Release Notes

Symbility *Mobile Claims* and *Claims Connect*
Version 5.5

Revision History

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1.1	July-8-14	Comments	Craig Batten
1.2	July-10-14	Modifications based on comments	Catherine Huish

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1. Introduction

This document describes the new features and enhancements that are part of the upcoming version 5.5 of Symbility *Claims Connect* and *Mobile Claims*. The target date for this release is July 11, 2014 in Canada and August 15, 2014 in the US.

2. Major Enhancements

2.1 Enhancement # 19222 – Allow an Unlimited Number of Coverages per Claim

It is now possible to define as many coverages as necessary on the Loss Summary page of a claim, as opposed to the previous limit of 10 coverages per claim.

2.2 Enhancement # 24256 – Salvaged Goods

By client request, Symbility now offers its users the ability to include an allowance for salvaged goods in an estimate which is automatically deducted from the estimate total. This new option also provides salvage management and reporting capabilities. Users can set a salvage allowance amount for the estimate and choose whether amounts should apply before or after taxes, as well as enter the total amount recovered for salvaged goods. Statistics and reports on salvage and recovery are an integral part of this feature, allowing users to track salvage-related amounts and report on them.

Please contact your account manager for more information about this option.

2.3 Enhancement # 25783 – Video Connect Integration

Symbility proudly announces the integration of Librestream's leading virtual collaboration technology in Symbility's suite of mobile products. Symbility's new virtual collaboration tool, Video Connect, allows desk adjusters to perform live, remote site inspections by way of a video call with almost any individual with a mobile device at the loss location. During the call, the adjuster can speak with the person on site who will be able to show the details of the damaged area while the adjuster uses the built-in documenting features to record, capture and annotate the loss data and images being received. The captured data can be used to assess and settle claims faster and at greatly reduced cost, saving on travel and other expenses.

The video collaboration tool was built to function in locations with limited network conditions and runs on ultra-low bandwidth, making it even more efficient in emergency situations. Video Connect is supported on the following iOS devices: iPhone 5 or higher, iPad 2 or higher, iPad mini with Retina display (2013 or later) and iPad Air. Download the Video Connect datasheet for more information.

3. Other Enhancements

3.1 Enhancement # 10471 – Automatic Selection of Latest Symbility Database

In response to a client request, Symbility has added the ability to automatically update pricing databases so that the latest version is used by default when creating new claims. This is extremely practical and time-efficient as it saves users the time of manually selecting new versions and of making sure the version is the most recent.

3.2 Enhancement # 24178 – Ability to Include Timestamps for Custom Fields

Users can now choose to have their custom fields include a timestamp, which will appear next to the custom field and display the date and time of its most recent update, helping companies to track updates to important fields. Each update to a timestamp-enabled custom field will also log a journal entry.

3.3 Enhancement # 24181 – Add Claim Contact Column to Hot List and Claim List

A new column, "Claim Contact", has been added to the list of columns available in the Hot List and the Claim List in *Claims Connect*.

3.4 Enhancement # 24183 – Provisional Item Property

There is a new item property, "Provisional item", which serves to remind the user to update the actual cost of the item once known. Users can either flag database items as provisional or have certain items set to be marked as a "Provisional item" by default, so that it applies as soon as the item is added to an estimate. Marking an item as provisional automatically adds a note indicating that it is provisional and allows users to create rules and alerts specific to provisional items. This property can also be used to search for estimates, to call claims from the API and as an element in the Report Builder feature.

3.5 Enhancement # 24274 – Add Full Name (or Business Name) of 1st Policyholder as Column in Tasks Table

A new column, "Policyholder Name", has been added to the Tasks table to make it easier for users to identify claims based on the policyholder.

3.6 Enhancement # 24275 – Report Builder Pricing Region Range Property

Symbility has added new optional parameters to the pricing region element in the Report Builder that allow users to define a range within a region level in order to extract specific information.

3.7 Enhancement # 24537 – Option to Hide Page Numbers When Printing

A new printing option has been added that allows users to show or hide page numbers when printing a claim.

3.8 Enhancement # 24595 – Remove Date and Time Stamp from SMS Notifications

SMS notifications for claim events will no longer contain the date and time that the notification was sent, leaving more space for relevant claim information in the message.

3.9 Enhancement # 24635 – Changes to Default Settings in *Mobile Claims* for New Users

Certain default settings in *Mobile Claims* have been changed to improve initial setup of the application for new users. Over time, the default values for some settings gradually became less than optimal for first-time users and had to be manually changed upon installation as a matter of course. As a result, Symbility has reconfigured the default settings so that they reflect the ideal initial setup for users. The new defaults will have no impact on existing users or their settings. These changes include, among others:

- All interior and exterior dimensions are displayed on floorplans and on roofplans.
- A line item's action is placed before the item name in the estimate view.
- The setting "Combine related subrooms" is enabled.
- Columns for both Quantity and Total Price are visible by default in the line items pane.
- The option "Remember item pane opened state" is enabled.
- The default action when opening photos is to open them in a photo viewer.

