

# Lesson 4 Configuring Vendor Services

ClaimCenter, when integrated with an address book system such as Guidewire ContactManager, allows you to assign services to vendors. This capability is based on two XML files, which control what services are available and the circumstances under which they can be requested.

ClaimCenter also incorporates Straight-Through Invoice Processing (STIP), which allows for the automatic approval and payment of routine invoices without human intervention.

## Prerequisites

This lesson assumes that you have successfully completed the **ClaimCenter Configuration Kickstart** course.

For this exercise, you will use **ClaimCenter** and a supported web browser.

ClaimCenter Server should be running in debug mode when you start the exercise.

## 4.1 Adding services



### Exercise

Succed Insurance needs to add two new services, Interpreter and Negotiator. Both these services should be under a new service category, Personal Services.

They should both be available as the **Quote** and **Service** service kind.

They should be available for all incident types.

### Exercise 1: Adding services

1. In Studio, create four new Display Keys:

```
Ext_Services.PersonalServices.Description = Personal Services
Ext_Services.PersonalServices.Name = Personal Services
Ext_Services.PersonalServices.Interpreter.Description = Interpreter
Ext_Services.PersonalServices.Interpreter.Name = Interpreter
```

2. In Notepad++, open the file **C:\GW10\ClaimCenter\modules\configuration\config\sampledata\vendorservicetree.xml**.
  - a) Add a top-level service category called **Personal Services**, with code **pers** and public id **svc:pers**.
  - b) As a child of **Personal Services**, add the service called **Interpreter**, with code **interp** and public id **svc:pers\_interp**.
  - c) Save and close the file.

3. In Notepad++, open the file  
**C:\GW10\ClaimCenter\modules\configuration\config\sampledata\vendorservicedetails.xml**
  - a) Add svc:pers\_interp with service kind quote and service.
  - b) Add svc:pers with incident types of Incident, InjuryIncident, VehicleIncident, TripIncident, BaggageIncident, PropertyIncident, DwellingIncident and FixedPropertyIncident.
  - c) Save and close the file.
4. Import the changes.
  - a) Log in to ClaimCenter as **su/gw**.
  - b) Navigate to **Administration ➔ Utilities ➔ Import Data**.
  - c) Import the file  
**C:\GW10\ClaimCenter\modules\configuration\config\sampledata\vendorservicetree.xml**.
  - d) Import the file  
**C:\GW10\ClaimCenter\modules\configuration\config\sampledata\vendorservicedetails.xml**.

## Test procedure

1. Log in to ClaimCenter as **aapplegate/gw**.
2. Navigate to an existing claim, such as the Bill Kinman claim.
3. Add a person vendor to the claim.
  - a) Click the **Parties Involved** link.
  - b) Select **New Person ➔ Person**.
  - c) Give the person a first and last name.
  - d) Add the role **Service Vendor** to the person.
  - e) Click **Update**.
4. Create a new service on the claim.
  - a) Select Action ➔ New Service.
  - b) For the request type, select **Quote and Perform Service**.
  - c) For the vendor name, select the person you created in step 3.
  - d) Under Services to Perform, click **Add**.
  - e) Verify that there is a Personal Services category, with one service, Interpreter.
  - f) Select **Interpreter**.
  - g) Choose an address and complete the service.



## 4.2 Invoices on flagged claims



### Exercise

Succeed does not want automatic approval to happen for any invoice where the claim is flagged.

### Prerequisites

For this exercise, you will use **ClaimCenter** and a supported web browser.

ClaimCenter Server should be running in debug mode when you start the exercise.

### Exercise 2: Invoices on flagged claims

1. Create a display key that reminds the user that the claim is currently flagged.
2. Add a clause to the `InvoiceAutoApprovalHelper` to cover this use case.

### Test procedure

1. Navigate to a flagged claim.
  - a) Log on to ClaimCenter as **bbaker/gw**.
  - b) Navigate to the Mark Henderson claim (**235-53-373870**), or any flagged claim.
2. Attempt to create a payment.
  - a) Select Action → New → Service.
  - b) Relate it to reserve line (2).
  - c) Make the request type Quote and Perform Service.
  - d) Under Services to Perform, select Glass.
  - e) Create a new Vendor (Company).
  - f) Fill in details as required.
  - g) Click Submit.

- h) If the Next Action field for the service request reads Submit Request, click the link and submit the request.
- i) In the Details tab of the Services screen, click Record Vendor Progress → Vendor Accepted Work.
- j) Pick today's date and click Update.
- k) Click Record Vendor Progress → Vendor Completed Work.
- l) Click Add invoice.
- m) In the Description field, enter Glass.
- n) In the Add Invoice screen, select Labor for the category and enter \$95 as the amount.
- o) Click Update.
- p) Select the Invoices tab and observe that the invoice's status is Waiting for Approval, and note the Status Reason.
- q) Click Approve.



