Claim Request Management

Overview:

The project involved developing a solution using PowerApps application with SharePoint for an IT company . The client uses the solution for Claim Request management of their farm. This project enabled them to track all the claims and approval status in their organization.

Client details:
Name: Confidential | **Industry:** IT | **Location:** US

Technologies:
SharePoint, PowerApps (Canvas Apps),

Project Description:

The Claim Request Management app is designed to streamline the process of managing and tracking claims, from the initial submission to the final resolution. The app is built using Power Apps and leverages features like forms, buttons, and filters to provide a user-friendly and efficient experience for handling claims.

Key features of the Claim Request Management app include:

- Claim Submission: Users can submit new claims through a form, which captures essential information such as claim type, description, and claimant details.
- Form Mode: The app allows users to switch between different form modes, including "New" and "Edit," to create or modify claim requests.
- Filtering: The app utilizes the Filter function to refine the data displayed based on specific criteria, such as claim type or status.
- Button Interaction: Users can interact with buttons to initiate actions like switching the form mode to "New" or submitting a claim request.
- Approval: After Request has been submitted then it will go through Approvals through Power Automate.
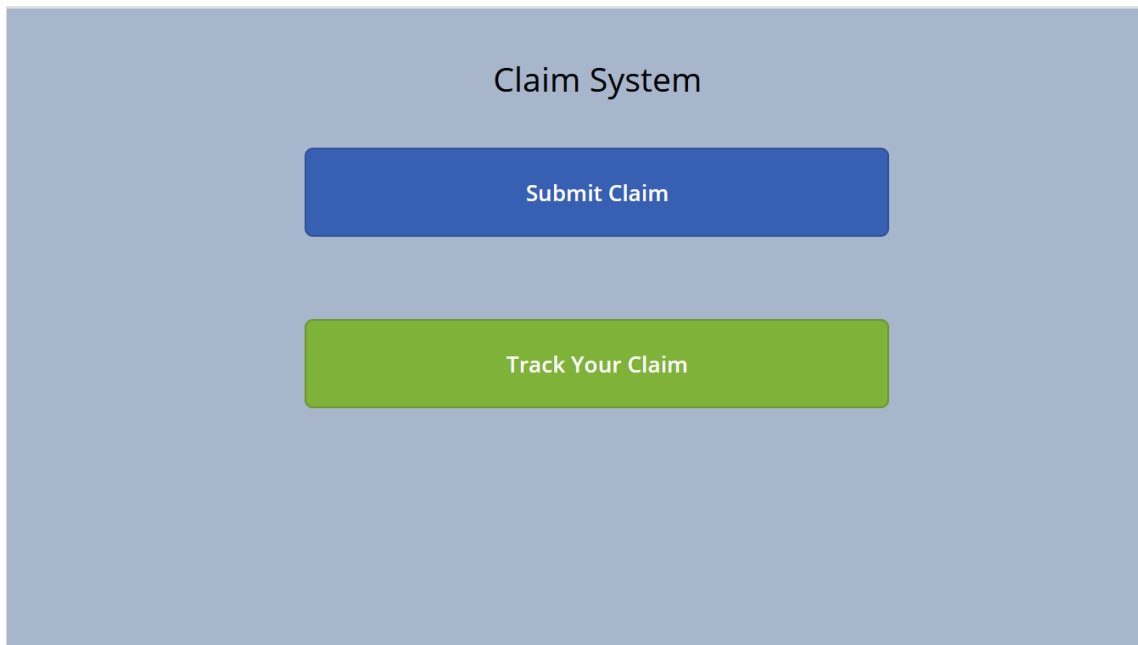
What is Claim Request Management?

Claim request management involves the systematic handling of claims from submission to resolution. The primary objective of claim request management is to streamline operations and provide seamless experience for users. The following are some noteworthy aspects of the project's success:

Sample and Design :

Claim Request management Home screen

Steps:

- Go to make.powerapps
- Create a blank app.
- Add a label and in text property give Submit Claim.
- Add three buttons for Submit Claim, Track your Claim.

In the claim request management screen, users are can navigate to any of the 2 screens by clicking on buttons.

Create SharePoint List

- Create a SharePoint list. And name it as Employee Claims.
- Create fields. Company Name(Choice field), Region(Choice field), Claim type(Choice field), Date (Date and Time field), Payment mode(Choice field), Project code (Single line text), Comments (multi line text), Status (Choice field), Manager (Person and group), Settle desk (Person and group), Approval link (multi line text).

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Title	Single line of text
Company Name	Choice
Region	Choice
Claim Type	Choice
Claim Name	Single line of text
Date	Date and Time
Payment Mode	Choice
Amount	Number
Project Code	Single line of text
Comments	Multiple lines of text
Status	Choice
Manager	Choice
Settle desk	Person or Group
Manager Comments	Multiple lines of text
Settle desk Comments	Multiple lines of text
Approval link	Multiple lines of text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

Claim Request screen:

In the claim request submit screen, users are presented with a form interface that allows them to input and submit their claim requests efficiently. This form serves as a structured way for users to provide essential information related to their claims, enabling a streamlined and organized submission process within the claim request management system. This screen will navigate from Home screen. And also from All Claims screen.

Steps
- Create new screen.
- This screen is used for submitting a record and also for editing a record.
- Add header to screen.
- Add a form to the screen and add data source SharePoint list.
- Add two custom cards to the form and name it as Claim info and Claim details.
- Edit fields in the form.
- In header add a home icon and in Onscreen property of this provide Navigate(Screen1).
- Add another icon add and in OnSelect of this provide NewForm('New Claim Form').
- Add two buttons for Submit form and Reset.
- In On select property of Submit form provide SubmitForm('New Claim Form');ResetForm('New Claim Form').
- In Visible property of it provide If('New Claim Form'.Mode= FormMode.View, false,true).

