

# 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

Succeed 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\sampladata\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\sampladata\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\sampladata\vendorservicetree.xml**.
- d) Import the file  
**C:\GW10\ClaimCenter\modules\configuration\config\sampladata\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

venderservicetree.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

venderservicedetails.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

235-53-425891

Service Vendor

Active? ☒ Yes ☐ No
Comments

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>

Select Services to Add

Return to Add Service

OK

Cancel

▼ Medical

☐

Medical care

▼ Personal Services

☒

Interpreter

▼ Property

▼ Construction services

☐

Arborist

☐

Boilers

## 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

<input type="checkbox"/>	Category ▾	Subcategory ▾	Service Type ▾
<input type="checkbox"/>	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