

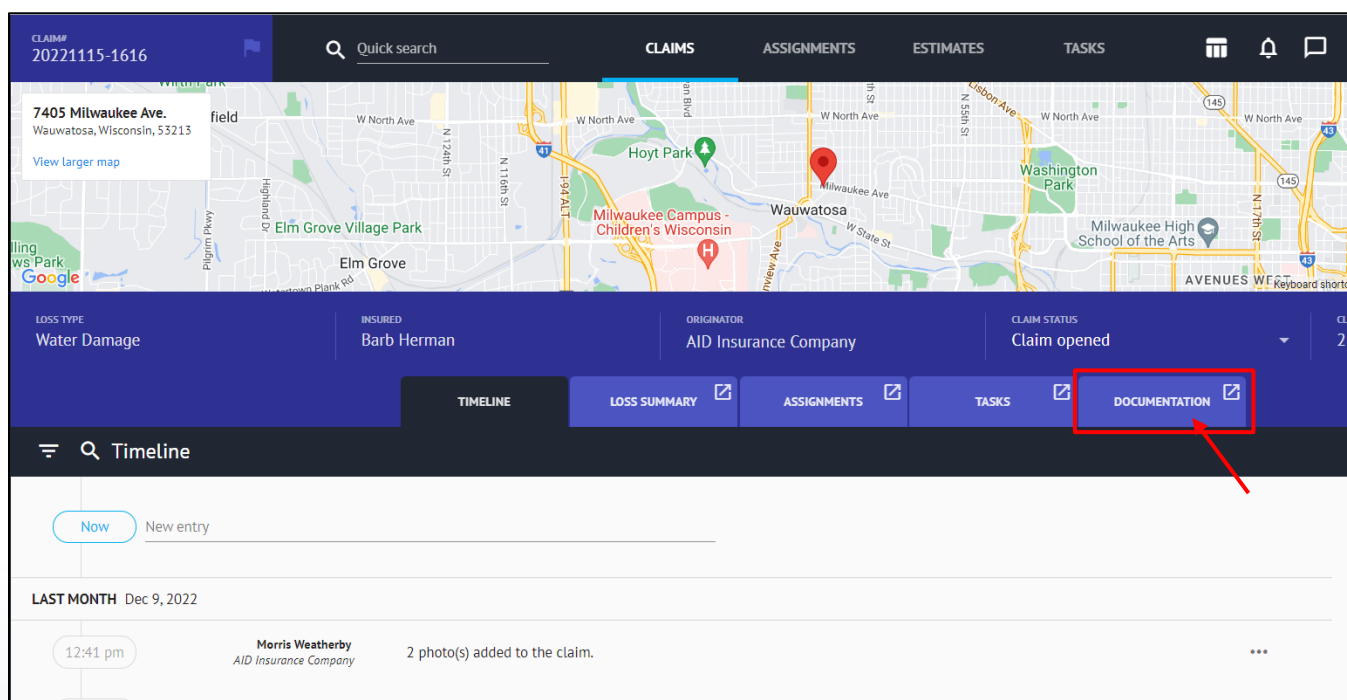
# 'Replace with'

## 'Replace with' Option in Claims Connect

*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

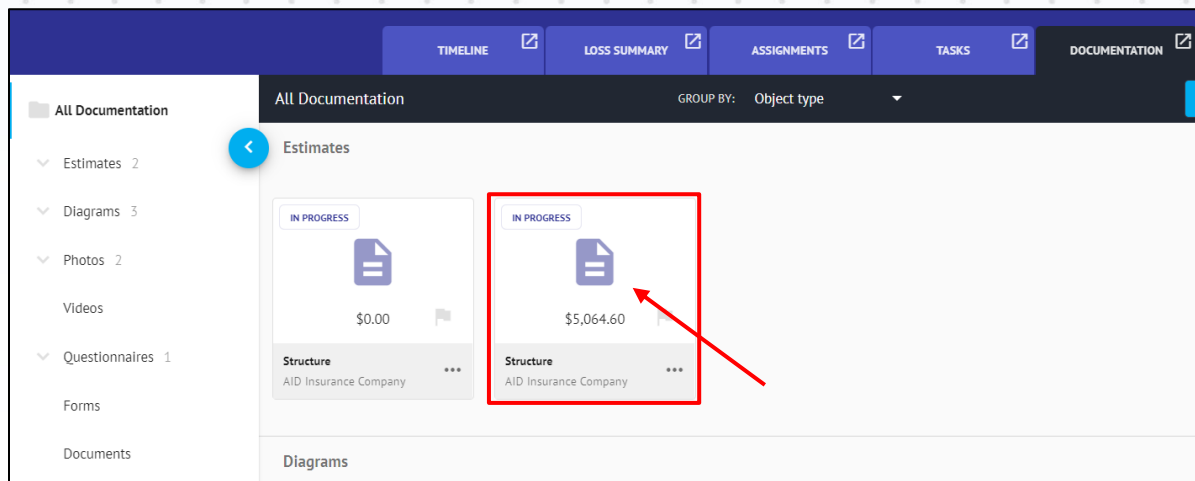
Within a claim in Claims Connect, click on the Documentation tab to view available estimates.



