.

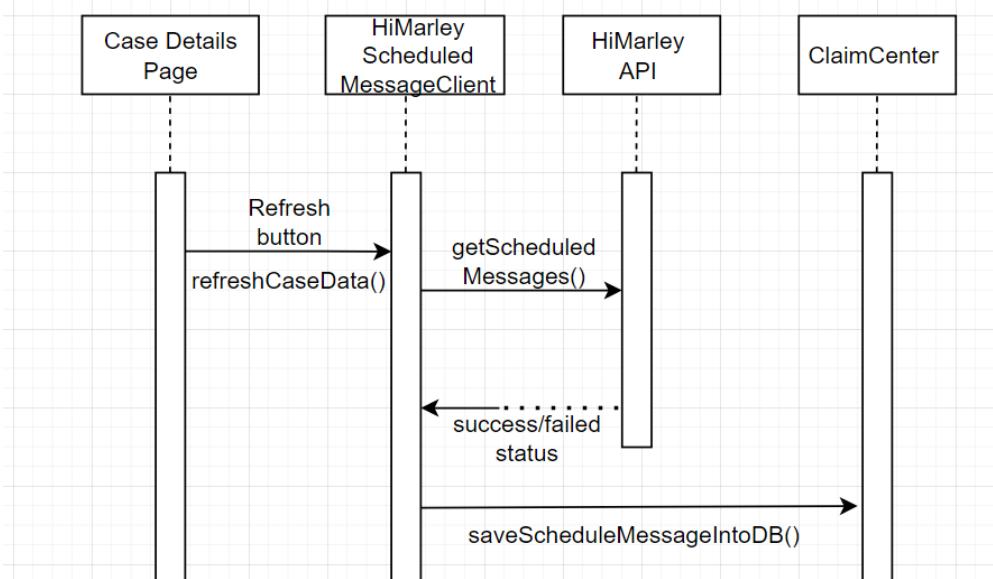
Duplicated Case Handling



Improve GET Scheduled Messages Polling

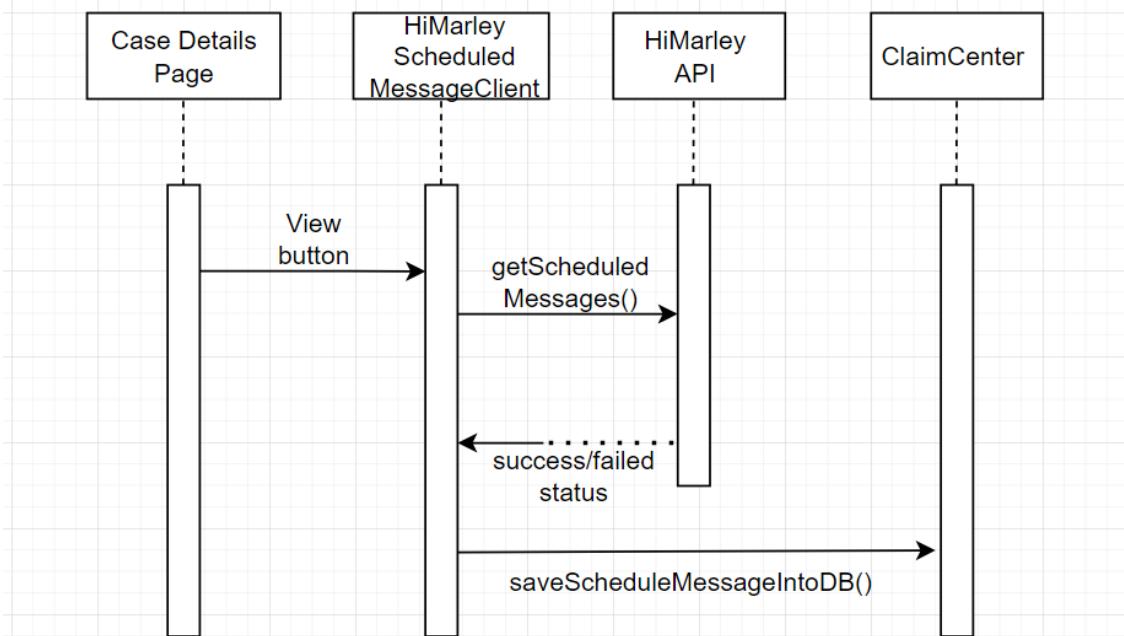
- When a user clicks the Refresh button on the Hi Marley Case Details page, it runs the `refreshCaseData()` function. This function triggers several methods and one of them is `getScheduledMessages()` inside the `HiMarleyScheduledMessageClient` class. This method gets scheduled messages from the Hi Marley server and saves them in the ClaimCenter database. After that, the user can see the updated number of scheduled messages on Hi Marley Case Details page and check them by clicking the View button.

