

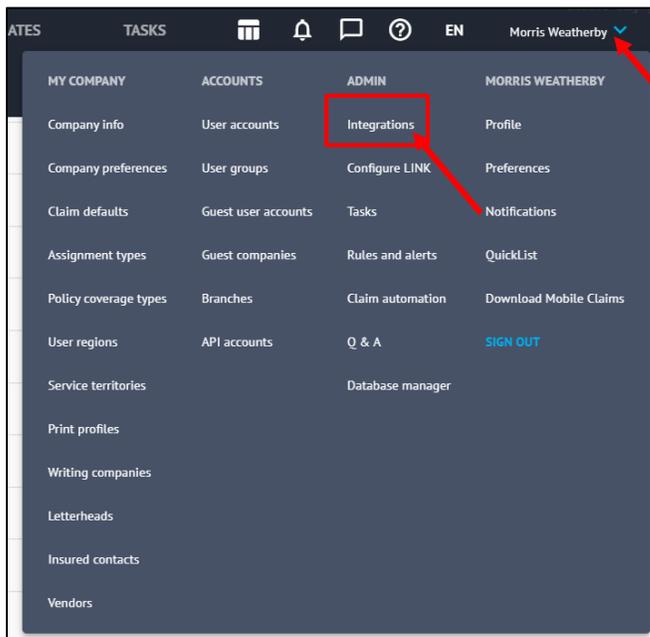
ITEL Integration

Automatic Notes for ITEL Items

Disclaimer: This job aid was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

Step 1

As a Company Admin, navigate to the Integrations page within Claims Connect by clicking on the User Menu in the top right corner and selecting 'Integrations' from the Admin Menu.



Step 2

Navigate to the ITEL Integrations page by clicking ITEL from the tabs at the bottom of the page.

ITEL Order Preferences

Use these preferences to define which ITEL order methods are available for your company's users.

Order methods

- Send physical samples to ITEL
- Send photos to ITEL using ITEL Now mobile application

ITEL Now photo import

- Do not import ITEL Now sample photos
- Import ITEL Now sample photos

Enable ITEL Automatic Shingle Pricing

ITEL identifier: *

ITEL billing

These options will apply to claims originated by your company.

- Bill my company for ITEL orders
- Allow users to choose which company to bill

Save Cancel

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Step 3

Scroll down until the Automatic Notes section is visible.

Automatic Notes

Instruction notes are automatically added to an estimate line item after a price has been received from ITEL. These notes can add information about procurement of materials at the ITEL price. To include the ITEL price in the note, use the placeholder {ITELPrice}.