3.10 Enhancement # 25101 – Creating Estimates as Part of Assignments

Symbility has enhanced the assignment process with the ability to configure which assignment types will automatically trigger the creation of a new, blank estimate. There is now also the option to prevent vendors from adding their own estimates to claims based on assignment type. Companies can define a custom list of estimate names for their company's assignments and these estimate types can be customized by assignment type. This greatly simplifies the process for assignors and assignees since it automatically ensures the consistency of the estimates included in claims assigned from *Claims Connect* without assignees having to modify their default claim structure. It also ensures that only assignments requiring a blank estimate to be created will generate one.

Please contact your account manager for more information about this enhancement.

3.11 Enhancement # 25189 – Guest User Enhancements

Symbility has added more options to its Guest User account feature for greater flexibility of use. Among these new options is the ability to automatically add the Insured as a Guest so that person can track progress and receive notifications of claim events. Another notable enhancement is the addition of the notification functionality in Guest User accounts. The default permissions for Guest Users have also been simplified in that they can now be configured by Guest User type so that a newly created Guest User will automatically have default permissions that reflect its type.

For more details about the additions to this feature, please contact your account manager.

3.12 Enhancement # 25996 – Improve Visibility of Deleted Items When Processing Payments

When the Payment dialog is open, users can now see deleted items in the Merged Estimate view that had a "Paid" status prior to being deleted. Deleted items, which appear in gray italics, can be moved to the Payment dialog and have payments applied to them.

3.13 Enhancement # 26230 – RCT Express - Integration Enhancements

Certain company-specific RCT Express sites now have additional options that will facilitate record tracking and management for administrators. The update consists of the new option to grant valuation editing permission to selected users even when the company-wide setting is read-only. Users with read-only access will only see the PDF report in the claim. Users with site access can modify the RCT report and RCT will keep a record to identify who made the changes.

3.14 Enhancement # 26350 – Prefill - *Mobile Claims* Compatible with RCT 4.1

Mobile Claims has been adapted to be compatible with RCT version 4.1, which requires Internet Explorer 8 or higher.

3.15 Enhancement # 26602 – Create Journal Entry When User Must Transfer Participation

Symbility has ensured that a Journal entry is created for the event when the user stops participating in a claim and is obliged to select another user to transfer participation or the assignment to. This was done to clearly indicate and provide a record of how participation was transferred to the new participant or assignee.

3.16 Enhancement # 27153 – SkyMeasure - Enhancements to the Integration

When placing an order for a SkyMeasure™ (formerly Acuverity) ROOF Report, users can now specify whether the property type is commercial or residential, according to the type of claim it will be used in.

3.17 Enhancement # 27274 – Access to Calendar in *Mobile Claims*

Symbility has developed the ability for users to view their calendar in *Mobile Claims* from the Claim List page without having to go through a specific claim or create a new claim.

3.18 Enhancement # 27277 – Calendar Block Details

The main Calendar view now displays more essential information for each event or appointment item – including the location – so that users can see all the details at a glance.

3.19 Enhancement # 27278 – Default Zoom Level for Forms

Users can now select their preferred default zoom level for viewing forms in *Mobile Claims* and the new default zoom is set to fit the width of the screen. This will allow better visibility for forms on smaller screens, such as on mobile devices, and the new options will prevent users from having to change the zoom manually each time they open a form.

3.20 Enhancement # 27470 – Ability to Combine Line Items per Item

This modification enables the grouping of related line items on the Estimate page for a more clear and concise view of the estimate. Users can choose to combine various lines items – representing actions or grades, for instance – if their item descriptions and quantities are identical.

3.21 Enhancement # 27732 – Improve Speed When Downloading the Item Database Tree

The process for users to download pricing databases has been optimized for greater speed when downloading and populating the database tree.

5. Major Resolutions

5.1 Resolution # 24727 – Vendor Should Not Be Able to Approve Their Own Payment Request

Symbility has implemented a restriction on the approval of payments that prevents a Vendor or Peer from approving or rejecting a payment that they have created.

5.2 Resolution # 25970 – Contractor Should Not Be Allowed to Create a New Claim in *Mobile Claims* Without Database Create Claim Permission

Symbility has investigated and resolved the issue that was allowing certain vendors to create claims using a pricing database for which they do not have Create Claim permission.

5.3 Resolution # 26045 – Claim Does Not Denote User as Primary Adjuster for the Claim

Symbility has corrected the issue of improper flagging of the role of Primary Adjuster for the claim in both *Mobile Claims* and *Claims Connect*. Now, as per the intended behavior, an asterisk/flag will appear next to the name of the Primary Adjuster for the claim, as distinct from the Primary Adjuster for an assignment.

5.4 Resolution # 26298 – Inactive Database Versions Showing on *Claims Connect*

Inactive databases are no longer displayed in the Database Manager in *Claims Connect*.

5.5 Resolution # 27776 – Writing Company Value Deleting

Symbility has resolved the issue of the Writing Company field's value being deleted.

5.6 Resolution # 27973 – "Select Database Object" Dialog Blank after Downloading Pricing Database

The issue that had been causing the "Select database object" dialog to appear blank for certain users when trying to download pricing databases has now been corrected.