



Job Aid

Reordering Line Items – Claims Connect

Version 7.2

Issue 1
November 15th 2023

Reordering Line Items in Claims Connect

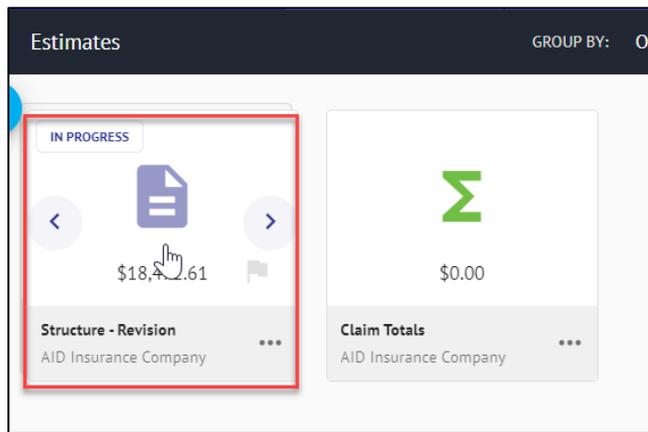
This job aid will guide a User through the steps to reorder line items in an estimate in Claims Connect. Reordering of line items applies to original estimates, as well as revisions.

Note: This document 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.

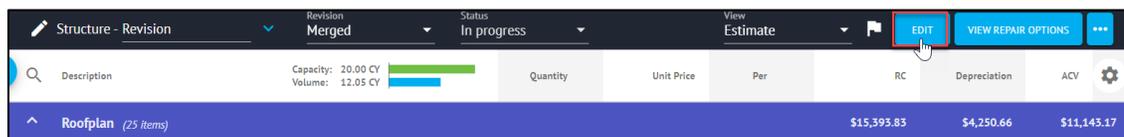
1. Within a Claim in Claims Connect, navigate to the Documentation page by clicking on the tab.



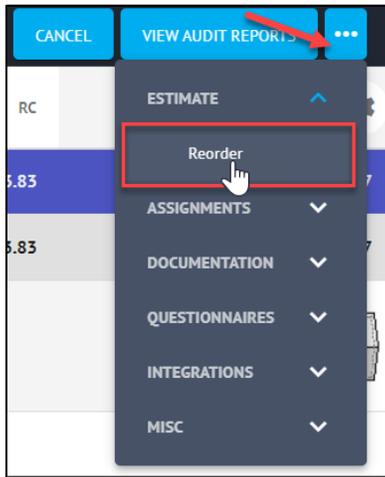
2. Open the unlocked Estimate of choice that you have ownership of.



3. Once the Estimate is open, click the **Edit** button to enter Edit mode.



- From the **Ellipsis** menu, select **Reorder** from the Estimate section of the dropdown menu.



- The **Drag & Drop** icons will appear next to all line items. Use the hand cursor to grab an individual item to move to a different location in the Estimate.

Reorder Items		Capacity: 20.00 CY	Quantity	Unit Price	Per	RC	Depreciation	ACV
Description		Volume: 12.05 CY						
16	Replace - Flashing, Pipe Jack, Plastic		2.00	\$34.44	EA	\$68.88	\$27.55	\$41.53
DEBRIS REMOVAL								
17	Dumpster 20 Yard		1.00	\$704.07	EA	\$704.07	\$0.00	\$704.07
	Tear Out - Roof Exhaust, Vent Cap, Painted Aluminum, Small		1.00	\$2.72	EA	\$2.72	\$0.00	\$2.72
A.19	Replace - Roof Exhaust, Vent Cap, Painted Aluminum, Small		1.00	\$78.34	EA	\$78.34	\$0.00	\$78.34
A.20	Tear Out - Flashing, Chimney, Galvanized, Large		1.00	\$38.41	EA	\$38.41	\$0.00	\$38.41
A.21	Replace - Flashing, Chimney, Galvanized, Large		1.00	\$492.86	EA	\$492.86	\$0.00	\$492.86

- To reorder multiple items simultaneously, check the boxes next to all applicable items, and then use the hand cursor to grab one of the **Drag & Drop** icons and move all line items to the different location within the Estimate.

