



Release Notes – Symbility version 5.8

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Effective Date:	07/06/2015
Version:	1.0



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1.0 introduction

This document describes the new features and enhancements that are part of the upcoming version 5.8 of Symbility *Claims Connect* and *Mobile Claims*. The target dates for this international release are:

- ♦ August 14, 2015 in Canada
- ♦ August 20, 2015 in the UK
- ♦ August 28, 2015 in the US
- ♦ September 3, 2015 in Germany
- ♦ September 10, 2015 in South Africa
- ♦ September 15, 2015 in Belgium
- ♦ September 17, 2015 in Poland

2.0 major enhancements

2.1 enhancement # 5322 - spell checking in *mobile claims*

Symbility *Mobile Claims* users will now have access to spell check within *Mobile Claims* when entering text into many different fields within the claim. The spell check inside of *Mobile Claims* will be interactive in that it will underline words that are misspelled and will also have an “Add to Dictionary” feature for words or names the user wishes to add to their dictionary in order to avoid them being constantly flagged. Misspelled words will also have a suggestions dialogue once clicked on. This will give the user options for the correct spelling. This spell check feature is also available in multiple languages.

2.2 enhancement # 8888 - *claims connect* & *mobile claims* online help

Claims Connect and *Mobile Claims* users will now have access to online help from within both systems. This powerful new feature gives first time or even experienced users access to help throughout both *Claims Connect* and *Mobile Claims*. The new help feature is context sensitive allowing users to access the portion of the help they need from wherever they are inside the application.

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2.3 enhancement # 27618 - ability to define variable deductible

Symbility believes in providing companies and adjusters flexibility, especially when it comes to settings for claims and estimates. The enhancements to the deductible feature for *Claims Connect* and *Mobile Claims* now gives a company multiple options regarding defining deductibles. These new options include:

- Selecting a fixed or variable deductible for each coverage.
- Setting a minimum deductible as an amount and a maximum deductible as a percentage of the coverage limit.
- Allowing a company or a user to set a deductible as a percentage of the estimate or as a flat amount for a coverage using the variable deductible option.

2.4 enhancement # 29909 – enhancements to *desk adjuster*

Symbility *Desk Adjuster* now has significant enhancements that expand its capabilities for generating and managing estimates within *Claims Connect*. Specifically, these enhancements include:

- Expansion of Estimate Items Editing – Users can now open up the Item Properties and edit such things as coverage, depreciation, view image, and comments.
- Expanded Edit Capabilities on the Estimate Page – Users have access to editing elements on the estimate page such as titles, text items, item notes, item photo captions and voice annotations.
- Expanded Preferences – Users now have the ability to set preferences regarding item notes. These preference settings allow item notes to be automatically attached to a line item based upon specific criteria.

3.0 enhancements

3.1 enhancement # 12312 - new estimate type

This new enhancement will now allow an estimate to be given a specific “type” which a company can choose to define for themselves. This type cannot be changed yet will still allow contractors or adjusters to change the estimate name field.

These new types will have a number of rules in place that will govern what type an estimate should be when added into the various parts of the system. In addition, these types will be available as fields in the report builder and in the API.

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3.2 enhancement # 17913 - session timeout message on *claims connect*

Symbility *Claims Connect* was designed with a time-out feature to protect the system from staying open after a period of time. This feature has been enhanced to give *Claims Connect* users more flexibility with regards to dealing with time-outs on the system. If a user's session has been timed out they will receive a notification when they attempt to work within *Claims Connect*. In addition, they will receive a warning and a countdown indicating the session is about to expire as well as an option to continue to work.

3.3 enhancement # 19825 - ability for intermediaries to move users from one branch to another

Intermediary companies such as independent adjusting companies often need to move an adjuster from one branch to another within their structure. This feature now allows an intermediary company to do that without having to create a new user within that branch for the adjuster. This saves time and allows for consistency in reporting and tracking adjuster records.

3.4 enhancement # 24683 - allow originator or intermediary with delegated authority to set share options for any estimate in the claim

When working in *Claims Connect* the originator of a claim can assign to multiple vendors. However, if the originator wishes to share one vendor's estimate with another they have to rely upon that vendor to share it with the other. This new enhancement allows the originator to share an estimate from any vendor with another vendor, no longer relying upon that vendor to share it.

3.5 enhancement # 24657 – new dry standard mitigation field

Within Symbility *Mobile Claims Water Mitigation* module a user can set drying goals for various materials within a room in a chamber. This drying goal is often different from an industry "dry standard". This enhancement to the drying goal dialogue box now gives users the ability to record both the drying goal and the dry standard which may differ in some cases. Additionally, this dry standard value will be available in the Water Mitigation Summary form.

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3.6 enhancement # 24659 - improved ability to mark equipment as removed

For a water mitigation contractor, time is of the essence. Typically, equipment is often removed from a site all at one time. In an effort to help facilitate a faster process Symbility now gives the *Mobile Claims* user (both on the smartphone and PC) the ability within a Water Mitigation claim to mark multiple pieces of equipment as removed at one time. This saves the user a tremendous amount of time having to open up the properties of each piece of equipment and removing it individually which, on large claims, can be both time consuming and confusing.

