



Job Aid

Configuring a Print Profile – Claims Connect

Version 7.2

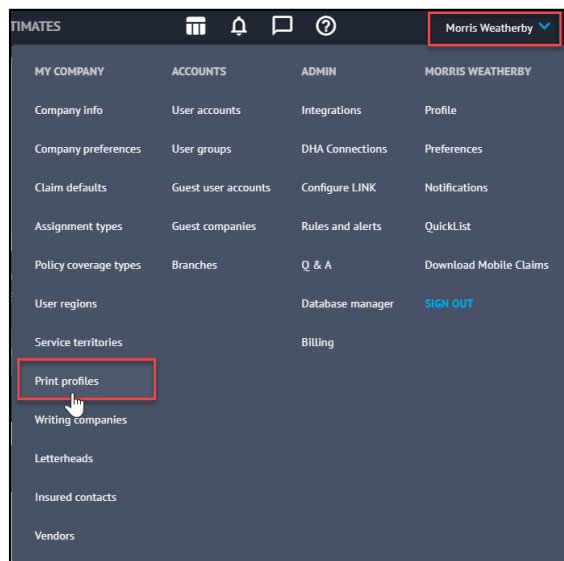
Issue 1
November 15th, 2023

Configuring a Print Profile in Claims Connect

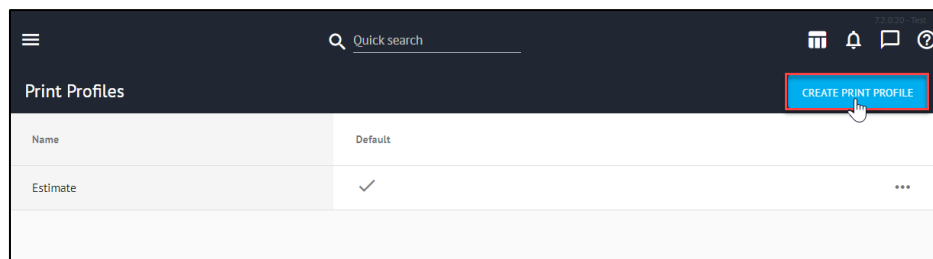
This job aid will guide a Company Administrator through the steps to set up a Print Profile for their company in Claims Connect.

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.

Print profile

GENERAL ESTIMATE OPTIONS

Name

☐ Set as default print profile

☐ Group by assignment

Include only estimates Completed or above

PAGES TO PRINT BY DEFAULT

- ☒ Loss Summary
- ☒ Diagrams
- ☒ Estimates
 - ☒ Structure
 - ☒ Contents
- ☐ Claim Totals
- ☐ Payments
- ☐ Photos
- ☐ Forms
- ☐ Timeline

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).

Job Aid Profile

CANCEL SAVE

GENERAL ESTIMATE OPTIONS

Name *

Job Aid Print Profile

☐ Set as default print profile

☐ Group by assignment

Include only estimates Completed or above

PAGES TO PRINT BY DEFAULT

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.

GENERAL ESTIMATE OPTIONS

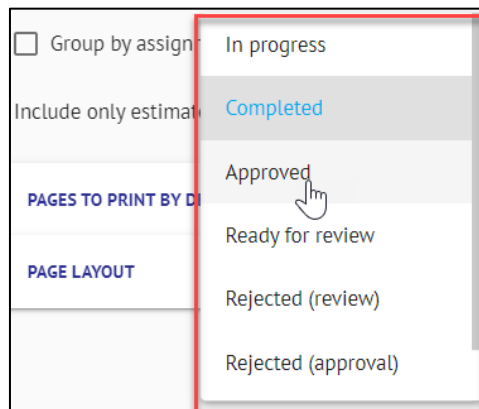
Name *

Job Aid Print Profile

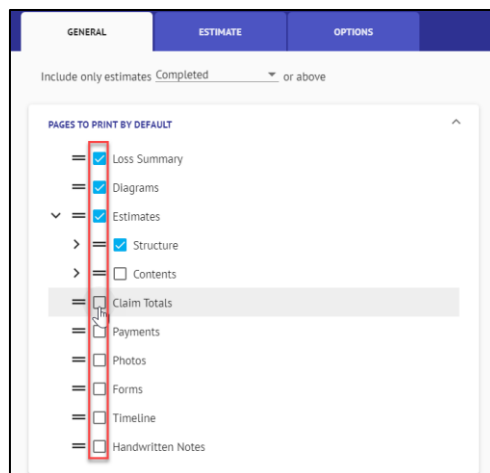
☒ Set as default print profile

☐ Group by assignment

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

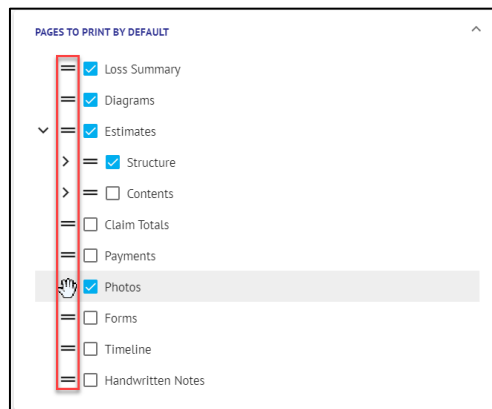


7. The next menu allows you to select the claim elements you wish to print by default in your print profile by checking the box next to the element.