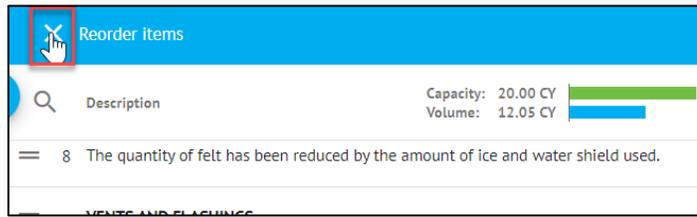
Reorder Items		Capacity: 20.00 CY	Quantity	Unit Price	Per	RC	Depreciation	ACV
Description		Volume: 12.05 CY						
15	Tear Out - Flashing, Pipe Jack, Plastic		2.00	\$6.31	EA	\$12.62	\$5.05	\$7.57
16	Replace - Flashing, Pipe Jack, Plastic		2.00	\$34.44	EA	\$68.88	\$27.55	\$41.33
DEBRIS REMOVAL								
17	Dumpster 20 Yard		1.00	\$704.07	EA	\$704.07	\$0.00	\$704.07
<input checked="" type="checkbox"/>	Tear Out - Roof Exhaust, Vent Cap, Painted Aluminum, Small		1.00	\$2.72	EA	\$2.72	\$0.00	\$2.72
<input checked="" type="checkbox"/>	Replace - Roof Exhaust, Vent Cap, Painted Aluminum, Small		1.00	\$78.34	EA	\$78.34	\$0.00	\$78.34
<input checked="" type="checkbox"/>	Tear Out - Flashing, Chimney, Galvanized, Large		1.00	\$38.41	EA	\$38.41	\$0.00	\$38.41
<input checked="" type="checkbox"/>	Replace - Flashing, Chimney, Galvanized, Large		1.00	\$492.86	EA	\$492.86	\$0.00	\$492.86

- The Line Item(s) is/are now visible in the new location within the Estimate.

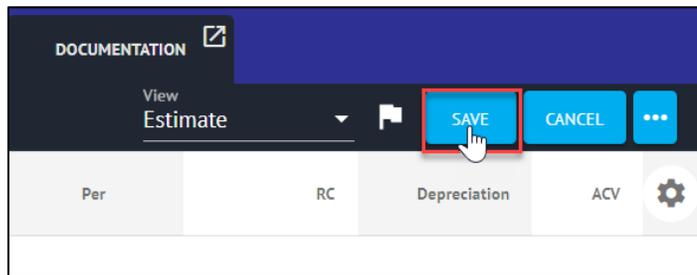
Reorder Items		Capacity: 20.00 CY	Quantity	Unit Price	Per	RC	Depreciation	ACV
Description		Volume: 12.05 CY						
8	The quantity of felt has been reduced by the amount of ice and water shield used.							
VENTS AND FLASHINGS								
<input checked="" type="checkbox"/>	Tear Out - Roof Exhaust, Vent Cap, Painted Aluminum, Small		1.00	\$2.72	EA	\$2.72	\$0.00	\$2.72
9	Tear Out - Drip Edge, Rake, Aluminum, Pre-Finished Color		89.44	\$0.58	LF	\$51.88	\$25.94	\$25.94

Reorder Items		Capacity: 20.00 CY	Quantity	Unit Price	Per	RC	Depreciation	ACV
Description		Volume: 12.05 CY						
8	The quantity of felt has been reduced by the amount of ice and water shield used.							
VENTS AND FLASHINGS								
<input checked="" type="checkbox"/>	Tear Out - Roof Exhaust, Vent Cap, Painted Aluminum, Small		1.00	\$2.72	EA	\$2.72	\$0.00	\$2.72
<input checked="" type="checkbox"/>	Replace - Roof Exhaust, Vent Cap, Painted Aluminum, Small		1.00	\$78.34	EA	\$78.34	\$0.00	\$78.34
<input checked="" type="checkbox"/>	Tear Out - Flashing, Chimney, Galvanized, Large		1.00	\$38.41	EA	\$38.41	\$0.00	\$38.41
<input checked="" type="checkbox"/>	Replace - Flashing, Chimney, Galvanized, Large		1.00	\$492.86	EA	\$492.86	\$0.00	\$492.86
9	Tear Out - Drip Edge, Rake, Aluminum, Pre-Finished Color		89.44	\$0.58	LF	\$51.88	\$25.94	\$25.94

- Click the **X** to end Reordering mode.



- Click **Save** to save all changes made to the estimate while in Edit mode. Clicking **Cancel** will prompt the cancellation process if changes made are no longer desired.





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