

Claim Wizard Documentation

Listing Title: Claim Wizard

Tagline: Submit and Process claims like a wizard

Brief Description: A step by step guided claim wizard that can be used by both customer and support agent. Including related custom fields, app, lightning pages and custom metadata. With proper license, agent would be able to gather claim images from customer via VRA session. Multi-user approval process managed via Flow Orchestrator.

Highlights

1. Utilizes Flow Orchestrator for multi-user approval process
2. VRA capable and fully configurable via custom metadata
3. Custom notifications for back-office staff
4. Custom Email notifications for customers

Step-by-step guidance: [🔗 Claims Management Flow Guidance](#)

Pre-requisites- instal all dependencies in the below specified order before installing the Claim Wizard package

1. VRA <https://login.salesforce.com/packagingSetupUI/ipLanding.app?apvId=04t3t000002zRJN>
2. FlowActionsBasePack <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t8b000001Eh4YAAS>
3. FlowScreenComponentsBasePack <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5G000003rUvVQAU>
4. Datatable <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5G000003rUvLQAU>
5. customHeader <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5G000004PucQAC>
6. Flow Magic Picklists <https://login.salesforce.com/packagingSetupUI/ipLanding.app?apvId=04t6F0000045cXBQAY&src=U>
7. quickLookup <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5G000003rUcDQAU>

Manual steps

- Organization-Wide Addresses: The Flow Orchestrator requires an org wide email to work. Make sure that the email address can be validated, otherwise, emails will not be sent out and the flow will crash
 - Navigate to Setup> Search “org” in quick find> Select “Organization-Wide Addresses”> Add an “User Selectable Organization-Wide Email Addresses”
- Flowpicklistconfig: Follow [this](#) ([📖 Flow Magic Picklists Setup Instructions](#)) document to setup Custom Settings, otherwise, Flow Magic Picklist Editor will not work as expected
- Setup Queues: The flow requires two queues to work. Go to Setup, search “queue” in quick find, select “Queues”, create two new queues, one named “Agent Queue” and the other named “Approver Queue”. Both queues need to have “Case” as supported object. Assign users as desired

ASSUMPTION

- Orders and Contacts are pre-created

- If no Contact is provided, then the flow picks up the first Contact alphabetically (think Acme Distributor or Andy Young)

VRA prerequisites

Assumption- VRA is pre-installed.

Click on App Launcher, search for “visual”, select the “Visual Remote Assistant - Admin” app. And then select the “Visual Remote Assistant Configuration”. If you have VRA license in your org, follow the step by step config wizard to activate the VRA account and configurations.

VRA Limitation

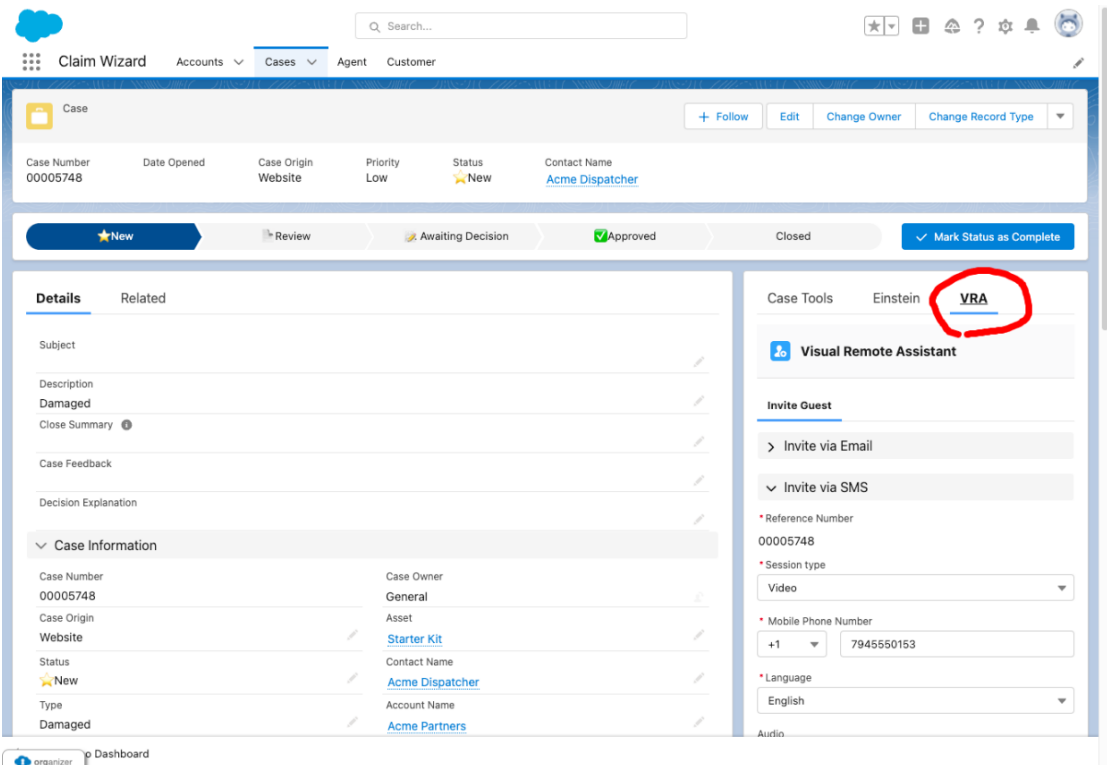
Due to the technical limitation of VRA package, there is a trick to follow when you need to use VRA in the claim flow.