- In OnSelect of Reset form provide ResetForm('New Claim Form').
- In Visible property of the form provide If('New Claim Form'.Mode=FormMode.View, false,true).
- In OnSuccess property of form provide Navigate('Successfully Completed Screen'). So it will navigate to success screen when on successfully submitting an item.

Successfully Screen

This screen will show on the successfully submitting the form.

Steps
- Add a label and add text as The Claim is Inserted Successfully !!.
- Add a circle and a check icon and in Onselect icon of check icon provide Navigate('New Claim Form')

All Claims Screen
In All Claims screen user can see all claims and also filter claims based on status. In this screen user can see company name, claim name, Amount, Claimed date, status, and track status.
User can also edit and view details of the item from this gallery.

Steps

- Create a screen. And name it as All Claims.
- Add a gallery for see items based on filter option and name it as gallery1.
- Add labels to show different fields in the gallery. Also add icons for edit and view details.
- In OnSelect property of edit icon provide EditForm('New Claim Form');Navigate('New Claim Form').

- In Onselect property of View icon provide ViewForm('New Claim Form');Navigate('New Claim Form').
- Add another gallery for filtering items. And name it as Gallery3.
- In Gallery3 add a button and make wrap count of the gallery as 5.
- In item property of the gallery provide *Table({Filter:"All"},{Filter:"Waiting for manager"},{Filter:"Waiting for settle desk"},{Filter:"Settle"},{Filter:"Rejected"}).*
- In items property of gallery1 provide *If(Gallery3.Selected.Filter="All",'Employee Claims',Filter('Employee Claims', Status.Value=Gallery3.Selected.Filter)).*
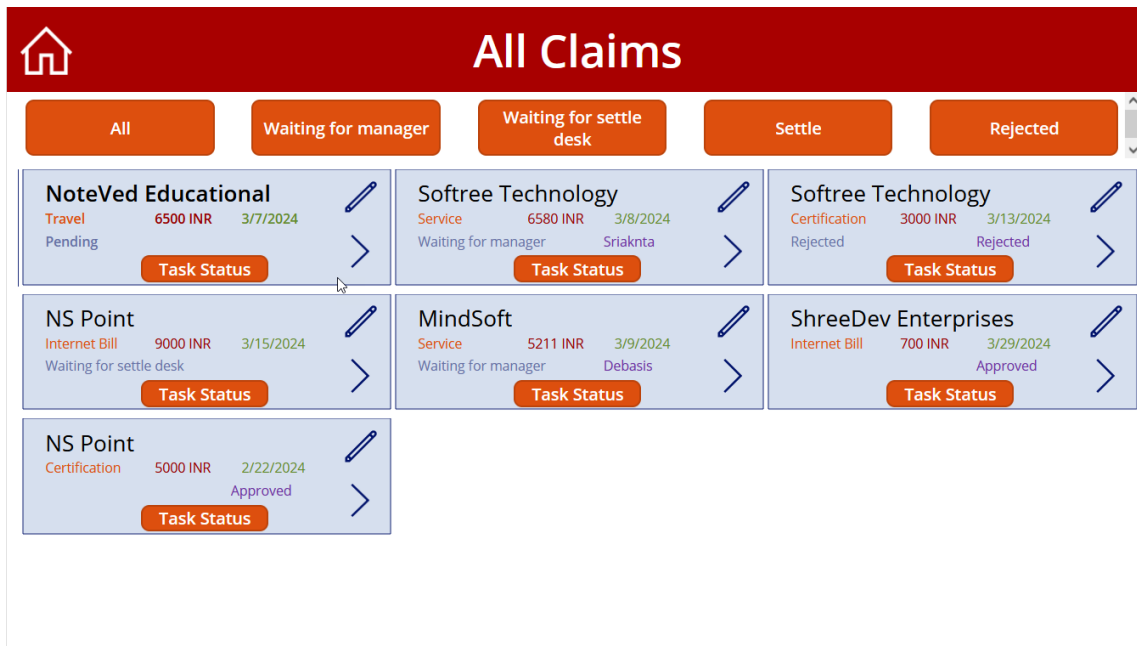
Power Automate Workflow

- When ever a user is going to create a claim, the workflow is going to trigger, and will forward for manager for approval, when ever a manager is going to take action then it is going for settle deck user.

Steps

- Create a cloud flow.
- Add a action "when an item is created and provide URL of site and list name.
- Create an approval action and make approval type as Approve/Reject First to respond. In title provide please approve request. Add assignment to manager ID. Add details of approval "Please approve request". Add link to item in Item link.
- Add update item control and provide URL and list name, In status value provide URl and List Name. In status value provide waiting for manager, Provide manager ID in manager claim field, provide respond link from approval to approval link.
- Add another approval and name it waiting for manager approval and in ID, provide approval ID.
- Add condition control and add outcome is equal to Approve.
- If it returns YES then add another approval and name it "Create Settle desk approval" and Approval type- Approval/Reject- First to Respond, Title- Please take action Claim name.

- In assigned to provide approvers ID, provide details and in Item link provide link to item.
- Add another control Apply to each and add output from previous manager to it.
- Add Update item control and name it Update manager response and provide URL and List name, and ID. In status value provide waiting for settle desk.
- In settle desk claim provide settle desk approval provider ID, add manager comments and add response link to approval link.
- Add another wait for approval and name it as wait for settle desk approval and provide ID.
- Add a condition control and add outcome is equal to approve, If yes then Update item provide URL and List name, provide status value is settled and provide response comment to settle desk comment.
- If NO then update item, provide URL, list name and ID, status value- Rejected, add response comment to manager comment.

This project is successfully done by using the above-mentioned technology and it is maintaining the requirement of the client.