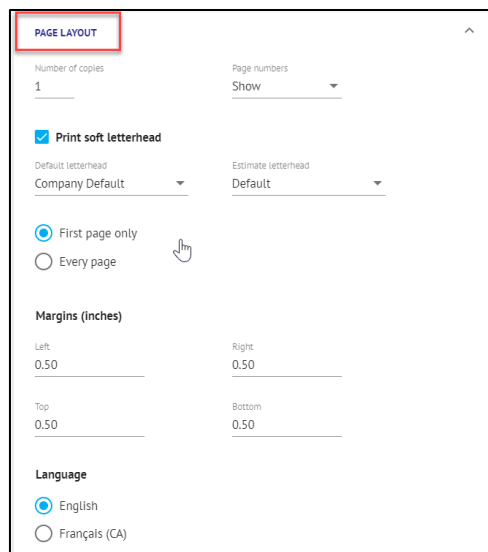
Note: If there is a small arrow next to element, click that element to view subitems in that grouping. Some elements will be checked by default and you may uncheck them if you do not wish them to print by default in the print profile.

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



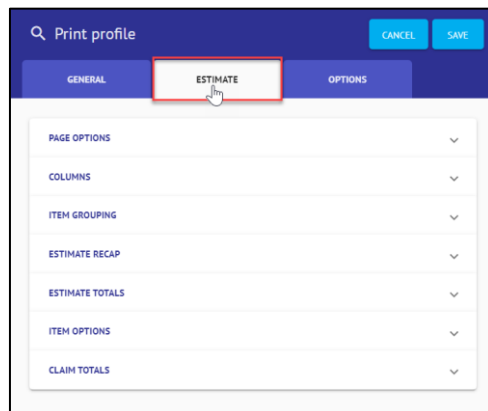
Note: Claim elements may be moved into any order, however only within elements of the same level. Elements that are within a subgrouping may only be reordered within elements of that specific grouping.

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

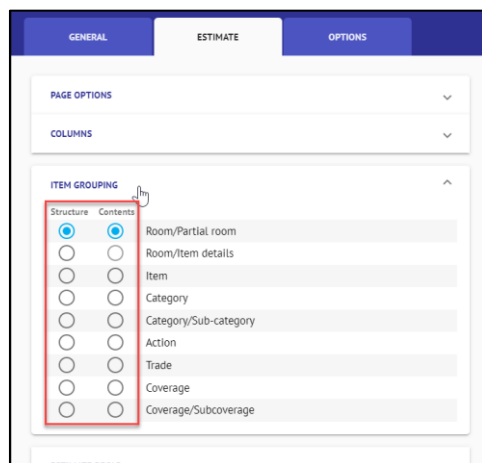


Note: If your company has multiple languages configured, the option to select the default print language will appear in the Page Layout section. If not, this section will not display.

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.

The screenshot shows the 'Options' tab with the following settings:

- Diagrams**
 - ☒ Print dimensions on diagrams
 - ☒ Print exterior dimensions on floorplans
 - ☐ Print room surface area on floorplans
- Orientation**
 - ☒ Automatic
 - ☐ Portrait
 - ☐ Landscape
- Water mitigation layer**
 - ☒ Do not print
 - ☐ Print on floorplan
 - ☐ Print as separate floorplan

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

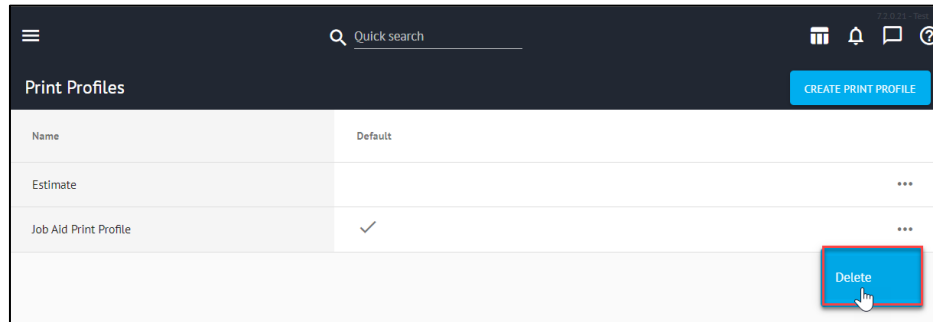
The screenshot shows the 'Print profile' dialog box with the 'Options' tab selected. The 'Save' button is highlighted with a red box and a mouse cursor.

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

The screenshot shows the 'Print Profiles' list with the following data:

Name	Default
Estimate	...
Job Aid Print Profile	✓

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.





About CoreLogic

CoreLogic is the leading provider of property insights and solutions, promotes a healthy housing market and thriving communities. Through its enhanced property data solutions, services and technologies, CoreLogic enables real estate professionals, financial institutions, insurance carriers, government agencies and other housing market participants to help millions of people find, buy and protect their homes. For more information, please visit corelogic.com.

For additional information, please visit [Corelogic.com](https://corelogic.com).

© 2023 CoreLogic, Inc. All rights reserved.

CORELOGIC and the CoreLogic logo are trademarks of CoreLogic, Inc. and/or its subsidiaries. All other trademarks are the property of their respective holders.