



**SYMBILITY**  
PROPERTY

## RELEASE NOTES

SYMBILITY VERSION 5.12  
SCOTT WIENS, PASCAL BÉGIN

# 1) CONTENTS

---

1) CONTENTS.....	1
2) INTRODUCTION.....	2
3) ENHANCEMENTS .....	2
a) Enhancement 233 – Sales Tax Configuration (US).....	2
b) Enhancement 234 – Integration with CoreLogic Commercial Express (North America).....	2
c) Enhancement 245 – EagleView Integration enhancement (North America).....	3
d) Enhancement 279 – Finalization - Invoice Reference Number Character Limit (UK) .....	3
e) Enhancement 278 – Postcode Mandatory on Correspondence and Risk Address (UK)...	4
f) Enhancement 280 – Finalization - No Future Invoice Date (UK).....	4
g) Enhancement 295 – Individual Payment Coverage Details.....	4
4) MAJOR RESOLUTIONS.....	4
a) Resolution 250 – Estimate Total 0.01\$ error in Claims Connect .....	4
b) Resolution 296 – Items Without Recoverable Depreciation Should Show as “*Paid” .....	5



## 2) INTRODUCTION

---

This document describes the new features and improvements that are part of version 5.12 for Claims Connect and Mobile Claims applications. The launch dates abroad are:

- November 4, 2016 in Canada
- December 2, 2016 in the United States
- January 5, 2017 in the United Kingdom
- January 12, 2017 in Germany and South Africa
- January 19, 2017 in Australia and New Zealand
- January 24, 2017 in Belgium and Poland

## 3) ENHANCEMENTS

---

### a) Enhancement 233 – Sales Tax Configuration (US)

This enhancement centers on how sales tax can be configured and applied inside of a claim:

- Companies can choose to customize default tax settings per state.
- Applying tax on O&P can be done separately for each tax line.
- Users can select to apply tax on materials, labor, equipment, market conditions per line item.

### b) Enhancement 234 – Integration with CoreLogic Commercial Express (North America)

Symbility has a deep integration with the CoreLogic underwriting valuation tools. In the past two years CoreLogic has transitioned most of their clients from the BVS Express system to the new Commercial Express platform and this integration with Symbility now gives Symbility customer's access to Commercial Express. A company can either link the integration directly to their Commercial Express account or, use a generic Commercial Express site



Specifically, this integration provides the following new functionality:

- Claims Connect can be configured to automatically attach PDF copies of the Commercial Express valuation report to new claim per a policy number match via the API.
- Allows Mobile Claims users to view attached valuation reports (PDF).
- Allows Mobile Claims users to edit and save new versions of the existing valuations.
- Keeps a history of all changes and modifications to existing valuations.
- Gives Mobile Claims users the ability to create commercial valuations if no valuation exists.

## c) Enhancement 245 – EagleView Integration enhancement (North America)

This enhancement to the EagleView integration into Symbility continues to expand capabilities for those customers that utilize EagleView for their aerial roof diagram services. This enhancement contains four parts:

- Symbility customers can now control the EagleView authentication process within Claims Connect for themselves giving them greater flexibility and control.
- Ability to include EagleView product add-ons such as the ordering of a wall measurement report with the initial order.
- Ability to automatically share EagleView reports and diagrams with assignees.
- Ability to order EagleView reports from Desk Adjuster.

## d) Enhancement 279 – Finalization - Invoice Reference Number Character Limit (UK)

This enhancement is an option that allows an Administrator user to limit the number of characters that can be put in the 'invoice number' within a Finalization. This new option will assist customers who have billing systems that cannot handle long invoice numbers. This option can be set in the Company Preferences within Claims Connect.



## e) Enhancement 278 — Postcode Mandatory on Correspondence and Risk Address (UK)

This enhancement directly impacts the mandatory postcode setting within Claims Connect. With this change the setting to make the Postcode required now impacts both the risk and the policyholder address on the Loss Summary Page. When the option 'Risk Address is Different to Policyholder Address' both postcodes become mandatory fields.

## f) Enhancement 280 — Finalization - No Future Invoice Date (UK)

Greater control has been added to the Finalization process and specifically to the entering of the payment date. Some Symbility customers use the invoice date to apply payment terms and when a future date was added the result was a delay in payment. This enhancement now makes available a setting which allows an Administrator user to restrict the use of future dates within the invoice date field thus eliminating the potential for delay in payment.

## g) Enhancement 295 — Individual Payment Coverage Details

Another enhancement for 5.12 involving the Payment Tracker is related to associating items with coverages. Because individual estimate items are typically associated with coverages this enhancement now allows a user to identify how much of the payment is associated with each coverage. With this enhancement, within each payment a table would be displayed showing the list of coverages and how the payment is distributed across related coverages.

# 4) MAJOR RESOLUTIONS

---

## a) Resolution 250 — Estimate Total 0.01\$ error in Claims Connect

Symbility has resolved a rounding issue that caused the system to display, in some specific situations, a 'No Coverage Total' amount of \$0.01 in the Totals page.



## b) Resolution 296 – Items Without Recoverable Depreciation Should Show as “\*Paid”

The final resolution within Payment Tracker is related to correcting how items within an ACV payment that did not have recoverable depreciation are currently showing as ACV Paid. There are two primary issues at work:

- These Items are Considered Already Paid: Items within an ACV Payment that do not have recoverable depreciation are considered fully paid from the perspective of the Policyholder and the insurance company and therefore need to be marked as such.
- Recoverable Depreciation Payment Consideration: Although these items are considered fully paid, they still need to be added to a payment in those cases where a Recoverable Depreciation payment is created in the Payment Tracker and that payment is aligned with an invoice provided by the policyholder that includes work that comprises line items that have or do not have recoverable depreciation amounts.

This resolution addresses this and now all items that do not have recoverable depreciation amount should be given a status that indicates they are paid but also allows these to be added to future payments.