The screenshot displays the Claims Connect web application interface. At the top, a navigation bar includes tabs for CLAIMS, ASSIGNMENTS, ESTIMATES, and TASKS. Below this, a map shows the location of 7405 Milwaukee Ave. in Wauwatosa, Wisconsin. A summary bar below the map lists details: LOSS TYPE (Water Damage), INSURED (Barb Herman), ORIGINATOR (AID Insurance Company), and CLAIM STATUS (Claim opened). Below the summary bar is a horizontal menu with tabs: TIMELINE, LOSS SUMMARY, ASSIGNMENTS, TASKS, and DOCUMENTATION. The DOCUMENTATION tab is highlighted with a red box and a red arrow pointing to it. Below the menu, the TIMELINE section is visible, showing a 'Now' entry and a 'LAST MONTH' entry for Dec 9, 2022, at 12:41 pm, indicating that 2 photo(s) were added to the claim by Morris Weatherby of AID Insurance Company.

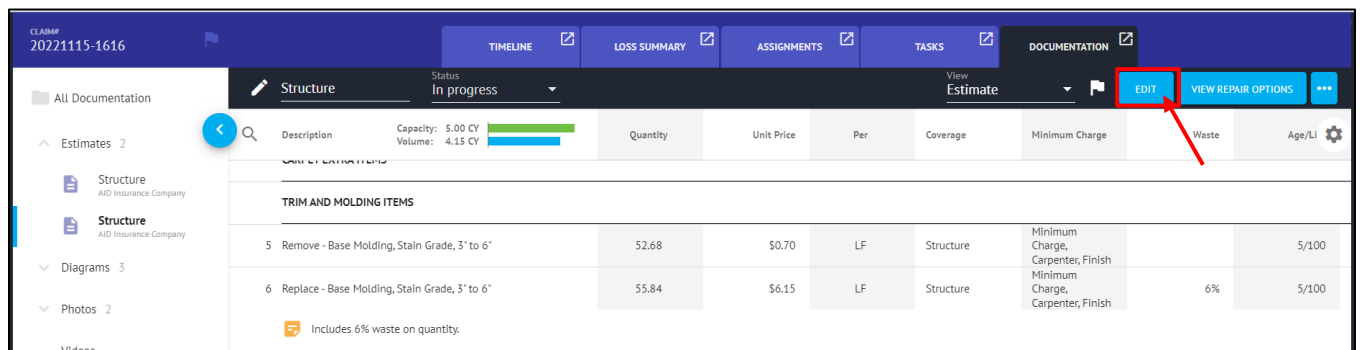
## Step 2

Open the estimate you wish to review/edit by clicking on it from the Documentation page.



## Step 3

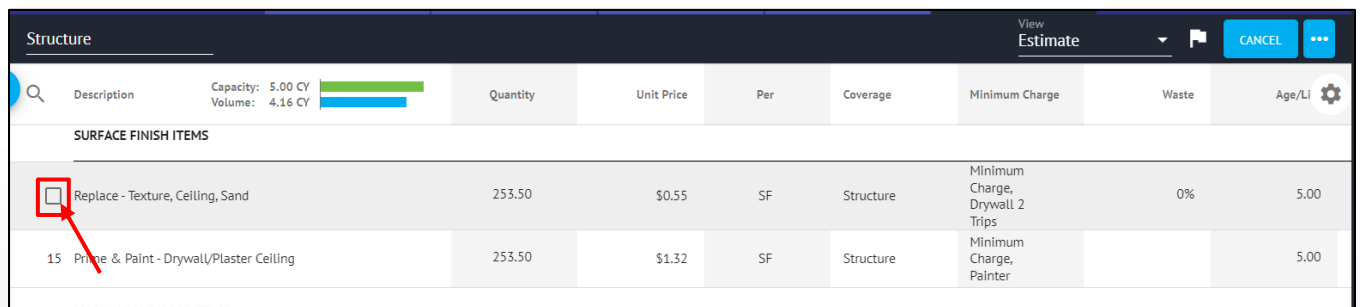
Within the Estimate view, click on 'Edit' to enter edit mode.



