CoreLogic®

Job Aid

Configuring a Print Profile – Claims Connect

Version 7.2

# Configuring a Print Profile in Claims Connect

This job aid will guide a Company Administrator through the steps to set up a Print Profile for their company in Claims Connect.

> **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. Navigate to the User Menu and click on **Print profiles** from the My Company section.
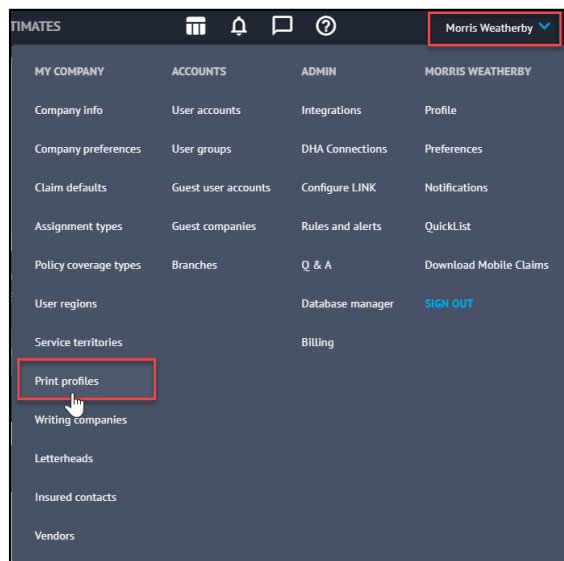
2. Click the **Create Print Profile** button in the top right.
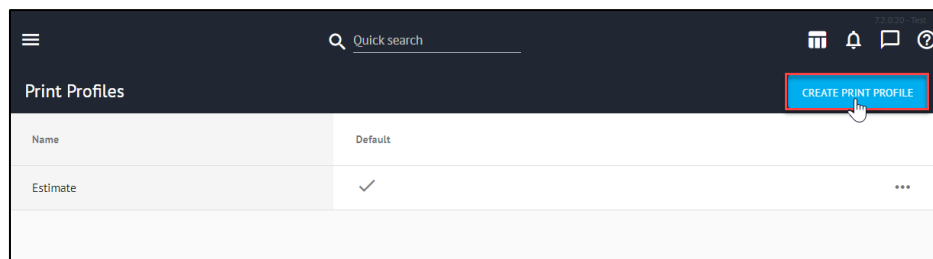
3. The **Print Profile** blade will slide across from the right to begin the creation process by defaulting to the **General** tab.

4. From the **General Tab,** you must type a **Name** for the profile into the text field (this is a required field and saving will not be possible without a name).

5. Next, check either or both of the boxes if you wish to have this Print Profile as the **Default Print Profile** or if you wish to **Group the claim elements by assignment** in the printing package.

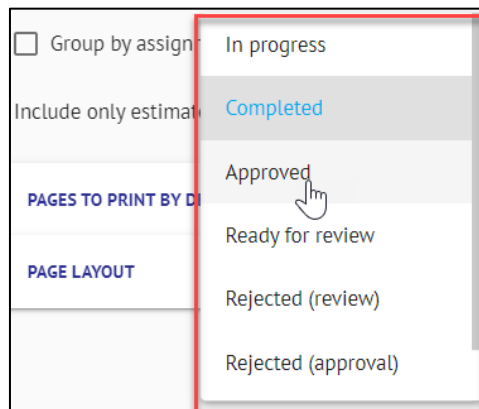6. Then click the dropdown and choose which estimates by status you only want to include in the print package.


7. The next menu allows you to select the claim elements you wish to print by default in your print profile by checking the box next to the element.
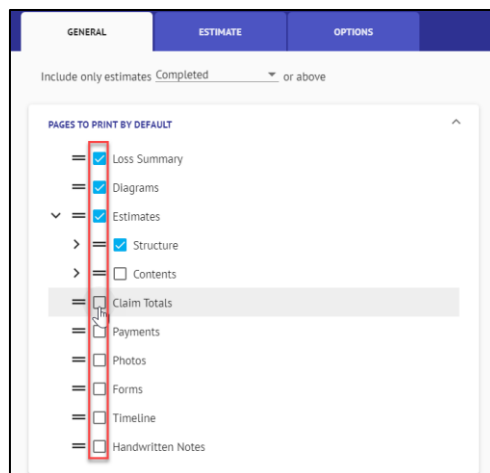

Note: *If there is a small arrow next to element, click that element to view subitems in that grouping. Some elements will be checked by default and you may uncheck them if you do not wish them to print by default in the print profile.*