When a VRA session starts, it was suppose to trigger the VRA Dashboard popup so the agent can see whether the customer has joined or not and be able to see the picture customer uploaded

However, there is a pre-work to do to ensure the proper popup of the dashboard.

1. Go to the “Cases” tab of “Claim Wizard” app, select any case, and go to that VRA tab on the right side bar like below

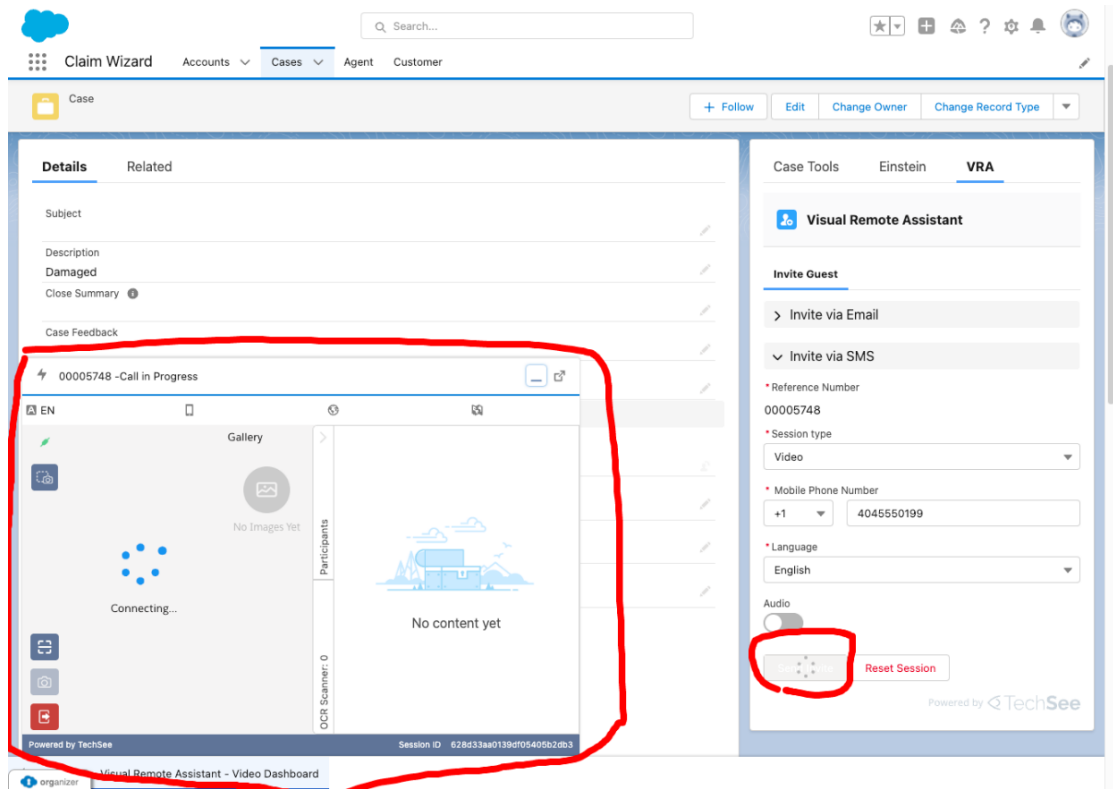
a.



