
Schedule UI Guide

Applicable to Claims Connect v6.16 and later

Issue 1.1
January, 2023

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Introduction

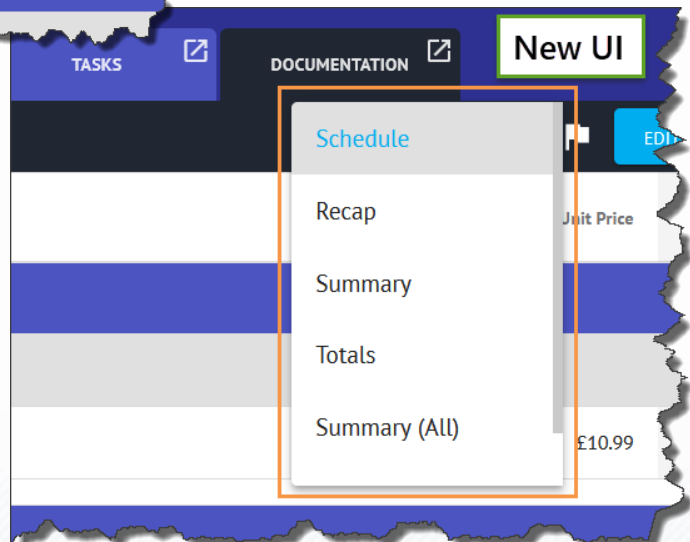
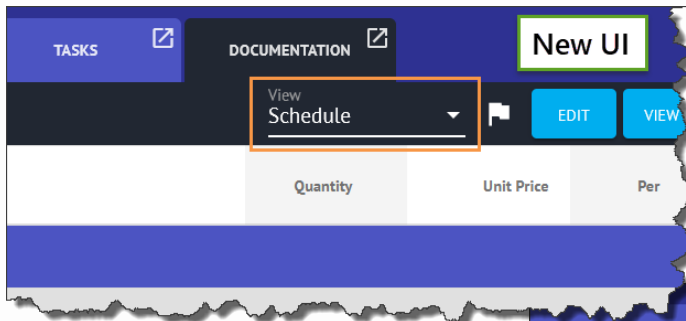
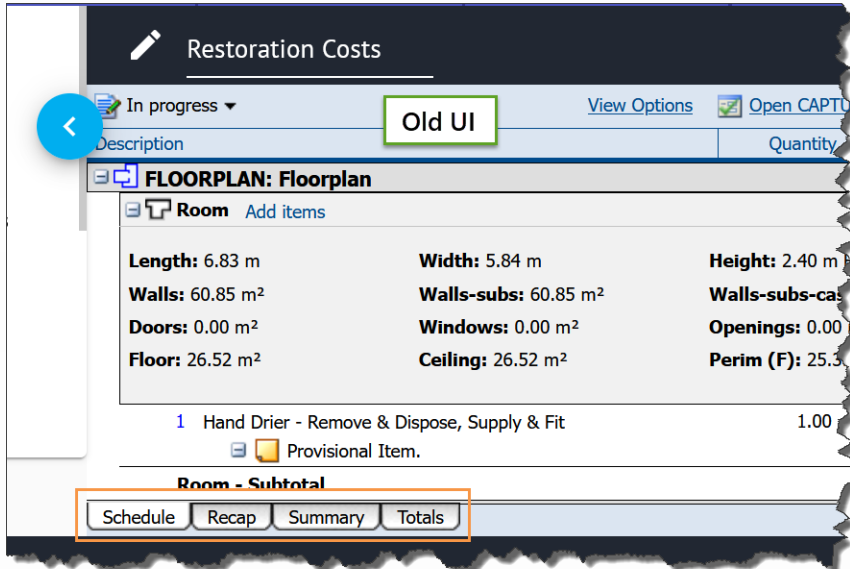
This document relates to the updated Schedule UI which was introduced in v6.16 of Claims Connect. This change means that the user experience for the Scheduling section within Claims Connect has been updated to reflect and be consistent with the other parts of Claims Connect, that had been updated previously. This means an improved user experience, more intuitive navigation, more efficient processes (less clicks), increased ease of use for users. It also means that we have improved our system architecture to lay the foundations for future improvements.

It should though be highlighted that the underlying functionality has not changed, so the user processes for this part of Claims Connect have not changed – there is just now an improved way of carrying out these processes!

Schedule page navigation

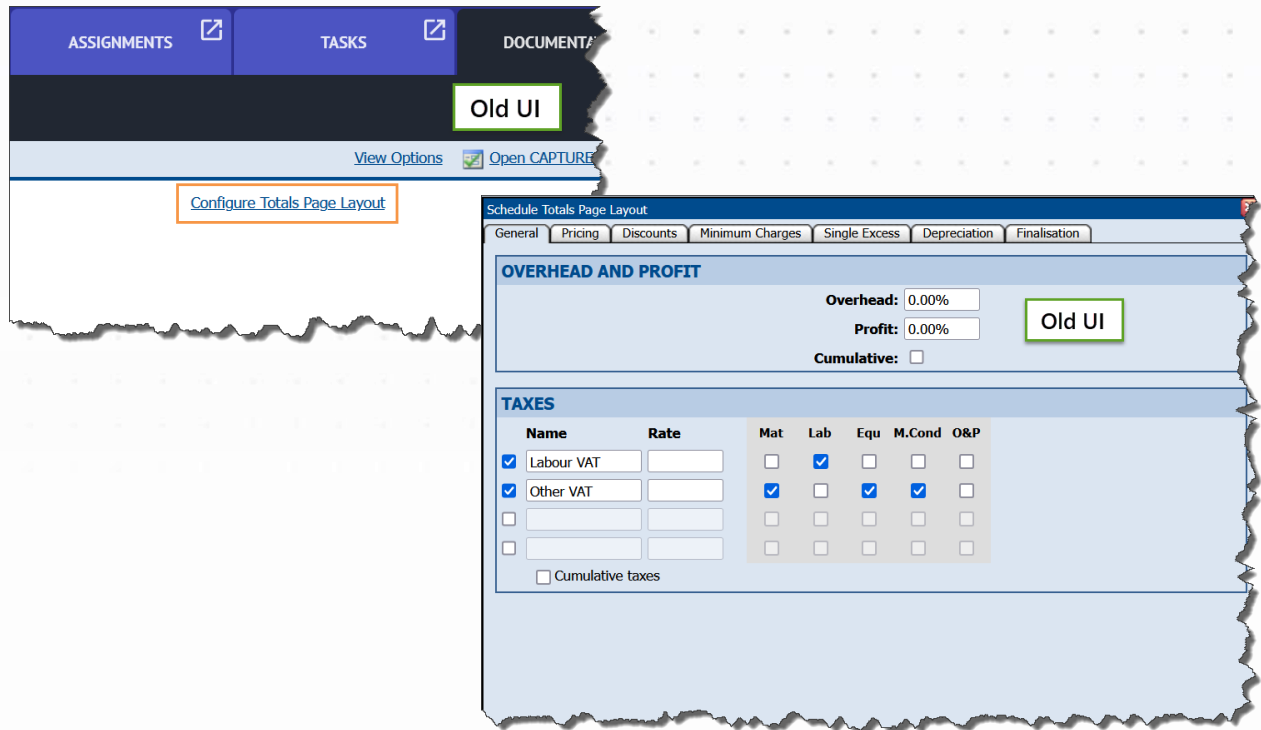
Schedule View

Schedule View options are now located in the header and no longer displayed as tabs on the footer of the page.