ClaimCenter gets scheduled messages when clicking Refresh button

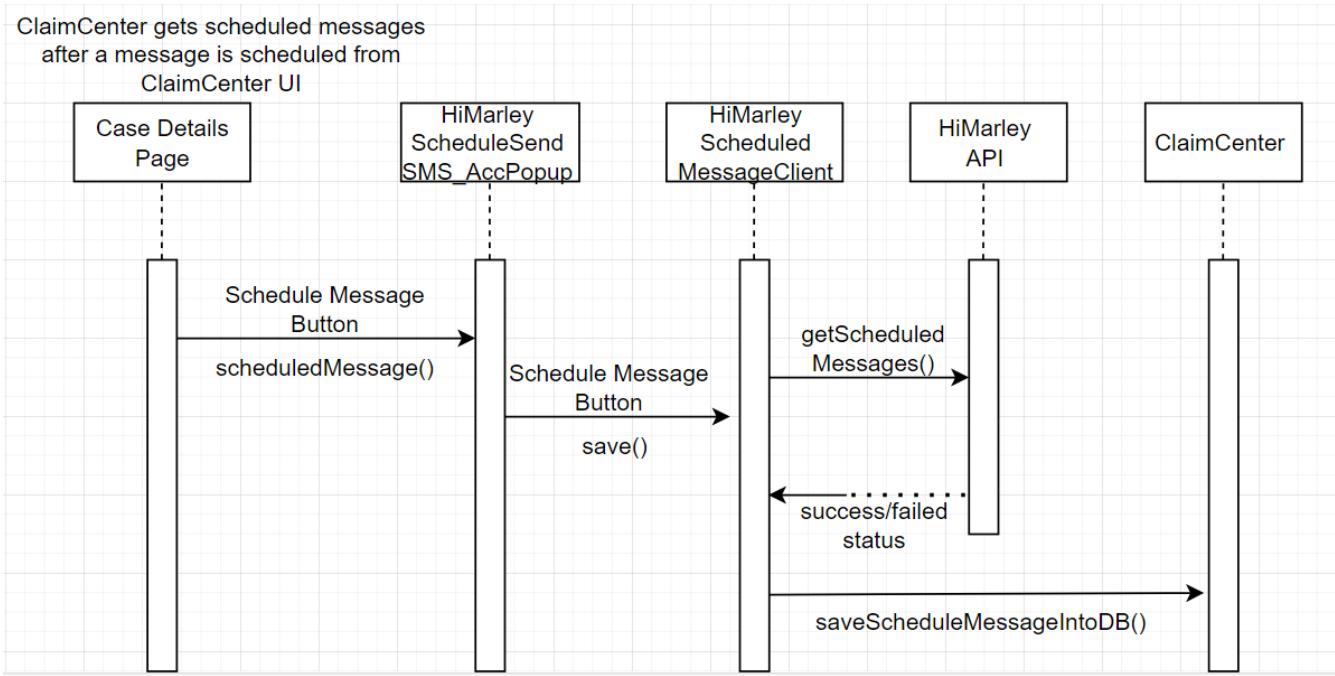


- Another option to get scheduled messages from Hi Marley - clicking the View button on Hi Marley Case Details page. It opens the HiMarleyScheduleSMSEdit_AccPopup page, but before that it calls the `getScheduledMessages()` method inside the `HiMarleyScheduledMessageClient` class. This method gets scheduled messages from the Hi Marley server and saves them in the ClaimCenter database. So, the `HiMarleyScheduleSMSEdit_AccPopup` page opens with the updated scheduled messages received from the Hi Marley server.

ClaimCenter gets scheduled messages when clicking View button



- Scheduled messages can be also received right after scheduling a message from ClaimCenter UI. When clicking the Schedule Message button on Hi Marley Case Details page, the `HiMarleyScheduleSendSMS_AccPopup` page opens. Here, all the required fields must be filled before proceeding. After that, when clicking the Schedule Message button, it fires the `save()` method which creates a new scheduled message and calls the `getScheduledMessages()` method inside the `HiMarleyScheduledMessageClient` class. This method gets scheduled messages from the Hi Marley server and saves them in the ClaimCenter database. So, after creating a new scheduled message and going back to the Hi Marley Case Details Page, a new number of scheduled messages will be displayed, and the user can check them by clicking the View button.



Integrate Brand & Line Of Business

First, to enable sending brand and/or lines of business to Hi Marley, make sure the corresponding checkboxes are checked on the Hi Marley Admin Items page.

Hi Marley Case Admin Items

HiMarley Admin Flag Feature

Case Creation Features

- Enable Brand
- Enable Lines Of Business

Override to Single Brand

Brand to Be Overwritten

Lovable Insurance

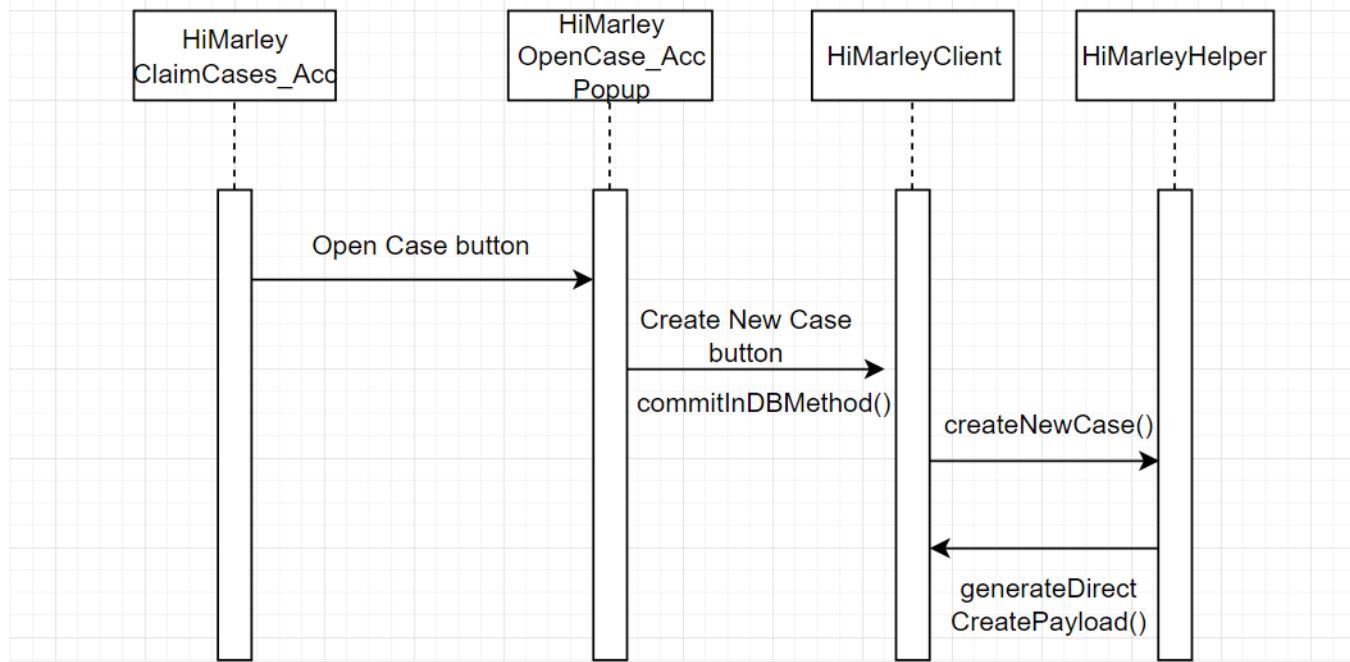
- Enable Brand: to send brands to Hi Marley
- Enable Lines Of Business: to send lines of business to Hi Marley (cannot be checked if Enable Brand is unchecked)
- Override to Single Brand: to enable overriding to a single brand
- Brand to Be Overwritten: to set a brand for override

Enable Brand and Line of Business by opening a case from the Hi Marley Cases tab

One of the ways to create a case is to go to the Hi Marley Cases tab and click the Open Case button. This action redirects to the Open Case page where all the needed data can be filled in. After that, clicking the Create New Case button triggers the `commitInDBMethod()` which calls the `createNewCase()` method inside the `HiMarleyClient` class. In turn, the `createNewCase()` method calls the `generateDirectCreatePayload()` in the `HiMarleyHelper` class. This function checks the values of Enable Brand, Enable Lines Of Business and Override to Single Brand checkboxes and

the Brand to Be Overwritten field. Based on the results, the corresponding data will be added to the payload, which is further processed in the `createNewCase()` method inside the `HiMarleyClient` class.