## Step 4

In Edit mode, select the line item that you wish to replace by clicking on the box next to the item description.

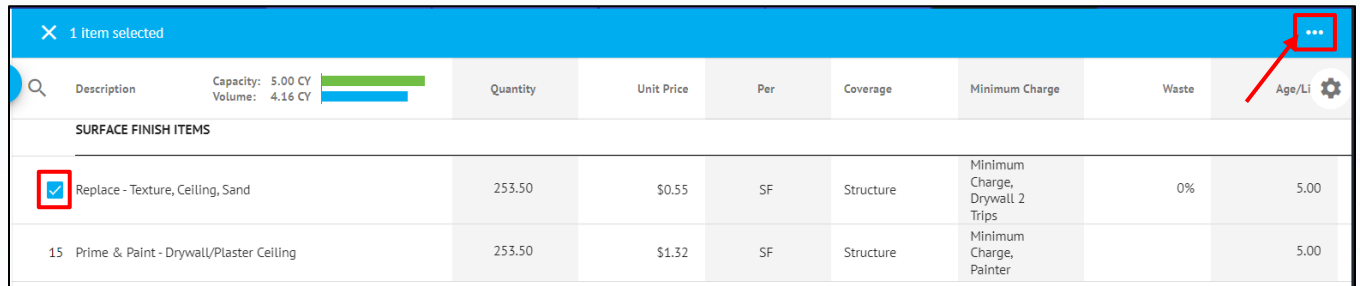
(Note: When the line is not highlighted, the box will disappear and the line item number will appear.)



## Step 5

Once the line item that requires replacing has been selected, click on the ellipses button above the column headers.

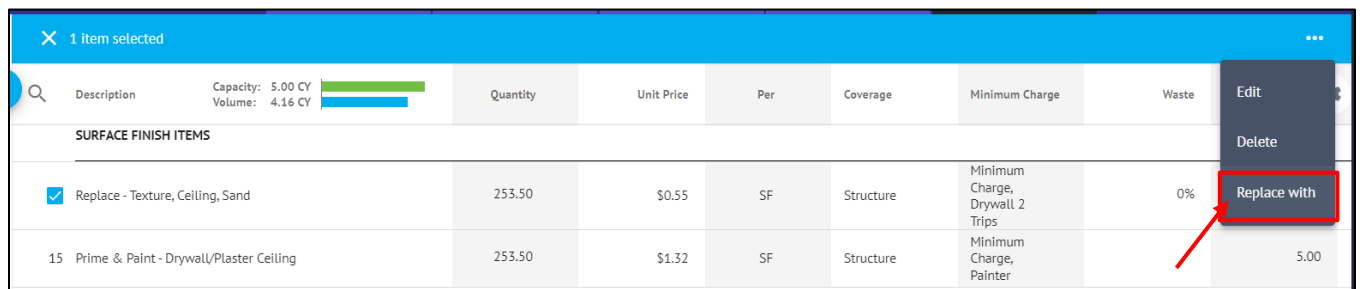
(Note: Only one line item may be selected at a time for the 'replace with' function.)



1 item selected									
	Description	Capacity: 5.00 CY Volume: 4.16 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li
SURFACE FINISH ITEMS									
<input checked="" type="checkbox"/>	Replace - Texture, Ceiling, Sand		253.50	\$0.55	SF	Structure	Minimum Charge, Drywall 2 Trips	0%	5.00
15	Prime & Paint - Drywall/Plaster Ceiling		253.50	\$1.32	SF	Structure	Minimum Charge, Painter		5.00

