RELEASE NOTES
Release 5.3

Version 1.3

Authors: Pascal Bégin
Catherine Huish

Revision History

Version	Date	Description	Author(s)
1.0	Nov-1-2013	Document creation	Catherine Huish
1.1	Nov-29-2013	Review, comments added	Pascal Bégin & Craig Batten
1.2	Dec-2-2013	Modifications, comments incorporated	Catherine Huish
1.3	Dec-3-2013	Major Resolutions added	Catherine Huish

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1. Introduction

This document describes the new features and enhancements that are part of the upcoming version 5.3 of Symbility Claims Connect and Mobile Claims. The target date for this release is January 17, 2014 in North America.

2. Major Enhancements

2.1 Enhancement # 24159 – Contents Estimating - Phase I

Symbility is introducing the first phase of an all-new tool called Contents Estimating. With this tool, users can now create a detailed contents estimate in Mobile Claims. It enables users to easily create and manage an inventory list, accurately establish replacement cost of items, and track payments to the insured. This fully-integrated feature was tailored to the way contents are inventoried and valued, greatly simplifying the process for our users, whether it's a purely contents-based estimate or associated with a structural estimate. Using a contents-specific pricing database, it will help avoid inflated prices, save time previously spent on brand and model research, track recoverable depreciation, and more.

Please contact your account manager for more details on this major feature.

2.2 Enhancement # 24152 – Claim Prefill

Symbility has developed a strategic new feature that will radically increase the efficiency and accuracy of the estimating process. This unique tool uses different models, based on the type of loss, to predict which items should be included in the estimate. When a user enters the relevant claim information, the Claim Prefill module presents the user with a list of recommended items – the items most likely needed for replacement or repair in that specific loss scenario, computed using the claim information. Now, with minimal input, users receive a focused claim template – optimized for speedy and efficient completion. The user has the option to add or remove items as needed.

Please contact your account manager for more details on this major feature.

2.3 Enhancement # 24164 – Database intelligence – Auditing based on taxonomy

Symbility has created classifications for items and how they relate to other items in the database, making the audit rules engine more flexible. For more information about audit rules, contact your account manager.

2.4 Enhancement # 24163 – Database intelligence – Item Browser Filtering

Mobile Claims users now have a new tool that will help them quickly target the items they need to add to their estimates, significantly reducing the overall estimate-building time. The Item Browser Filter tool is activated via an icon in the Items panel, and allows users to select one or more filters that will return a customized list of relevant items. The available filters are based on a range of item properties including the type of loss, location of the damage, building type and even material quality. Users simply need to check all the filters that apply to their claim, and the Items panel will

dynamically update to display only the sets of items that are relevant to the claim for the user to choose from, making it easier to find the right items.

2.5   Enhancement # 22642 – Document explorer and customizable folder structure

In response to a client request, Symbility has added functionality that gives users a more intuitive way to manage documents in the Claim Explorer in Mobile Claims. Users can now customize the way claim documents are organized and stored, streamlining the process of adding and navigating documents. Administrators will be able to define new default document folder structures for the company in Claims Connect, including subfolders and the ability to set different levels of permissions for folders and their contents.

3.   Other Enhancements

3.1   Enhancement # 24132 – Company options – Do not delete estimates when assignment cancelled

In response to client feedback, estimates that are created as part of an internal assignment will remain in the claim by default when the assignment is cancelled. Estimates built as part of an external assignment will still be deleted by default upon cancellation. These settings can be changed by contacting your account manager.

3.2   Enhancement # 24162 – Client Request – Ability to merge all sub-categories in Recap by Category

Users can now opt for a more concise view of the Recap by Category section of the Recap page using the new viewing preferences in the View Ribbon. Users can select "All categories", "Parent categories", or "Group categories" for viewing the recap. There are also new options for customizing print profiles so that users can choose what category level is printed in the Recap section.

3.3   Enhancement # 24427 – Ability to retrieve item category and trade name via the API

This much-anticipated enhancement allows an external system to extract an item's category and trade name through the API.

3.4   Enhancement # 24129 – Warning message when last user on an assignment tries to stop participating

If the last/only user in an assignment attempts to stop participating in a claim, Mobile Claims now prompts them to first make sure that another user is participating in the claim, since every assignment in a claim needs at least one user who is part of the assignment.

3.5   Enhancement # 24135 – Warning message when un-assigning a claim

When users attempt to unassign a claim that has estimates associated with the assignment, they will now see a warning message telling them that the estimates will be deleted if they proceed.

3.6   Enhancement # 24125 – Estimates Completed or Cancelled before completing assignments / Assignments Completed or Cancelled before closing claim

This gives companies the option to prompt users to mark all estimates as Completed or Cancelled before completing an assignment, as well as the option to prompt users to mark their assignments as Completed or Cancelled before closing a claim.

3.7   Enhancement # 24826 – Client request – US Tax lookup

This update will validate addresses as they are entered to prevent incorrect tax information from being returned when an address is incomplete or incorrect. If an address entered is invalid (i.e. it fails the tax rate lookup), a message will inform the user that taxes cannot be applied, and the

claim will be flagged. Flagged claims can be identified by generating a report using the new report template.

3.8 Enhancement # 24168 – New "Standard light" user type

There is a new user type available for insurance companies, with only the essential user features activated. Ideal for users who will be assigned claims and will not need to create or manage them.

3.9 Enhancement # 24192 – Ability to import new depreciation type from Accurence

Symbility can now import the new "Percentage" depreciation method available in Accurence. For more information about integration with Accurence, please contact your account manager.

3.10 Enhancement # 22968 – Totals and Summary page enhancements

There is now a *Summary (All)* page that allows a user to select estimates written by any user or company, and displays the combined summary of the selected estimates in one page. The *Totals (All)* page now also displays the data for all estimates selected by the user, even if the estimates' status is not Approved.

4. Major Resolutions

4.1 Resolution # 24043 – Claims Connect – Issue with photo caption font size in PDF printout

Symbility has resolved the issue with the photo caption font size that occurred when the photo page was printed as a PDF. The font size for captions is now scaled and readable.

4.2 Resolution # 24647 – Mobile Claims – Default printer not saved when using Windows 8

Symbility has resolved the issue of having to reselect the default printer every time a Windows 8 user printed from Mobile Claims, so that the default remains selected.

4.3 Resolution # 24679 – Claims Connect – Reports not loading when "Alert – Rule" applied

Symbility has resolved the issue that was occurring with the report builder when the "Alert – Rule" column was applied.

4.4 Resolution # 24823 – Claims Connect – Rules & Alerts issue

Symbility has resolved the issue of event/time-related alerts triggering even if the rule's conditions were met, so that users now only have alerts appear when appropriate.

4.5 Resolution # 24874 – Mobile Claims – Assignments not displayed in Loss Summary

Symbility has resolved the issue that had caused some assignments to not appear in the Loss Summary in Mobile Claims.