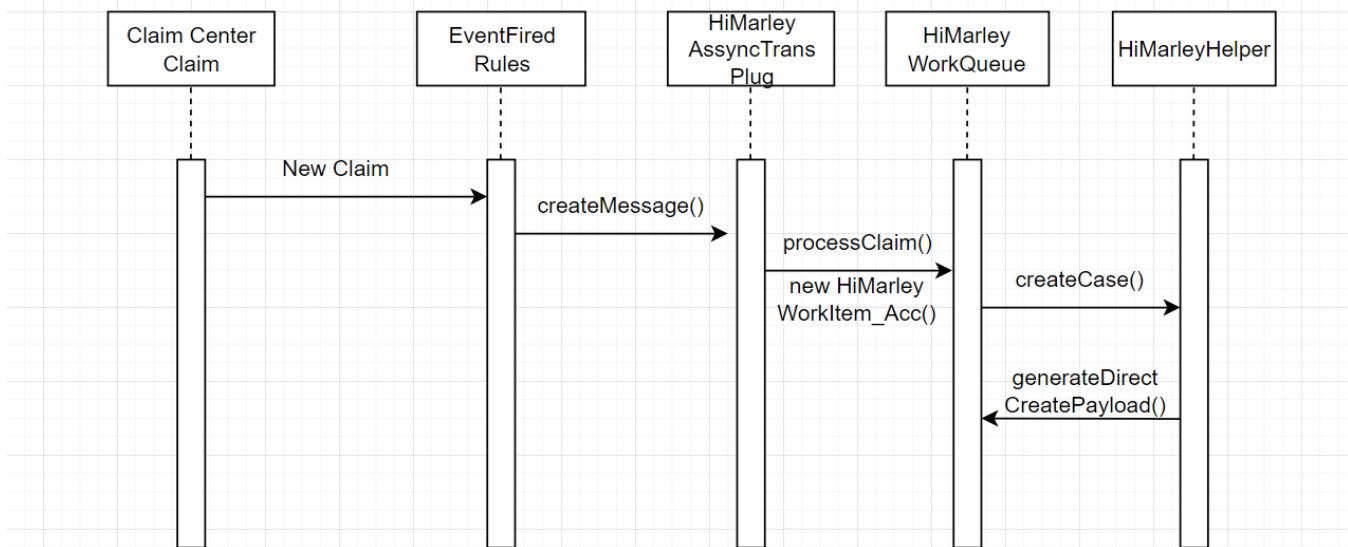
Enable Brand and Line of Business
by opening a case from the Hi
Marley Cases tab



Enable Brand and Line of Business by creating a case during the claim creation

The second way to create a case is to check the Enroll in Hi Marley Texting checkbox during the claim creation. After the claim is created, the Claim Changed EventFired Rule creates a message with Case Opening description. Next, `HiMarleyAssyncTransPlug` runs the `processClaim()` method and creates a new work item for case opening, which is later processed by the `HiMarleyWorkQueue` class. This class calls the `createCase()` method which calls the `generateDirectCreatePayload()` function inside the `HiMarleyHelper` class. This function checks the values of Enable Brand, Enable Lines Of Business and Override to Single Brand checkboxes and the Brand to Be Overwritten field. Based on the results, the corresponding data will be added to the payload, which is further processed in the `createCase()` method inside the `HiMarleyWorkQueue`.

Enable Brand and Line of Business by creating a case during the claim creation



Integration Components

Messaging

Hi Marley Outbound Integration

- Uses Message Transport and event fired mechanism to send messages to Hi Marley by consuming Hi Marley REST API

Hi Marley Inbound Integration

- Servlets that subscribe to Hi Marley webhook to receive update from Hi Marley for:
 - Case Open/Close status
 - OptIn/OptOut
 - SMS detail
 - Hi Marley case notes
 - Transcript

Future JSON payload field additions would require changes to the corresponding schema:

- Go to the corresponding schema:

<ClaimCenter Installation Root>\ modules\configuration\config\integration\schemas\acc\himarley

- Follow the format in the schema file to add the additional field. Example:

```
"fieldName": {
  "type": "object",
  "properties": {
    "property1": {
      "type": "string"
    }
  }
}
```

- For nested fields, do like:

```
"FieldName": {
  "type": "object",
  "properties": {
    "aFieldName": {
      "$ref": "#/definitions/fieldName"
    }
  }
}
```

-

Hi Marley Batch Process Integration

- Batch Process read and generate transcript document
- Batch process resends welcome message to claimant after a number of hours, default is 24 hours

Data Model Extensions

Entity Modifications

- **Activity.etx** - Added new columns HiMarleyMessageID_Acc, HiMarleyCaseID_Acc
- **Claim.HiMarley.etx** - New entity extension added with one-to-many relation to HiMarleyCaseData_Acc entity with the new column EnrolledInHiMarley_Acc
- **Group.etx** - added new columns EnrolledGroupInHiMarley_Acc, HiMarleyGroup_ID_Acc, PreviousParentId_Acc
- **HiMarleyAdmin_Acc.HiMarley.eti** – New entity added with following new columns: ViewCases, AutoCreateOperator, SendSMS, LiveUpdate, DownloadTranscript, AutoSyncNotes, SendTemplate, and AutoReSendWelcomeTimer, GroupUpdate, CoachingAlerts, FireActivity, FireActivityToSupervisor, SecenaryOperators
- **HiMarleyCaseData_Acc.HiMarley.eti** - New entity extension added with following new columns: CaseID, CustomerID, PushTranscriptInitiated, UploadedToDMS, HiMarleyEnrollStatus, PreferredLanguage, Operator, Privacy, HiMarleyTranslationOnOff, HiMarleyCaseStatus, LastTimeResendWelcomeSent, HiMarleyOptStatus, FutureReOpenClaim, LastTimeManualResendWelcome, SecondaryOperators and events with new columns HiMarleyCaseDataChanged and ClaimChanged
- **HiMarleyCustomEvent_Acc.HiMarley.eti** - New entity extension added with the following new columns: IsActive, HiMarleyCustomEvents, HiMarleyCustomEventsArray and foreign key TemplateMessage
- **HiMarleyCustomEventsArray_Acc.HiMarley.eti** - New entity added with the following new array HiMarleyCustomEventArray
- **HiMarleyGroupWorkItem_Acc.HiMarley.eti** -- New entity extension added with the following new columns: GroupItem, Operation
- **HiMarleyMessagingWorkItem_Acc.HiMarley.eti** - New entity extension added with the following new columns: Workitem, Claim, Body
- **HiMarleyNote_Acc.HiMarley.eti** – New entity extension added with the following new columns: Body, Confidential, Subject, AuthoringDate, Activity, Author, Topic, SecurityType, Language, PostType, CaseId, HiMarleyAuthor, HiMarleyCase, MessageAlerts, HiMarleyMessageID
- **HiMarleyScheduledSMS_Acc.HiMarley.eti** - New entity extension added with the following new columns: ScheduleDateTime, MessageText, ScheduledMessageID and foreignkeys: Author and HiMarleyCase
- **HiMarleyTemplate_Acc.HiMarley.eti** – New entity added with the following new columns: TemplateBody and TemplateName
- **HiMarleyWorkItem_Acc.HiMarley.eti** -- New entity added with the following new columns: Claim, ClaimNumber
- **Note.HiMarley.etx** - New entity extension added with the following new columns: PostType, CaseId, and HiMarleyAuthor, HiMarleyMessageID_Acc
- **SecondaryOperators.eti** - new entity added with following new foreignkeys: HiMarleyCaseData_Acc, User
- **User.etx** - added new columns EnrolledUserInHiMarley