The screenshot shows the 'Claim Wizard' app interface. The top navigation bar includes 'Claim Wizard', 'Accounts', 'Cases', 'Agent', and 'Customer'. The 'Cases' tab is selected. Below the navigation bar, there is a search bar and a list of cases. The first case is selected, showing details like Case Number (00005748), Date Opened, Case Origin (Website), Priority (Low), Status (New), and Contact Name (Acme Dispatcher). The 'Details' tab is active, showing fields for Subject, Description (Damaged), Close Summary, Case Feedback, and Decision Explanation. The 'Case Information' section is expanded, showing Case Number, Case Owner (General), Case Origin, Asset (Starter Kit), Website, Contact Name (Acme Dispatcher), Status (New), Type (Damaged), and Account Name (Acme Partners). On the right sidebar, the 'VRA' tab is selected and circled in red. The 'VRA' section includes 'Visual Remote Assistant' and 'Invite Guest' options. The 'Invite Guest' section has fields for 'Reference Number' (00005748), 'Session type' (Video), 'Mobile Phone Number' (+1 7945550153), and 'Language' (English).

2. Fill in the mobile phone number with your number, and start a VRA session, you should be able to see the Dashboard popup on the bottom left of the page.

a.



3. End the session by clicking the red exit button on bottom left, without refreshing the page, go to the “Agent” tab and run the flow. The VRA step should now be able to properly popup the Dashboard.

Claims Management Flow Guidance

Claims process for damaged, lost, and stolen goods within the transportation & logistics industry.

Claims can be submitted by a customer via a self service portal (e.g. Experience Cloud site) or with the assistance of a support representative using the SF Service console. The claims process is powered by SF Flow and Orchestrator that guides the user and support rep through the process ensuring they've captured relevant details. The process is similar for the customer and agent, and the agent process includes the capability to send a request to gather additional information using visual remote assistant (VRA), add internal comments, and to approve or deny the claim.

~~This video provides an overview of the proposed solution, which needs additional enhancements included in requirements below.~~