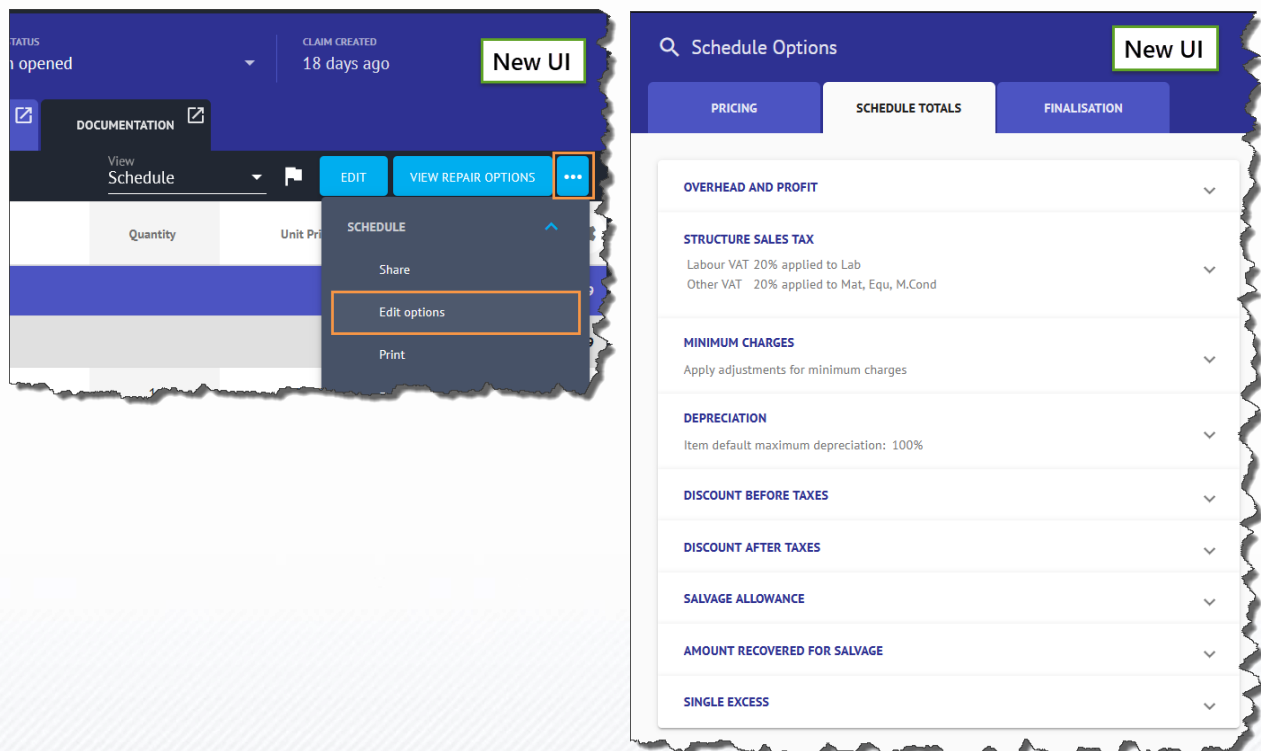


Schedule Options

Schedule Options (previously available within 'Configure Totals Page Layout') are now accessible in the side menu [...] under 'Edit options' and display in a blade.

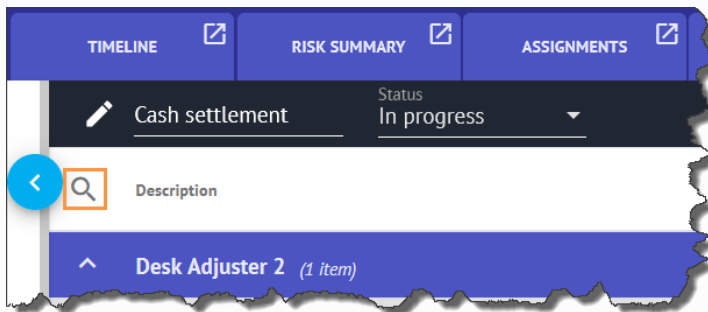


Note that Edit Options is only available when the schedule is not in Edit mode.



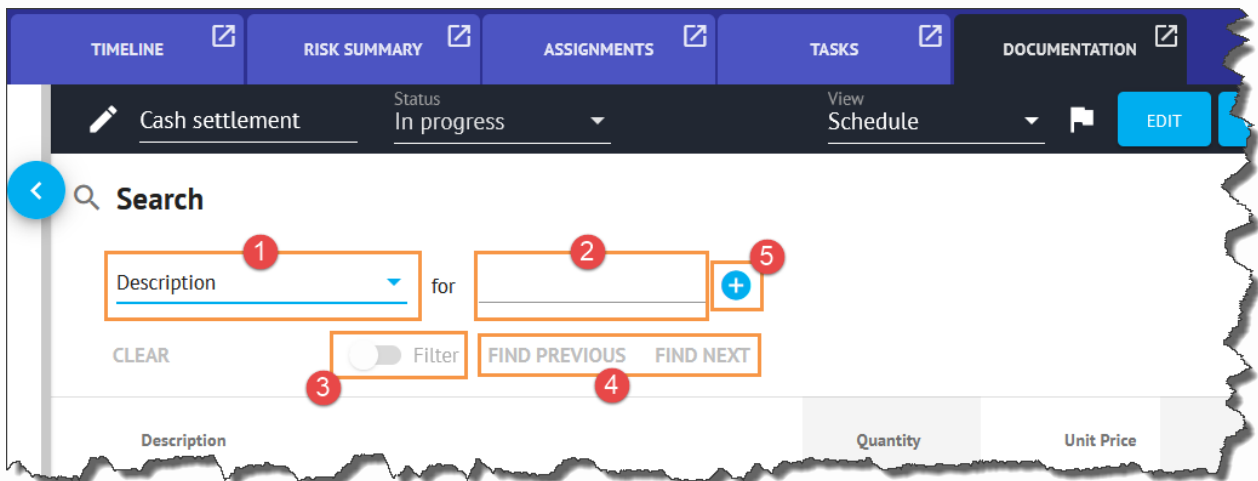
Search & Filter line items

Click on the magnifying glass to enable the Search options




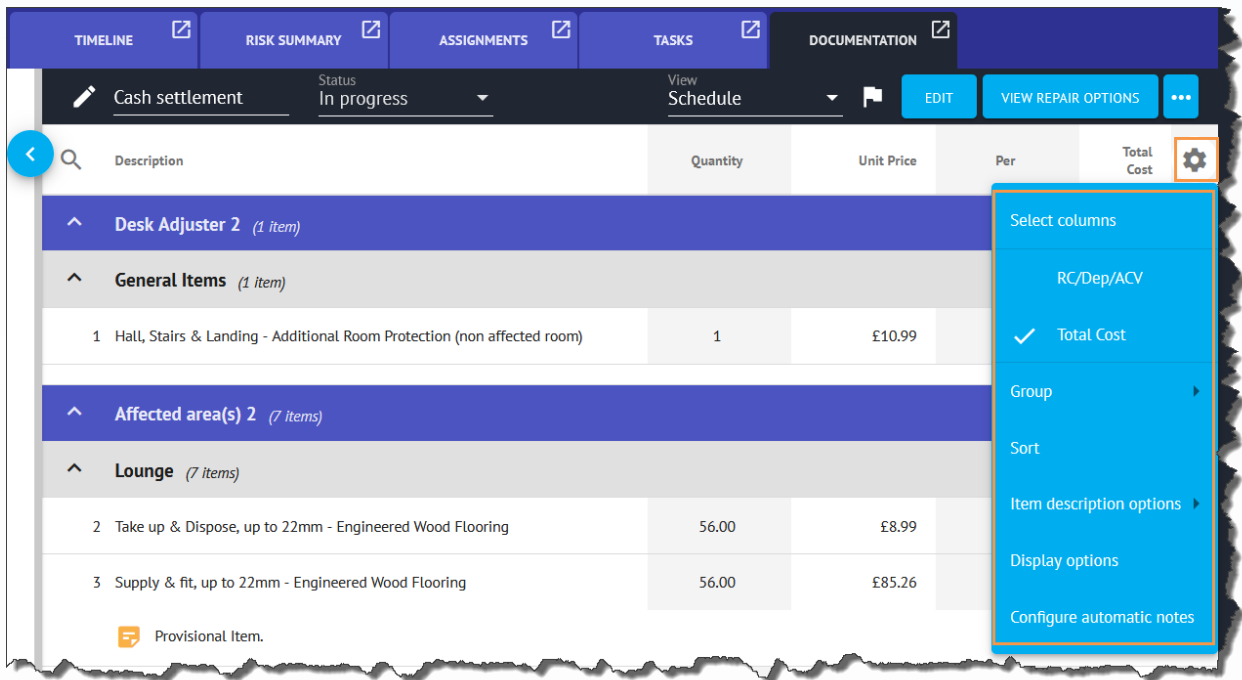
Within the search menu you can

1. Select the property of the line item to search. Options include Description, Coverage, OH&P, Provisional Sum and many more.
2. Enter the text or value to search
3. Filter allows you to view all items that match search criteria
4. Find Next/Previous will highlight the next/previous item that matches search criteria
5. You can add multiple search criteria by clicking the [+] button



Schedule page view options

Clicking the  icon will display the schedule page options.