## Step 6

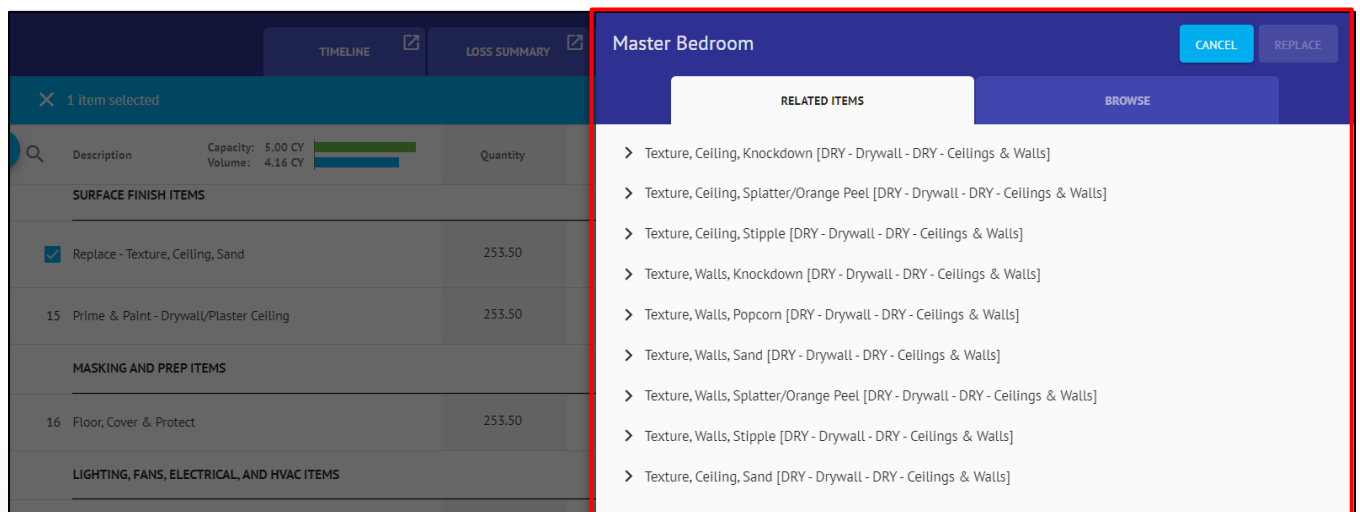
From the dropdown menu, click 'Replace with'.



1 item selected									
	Description	Capacity: 5.00 CY Volume: 4.16 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Edit
SURFACE FINISH ITEMS									
<input checked="" type="checkbox"/>	Replace - Texture, Ceiling, Sand		253.50	\$0.55	SF	Structure	Minimum Charge, Drywall 2 Trips	0%	Replace with
15	Prime & Paint - Drywall/Plaster Ceiling		253.50	\$1.32	SF	Structure	Minimum Charge, Painter		5.00

## Step 7

A blade will appear from the right with two tabs – Related Items and Browse.

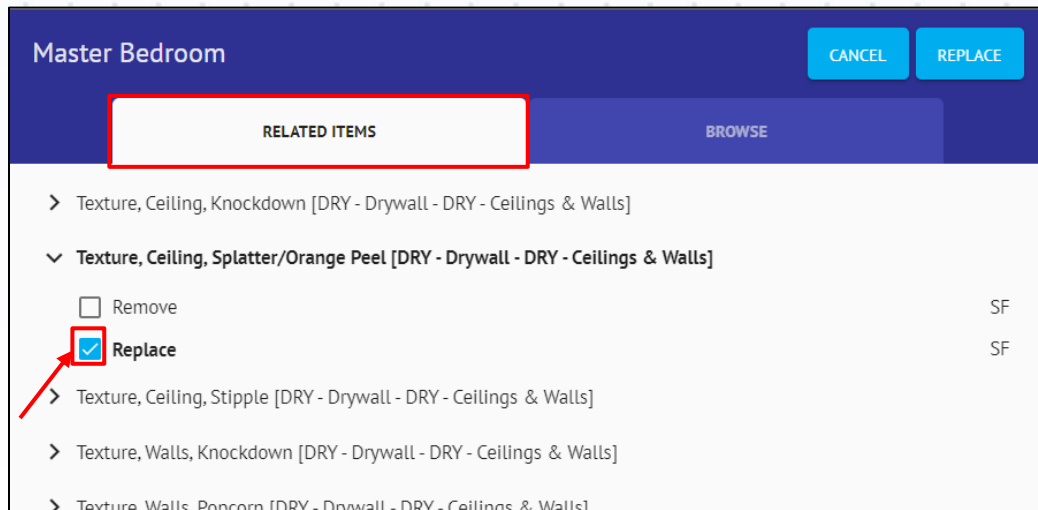


Master Bedroom		CANCEL	REPLACE
RELATED ITEMS		BROWSE	
<ul style="list-style-type: none"><li>&gt; Texture, Ceiling, Knockdown [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Ceiling, Splatter/Orange Peel [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Ceiling, Stipple [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Walls, Knockdown [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Walls, Popcorn [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Walls, Sand [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Walls, Splatter/Orange Peel [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Walls, Stipple [DRY - Drywall - DRY - Ceilings &amp; Walls]</li><li>&gt; Texture, Ceiling, Sand [DRY - Drywall - DRY - Ceilings &amp; Walls]</li></ul>			