8. Rearrange the printing order of claim elements by grabbing the double bar next to the check box, then drag & drop into place.
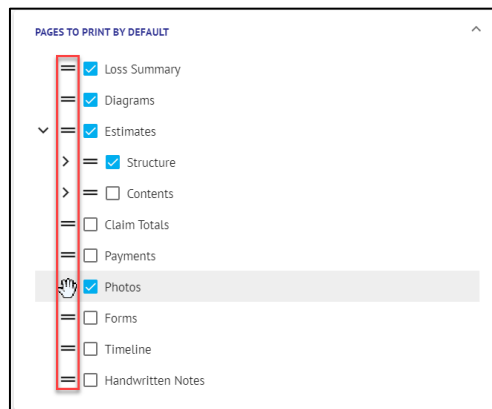

Note: *Claim elements may be moved into any order, however only within elements of the same level. Elements that are within a subgrouping may only be reordered within elements of that specific grouping.*

9. Open the **Page Layout** section to configure page layout settings, such as printing letterhead, margins, and page orientation.
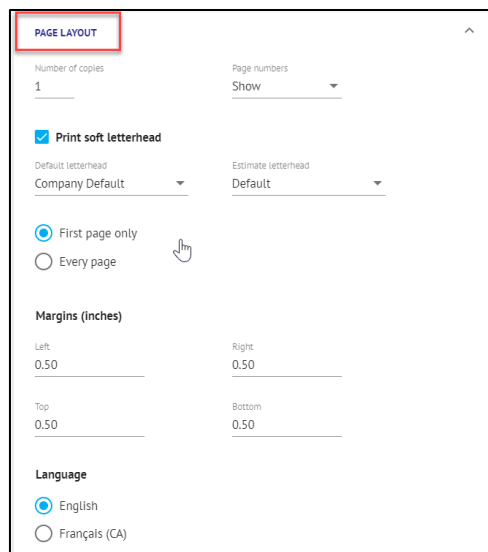

Note: *If your company has multiple languages configured, the option to select the default print language will appear in the Page Layout section. If not, this section will not display.*

10. Next, navigate to the **Estimate** tab to explore many more printing options like column selection, how to group items, estimate and claim totaling options, etc.
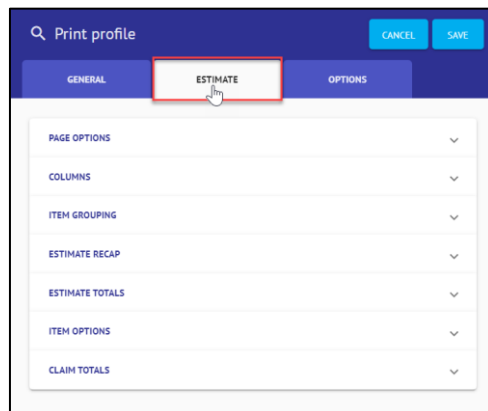
11. If Contents Estimates was selected in the Pages to Print by Default section of the General tab, then both Structure and Contents options will present on this tab.
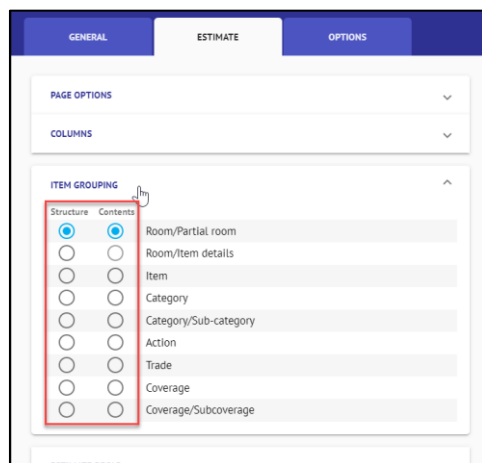
Note: *When a certain option does not apply to that type of estimate, that option will be grayed out and you will not be able to click the radio button.*

12. Next, navigate to the last tab, **Options**, and configure any necessary settings in the **Diagrams** section.

13. Click **Save** to save your new Print Profile.

14. The new Print Profile will display on the Print Profiles list.

15. Click anywhere on that profile line to open the Print Profile to make changes or update the profile. Click the **Ellipsis** button to be presented with the option to **Delete** the Print Profile right from the list view.
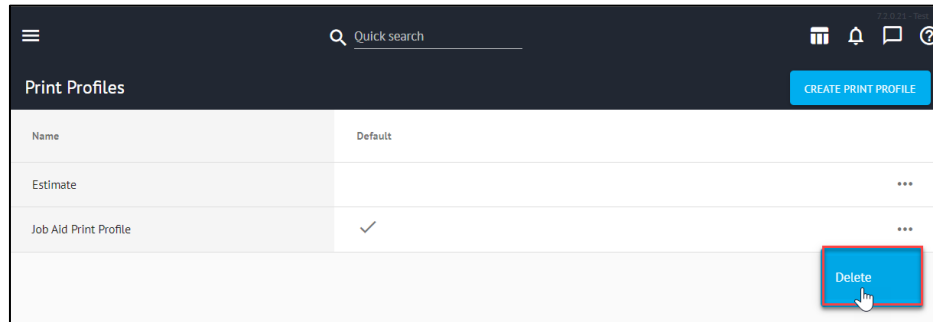
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