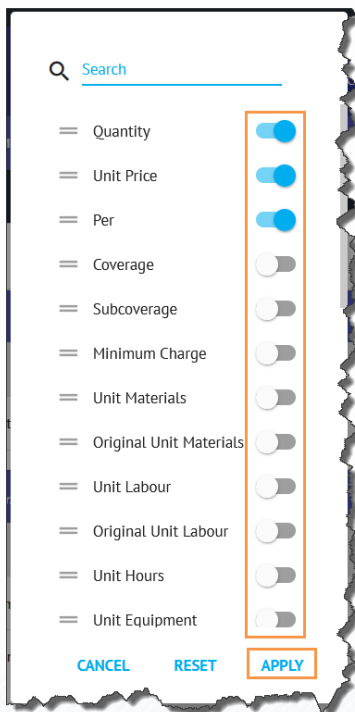


The screenshot shows the 'Schedule' page in a software application. The top navigation bar includes 'TIMELINE', 'RISK SUMMARY', 'ASSIGNMENTS', 'TASKS', and 'DOCUMENTATION'. Below this, there's a header with 'Cash settlement', 'Status: In progress', 'View: Schedule', and buttons for 'EDIT' and 'VIEW REPAIR OPTIONS'. A search bar is on the left. The main table has columns: 'Description', 'Quantity', 'Unit Price', 'Per', and 'Total Cost'. The table is grouped into sections: 'Desk Adjuster 2 (1 item)', 'General Items (1 item)', 'Affected area(s) 2 (7 items)', and 'Lounge (7 items)'. A settings menu is open on the right, showing options: 'Select columns', 'RC/Dep/ACV', 'Total Cost' (checked), 'Group', 'Sort', 'Item description options', 'Display options', and 'Configure automatic notes'.

Description	Quantity	Unit Price	Per	Total Cost
Desk Adjuster 2 (1 item)				
General Items (1 item)				
1 Hall, Stairs & Landing - Additional Room Protection (non affected room)	1	£10.99		
Affected area(s) 2 (7 items)				
Lounge (7 items)				
2 Take up & Dispose, up to 22mm - Engineered Wood Flooring	56.00	£8.99		
3 Supply & fit, up to 22mm - Engineered Wood Flooring	56.00	£85.26		

Provisional Item.

Select columns You can define the columns that display. Toggle the required options On or Off and click [Apply].

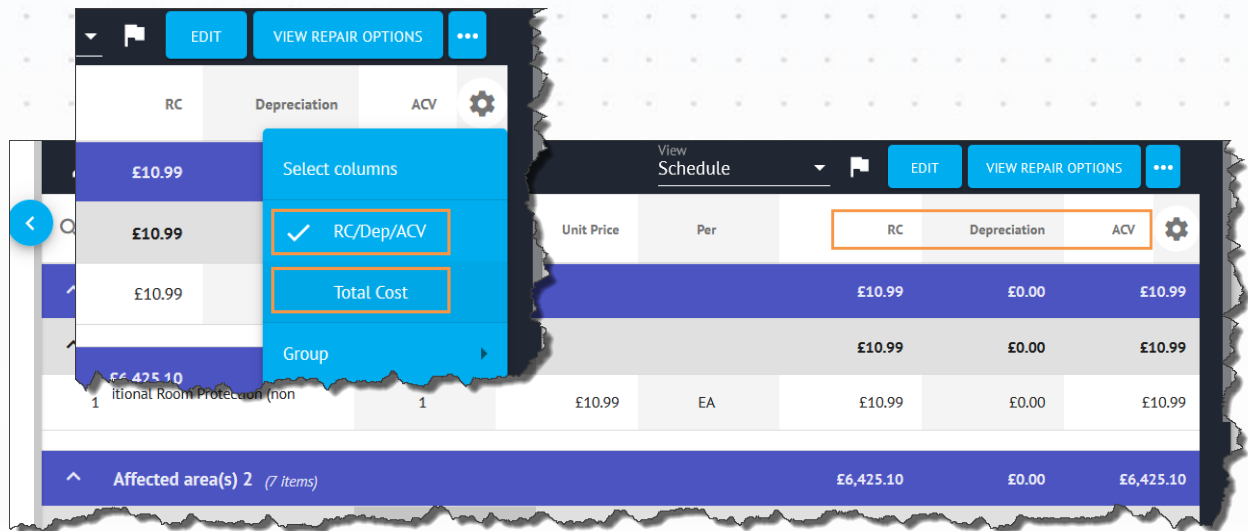


The 'Select columns' dialog box is shown. It has a search bar at the top. Below it is a list of columns with toggle switches. The columns are: Quantity, Unit Price, Per, Coverage, Subcoverage, Minimum Charge, Unit Materials, Original Unit Materials, Unit Labour, Original Unit Labour, Unit Hours, and Unit Equipment. The first three columns (Quantity, Unit Price, Per) have their toggle switches turned on. The other columns have their toggle switches turned off. At the bottom, there are three buttons: 'CANCEL', 'RESET', and 'APPLY'.

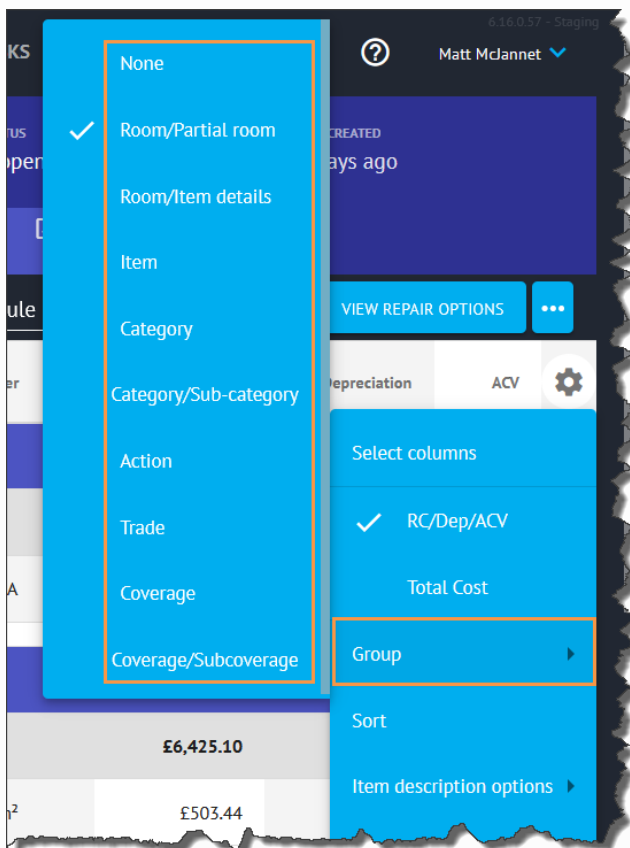
Column	Toggle
Quantity	On
Unit Price	On
Per	On
Coverage	Off
Subcoverage	Off
Minimum Charge	Off
Unit Materials	Off
Original Unit Materials	Off
Unit Labour	Off
Original Unit Labour	Off
Unit Hours	Off
Unit Equipment	Off