Typelist Modifications

- **BatchProcessType.HiMarley.ttx**-- New typelist extension added for BatchProcessType with type code HiMarleyNotification_Acc,HiMarleyGroupWorkQueue_Acc, HiMarleyMessagingWorkQueue_Acc
- **HiMarleyCaseStatus_Acc.HiMarley.tti** – New typelist added to show Hi Marley case status
- **HiMarleyCustomEvents_Acc.HiMarley.tti** – New typelist added with names of custom events.
- **HiMarleyEnrollStatus_Acc.HiMarley.tti**-- New typelist added it shows the HiMarley System Customer Case Enrollment Status.
- **HiMarleyMessageAlerts_Acc.HiMarley.tti** - New typelist added to show Status of HiMarley Cases
- **HiMarleyOptStatus_Acc.HiMarley.tti** – New typelist added to show Hi Marley opt status
- **HiMarleyPrefLanguage_Acc.HiMarley.tti** – New typelist added for preferred language for translation
- **HiMarleyTimeZone_Acc.HiMarley.tti** - New typelist added with all timezones
- **NoteTopicType.HiMarley.ttx** – New typelist added for adding SMS to ClaimCenter
- **RuntimePropertyGroup.HiMarley.ttx** - New typelist added with general Hi Marley properties
- **SystemPermissionType.HiMarley.ttx** – New typelist added for system permissions

User Interface Modifications

Entry/Exit Points

- **HiMarleyText_Acc.pcf**—Added a new exit point to redirect to Hi Marley System Texting
- **HiMarleyTranscriptDownload_Acc.pcf** — Added new exit point which redirect to download transcript

Claim Screens

- **FNOLWizard_AssignSaveScreen.pcf**—Added Hi Marley Enrollment Check box
- **ClaimStatus.pcf**-- Update Claim summary PCF with new HiMarley Details section and status details

Deployment

ClaimCenter

config

- extensions
 - entity
 - **Claim.HiMarley.etx** — New entity added which extends Claim entity and having foreign key relation to HiMarleyCaseData_Acc entity with the new column EnrolledInHiMarley_Acc
 - **Group.etx** — The indicator EnrolledGroupInHiMarley_Acc and HiMarleyGroup_ID_Acc have been added to the group entity.
 - **HiMarleyAdmin_Acc.HiMarley.eti** — New entity added with following new columns: ViewCases, AutoCreateOperator, SendSMS, LiveUpdate, DownloadTranscript, AutoSyncNotes, SendTemplate, LiveSMSToNote and AutoReSendWelcomeTimer, GroupUpdate.
 - **HiMarleyCaseData_Acc.HiMarley.eti** — New entity added with following new columns: CaseID, CustomerID, PushTranscriptInitiated, UploadedToDMS, PreferredLanguage, Operator, Privacy, HiMarleyTranslationOnOff,

LastTimeResendWelcomeSent, FutureReOpenClaim, LastTimeManualResendWelcome, an array HiMarleySMS, and events with new columns HiMarleyCaseDataChanged and ClaimChanged and typekeys HiMarleyEnrollStatus, HiMarleyCaseStatus, and HiMarleyOptStatus

- **HiMarleyCustomEvent_Acc.HiMarley.eti** - New entity extension added with the following new columns: IsActive, HiMarleyCustomEvents, HiMarleyCustomEventsArray and foreign key TemplateMessage
- **HiMarleyCustomEventsArray_Acc.HiMarley.eti** - New entity added with the following new array HiMarleyCustomEventArray
- **HiMarleyGroupWorkItem_Acc.HiMarley.eti** – New entity for a custom work item for Hi Marley asynchronous group creation
- **Note.HiMarley.etc** — New entity extension added with the following new columns: PostType, CaseId, and HiMarleyAuthor
- **HiMarleyNote_Acc.HiMarley.eti** - New entity added with following new columns: Body, Confidential, Subject, AuthoringDate, PostType, CaseId, and HiMarleyAuthor, typelists Topic, SecurityType, and Language, and foreignkeys HiMarleyCase, Activity, and Author
- **HiMarleyScheduledSMS_Acc.HiMarley.eti** - New entity extension added with the following new columns: ScheduleDateTime, MessageText, ScheduledMessageID and foreignkeys: Author and HiMarleyCase
- **HiMarleyTemplate_Acc.HiMarley.eti** — New entity added with the following new columns: TemplateBody and TemplateName
- **HiMarleyWorkItem_Acc.HiMarley.eti** – New entity for a custom work item for Hi Marley asynchronous case creation
- **SecondaryOperators.eti** - new entity added with following new foreignkeys: HiMarleyCaseData_Acc, User
- **User.etc** - The indicator EnrolledUserInHiMarley_Acc has been added to the User entity.
- typelist
 - **BatchProcessType.HiMarley.ttx** -- New typelist added which extends BatchProcessType and having the type code HiMarleyNotification_Acc, extension of typelist added from BatchProcessType as HiMarleyNotification for sending welcome message after a certain time period.
 - **HiMarleyCaseStatus_Acc.HiMarley.tti** — New typelist added which contains the case status reference and used to add or modify
 - **HiMarleyCustomEvents_Acc.HiMarley.tti** – New typelist added with names of custom events.
 - **HiMarleyEnrollStatus_Acc.HiMarley.tti** — New typelist added it shows the HiMarley System Customer Case Enrollment Status
 - **HiMarleyMessageAlerts_Acc.HiMarley.tti** - New typelist added to show Status of HiMarley Cases
 - **HiMarleyOptStatus_Acc.HiMarley.tti** — New typelist added which contains the customer Opt status reference and used to add or modify HiMarleyCaseData_Acc.HiMarley.eti entity for the field HiMarleyOptStatus