Customizations- provide links within document

-number of orders- 4 or more

number of days- 180 or less

-order amount for auto approval- 500

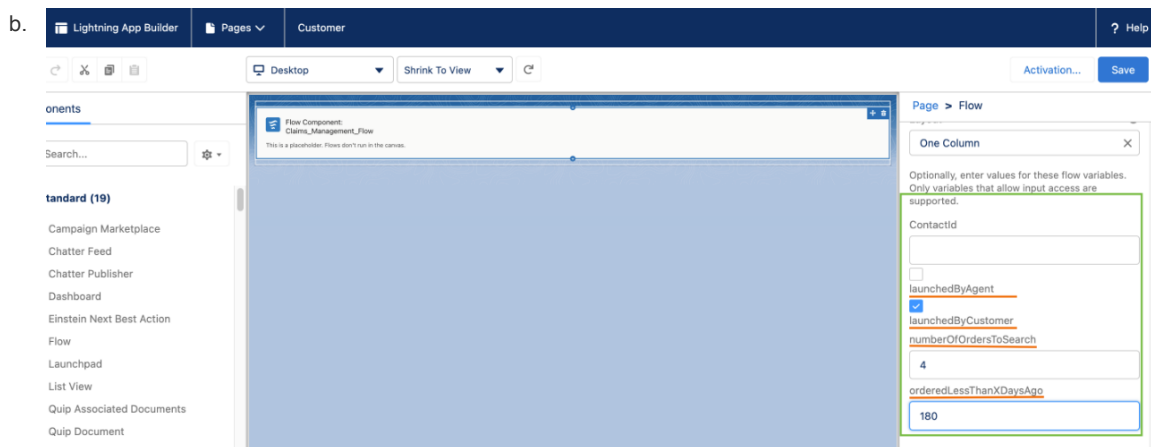
-allow VRA-

Customer

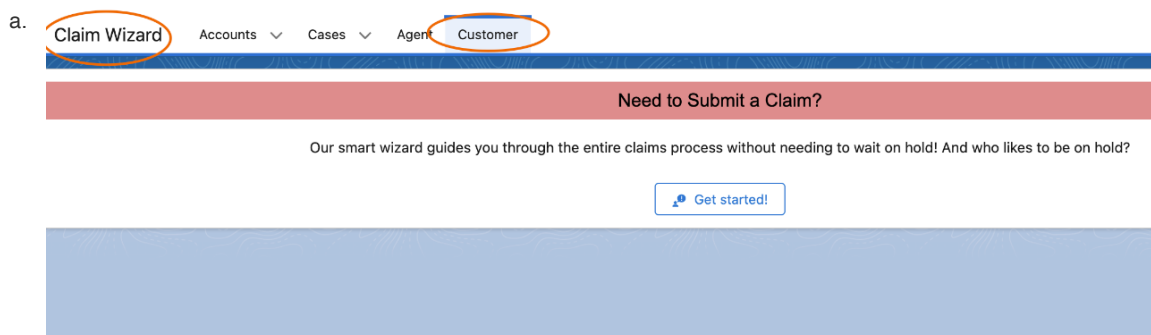
From customer community site (or from Salesforce back-office as shown in the demo video), guide **customer** through claims process.

1. If using Salesforce back-office: Navigate to 'Claim Wizard' App > Customer Tab

a. Using Lightning App Builder, make sure launchedByCustomer field is '**CHECKED**'



2. Welcome Screen displays a button labeled "Get Started!" to launch the claim process for Customers



3. Select Order screen- User can select an order from the list & proceed to claim classification screen

a. Displays 4 most recent orders for the Contact

i. NOTE#1: Number of orders to display are configurable. Set 'orderedLessThanXDaysAgo' to the desired number of days (step 1.b above). **Minimum is 2 otherwise the flow will break**

ii. NOTE#2: When using this flow from a community, the flow will automatically pickup the logged in contact ID details

iii. NOTE#3: When using this flow from back-office,

1. Either provide the default Contact ID when setting up the flow under the Customer Tab using Lightning App Builder (step 1.b above), OR

2. The flow will pickup the first contact in alphabetical order (think Acme Distributors or Andy Young)

b. Allows Admin to let users select Orders only from past 180 days

i. NOTE#1: Number of Days- 180 in this case is configurable. Set 'numberOfOrdersToSearch' to the desired number (step 1.b above)

c. Advanced Search- At bottom of screen are buttons with following choices

1. Show All Orders (search all orders for the contact)

2. Search by Order Number (Order object)

d.

Select from your most recent Orders

00000101
Order Date: 5/4/2022 | Order Amount: \$825,000

00000100
Order Date: 5/2/2022 | Order Amount: \$5,000

 Search All Orders

 Search By Order#

4. Claim Classification screen - User is presented with options to the order product, issue with the order (damaged/stolen, etc.) and desired outcome (Refund/Replace)

Consideration:

a. Damage - If user selects Damaged, the user is then prompted to upload an image on the following screen

b.

Select Affected Order Products

	Order Product Number	Product Name	Unit Price	Quantity	Total Price	Created
1	☐ 0000000002	GenWatt Diesel 1000kW	\$100,000.00	1.00	\$100,000.00	5/18/2022
2	☐ 0000000003	GenWatt Gasoline 2000kW	\$150,000.00	1.00	\$150,000.00	5/18/2022
3	☐ 0000000004	GenWatt Gasoline 750kW	\$75,000.00	2.00	\$150,000.00	5/18/2022
4	☐ 0000000005	Installation: Industrial - High	\$85,000.00	5.00	\$425,000.00	5/18/2022

What's wrong with this order?