CANCEL RESET APPLY

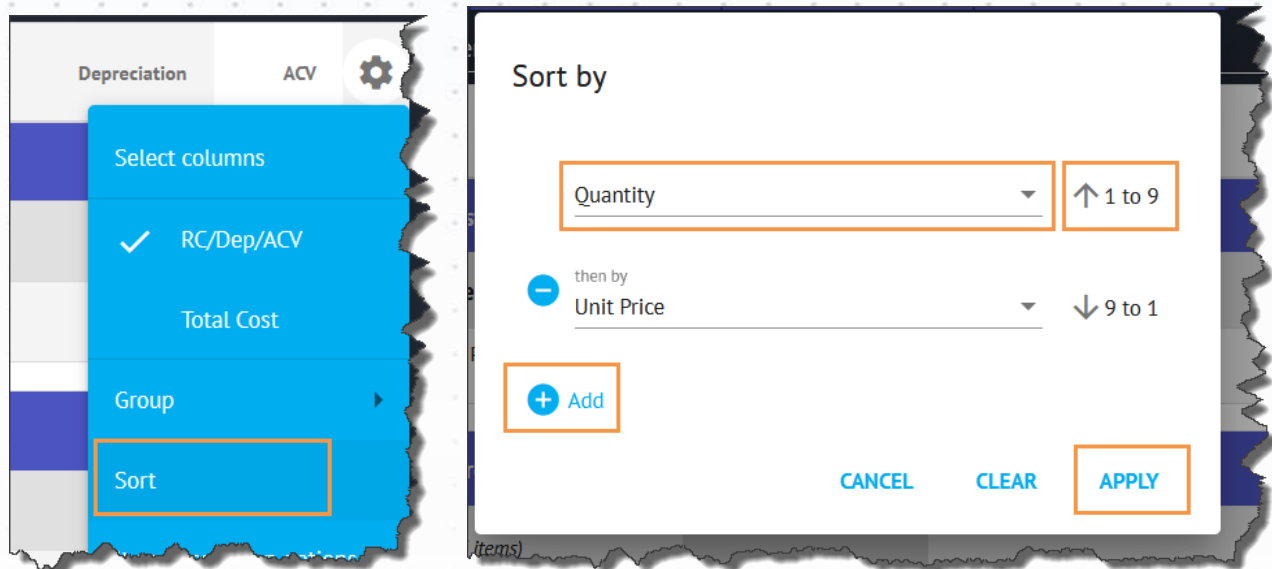
RC/Dep/ACV and Total Cost This allows you to quickly change between displaying the Total Cost column or the three RC/Dep/ACV columns.



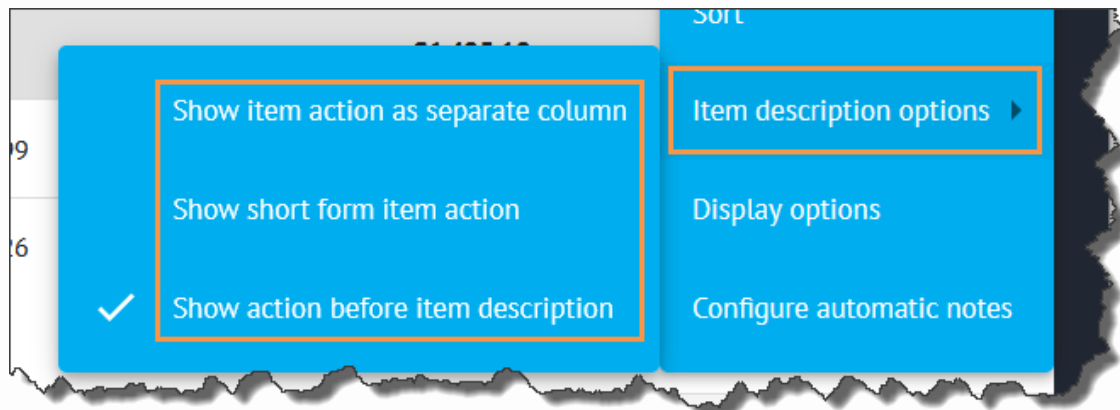
Group The view of the schedule can be updated to group by any of the available options.



Sort You can sort up to 3 columns in the schedule and each can be ordered in a different way.



Item description options Additional options relating to the description of the line item can be defined if required.



Display options This allows you to change the display of the schedule including options to Hide prices, Hide diagram objects with no items and Number items etc. Toggle the required options On or Off and click [Apply].

Display options

- ☒ Hide diagram objects with no items
- ☐ Hide diagram object details
- ☐ Hide prices
- ☒ Number items
- ☒ Combine related subrooms
- ☐ Combine related items
- ☐ Include O&P and taxes in line totals

☐ Sum total cost/ACV only

☒ Sum all financial columns

CANCEL APPLY

Configure automatic notes Item notes can be set to automatically generate when different properties are set or updated. Toggle the required options On or Off and click [Apply]

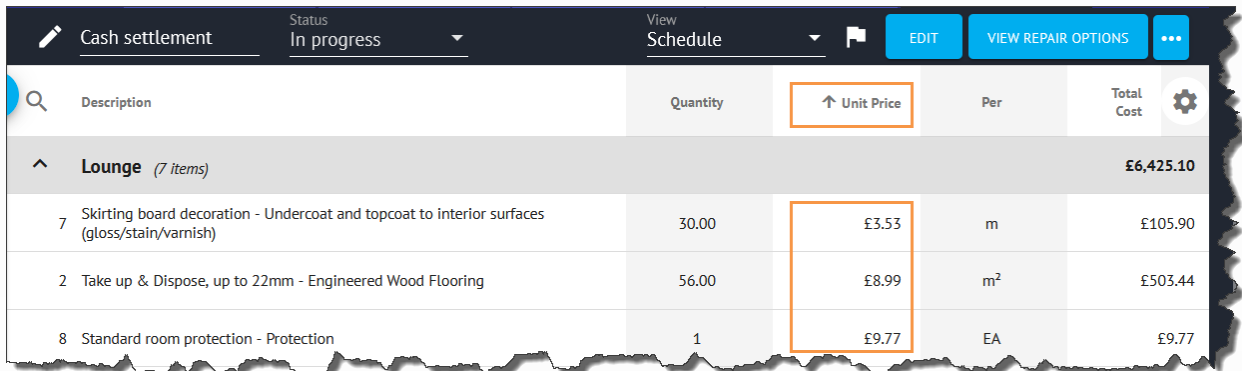
Automatically generate these notes

- ☐ Non-zero waste used
- ☐ Height used for item is less than full
- ☐ O&P is toggled ON/OFF for item
- ☐ Tax is toggled ON/OFF for item
- ☐ Credit item
- ☒ Provisional item
- ☐ Materials quantity bundle rounding
- ☐ Item has unit of measure conversion

CANCEL APPLY

Sort schedule by column

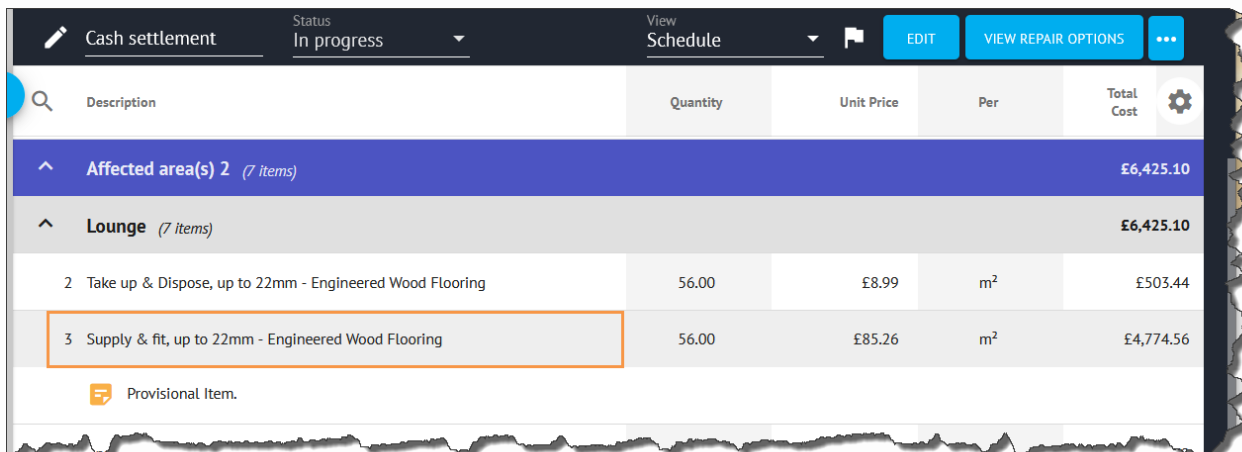
Clicking any of the column headers will sort the schedule by that column, clicking the same column header a second time will change the direction of the sort.