- **HiMarleyPrefLanguage_Acc.HiMarley.tti** — New typelist added which contains list of HiMarley system multiple language reference and used to add or modify HiMarleyCaseData_Acc.HiMarley.eti entity for the field PreferredLanguage
- **HiMarleyTimeZone_Acc.HiMarley.tti** — Common list of values for all time zone drop-downs used in scheduled messaging (Note: typecode order determined by the sort order of the typecode display name defined in the auxiliary .sort file config/locale/HiMarleyTimeZone_Acc_en_US.sort)
- **NoteTopicType.HiMarley.ttx** — Extension of typelist added from NoteTopicType for maintaining Note Topic category. As new data, HiMarley case type has been added to distinguish HiMarley Note Topic.
- **RuntimePropertyGroup.HiMarley.ttx** - New typelist added with general Hi Marley properties
- **SystemPermissionType.HiMarley.ttx** — Added HiMarley case operational permission types. Those are, automaticcreateoperator, viewsendmessage, viewliveupdate, viewdownloadscript, automaticsyncnotes, viewsendtemplate, groupupdate, coachingAlerts_Acc, fireactivity_Acc, fireactivitytosupervisor_Acc, secondaryoperators_Acc. Those were used to reference the permissions required to maintain userwise.
- integration
 - apis
 - acc
 - himarley
 - caseupdateapi
 - **himarley_optin-1.0.swagger.yaml** — Swagger to opt-in/opt-out Hi Marley cases with webhooks
 - **himarley_sms-1.0.swagger.yaml** — Swagger to receive SMS Message from Hi Marley- to ClaimCenter notes with webhooks
 - **himarley_update-1.0.swagger.yaml** — Swagger to close and reopen Hi Marley cases with webhooks
 - **published-apis.yaml** — Lists APIs to publish for Hi Marley webhooks
 - schemas
 - acc
 - himarley
 - caseupdate
 - **close_reopen-1.0.schema.json** — Schema to close and reopen Hi Marley cases with webhooks
 - **optin-1.0.schema.json** — Schema to opt-in Hi Marley cases with webhooks
 - **optout-1.0.schema.json** — Schema to opt-out Hi Marley cases with webhooks

- **sms-1.0.schema.json** — Schema to receive SMS Messages and Notes from Hi Marley to ClaimCenter notes with webhooks
- locale
 - **display.properties** — Added properties for Hi Marley Integration
 - **HiMarleyTimeZone_Acc_en_US.sort** - Added new class which contains common list of values for all time zone drop-downs used in scheduled messaging
- messaging
 - **messaging-config.xml** — Added a Hi Marley destination and event for Cases integration, added a Hi Marley destination for Groups
- plugin
 - registry
 - **CredentialsPlugin.gwp** - Configure HiMarleyAsyncTransPlug_Acc and HiMarleyAsyncGroupTransPlug_Acc
 - **HiMarleyAsyncTransPlug_Acc.gwp** — Contains the Hi Marley asynchronous plugin configuration regarding claim and cases
 - **HiMarleyAsyncGroupTransPlug_Acc.gwp** — Contains the Hi Marley asynchronous plugin configuration regarding groups
- rules
 - Event Message
 - EventFired_dir
 - **HiMarleyAsyncCall.gr** — Hi Marley Event rules to invoke integration
 - HiMarleyAsyncCall_dir
 - Case.gr
 - Case_dir
 - HiMarleyCaseData_AccChanged.gr
 - HiMarleyCaseData_AccChanged_dir
 - **HiMarleyPreferredLanguageChanged.gr** - Triggers and generates change of Preferred Language
 - **HiMarleyTranslationOnOffChanged.gr** - Triggers and generates switching on/off Translation
 - **SecondaryOperatorsChanged.gr** - Triggers and generates adding and removing secondary operators
 - order.txt
 - order.txt
 - Claim.gr
 - Claim_dir
 - **ClaimChanged.gr** - Triggers and generates adjuster changed payload, case creation during the claim creation, case reopening during claim reopening and case closing during claim closing.

- **ClaimClosed.gr** - Triggers and generates payload with the SMS message (Custom Event)
- **ClaimReopen.gr** - Triggers and generates payload with the SMS message (Custom Event)
- order.txt
 - Transaction.gr
 - Transaction_dir
 - **ClaimPayment.gr** - Triggers and generates payload with the SMS message (Custom Event)
 - order.txt - Hi Marley rule ordering
- **HiMarleyAsyncGroupCall.gr** — Hi Marley Event rules to invoke integration
- HiMarleyAsyncGroupCall_dir
 - **Group.grs** — Hi Marley Event rules to invoke integration
 - **GroupAdded.grs** — Generate (add) payload for groups
 - **GroupChanged.grs** — Generate (change) payload for groups
 - **GroupRemoved.grs** — Generate (remove) payload for groups
 - order.txt
- Order.txt — Hi Marley rule ordering
- Validation
 - ClaimValidationRules_dir
 - **CLV16000CustomerDataHiMarley.gr** - Check the reported data during claim opening
 - **CLV17000Claimclosed.gr** - Adds Custom Event Claim Closed
 - **CLV18000Claimreopen.gr** - Adds Custom Event Claim Reopen
 - **order.txt** - Added new rules to the ordering
 - HiMarleyCaseData_AccValidationRules_dir
 - **HMV01000ChangedSecondaryOperator.gr** - Checks if all Secondary Operators are Hi Marley users
 - **order.txt** - Added new rules to the ordering
 - TransactionSetValidationRules_dir
 - **TXV24000ClaimPayment.gr** - Adds Custom Event Claim Payment
 - **order.txt** - Added new rules to the ordering
 - HiMarleyCaseData_AccValidationRules.grs
- runtimeproperties
 - **RuntimeProperties.xml** – File that holds URL text for API calls as runtime properties

- scheduler
 - **scheduler-config.xml** — Added process AutoResendWelcome
- security
 - **security-config.xml** — Added system permissions for Hi Marley permissions
- web
 - pcf
 - acc
 - himarley
 - admin
 - **HiMarleyAdmin_Acc.pcf** — Location group for Hi Marley Admin pages
 - **HiMarleyAdminItems_Acc.pcf** — Page to enable/disable feature flagging items for Hi Marley
 - **HiMarleyAdminItems_AccDV.pcf** — Detail view that has items for feature flagging for Hi Marley
 - **HiMarleyAdminSendSMSTemplates_AccLV.pcf** — List view to create and delete SMS templates
 - **HiMarleyAdminTemplates_Acc.pcf** — Page to create and delete SMS templates
 - **HiMarleyCoachingItems_AccDV.pcf** — Detail view that has items for feature Coaching flagging for Hi Marley
 - **HiMarleyCustomEvents_AccLV.pcf** — ListView with Hi MarleyCustomEvents
 - **HiMarleyNewTemplate_AccPopup.pcf** — Popup to create and add new SMS template
 - **HiMarleyPickTemplate_AccPopup.pcf** — Popup to choose SMS template
 - **HiMarleyTemplateDetail_AccDV.pcf** — Detail view to view SMS template
 - **HiMarleyWelcome_Acc.pcf** — Forwards to go to Hi Marley Admin pages
 - cases
 - **HiMarleyAssignOperator_AccPopup.pcf** — Popup to reassign Hi Marley Operator
 - **HiMarleyCaseDetail_AccLV.pcf** — List view to view Hi Marley case details
 - **HiMarleyCaseDetail_AccPopup.pcf** — Popup to view Hi Marley case details
 - **HiMarleyClaimCases_Acc.pcf** — Page to view list of Hi Marley cases for a claim

