



# RELEASE NOTES

SYMBILITY VERSION 5.13  
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## 2) INTRODUCTION

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This document describes the new features and enhancements that are part of the upcoming version 5.13 of Symbility Claims Connect and Mobile Claims. The target dates for this international release are:

- May 19<sup>th</sup> in Canada
- June 8<sup>th</sup> in the United Kingdom
- June 16<sup>th</sup> in the United States
- June 22<sup>th</sup> in South Africa, Australia and New Zealand
- June 27<sup>th</sup> in Poland
- June 29<sup>th</sup> in Belgium & Germany

## 3) MAJOR ENHANCEMENTS

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### a) Enhancement 163 – Subcoverages

It is a common practice for insurance companies to specify limitations within a policy on the amount of coverage available to cover a specific type of loss (e.g. jewelries). This feature will greatly assist insurance companies when working with coverage sublimits within a claim.

Specifically, this enhancement now opens up the capability for an insurance company to do the following:

- Define subcoverage types as part of the company claim defaults. This includes the ability to add, modify or delete a subcoverage.
- Automatically add default subcoverages as part of a coverage to a claim.
- Apply sublimits within a subcoverage in a claim.
- Allow recoverable depreciation attributes from items and the parent coverage to apply to the subcoverage.
- Ability to specify a subcoverage when adding a line item.
- Ability to view subcoverage limits within reports and within the Payment Tracker feature.
- Ability to create claims including subcoverages using the API.
- Ability for a subcoverage to apply across multiple coverages.



Because this feature requires some initial set up, companies should work closely with their Symbility Account Manager who can assist them with setting up the subcoverages and applying them to claims.

## b) Enhancement 310 – Material Rollout Calculator

Symbility places a great deal of emphasis on helping our customers write more accurate estimates. The Rollout Calculator is a significant step towards this goal by giving Mobile Claims users a tool that helps accurately estimate quantities for rolled material such as vinyl flooring and carpet.

This first phase of the Rollout Calculator focuses on rolled material where the amount of waste can vary greatly based upon how the material is installed. Because of the sizes and shapes of rooms within a structure, material waste can be minimized by correctly laying out the flooring. With the Rollout Calculator users can now set parameters for the flooring material when they apply it to a room. These parameters include such things as roll width, number of seams, and horizontal and vertical repeat patterns on the material. The system will then calculate the most efficient layout for the room or rooms selected to minimize material waste.

Key features within the Rollout Calculator include:

- Application of a material to single or multiple rooms and multiple floors.
- Ability to set default roll width, maximum T-seams, and cut margins.
- Ability to switch between horizontal and vertical seams.
- Factoring in of material patterns for matching purposes.
- Automatic item notes for estimate line items where the Rollout Calculator was used.
- Ability to view the material rollout plan within a floorplan.



## 4) ENHANCEMENTS

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### a) Enhancement 203 – Modifications to Water Mitigation module to fit new S500 standards

The Symbility Water Mitigation module has received an enhancement per the new S500 standards released by the IICRC. The changes to these standards reflected in the Water Mitigation module include the following:

- Updated water intrusion class definitions.
- New Audit Rules that validate the class of water against the percentage affected within a chamber.
- Air mover numbers now being determined using calculation only.
- Change to the moisture meter measurement for wood from a percentage to a scale.
- Change in the drying goal calculation.

### b) Enhancement 236 – Automate assignment process by using Repair Options and Business Rules

Symbility Claims Connect can be used as an assignment management tool to ensure that the most appropriate user/vendor can be found at any time during the claim lifecycle. The assignment management tool's capabilities have been greatly expanded by allowing the use of customizable business rules to make sure a company's specific workflows are taken into account when selecting the assignees. The enhanced assignment tool leverages the capabilities of the Group Assignment process engine as well as the concept of Repair Options introduced in Desk Adjuster. These new features make the experience less error prone and ensures an easy to use, accurate and efficient assignment process.



## c) Enhancement 289 – Add guidance to Symbility LINK

Symbility LINK is Symbility's first application that is focused on the Policyholder rather than professional claims people. From the perspective of the user focus, the Policyholder will access LINK relatively few times during the course of their claim whereas insurance company professionals will be inside of Symbility's systems constantly as a part of their job. This means it is of the utmost importance that Symbility focuses on making the on-boarding and the user experience for LINK extremely simple and intuitive for these Policyholders and be able to respond quickly to customer feedback. To accomplish this Symbility has added default walk-throughs within LINK that are currently covering the following aspects of the solution:

- Review the Claim Summary.
- Configure the notifications.
- Add claim documentation (photos, documents).

More walk-throughs and guidance will be added in the coming months.

## d) Enhancement 293 – LINK: Ability to support multiple brands

Many Symbility insurance company customers write policies under different writing companies and their policyholders expect to see communication from the insurance company reflect that branding. With this enhancement companies that write policies under different names and branding can now set up those multiple brands within Symbility LINK thereby giving the policyholder the familiar logo and color scheme of the company their policy is written under.