	Description	Quantity	Unit Price	Per	Total Cost
^	Lounge (7 items)				£6,425.10
7	Skirting board decoration - Undercoat and topcoat to interior surfaces (gloss/stain/varnish)	30.00	£3.53	m	£105.90
2	Take up & Dispose, up to 22mm - Engineered Wood Flooring	56.00	£8.99	m²	£503.44
8	Standard room protection - Protection	1	£9.77	EA	£9.77

View item properties & item cost breakdown

Click on the line item that you want to view, the properties blade will launch.



	Description	Quantity	Unit Price	Per	Total Cost
^	Affected area(s) 2 (7 items)				£6,425.10
^	Lounge (7 items)				£6,425.10
2	Take up & Dispose, up to 22mm - Engineered Wood Flooring	56.00	£8.99	m²	£503.44
3	Supply & fit, up to 22mm - Engineered Wood Flooring	56.00	£85.26	m²	£4,774.56

Provisional Item.

Within the blade on the General tab you can view properties for VAT/Taxes and whether the item has been marked as Provisional.

On the Unit Price tab you can see the breakdown of Labour, Materials, Equipment and Market conditions.

Supply & fit, up to 22mm - Engineered Wood Flooring

Item Properties

GENERAL

UNIT PRICE

COVERAGE

DEPRECIATION

Item: ☒ Engineered Wood Flooring Action: Supply & fit, up to 22mm Grade:

Description: ☐

Unit price: £85.26 per m²

Quantity: 56.00 m²

Waste included: 0.00%

☐ Credit Item (appears as negative amount)
 ☒ Include subtractions in quantity calculation
 ☐ Apply O&P
 ☒ Provisional item

TAXES

Name	Mat	Lab	Equ	M.Cond
<input checked="" type="checkbox"/> Apply Labour VAT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Apply Other VAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Supply & fit, up to 22mm - Engineered Wood Flooring

Item Properties

GENERAL

UNIT PRICE

COVERAGE

DEPRECIATION

Materials: £73.55

Labour: £11.71

Equipment: £0.00

Market conditions: £0.00

Unit price: £85.26 per m²

Trade/Crew: Floor Layer/Tiler

Trade rate: £27.23

Hours: 0.4300 (2.3256 m² in 1 hour)

Price Component Details

Waste volume: 0.0000 m³

Clicking [Price Component Details] on the [Unit Price] tab will show the cost breakdown for materials and labour.

Price Component Details

Materials

<input type="checkbox"/>	Description	Materials Price	Gross Coverage	Net Coverage	Unit Price	Per
<input checked="" type="checkbox"/>	Engineered Wood Flooring - 20mm thick	£49.50	1.1111 m ²	1.0000 m ²	£72.07	m ²
<input checked="" type="checkbox"/>	Spectrim Quick Step underlay 15m2 Roll	£15.20	15.7109 m ²	14.9254 m ²	£1.48	m ²

Total Materials Unit Price: **£73.55**

Labour

<input type="checkbox"/>	Work Description	Trade	Rate	Hourly Productivity	Waste	Eff. Productivity
<input checked="" type="checkbox"/>	Floor Layer/Tiler	Floor Layer/Tiler	£27.23	2.3079 HR	0%	2.3079 HR

Total Labour Unit Price: **£11.71**

Equipment

This item does not include any equipment components.

CANCEL

UPDATE

On the Coverages tab you can see what Coverage is applied to the item.

Supply & fit, up to 22mm - Engineered Wood Flooring

Item Properties

GENERAL

UNIT PRICE

COVERAGE

DEPRECIATION

Coverage
Buildings

Limit:

Deductible: £0.00

Recoverable Depreciation: ☐

Total for all items related to this coverage: £6,436.09

[VIEW ITEMS](#)

Clicking [View Items] will display all items linked to this Coverage.

Buildings Items

Description	Found In	Quantity	Total
Hall, Stairs & Landing - Additional Room Protection (non affected room)	General Items	1 EA	£10.99
Take up & Dispose, up to 22mm - Engineered Wood Flooring	Lounge	56.00 m ²	£503.44
Supply & fit, up to 22mm - Engineered Wood Flooring	Lounge	56.00 m ²	£4,774.56
Apply varnish 2 coats - Engineered Wood Flooring	Lounge	56.00 m ²	£818.72
Remove & Dispose, Supply & Fit - Timber Threshold	Lounge	1.00 m	£34.96
Remove & Dispose, Supply & Fit - Skirting Board	Lounge	15.00 m	£177.75
Skirting board decoration - Undercoat and topcoat to interior surfaces (gloss/stain/varnish)	Lounge	30.00 m	£105.90
Standard room protection - Protection	Lounge	1 EA	£9.77

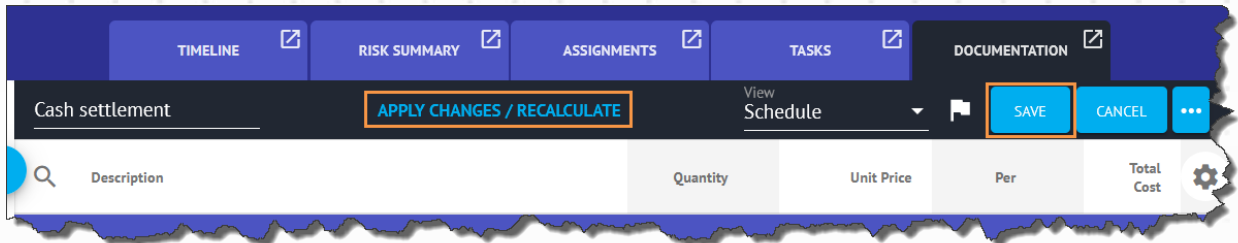
[CLOSE](#)

Schedule editing

General

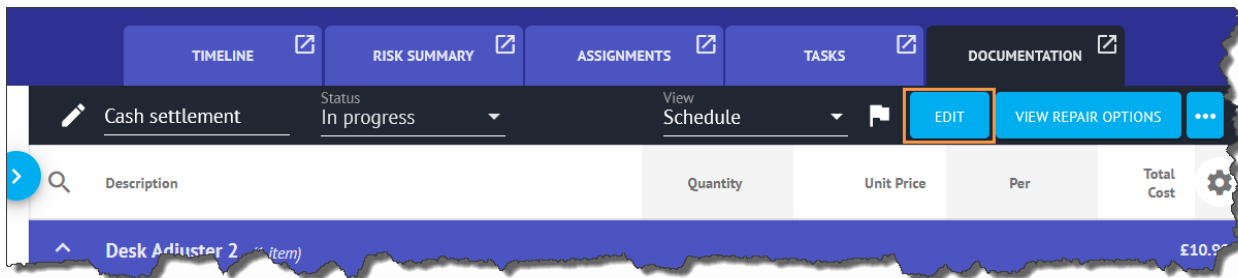
You will need to Participate in a claim before editing is enabled.