## Step 8

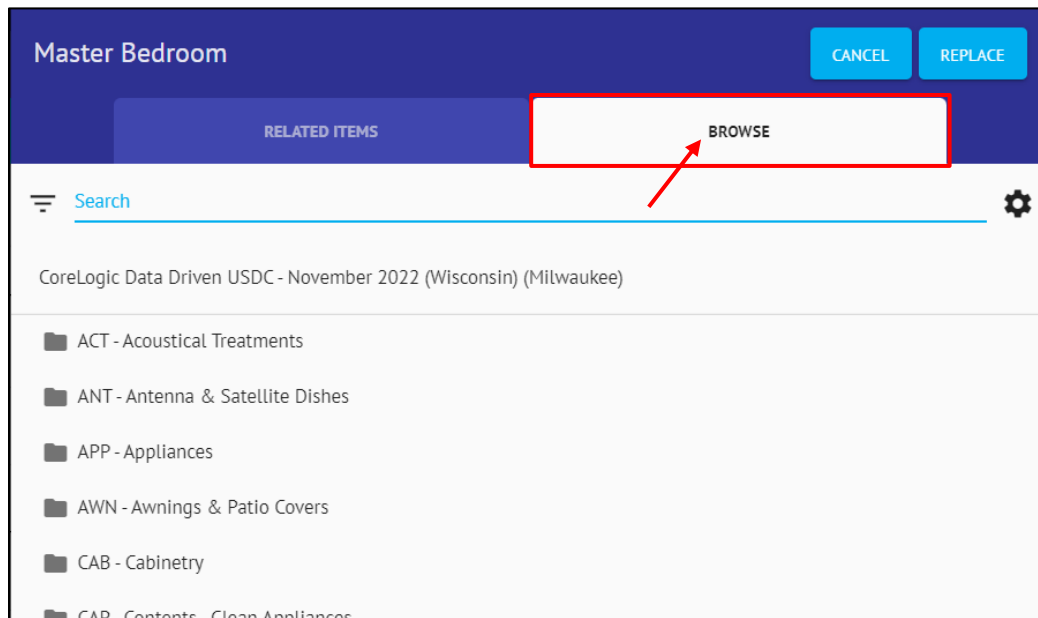
### Related Items Tab

If the line item that you require exists in the 'Related Items' tab, click on the item and then select the box next to the desired action.



### Browse

If the line item that you require does not exist in the 'Related Items' tab, click on 'Browse' to search the full database.



From the Browse tab, you may manually search through the database categories or utilize the Search bar at the top by typing in a key word or phrase. The optimized Line Item Search will return results for you to select from.

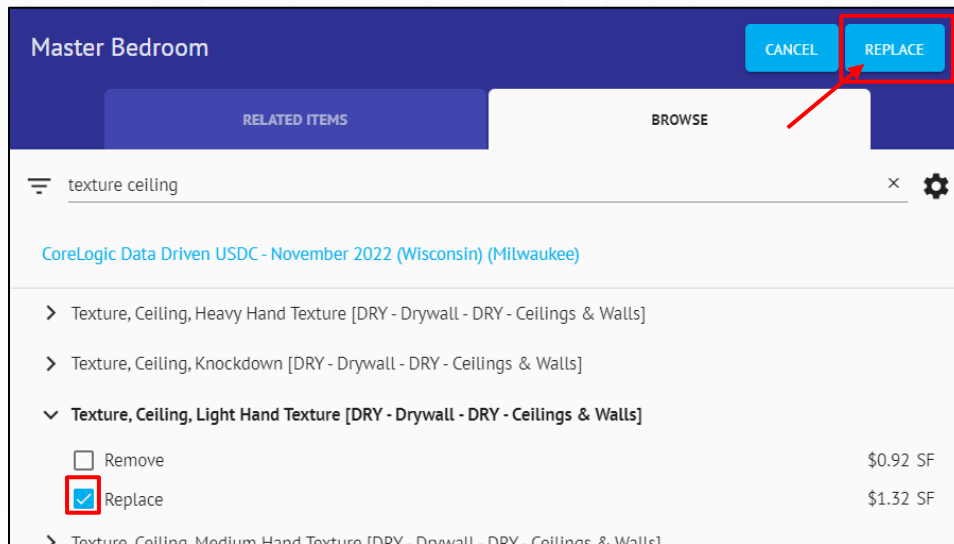
The screenshot shows the 'Master Bedroom' window with the 'BROWSE' tab selected. A search bar at the top contains the text 'texture ceiling'. Below the search bar, a list of search results is displayed, all starting with 'Texture, Ceiling, ... [DRY - Drywall - DRY - Ceilings & Walls]'. The results include: Heavy Hand Texture, Knockdown, Light Hand Texture, Medium Hand Texture, Popcorn, Heavy, Popcorn, Light, Popcorn, Medium, Sand, Splatter/Orange Peel, and Stipple. The 'BROWSE' tab and the search bar are highlighted with red boxes.