- **HiMarleyClaimCases_AccLV.pcf** — List view of Hi Marley cases for a claim
- **HiMarleyConfirmation_AccPopup.pcf** — Popup to confirm success of an API call
- **HiMarleyOpenCase_AccPopup.pcf** — Popup to open new Hi Marley case in existing claim
- **HiMarleyPhoneInputSet.pcf** — InputSet which allows to enter the phone number
- **HiMarleyPickSMSTemplate_AccPopup.pcf** — Popup to select SMS template for SMS message
- **HiMarleyScheduledMessagesLV.pcf** — List view of Hi Marley Scheduled Messages on case
- **HiMarleyScheduleMessageEdit_AccPopup.pcf** - Popup to edit existing Scheduled Message
- **HiMarleyScheduleSendSMS_AccPopup.pcf** - Popup to create a Scheduled Message
- **HiMarleyScheduleSMSEdit_AccPopup.pcf** - Popup with all existing Scheduled Messages
- **HiMarleySecondaryOperator_AccLV.pcf** — List view of Hi Marley secondary operators for claim
- **HiMarleySendSMS_AccDV.pcf** — Detail view to send SMS message - file removed - changes moved to **HiMarleyCaseDetail_AccPopup**
- **HiMarleySendSMS_AccPopup.pcf** — Popup to send SMS message - file removed - changes moved to **HiMarleyCaseDetail_AccPopup**
- **HiMarleySMSMessageTemplateResult_AccLV.pcf** — List view to view SMS templates
- contact
 - **HiMarleyClaimContactCases_AccLV.pcf** — List view to view cases based on contact in existing claim
- **ClaimHiMarleyCasesForward.pcf** – Forward to go to Hi Marley cases

- admin
 - groups
 - **GroupDetailToolbarButtonSet.pcf** — Toolbar Button to synchronize users and groups with HiMarley Chat
 - **GroupUsersLV.pcf** — Column in Listview showing the state of the HiMarley indicator
 - newgroup
 - **NewGroup.pcf** — Check box to set an Hi Marley Indicator for New Group

- **NewGroupDetailDV.pcf** — Check box to set an Hi Marley Indicator for New Group
 - **GroupDetailPage.pcf** — Check box to change an Hi Marley Indicator for Group
- claim
 - FNOL
 - **FNOLWizard_AssignSaveScreen.pcf** — Added Hi Marley Enrollment Check box
 - notes
 - **NoteDetailDV.pcf** - added new topics available Hi Marley Note and Hi Marley SMS
 - **NotesSearchScreen.pcf** - adjusted displaying of Hi Marley Notes
 - partiesinvolved
 - **ClaimContacts.pcf** — Added Hi Marley Cases card to view cases based on selected contact in claim
 - summary
 - **ClaimStatus.pcf** — Added Hi Marley details section which contains status and , alert bar and texting details
 - **Claim.pcf** — Added location reference to view Hi Marley cases
- exitpoints
 - **HiMarleyText_Acc.pcf** — Added new exit point which redirect to specific case
 - **HiMarleyTranscriptDownload_Acc.pcf** — Added new exit point which redirect to download transcript
- shared
 - preferences
 - **UserDetailInputSet.pcf** — Boolean Radio Button Input to set Hi Marley Indicator for User
 - usersearch
 - **MultiSecOperatorSearchPopup.pcf** — Popup to allow multi user search of secondary operators
 - **SecOperatorSearchResultsLV.pcf** —List view showing the results of the search of secondary operators
- tools
 - **WorkQueueWorkItemsLDV** — toolbarButton to skip work items that failed
- workspace
 - activity
 - **ActivityDetailsInputSet.pcf** — InputSet showing the basic information about activities
- **TabBar.pcf** — Added “Hi Marley Operator” section under the “Administration” tab
- workqueue
 - **work-queue.xml** — Registers custom work queue for asynchronous case and group creation
- **credentials.xml** -- File to hold the API key credentials for a server

gsrc

- acc
 - himarley
 - Integration
 - **HiMarleyClient.gs** — The class contains methods responsible for sending requests related to Hi Marley cases
 - **HiMarleyConstants.gs** — The class contains constants which are used inside Hi Marley Accelerator
 - **HiMarleyHelper.gs** — The class contains methods responsible for creating URLs and payloads
 - **HiMarleyUtil.gs** — The class contains methods connected with the buttons updating cases
 - addon
 - **HiMarleyAddonClient.gs** — The class contains methods responsible for sending requests related to Hi Marley groups, cases and secondary operators
 - **HiMarleyAddonHelper.gs** — The class contains methods for handling functions related to HiMarley groups and cases
 - **HiMarleyScheduledMessageClient.gs** — The class contains methods for handling functions related to HiMarley Scheduled Messages
 - **HiMarleyScheduledMessageTimeZonePickerHelper.gs** — Defines a helper method for converting zoned dates to Coordinated Universal Time (UTC)
 - api.himarleyupdateapi
 - **HiMarleyCaseUpdateHandler.gs** — Class that works with Hi Marley webhooks to update Hi Marley cases after receiving the message from the webhook
 - **HiMarleyUpdateHandler.gs** — Class that works with Hi Marley webhooks to update Hi Marley cases
 - batchprocess
 - **HiMarleyResendWelcomeBatchProcess.gs** — Batch Process generate resend welcome message to claimant every set amount of hours
 - dto
 - **GroupsPostRequestDto.gs** — The class is responsible for creating the Json payload structure for HiMarley Groups
 - enhancement
 - **HiMarleyCase_AccEnhancement.gs** — Enhancement class to hold Hi Marley integration properties