Once changes have been made to the schedule items you can either click [Save] which will apply changes and Edit-Mode will end, or click [Apply Changes / Recalculate] which will update the schedule and leave the schedule in Edit-Mode.



Adding line items

Click the [Edit] button



Click the [+] button in the relevant room where you want to add a line item.

Cash settlement						View Schedule	CANCEL	...
Q	Description	Quantity	Unit Price	Per	Total Cost			
^	Desk Adjuster 2 (1 item)				£10.99			
^	General Items (1 item) +				£10.99			
<input type="checkbox"/>	Hall, Stairs & Landing - Additional Room Protection (non affected room)	1.00	£10.99	EA	£10.99			
^	Affected area(s) 2 (7 items)				£6,425.10			
^	Lounge (7 items) +				£6,425.10			
2	Take up & Dispose, up to 22mm - Engineered Wood Flooring	56.00	£8.99	m ²	£503.4			

The Item Database blade has not changed since the previous Schedule UI apart from improved item search functionality.

Either search for an item or navigate to it via the options available, set the quantity and then click [Add]

CLAIM#
11625

CAUSE
Storm or Tempest

POLICY
Miss

TIMELINE

Cash settlement

Q
Description

^ Desk Adjuster 2 (1 item)

^ General Items (1 item) +

General Items

BROWSE
ITEMS TO ADD 1

Emulsion wall

CoreLogic Schedule of Rates - 2022 - Q2 (*Base) (South East)

Emulsion to walls [Decorating - Painting]

☐ Standard Emulsion - Apply mist coat to new plaster or textured surface coating 1.00 £2.50 m²

☐ Standard Emulsion - Apply 1 Coat (White/Magnolia) 1.00 £3.91 m²

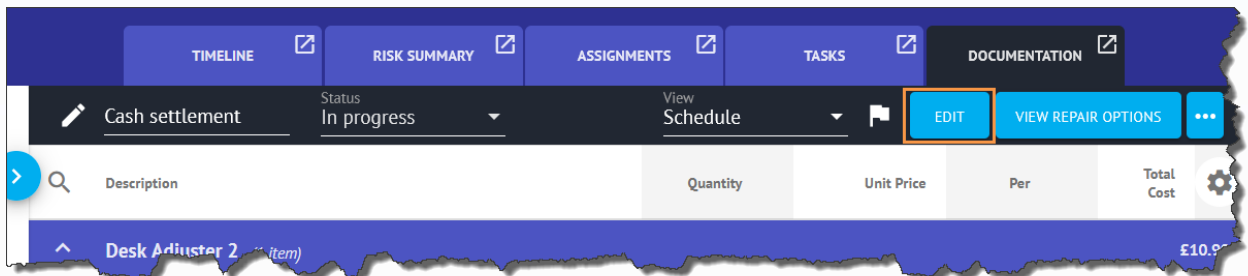
☒ Standard Emulsion - Apply 2 Coats (White/Magnolia) 22 £7.26 m²

CANCEL
ADD

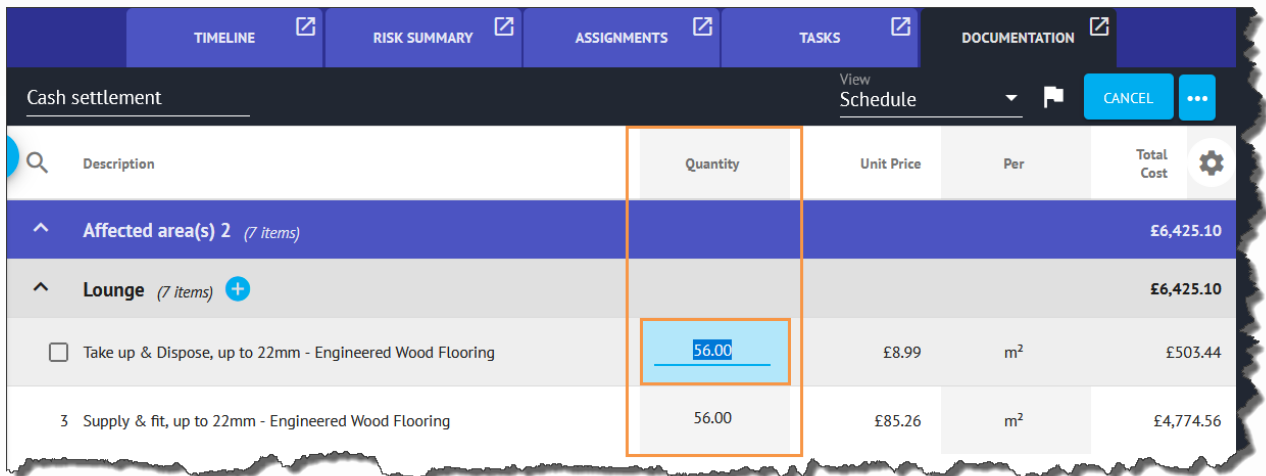
Click [Save] or [Apply Changes/Recalculate] to finish.

Update line item quantity

Click the [Edit] button.



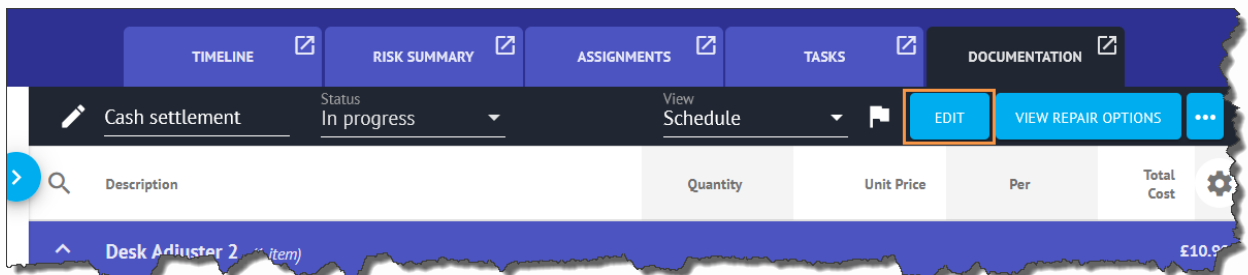
Click on the line item Quantity figure in the Quantity column and set the required quantity.



Click [Save] or [Apply Changes/Recalculate] to finish.

Deleting line items

Click the [Edit] button



Hover the cursor over the left of the line item text and a checkbox will display.

Select the relevant items you want to delete and then click [Delete] in the header bar.

TIMELINE

RISK SUMMARY

ASSIGNMENTS

TASKS

DOCUMENTATION

1 item selected

EDIT

DELETE

Description

Quantity

Unit Price

Per

Total Cost

Desk Adjuster 2 (2 items)

£170.71

General Items (2 items)

£170.71

Hall, Stairs & Landing - Additional Room Protection (non affected room)

1.00

£10.99

EA

£10.99

Standard Emulsion - Apply 2 Coats (White/Magnolia) - Emulsion to walls

22.00

£7.26

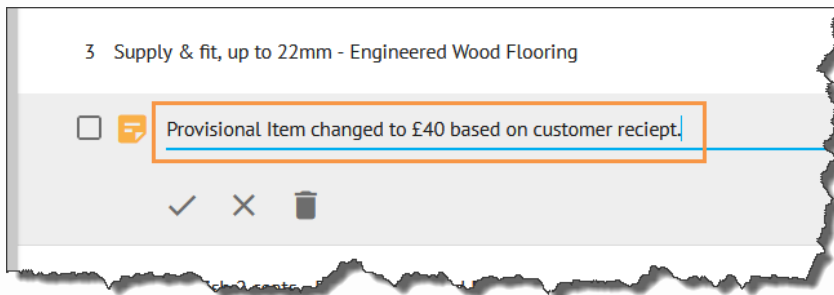
m²

£159.72

Click [Save] or [Apply Changes/Recalculate] to finish.