Roofing items

- No notes
- Generate note

Flooring items

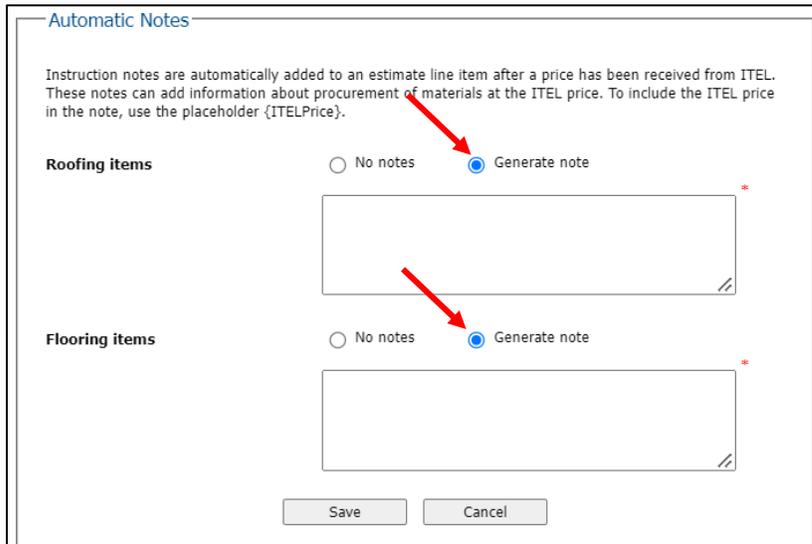
- No notes
- Generate note

Save Cancel

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Step 4

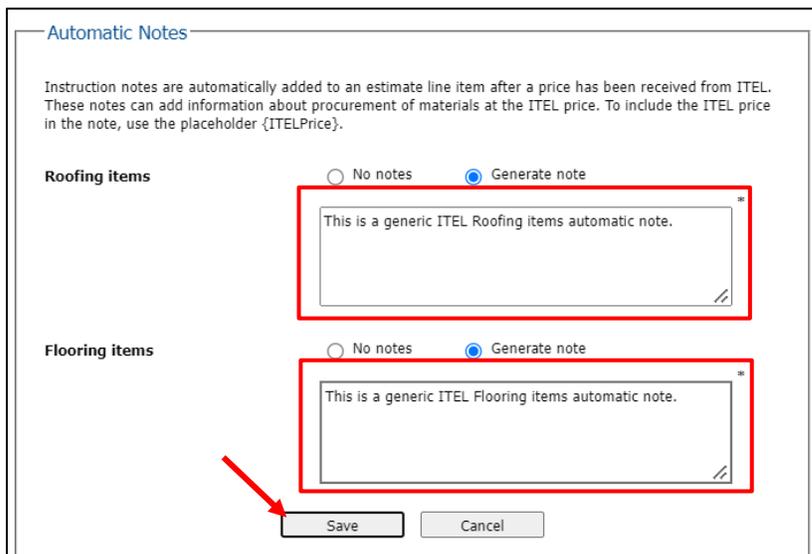
For Roofing items or Flooring items or both, select the radial button next to Generate Note. The border on the text box(es) will bolden and the asterisk will turn red indicating text must be entered in the box(es).



The screenshot shows the 'Automatic Notes' dialog box. At the top, there is a title bar 'Automatic Notes' and a paragraph of instructional text: 'Instruction notes are automatically added to an estimate line item after a price has been received from ITEL. These notes can add information about procurement of materials at the ITEL price. To include the ITEL price in the note, use the placeholder {ITELPrice}.' Below this, there are two sections: 'Roofing items' and 'Flooring items'. Each section has two radio buttons: 'No notes' and 'Generate note'. In both sections, the 'Generate note' radio button is selected. Below each section is a text input field with a red asterisk to its right. At the bottom of the dialog are 'Save' and 'Cancel' buttons. Red arrows point to the 'Generate note' radio buttons in both sections.

Step 5

Enter the desired Automatic Note text into the respective text boxes. Once text has been entered, the asterisk will turn black. Click 'Save' to save the notes, or 'Cancel' to discard the changes.



The screenshot shows the 'Automatic Notes' dialog box after text has been entered. The text in the 'Roofing items' text box is 'This is a generic ITEL Roofing items automatic note.' and the text in the 'Flooring items' text box is 'This is a generic ITEL Flooring items automatic note.' The asterisks next to the text boxes are now black. The 'Generate note' radio button is still selected in both sections. A red arrow points to the 'Save' button at the bottom of the dialog.

Step 6

An error message will appear if 'Generate note' is selected, no text was entered in the text box and the Admin attempts to save.

Automatic Notes

Instruction notes are automatically added to an estimate line item after a price has been received from ITEL. These notes can add information about procurement of materials at the ITEL price. To include the ITEL price in the note, use the placeholder {ITELPrice}.

Roofing items No notes Generate note

This is a generic ITEL Roofing items automatic note.

Flooring items No notes Generate note

Please provide an automatic note.

Save Cancel

Step 7

An Automatic note will now be populated for ITEL, Supply Roofing/Flooring line items when the ITEL report is returned completed, and the user applies the prices from the report to the estimate.

Description	Quantity	Unit Price	Per	Total Cost
ESTIMATE: Structure (AG Insurance Ltd) Claim #175, test test				
In progress Share with				
FLOORPLAN: Floorplan				
Room				
Length: 17.43 m Width: 9.91 m Height: 2.40 m Flat				
Walls: 131.20 m ² Walls-subs: 131.20 m ² Walls-subs-cas-bsbd: 124.70 m ²				
Doors: 0.00 m ² Windows: 0.00 m ² Openings: 0.00 m ² Missing Walls: 0.00 m ²				
Floor: 172.66 m ² Ceiling: 172.66 m ² Perim (F): 54.68 m Perim (C): 54.68 m				
ITEL, Shingles, Designer Irregular, Supply				
Includes 10% waste on material price.				
This line item includes a shingle material allowance of \$2.05 per square, which reflects current market prices in your area. Market prices were verified by ITEL. The ITEL Asphalt Shingle Program allows you or your contractor of choice to have materials delivered directly to your home for installation. For more information on ordering shingles through ITEL, contact them at customerservice@itelinc.com or 800-890-4835.				
Room - Subtotal (1 item)				\$38.09
Floorplan - Subtotal (1 item)				\$38.09