Damaged

Lost

Stolen

Other

Let's make it right!

Refund

Replace

5. Submit Claim- allows user to provide additional information, upload image if necessary and submit the claim
 - a. Validations-
 - i. If the claim is being submitted more than X days after the order date (Step 3.b), then display a message **‘Please note, this order was placed more than {!orderedLessThanXDaysAgo} days ago, claim is not guaranteed.’**
 - ii. If the claim is of type Damaged, user needs to provide supporting image

Additional Information

Sorry to hear that!

Let's submit a case, so our service team can help you asap

* Phone

(785) 265-5350

* Email

a_young@dickenson.com

* Help our service team with additional information

Please upload supporting images and documentation

Upload Files

Or drop files

< Back

Submit

6. Create case and provide user with Case Number for future reference
 - a. The case is assigned to Agent Queue
 - b. A Custom notification is sent to Agent Queue informing the queue members about the new case
 - c. An email confirmation is sent to the customer
 - d.



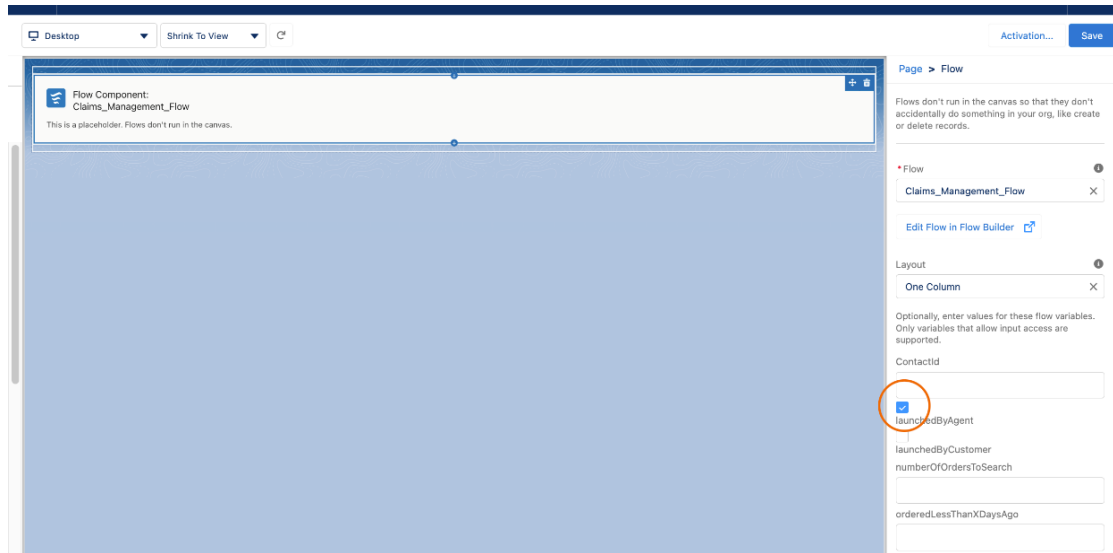
Thank you for submitting a claim!

Your claim number is **00001075**
Our support team will contact you shortly.

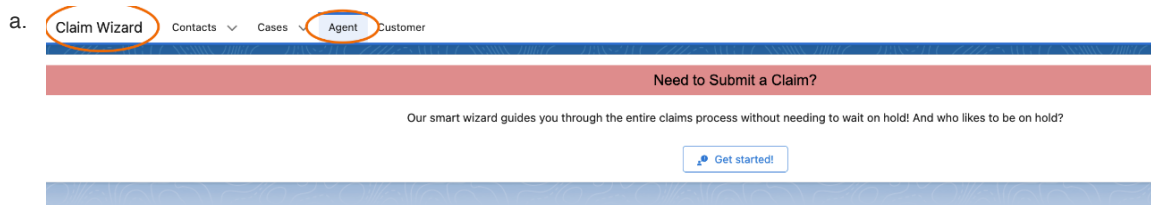
Agent

From Service Cloud Console, guide **Agent** through claims process, including approval, escalation, or denial.