3.7 enhancement # 26086 - option to allow intermediary companies to assign claims to users in any branch

This new enhancement for intermediary companies now allows a claim from one branch to be assigned to a user from another branch. This addresses a traditional challenge in catastrophe scenarios where adjusters in a specific branch were temporarily assigned to handle claims from a different branch. This flexibility will add speed and fluidity to this process.

3.8 enhancement # 26721 – new fields when exporting user list

When exporting the users list from the User Accounts page, the system will now export the User Region and Area as part of the list. This gives a company the ability to view this important information for their users as part of the list.

3.9 enhancement # 27006 - allow for decimal value in readings

Water mitigation contractors often have equipment readings that require a decimal place. Users in the Water Mitigation module are now able to enter in values for readings (Rh, temperature, GPP and G. Depression) with decimal values. The enhancement to these fields allows for readings to two decimal places on these readings, giving users the ability to record more precise readings.

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3.10 enhancement # 28169 - additional form fields for payments

A new set of fields related to the Payment Tracker module are now available from within the forms. These new fields will give users the ability to create more detailed forms related to payment tracking. Specifically the Invoice Amount, Previous Amount, Previous Payment(s) Including Deductible(s) and Payment Name were added.

3.11 enhancement # 28620 – option to get a specific calendar event via API

With this enhancement, a new GetCalendarEvent data field is now available and individual calendar events and their related data, such as dates and times, can be retrieved.

3.12 enhancement # 28756 - summary (all) and totals (all) tabs – estimate filter

In an effort to clearly show the user which estimates have been selected within the Summary (All) and Totals (All) tabs, this new enhancement improves the display. The user will now have access to a “Select Estimates” option from the Summary (All) tab as well as the Commands panel in *Claims Connect*. Additionally, a label displaying the currently filtered estimates will appear and the clickable “Materials” and “Labor” headings will now be in blue in both *Claims Connect* and *Mobile Claims*.

3.13 enhancement # 29807 - new assignment statuses for mitigation workflow

New assignment statuses have been created for the water mitigation workflow. These two new statuses are Mitigation Work Started and Mitigation Work Completed and mitigation companies can use them to track the specific mitigation work time for mitigation related claims.

3.14 enhancement # 30298 - add new unit of measure codes for international markets

Symbility continues to expand its overseas markets requiring more options for estimating property damage. With this new enhancement, new units of measure codes have been added for *Claims Connect*, *Desk Adjuster* (Triage) and

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Mobile Claims. These are being added to meet the needs of an ever-expanding international market. New unit codes include:

- Tsubo
- Shakutsubo
- Kilogram
- Gram
- Milliliter
- Liter
- Cubic Centimeter
- Cubic Decimeter

3.15 enhancement # 30463 - new notifications for estimate revisions

A new section of notifications has been added to the Notifications feature to account for revision estimates. This addresses the situation where a different team (group of users) handles the revisions and needs to be informed of them.

3.16 enhancement # 30680 - option to add absences to a user's calendar

This enhancement is for *Claims Connect* users that are utilizing the calendar feature when making assignments. Administrative users who have access to a user's calendar can now define absences for that user and also add in days both before and after that the user is not available for assignments.

3.17 enhancement # 30985 - default filter for claims list

Most *Claims Connect* users access the Claims List as their primary means of finding claims. Often times they have a reoccurring set of filters they need to set every time they go into the Claims List, taking up valuable time. This enhancement for *Claims Connect* gives the user the ability to set a "default filter" in the Advanced Search within the Claims List. Every time the user goes into the Claims List, *Claims Connect* will remember that default filter and bring up the Claims list already filtered, saving the user from having to change filters each time.

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3.18 enhancement # 30986 - add an o&p and taxes column in estimates

With this new enhancement, *Mobile Claims* users can now choose to display O&P and Taxes on a per line item basis within individual columns in the Estimate. Additionally, the user has the option in the Estimate page to indicate whether "Total Cost", "RC"/"Dep"/"ACV" columns should include the O&P and Taxes or not.

3.19 enhancement # 32001 - ability to display how depreciation is applied

When viewing an estimate, the depreciation currently shows only the dollar value but does not indicate what the depreciation applies to. This new enhancement addresses this problem by adding the letter "U" to indicate that depreciation applies to the Unit Price or an "M" to indicate that depreciation is applying to only the material of a line item. The user will now have an option within the Print Profiles in *Claims Connect* that reads "Show Depreciation Applies to".

3.20 enhancement # 32242 - ability to customize the revision estimate name

This enhancement now allows a company to select the name to use as the default name for their revision estimate. When set, this default name will be used on most instances of the word "revisions" within their system and will take precedence over a vendor's default name when working on the originator claim.

4.0 major resolutions

4.1 resolution # 30158 - item batch links lost when switching to a new version

We have resolved the issue within item batches where an item would become greyed out due to a change where the item is associated with a different trade. This enhancement alleviates that problem by having *Mobile Claims* go through a validation process on the item batch's saved properties against the database properties.

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4.2 resolution # 30466 - improve behavior of renamed items in batches

This resolution solves a problem caused when customizing an item or price within a database and the item batch retaining the old name and price. This resolution now allows the new item name and price to appear within the item batches.

4.3 resolution # 32035 - changes to formatting of US address fields

This is a simple resolution to how US addresses are appearing when printing claims documentation.