Once you have located the new line item, click on the item and then select the box next to the desired action.

This screenshot shows the same 'Master Bedroom' window, but with the 'Texture, Ceiling, Light Hand Texture [DRY - Drywall - DRY - Ceilings & Walls]' item selected. Below the item name, there are two checkboxes: 'Remove' and 'Replace'. The 'Replace' checkbox is checked and highlighted with a red box. A red arrow points to the 'Replace' checkbox. The 'BROWSE' tab and the search bar are also highlighted with red boxes. The price for the 'Replace' action is listed as '\$1.32 SF'.

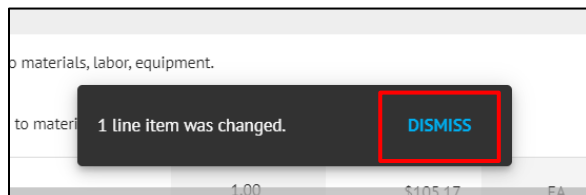
## Step 9

Click 'Replace' to switch out the existing line item in the estimate with the new line item from the database.



## Step 10

A dialog box indicating that the line item has been changed will appear at the bottom of the screen. Click dismiss to clear the box immediately or it will disappear on its own after a few seconds.



## Step 11

The item will now be switched out in the estimate. Deselect the check box by clicking on it.

1 item selected									
Description	Capacity: 5.00 CY Volume: 4.16 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li	
13 Replace - Drywall, Ceiling 5/8", Taped		266.18	\$2.79	SF	Structure	Minimum Charge, Drywall 2 Trips	5%	5.00	
Includes 5% waste on quantity.									
SURFACE FINISH ITEMS									
✓ Replace - Texture, Ceiling, Light Hand Texture		253.50	\$1.32	SF	Structure	Minimum Charge, Drywall 2 Trips	0%	5.00	
15 Prime & Paint - Drywall/Plaster Ceiling		253.50	\$1.32	SF	Structure	Minimum Charge, Painter		5.00	

## Step 12

If reviewing/editing of the estimate is not complete, but you want to view the changes to the estimate subtotals or total, you may click on 'Apply Changes/Recalculate' above the column headers at the top of the estimate. The estimate will remain in Edit mode.

Structure		APPLY CHANGES / RECALCULATE				View Estimate		SAVE	CANCEL	...
Q	Description	Capacity: 5.00 CY Volume: 4.15 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li	Settings

## Step 13

Once edits are complete, click 'Save' to save the changes and exit Edit mode.

(Note: Save will not present as an option if no changes have been made to the estimate.)

Structure		APPLY CHANGES / RECALCULATE				View Estimate		SAVE	CANCEL	...
Q	Description	Capacity: 5.00 CY Volume: 4.16 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li	Settings
5	Remove - Base Molding, Stain Grade, 3" to 6"		62.00	\$0.70	LF	Structure	Charge, Carpenter, Finish			5.00
6	Replace - Base Molding, Stain Grade, 3" to 6"		55.84	\$6.15	LF	Structure	Minimum Charge,	6%		5.00

If you do not wish to save the changes you made, click 'Cancel'.

Structure		APPLY CHANGES / RECALCULATE				View Estimate		SAVE	CANCEL	...
Q	Description	Capacity: 5.00 CY Volume: 4.16 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li	Settings
5	Remove - Base Molding, Stain Grade, 3" to 6"		62.00	\$0.70	LF	Structure	Charge, Carpenter, Finish			5.00
6	Replace - Base Molding, Stain Grade, 3" to 6"		55.84	\$6.15	LF	Structure	Minimum Charge,	6%		5.00