Editing line item notes

Click the [Edit] button then click on an existing item note. This will enable the text of the note to be edited or the note deleted.



Updating line item Provisional sum

Click the [Edit] button then click on the required line item to launch the item properties blade. Then select the [Unit Price] tab, then [Price Component Details]

Supply & fit, up to 22mm - Engineered Wood Flooring

Item Properties

GENERAL
UNIT PRICE
COVERAGE

Materials: £73.55

Labour: £11.71

Equipment: £0.00

Market conditions: £0.00

Unit price: £85.26 per m²

Trade/Crew: Floor Layer/Tiler

Trade rate: £27.23

Hours: 0.4300 (2.3256 m² in 1 hour)

[Price Component Details](#)

Waste volume: 0.0000 m³

Click on the item component that requires updating.

Price Component Details

Materials

<input type="checkbox"/>	Description	Materials Price	Gross Coverage
<input checked="" type="checkbox"/>	Engineered Wood Flooring - 20mm thick	£49.50	1.1111 m ²
<input checked="" type="checkbox"/>	Spectrim Quick Step underlay 15m2 Roll	£15.20	15.7109 m ²

Total Materials Unit Price: £73.55

Update the values as required and click [Update].

Materials

Description
Engineered Wood Flooring - 20mm thick

Gross materials price: £40.00

Gross coverage: 1.1111 m²

Waste: 10%

Net coverage: 1.0000 m²

Unit price: £40.00 per m²

CANCEL UPDATE

Click [Update] when all components have been updated.

Activity	Waste	Eff. Productivity	Unit Price	Per
79 HR	0%	2.3079 HR	£11.71	HR

CANCEL UPDATE

Click to the [General] tab and un-check the Provisional flag, then click [Apply]

Supply & fit, up to 22mm - Engineered Wood Flooring

Item Properties

CANCEL APPLY

GENERAL UNIT PRICE COVERAGE DEPRECIATION

Item: ☒ Engineered Wood Flooring Action: Supply & fit, up to 22mm Grade: _____

Description: ☐ _____

Unit price: £58.19 per m²

Quantity: 56.00 m²

Waste included: 0.00%

☐ Credit Item (appears as negative amount)

☒ Include subtractions in quantity calculation

☐ Apply O&P

☒ Provisional item

Select whether you want to update just this line item or all instances of this line item.

Apply changes this line item only

Apply changes to all occurrences of this item in the active schedule

Cancel

Click [Save] or [Apply Changes/Recalculate] to finish.

Update line item properties

Click the [Edit] button then click on the required line item to launch the item properties blade. Only items that are unlocked will be editable.

The options below are generally available when using the CoreLogic (UK) Schedule of Rates.

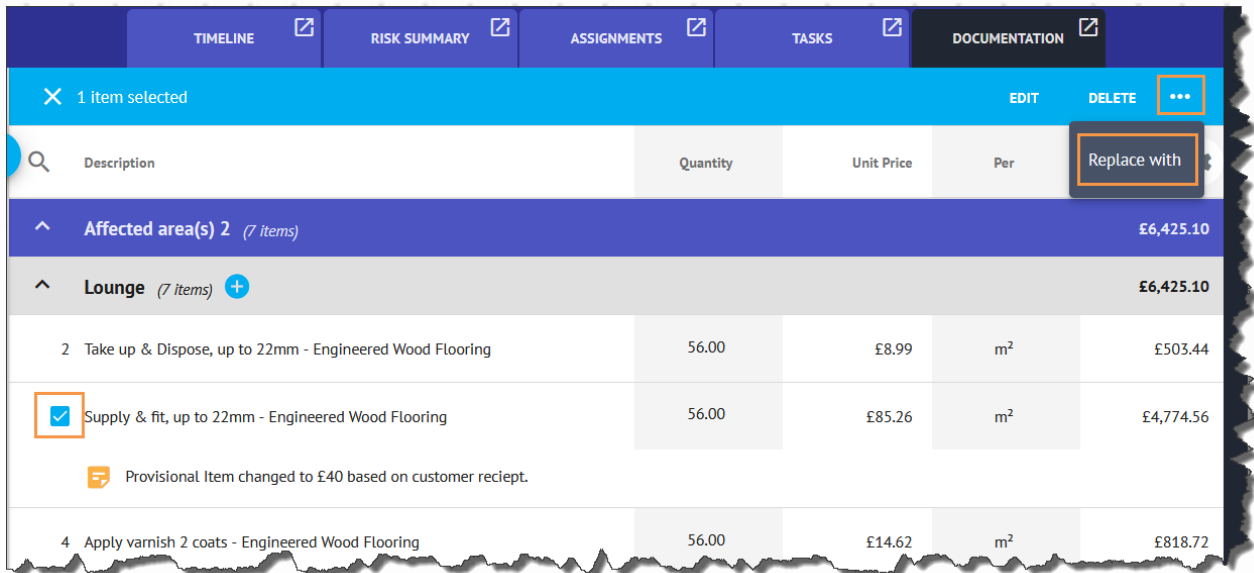
General Provisional sum (applies to provisional items only)

Coverage The coverage associated with a line item can be amended

Comment Line item notes can be added (Note: The Comment tab requires scrolling right).

Replace line items

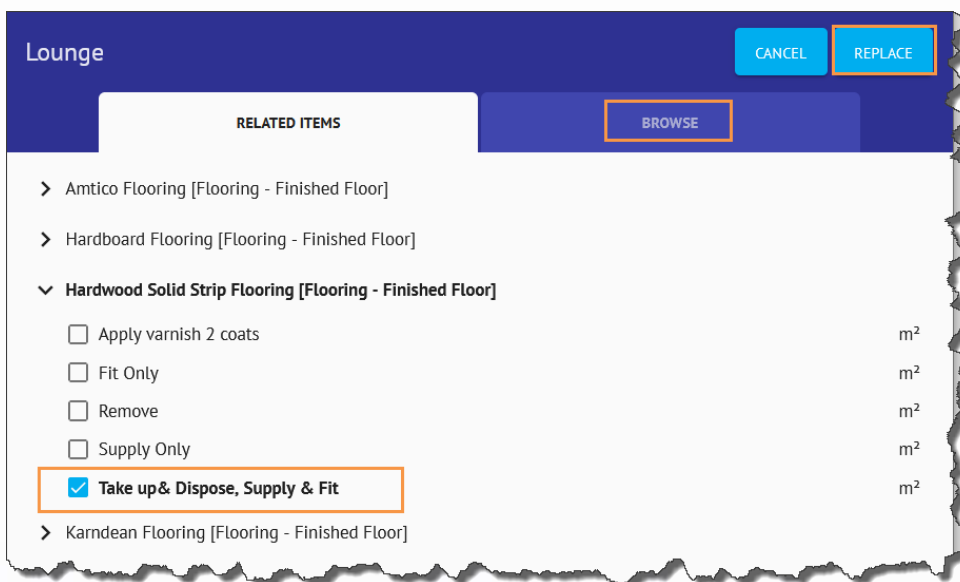
Click the [Edit] button, select the line item(s) you wish to replace then click the [...] button and [Replace with].



Description	Quantity	Unit Price	Per	
Affected area(s) 2 (7 items) £6,425.10				
Lounge (7 items) + £6,425.10				
2 Take up & Dispose, up to 22mm - Engineered Wood Flooring	56.00	£8.99	m²	£503.44
<input checked="" type="checkbox"/> Supply & fit, up to 22mm - Engineered Wood Flooring	56.00	£85.26	m²	£4,774.56
Provisional Item changed to £40 based on customer receipt.				
4 Apply varnish 2 coats - Engineered Wood Flooring	56.00	£14.62	m²	£818.72

Select the replacement item from the Related Items list or select the Browse tab to access the full pricing database.

Select the required item and click [Replace].