- **HiMarleyClaimEnhancement.gs** — Enhancement class to hold Hi Marley integration properties
- **HiMarleyGroupEnhancement.gs** — Enhancement class to hold Hi Marley Group integration properties
- exception
 - **HiMarleyDataValidationException.gs** — Class Contains Client-side data validation errors
 - **HiMarleyException.gs** — Generic exception class for Hi Marley integration
- messaging
 - **HiMarleyAsyncGroupTransPlug.gs** — Asynchronous message transport class which invokes Hi Marley REST API integration for adding, changing, removing, synchronizing HiMarley groups.
 - **HiMarleyAsyncTransPlug.gs** — Asynchronous message transport class which invokes Hi Marley REST API integration for opening, closing, and reopening cases and changing adjuster for Hi Marley cases, secondary operators, preferred language, translationOnOff. Also for managing custom events.
- workqueue
 - **HiMarleyGroupWorkQueue.gs** — Custom Hi Marley work queue for asynchronous Group creation
 - **HiMarleyMessagingWorkQueue.gs** — Custom Hi Marley work queue for asynchronous updating cases based on the received messages
 - **HiMarleyWorkQueue.gs** — Custom Hi Marley work queue for asynchronous case creation
- **HiMarleyClient.gs** — REST API Integration class with all operation details
- **HiMarleyConstants.gs** — Constants class which contains all integration related variables
- **HiMarleyHelper.gs** — Class with all helper get methods related to Hi Marley integration
- **HiMarleyUtil.gs** — Class with all utility methods related to Hi Marley integration
- gw
 - plugin
 - process
 - **ProcessPlugin.gs** — Added new Hi Marley transcript batch process
 - **surepath** — Structured Logger suggested and provided by Guidewire that is distributed within the accelerator. An update must occur if there is a newer version of the Logger.

Running this Reference Implementation

- a. Add or merge the accelerator code into existing ClaimCenter
 - a. Unzip distribution package to OOTB ClaimCenter 9.10 under following directory:


```
<ClaimCenter Installation Root>\ modules\configuration
```
 - b. Overwrite all files with same file names
 - c. Make sure update the API key, end point, test user email address from following properties files:


```
\config\runtimeproperties\HiMarleyRuntimeProperties.xml
```

```
\config\credentials.xml
```
 - d. If not exist, following Guidewire's instruction to create ClaimCenter database
 - e. Make sure update database connection information in following file:


```
\config\database-config.xml
```
 - f. Compile the code by running following command:


```
gwb compile
```
 - g. Build Tomcat package by running following command:


```
gwb warTomcatDbcp (or other options based on your need)
```
 - h. Deploy war file to application server
 - i. Restart the application server
- b. Update API key, end point, test user email address from following properties files:


```
\config\runtimeproperties\HiMarleyRuntimeProperties.xml
```

```
\config\credentials.xml
```
- c. Import the Runtime Properties by going to Administration>Utilities>Runtime Properties
 - a. Load the HiMarleyRuntimeProperties.xml file by clicking "Import" and navigating to the file
- d. Register Webhook events by consuming postman or swagger with below sample payloads

Consuming API: <https://{{Hi Marley URL}}/api/webhooks/register>

Opt-In Sample Payload:

```
{
  "EVENT_ID": 1,
  "HTTP_POST_ADDRESS": "http://{{claimcenterurl}}/cc/rest/acc/himarley/opt/v1/useroptin",
  "HEADERS": {
    "Authorization": "Basic c3U6Z3c=",
  }
}
```

}

Opt-Out Sample Payload:

```
{
  "EVENT_ID": 2,
  "HTTP_POST_ADDRESS": " http://{claimcenterurl}/cc/rest/acc/himarley/opt/v1/useroptout",
  "HEADERS": {
    "Authorization": "Basic c3U6Z3c=",
  }
}
```

Note Received in Hi Marley Sample Payload:

```
{
  "EVENT_ID": 16,
  "HTTP_POST_ADDRESS": " http://{claimcenterurl}/cc/rest/acc/himarley/sms/v1/notes",
  "HEADERS": {
    "Authorization": "Basic c3U6Z3c=",
  }
}
```

Message Received or Sent in Hi Marley Sample Payload:

```
{
  "EVENT_ID": 14,
  "HTTP_POST_ADDRESS": " http://{claimcenterurl}/cc/rest/acc/himarley/sms/v1/messages",
  "HEADERS": {
    "Authorization": "Basic c3U6Z3c=",
  }
}
```

Re-Open Case in Hi Marley Sample Payload:

```
{
  "EVENT_ID": 18,
  "HTTP_POST_ADDRESS": " http://{claimcenterurl}/cc/rest/acc/himarley/updates/v1/closeReopen",
  "HEADERS": {
    "Authorization": "Basic c3U6Z3c=",
  }
}
```

}

Close Case in Hi Marley Sample Payload:

```
{
  "EVENT_ID": 10,
  "HTTP_POST_ADDRESS": " http://{claimcenterurl}/cc/rest/acc/himarley/updates/v1/closeReopen",
  "HEADERS": {
    "Authorization": "Basic c3U6Z3c=",
  }
}
```

- e. Go to Hi Marley Admin entries to make sure you enabled desired:
 - a. Claim Level flags
 - b. Assigned appropriate role to user
 - c. Assigned appropriate Hi Marley permission to role
- f. After creating the case, verify Hi Marley status and Reply Yes to text message from mobile device and verify Opted status. This would allow sending SMS

Known Issues

- When a Hi Marley case is closed, if customer is not opt out, he/she will be able to continue to send SMS message to Hi Marley. Hi Marley will re-open the case and forward SMS to ClaimCenter. ClaimCenter will update the case with SMS message, however, ClaimCenter will NOT re-open the case. This is due to Hi Marley existing Web Hook does not send Re-Open call to ClaimCenter. This is expected to be fixed by Hi Marley once the Web Hook is updated.

Updates

Flexible schema

Flexible schema is designed to accept unknown elements in the body of request without the need to make changes to schema.json files.

Guidewire has a parameter that needs to be set in both the Swagger Yaml file and the Payload header (in Hi Marley's case, in the Webhook callback header or any response header). UnknownPropertyHandling can be set to 3 different values, each of them gives different possibilities.

Handling a call with unknown elements



A system API call may include a payload that includes a property that is not defined in the associated schema. By default, the system APIs reject unknown properties. You can override the default behavior by including the `GW-UnknownPropertyHandling` header. The header must be set to one of the following string values:

- `ignore` - Ignore all unknown properties. Do not log any messages or return any validation errors.
- `log` - Log a service-side info message, but then process the call, ignoring any unknown properties.
- `reject` - Do not process the call. Return a validation error specifying there are unknown properties.

Similarly, a system API call may include a URL with a query parameter that is not defined in the associated schema. By default, the system APIs reject calls with unknown query parameters. You can override the default behavior by including the `GW-UnknownQueryParamHandling` header. The header must be set to one of the following string values:

- `ignore` - Ignore all unknown query parameters. Do not log any messages or return any validation errors.
- `log` - Log a service-side info message, but then process the call, ignoring any unknown query parameters.
- `reject` - Do not process the call. Return a validation error specifying there are unknown query parameters.