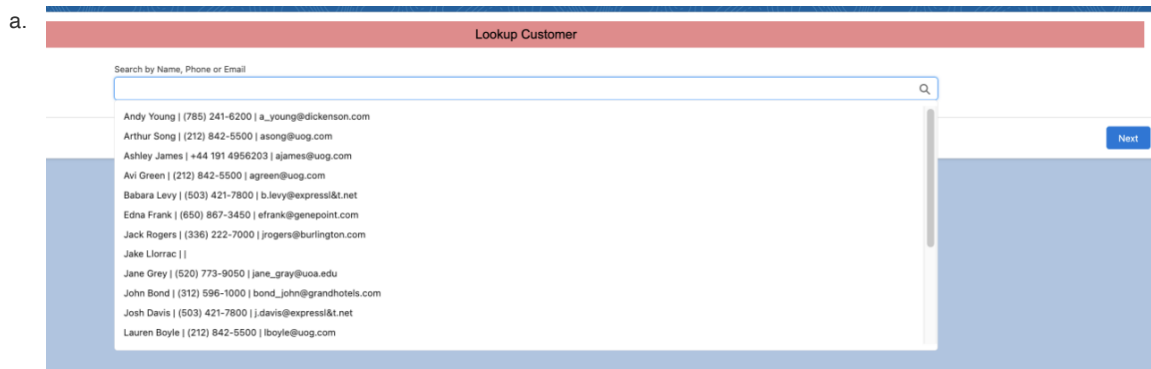
1. Provide Agent Tab under the Claim Wizard app that's available when customer has contacted Support via phone, chat, or sms.
2. If using Salesforce back-office: Navigate to 'Claim Wizard' App > Agent Tab
 - a. Using Lightning App Builder, make sure launchedByAgent field is '**CHECKED**'
 - b.



3. Welcome Screen displays a button labeled “Get Started!” to launch the claim process for Agents



4. Agent is presented with a screen to lookup customer using Name, Phone or Email



5. For the Contact/Customer record selected in 4.a, Agent is presented with 4 most recent orders

i. NOTE#1: Number of orders to display are configurable. Set 'orderedLessThanXDaysAgo' to the desired number of days (step 1.b above). **Minimum is 2 otherwise the flow will break**

a. Advanced Search- At bottom of screen are buttons with following choices

1. Show All Orders (search all orders for the contact)
2. Search by Order Number (Order object)

b.

Select from your most recent Orders

00000101

Order Date: 5/4/2022 | Order Amount: \$825,000

00000100

Order Date: 5/2/2022 | Order Amount: \$5,000



Search All Orders



Search By Order#

6. Claim Classification screen – User is presented with options to the order product, issue with the order (damaged/stolen, etc.) and desired outcome (Refund/Replace)

Consideration:

- a. Damage - If user selects Damaged, the user is then prompted to upload an image on the following screen

b.

Select Affected Order Products

☐	Order Product Number	Product Name	Unit Price	Quantity	Total Price	Created t
1	☐ 0000000002	GenWatt Diesel 1000kW	\$100,000.00	1.00	\$100,000.00	5/18/2022
2	☐ 0000000003	GenWatt Gasoline 2000kW	\$150,000.00	1.00	\$150,000.00	5/18/2022
3	☐ 0000000004	GenWatt Gasoline 750kW	\$75,000.00	2.00	\$150,000.00	5/18/2022
4	☐ 0000000005	Installation: Industrial - High	\$85,000.00	5.00	\$425,000.00	5/18/2022

What's wrong with this order?



Damaged



Lost



Stolen



Other

Let's make it right!



Refund



Replace

7. Additional Information Screen allows agent to initiate a Visual Remote Assistance (VRA) Session with the customer to get the required information/image.

a. Considerations for Launching VRA- Make sure that you first Initiate a VRA session outside of the flow by following the below steps-

- i. Go to a Case Record> VRA (Right sidebar) > Start VRA session which will launch the VRA Dashboard. Feel free to end the session or continue playing around.
- ii. If Step 7.a.i is NOT completed, the VRA may not launch from the flow.
- iii. Whether to allow VRA or not can be controlled using the field 'Allow_VRA__c' on 'Claims Wizard' Custom Metadata. Once set to True or False,
 1. any case created going forward will have the field 'Display_VRA__c' set to match the above value, which will control whether to Show/Hide VRA console to the agent when working on a case
 2. If Allow_VRA__c is set to true, agent will be allowed to initiate a VRA session from the flow as well, otherwise NOT.

b.