## e) Enhancement 308 – Option to disable taxes on specific contractor quotes in Desk Adjuster

In some countries the collection of taxes by a contractor is not required if the annual revenue of a company is below a certain threshold. There are times when an insured submitted contractor quote comes from a contractor that falls below these limits. This enhancement now gives the Desk Adjuster users an option to exclude taxes from a contractor quote causing the corresponding routing rules and options to use the new untaxed amount.



## f) Enhancement 309 – Default Desk Adjuster estimate names

Desk Adjuster has undergone a few enhancements in version 5.13. This specific enhancement has to do with the default estimate names within Symbility Desk Adjuster. Most insurance companies use the capability of being able to change estimate names inside Claims Connect to accurately identify the type of estimate being written. Default estimate names can be set inside a company's Preferences and locked down if so desired to restrict the end user from renaming them. With this enhancement the above described functionality is now expanded to include Desk Adjuster. Default estimate names can be created for Desk Adjuster and connected directly to the type of questionnaire used in order to correctly reflect the estimate type. For instance, if the user selects the 'Break In' script within Desk Adjuster the system could be set up so the default estimate name reads 'Break In Estimate'. The user will also be able to rename these to accommodate unique scenarios per company best practices.

## g) Enhancement 311 – Desk Adjuster reporting requirements

Claims handled within Symbility Desk Adjuster have some workflows that are unique to Desk Adjuster. Status and routing options are unique to Desk Adjuster and the need to generate reports related to these options required some minor changes. With this enhancement Symbility customers utilizing Desk Adjuster now will have access to three reports specifically related to Desk Adjuster. These reports deal with status and routing options. Specifically they are as follows:

- Claims Status: This will be a list of claims along with the status each claim is in and their selected repair option.
- Selected Routes: This report will consist of a list of all the repair options that were available for a claim and which one was selected by the user.
- Route Exceptions: This report contains the user-selected reason they did not chose the system recommended repair option.

## h) Enhancement 318 – New Template Report – Vendor Assignment List

A new report has been built inside of Claims Connect that helps track cycle times specifically for any assignment that has been sub-assigned. This report is generated from the Report Templates

under a new group called *Cycle Time*. It will allow an originating company to view the full cycle time of an assignment and the sub-assignment from the Originator's vendor which has the estimate attached to it. This report will also contain manually entered assignment dates to accurately reflect the date and time of key claim milestones.

## i) Enhancement 321 – LINK: Improvement on how permissions are applied for an insured

With the increased popularity of LINK, Symbility has continued to expand the features available to companies employing LINK to communicate claim statuses and information to their policyholders. This enhancement is directly related to how permissions are applied for a policyholder who is using LINK. The enhancements to LINK permissions are as follows:

- Visibility of Estimates: In the past a policyholder could only view an estimate if it had been marked as Approved. Because some Symbility customers have chosen not to use the Approved status when reviewing estimates this change now gives a company the ability to share with a policyholder an estimate without it having to be marked as Approved.
- Photo Upload: With this change a policyholder can now upload photos regardless of whether or not they have access to a photo page as long as they have been given *Attach Photo* access for their claim.
- Document Upload: This change is similar to photos in that as long as the policyholder has been given permission to *Attach Document* they will be able to upload documents regardless of which document folders they can access.

## j) Enhancement 359 – Customize contact options for support in Claims Connect

Due to the difference in support operations between the international markets an enhancement was needed to the wording and links available through the support options within the system. A new menu entry for Email Technical Support for all environments and a new Email Technical Support link will now be available for user to have quick access to the technical support from all Symbility support teams.



## k) Enhancement 362 – Ability to modify the Loss Summary page via the API even when the claim is owned

Within the Loss Summary page many fields are editable by both the Claims Connect and Mobile Claims user who owns the claim. There are instances where some of these fields are edited by either the Mobile Claims user, a user in Claims Connect or via an API and the system needs to know which one takes priority over the other. This enhancement was done to ensure that the correct edits are saved even when the claim is owned by a Mobile Claims user.

## l) Enhancement 363 – Addition of units of measurement

This enhancement is specific to the international market Symbility serves. Some Symbility customers are required to comply with specific construction standards which often times requires different units of measurement. The addition of specific units of measurement that mostly address equipment reservations will now allow those Symbility customers to comply with those construction standards. These additional units of measurement will also be supported in the new API.

## 5) MAJOR RESOLUTIONS

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### a) Resolution 192 – Changes to Mobile Claims to properly support high DPI displays

This resolution addresses the trending toward higher DPI displays in new devices and monitors. Symbility has now configured Mobile Claims to detect the DPI of the display on a device or monitor and then appropriately scale the graphical elements (text, icons, menus, etc.) so they can be seen clearly and accessed easily.



## b) Resolution 304 – LINK – Order assignments based on start date

This resolution relates directly to the order in which the repair details are displayed within LINK. Now, all assignments will be displayed in order (from top to bottom) of the schedules/start date, showing the earliest assignment first and going down from there.

## c) Resolution 324 – LINK: Localization for international markets

This resolution is one of a few changes made to LINK in order to address the use of LINK within the international market. This resolution addresses localization issues for international markets such as phone number formats, different currencies, etc.