## 4.3 Solutions

### Solution 1: Adding services

```

436   <SpecialistService public-id="svc:pers">
437     <Active>true</Active>
438     <Code>pers</Code>
439     <Description displayKey="true">Ext_Services.PersonalServices.Description</Description>
440     <Name displayKey="true">Ext_Services.PersonalServices.Name</Name>
441     <Parent/>
442   </SpecialistService>
443   <SpecialistService public-id="svc:pers_interp">
444     <Active>true</Active>
445     <Code>interp</Code>
446     <Description displayKey="true">Ext_Services.PersonalServices.Interpreter.Description</Description>
447     <Name displayKey="true">Ext_Services.PersonalServices.Interpreter.Name</Name>
448     <Parent public-id="svc:pers"/>
449   </SpecialistService>
450 </import>

```

```
327  <SpecialistServiceCompatibleServiceRequestKind public-id="cc:82">
328    <Kind>quoteandservice</Kind>
329    <Service public-id="svc:pers_interp"/>
330  </SpecialistServiceCompatibleServiceRequestKind>
```

```
435  <SpecialistServiceCompatibleIncidentType public-id="cc:27">
436    <IncidentType>InjuryIncident</IncidentType>
437    <Service public-id="svc:pers"/>
438  </SpecialistServiceCompatibleIncidentType>
439  <SpecialistServiceCompatibleIncidentType public-id="cc:28">
440    <IncidentType>VehicleIncident</IncidentType>
441    <Service public-id="svc:pers"/>
442  </SpecialistServiceCompatibleIncidentType>
443  <SpecialistServiceCompatibleIncidentType public-id="cc:29">
444    <IncidentType>TripIncident</IncidentType>
445    <Service public-id="svc:pers"/>
446  </SpecialistServiceCompatibleIncidentType>
447  <SpecialistServiceCompatibleIncidentType public-id="cc:30">
448    <IncidentType>BaggageIncident</IncidentType>
449    <Service public-id="svc:pers"/>
450  </SpecialistServiceCompatibleIncidentType>
451  <SpecialistServiceCompatibleIncidentType public-id="cc:31">
452    <IncidentType>DwellingIncident</IncidentType>
453    <Service public-id="svc:pers"/>
454  </SpecialistServiceCompatibleIncidentType>
455  <SpecialistServiceCompatibleIncidentType public-id="cc:32">
456    <IncidentType>FixedPropertyIncident</IncidentType>
457    <Service public-id="svc:pers"/>
458  </SpecialistServiceCompatibleIncidentType>
459  </import>
```

## Import Administrative Data

Cancel

Next

Finish

Please browse for an administrative data file to upload

vendorservicetree.xml

Browse...

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

## Import Administrative Data

Cancel

Next

Finish

Please browse for an administrative data file to upload

vendorservicedetails.xml

Browse...

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

## Test procedure

New Person [Return to Contacts](#)

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

[Update](#) [Cancel](#) | [Check for Duplicates](#)

This contact is not linked to the Address Book

Roles	Add	Remove	Related To	Role*	Active? *	Comments
			<input type="checkbox"/> 235-53-425891	Service Vendor	<input checked="" type="radio"/> Yes <input type="radio"/> No	

Person	Additional Info
Prefix	Tax ID (SSN)
First name	Tax Filing Status
Middle name	Date of Birth
Last name	Gender

Person

Prefix: <none>

First name: Terry

Middle name:

Last name: \* Gaste

Additional Info

Tax ID (SSN):

Tax Filing Status: <none>

Date of Birth: MM/dd/yyyy

Gender: <none>



## Solution 2: Invoices on flagged claims

```
Ext_Web.Plugin.InvoiceAutoApproveAutoPayPlugin.ClaimIsFlagged = The claim is currently flagged
```

```
var failureReasons: List<String> = {}

if (claim.State == ClaimState.TC_CLOSED) {
    failureReasons.add("The Claim is closed")
}

if (claim.isCurrentlyFlagged()) {
    failureReasons.add(DisplayKey.get("Ext_Web.Plugin.InvoiceAutoApproveAutoPayPlugin.ClaimIsFlagged"))
}

if (claim.SIUStatus == SIUStatus.TC_UNDER_INVESTIGATION) {
    failureReasons.add("There is an active SIU investigation")
}
```

## Test procedure

### Create Service

Related To \* (2) 3rd Party Vehicle - Richard Jackson

Services to Perform **Add** | **Remove**

Category  Subcategory  Service Type

Auto      Inspection / Repair Glass

Request Type \* Perform Service

**Vendor**

Name \* Consolidated International

Phone

Location 3232 32d St, SC 32839

Communication Method Guidewire Portal

### Vendor Accepted Work

Return to Services **Update** **Cancel**

Expected Service Completion Date \* 05/09/2018

### Add Invoice

Invoice Reference Number 1234-j

Description \* Glass

Line Items **Add** **Remove**

<input type="checkbox"/> Category	Description	Amount *
<input type="checkbox"/> Labor		\$ 95.00
Total		\$95.00

**Details**

**Approve**

**Reject**

**Withdraw**

Invoice waiting for approval

Invoice Reference Number      1234-j

Invoice Status                  Waiting for Approval

Status Reason                  This invoice could not be auto-approved because the Claim  
is currently flagged.

Submitted Date                05/02/2018