Sorry to hear that!
Let's submit a case, so our service team can help you asap

* Phone
(415) 555-0153

* Email
acme.dispatcher@example.com

* Help our service team with additional information
my package arrived damaged, both box and content

Internal comment for approval process

Please upload supporting images and documentation
[Upload Files](#) Or drop files

If you do not already have picture, you can start an VRA session to get picture from the customer.

< Back [Continue](#) [Send VRA Invitation](#)

c.

Claim Wizard Accounts Cases Agent Customer

Search...

Agent Actions

An VRA Session should have been created, you should be able to see the VRA Dashboard pop up from the utility bar. If not, please use following information to access the VRA Session.

Agent Link: <https://flowc2022-af-na.techsee.me/join?roomId=828d275deb04c066456c678mini=true&mb=true>

Customer Link: <https://flowc2022-af-na.techsee.me/app/0045822d7d4f>

Please do NOT proceed until customer uploads an image. If the customer is having trouble uploading image via VRA, please go back and try again.

[Submit for Decision](#) [Submit and Deny](#)

Previous Next

00005748 - Call in Progress

Gallery

No Images Yet

Connecting...

Participants

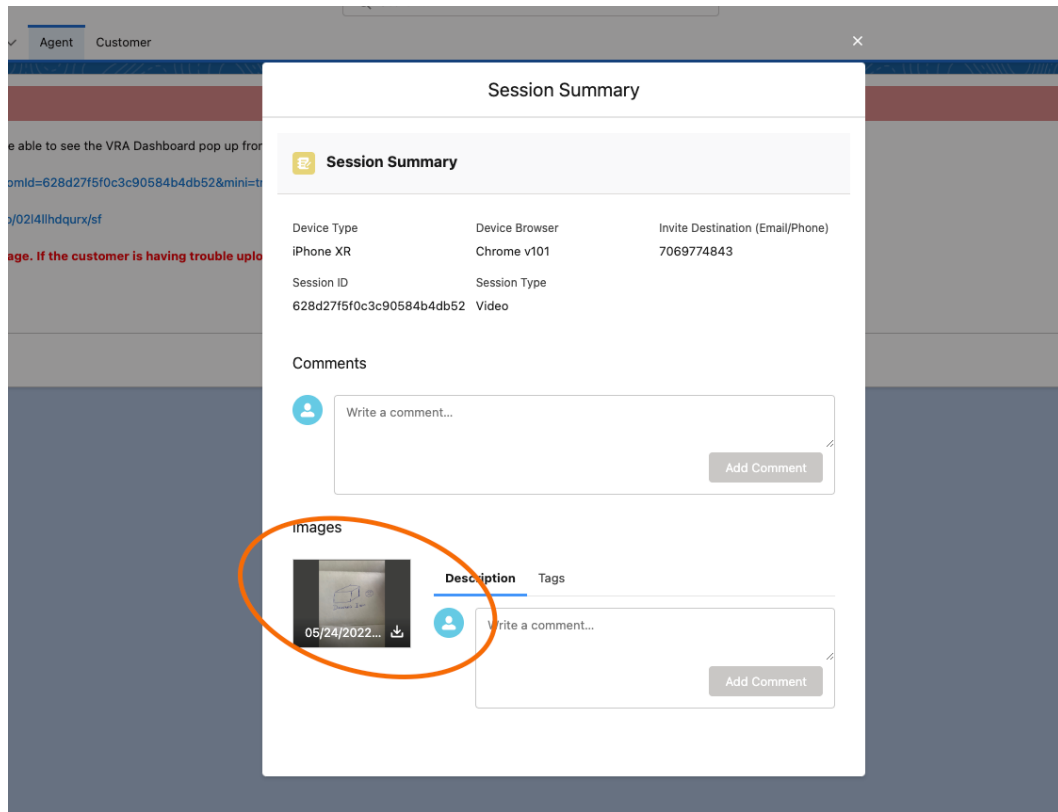
No content yet

Powered by TechSee

Session ID: 6286275a6ef8c0584c6a967

00005748 - Visual Remote Assistant - Video Dashboard

d.