Hi Marley needs to make changes in its payload generation by adding the `GW- UnknownPropertyHandling` parameter in the HTTP header of the Webhook call or HTTP response from HM to CC. As shown in the screenshot below, as a test this parameter with value "ignore" was added in the POSTMAN mock up payload:

POST ▼ 100.24.20.58:8080/cc/rest/acc/himarley/sms/v1/messages/

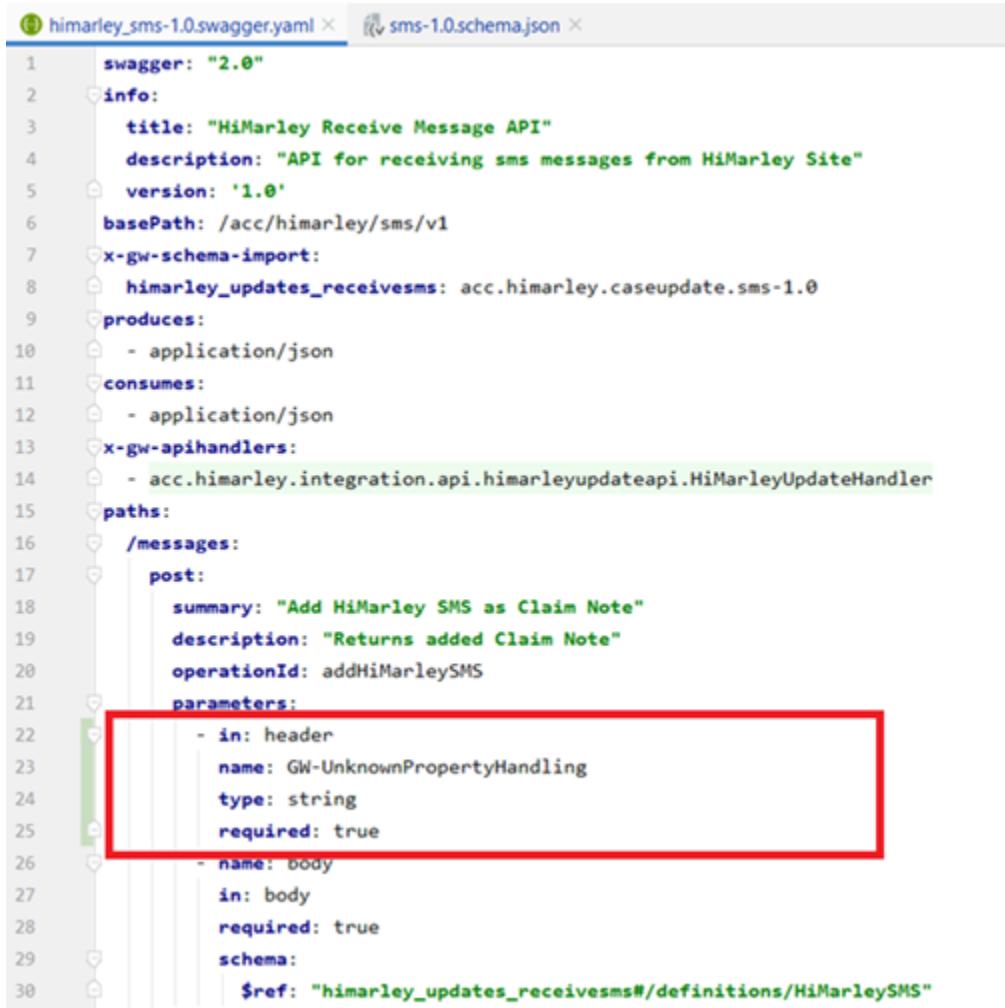
Params • Authorization • Headers (12) Body • Pre-request Script Tests Settings

Headers ✗ Hide auto-generated headers

KEY	VALUE	DESCRIPTION	...	Bulk
<input checked="" type="checkbox"/> Authorization	Basic c3U6Z3c=			
<input checked="" type="checkbox"/> Cache-Control	no-cache			
<input checked="" type="checkbox"/> Postman-Token	<calculated when request is sent>			
<input checked="" type="checkbox"/> Content-Type	application/json			
<input checked="" type="checkbox"/> Content-Length	<calculated when request is sent>			
<input checked="" type="checkbox"/> Host	<calculated when request is sent>			
<input checked="" type="checkbox"/> User-Agent	PostmanRuntime/7.29.2			
<input checked="" type="checkbox"/> Accept	*/*			
<input checked="" type="checkbox"/> Accept-Encoding	gzip, deflate, br			
<input checked="" type="checkbox"/> Connection	keep-alive			
<input type="checkbox"/> Cache-Control	22	eventid		
<input checked="" type="checkbox"/> gw-UnknownPropertyHandling	ignore	gw		

Key Value Description

In ClaimCenter, we changed the swagger file and added a few new lines of code to it as shown below. The code allows to catch a parameter "GW-UnknownPropertyHandling" on the CC side.



```

1  swagger: "2.0"
2  info:
3    title: "HiMarley Receive Message API"
4    description: "API for receiving sms messages from HiMarley Site"
5    version: '1.0'
6    basePath: /acc/himarley/sms/v1
7    x-gw-schema-import:
8      himarley_updates_receivesms: acc.himarley.caseupdate.sms-1.0
9    produces:
10      - application/json
11    consumes:
12      - application/json
13    x-gw-apihandlers:
14      - acc.himarley.integration.api.himarleyupdateapi.HiMarleyUpdateHandler
15    paths:
16      /messages:
17        post:
18          summary: "Add HiMarley SMS as Claim Note"
19          description: "Returns added Claim Note"
20          operationId: addHiMarleySMS
21          parameters:
22            - in: header
23              name: GW-UnknownPropertyHandling
24              type: string
25              required: true
26            - name: body
27              in: body
28              required: true
29              schema:
30                $ref: "himarley_updates_receivesms#/definitions/HiMarleySMS"

```

The json schema files were changed. To allow any objects of any type to be sent, the "additional properties" elements must be removed from the scheme. After removing the "additional properties" elements any type of object can be added to the request body.

```

{
  "EVENT": "MESSAGE",
  "SUBSCRIPTION_ID": "11b80218-b98c-4950-9902-33d8dbc0a722",
  "REGISTERED_PAYLOAD": {
    "EVENT_ID": 14,
    "HTTP_POST_ADDRESS": "http://50.16.55.54//cc/rest/acc/himarley/sms/v1/messages/",
    "HEADERS": {
      "Authorization": "Basic c3U6Z3c=",
      "GW-UnknownPropertyHandling": "ignore"
    }
  }
},

```

About Guidewire Software

Guidewire delivers the industry platform that Property and Casualty (P&C) insurers rely upon to adapt and succeed in a time of accelerating change. We provide the software, services, and partner ecosystem to enable our customers to run, differentiate, and grow their business. We are privileged to serve more than 350 companies in 32 countries. For more information, please visit www.guidewire.com and follow us on twitter: @Guidewire_PandC.

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