Troubleshooting

Question#1-

Image not showing for buttons- Search All Orders/Search By Order#/Damaged/Lost/Stolen/Other/Replace/Refund

a.

Select from your most recent Orders

00000622
 Order Date: 12/6/2021 | Order Amount: \$4,049

 Search All Orders
  Search By Order#

b.

What's wrong with this order?






Damaged Lost Stolen Other

Let's make it right!




Solution#1:

Step#1- Make sure you have complete all steps for setting up Flow Magic Editor as outlined in this document- [Flow Magic Picklists Setup Instructions](#)

Step#2- Navigate to App Launcher> Flow Magic Editor

Step#3- Select Object> Claims Wizard

Step#3.1- Select Picklist Field> Action Type > Edit

Step#3.1.1- For Icon Name, set the following values

For Refund- utility:money

For Replace- utility:change_record_type

Step#3.1.2- Save

Step#3.2- Select Picklist Field> Claim Type > Edit

Step#3.1.1- For Icon Name, set the following values

For Damaged- utility:process

For Lost- utility:in_app_assistant

For Stolen- utility:block_visitor

For Other- utility:warning

Step#3.1.2- Save

Step#3.3- Select Picklist Field> Search Type > Edit

Step#3.1.1- For Icon Name, set the following values

For Search All Orders- utility:all
For Search By Order#- utility:number_input
Step#3.1.2- Save

Component List

PAGES (6)

	Component Name	Parent Object	Component Type
1	FlowBackButton		Aura Component Bundle
2	Customer		Lightning Page
3	Agent		Lightning Page
4	cw_quickChoiceFSC		Lightning Web Component Bundle
5	Case_Claim		Lightning Page
6	Claim_Wizard_UtilityBar		Lightning Page

OBJECTS (2)

	Component Name	Parent Object	Component Type
1	Claims Wizard		Custom Metadata Type
2	Claim_Wizard		Custom Notification Type

FIELDS (14)

	Component Name	Parent Object	Component Type
1	Resolution Type	Case	Custom Field
2	Order Maximum for Auto Approval	Claims Wizard	Custom Field
3	Order	Case	Custom Field
4	Name Email Phone	Contact	Custom Field
5	Search Type	Claims Wizard	Custom Field
6	Display VRA?	Case	Custom Field
7	Allow VRA	Claims Wizard	Custom Field
8	Details	Order	Custom Field
9	Claim Type	Claims Wizard	Custom Field
10	Case	Order Product	Custom Field
11	Decision Explanation	Case	Custom Field
12	Product Name	Order Product	Custom Field
13	Action Type	Claims Wizard	Custom Field
14	Contact	Order	Custom Field

PERMISSION SETS (1)

	Component Name	Parent Object	Component Type
1	Claim Wizard Permission Set		Permission Set

APPS (1)

	Component Name	Parent Object	Component Type
1	Claim Wizard		App

FLOWS (6)

	Component Name	Parent Object	Component Type
1	Claim Wizard Send Notification		Flow Version
2	Assign Case to Queue		Flow Version
3	Claim Wizard Send Email		Flow Version
4	Claims Management Orchestrator		Flow Version
5	Claims_Management_Flow		Flow Version
6	Claims_Management_Flow_Approver		Flow Version

RESOURCES (4)

	Component Name	Parent Object	Component Type
1	Claims Wizard Layout	Claims Wizard	Page Layout
2	Claim	Case	Record Type
3	FlowPicklistConfig		Static Resource
4	Claim	Case	Business Process

TABS (2)

	Component Name	Parent Object	Component Type
1	Agent		Tab
2	Customer		Tab

Credit

-Lead SE Tim Shorten requested QBranch to create a Claim Flow. We built upon it adding more features and functionality.

Creators

-Billy Fan
-Oswaldo Perez
-Sharad Chandra Maheshwari