Lounge CANCEL REPLACE

RELATED ITEMS BROWSE

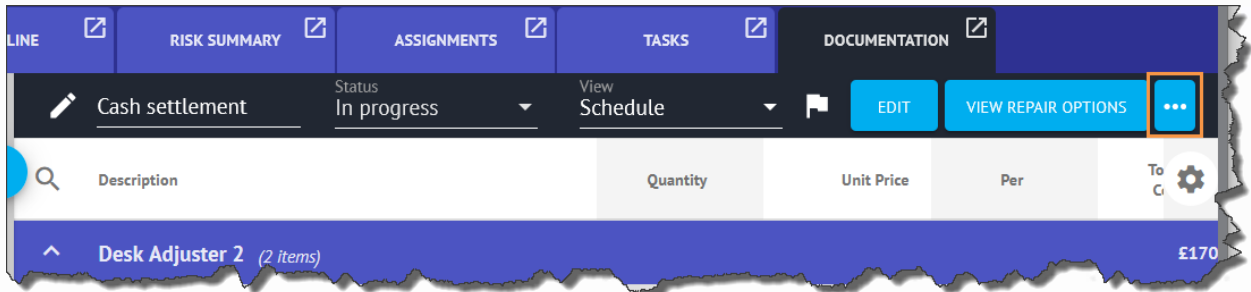
- > Amtico Flooring [Flooring - Finished Floor]
- > Hardboard Flooring [Flooring - Finished Floor]
- > **Hardwood Solid Strip Flooring [Flooring - Finished Floor]**
 - ☐ Apply varnish 2 coats m²
 - ☐ Fit Only m²
 - ☐ Remove m²
 - ☐ Supply Only m²
 - ☒ **Take up & Dispose, Supply & Fit** m²
- > Karndean Flooring [Flooring - Finished Floor]

Click [Save] or [Apply Changes/Recalculate] to finish.

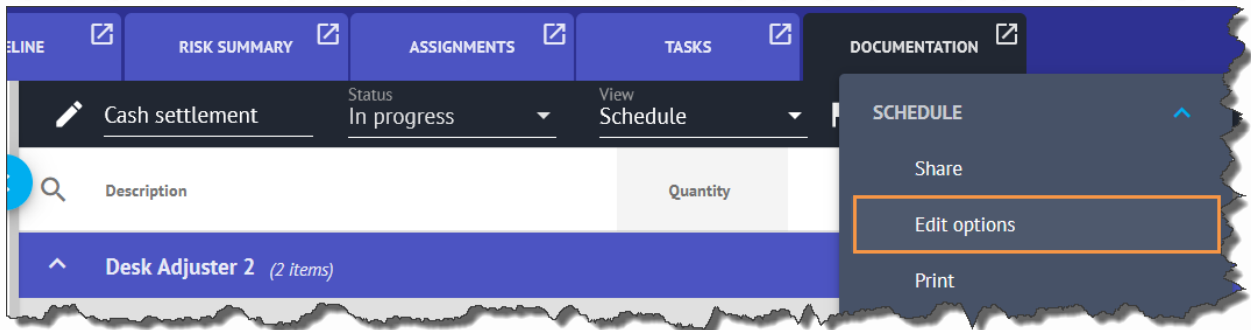
Schedule actions

Changing schedule pricing database

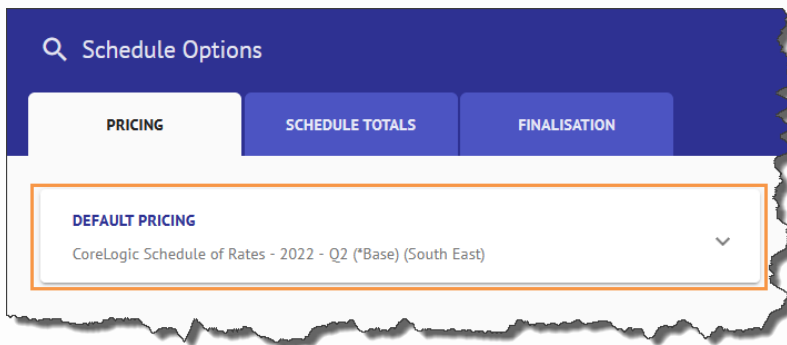
Click the [...] button to access the menu.



Select [Edit options]



Click to expand the pricing menu and then click [Select pricing database]



PRICING | SCHEDULE TOTALS | FINALISATION

DEFAULT PRICING

CoreLogic Schedule of Rates - 2022 - Q2 (*Base) (South East)

[Select pricing database](#)

Regional modification factors

Materials	Labour	Equipment	Market Conditions
0%	-2%	0%	0%

Select the new Pricing Database and click [Select]

Select pricing database

Current selection: CoreLogic Schedule of Rates - 2022 - Q2 (*Base) (South East)

- ▼ 2022 - Q4
 - ▼ *Base
 - Channel Islands
 - East Midlands**
 - East of England
 - Inner London
 - North East
 - North West
 - Northern Ireland
 - Outer London

CANCEL SELECT

Click [Save] to apply the changes.

Q Schedule Options

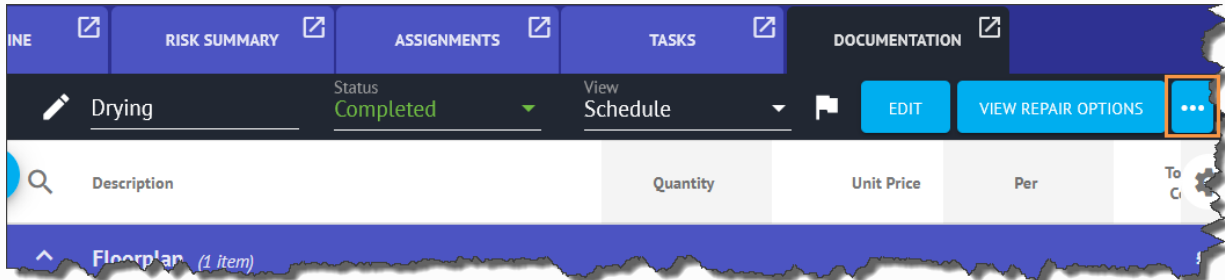
CANCEL SAVE

PRICING | SCHEDULE TOTALS | FINALISATION

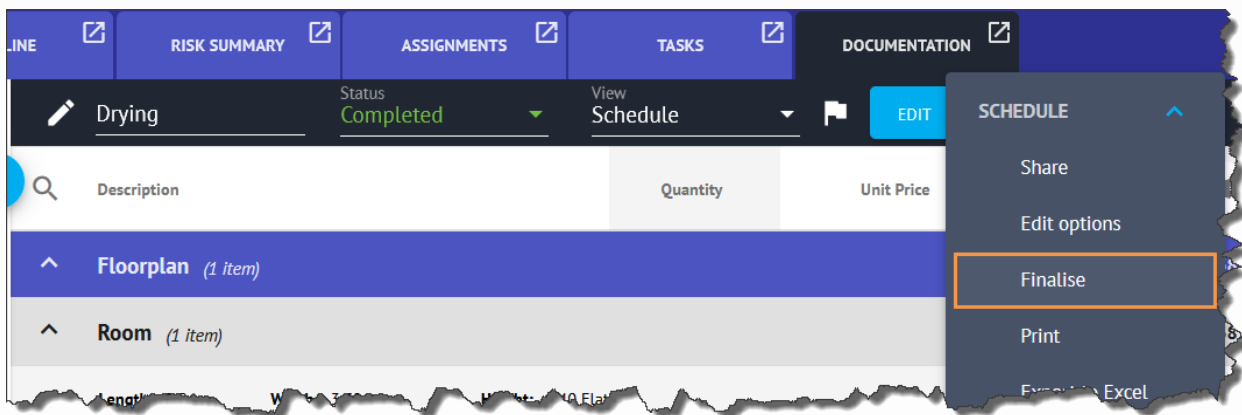
FAULT

Finalise schedule

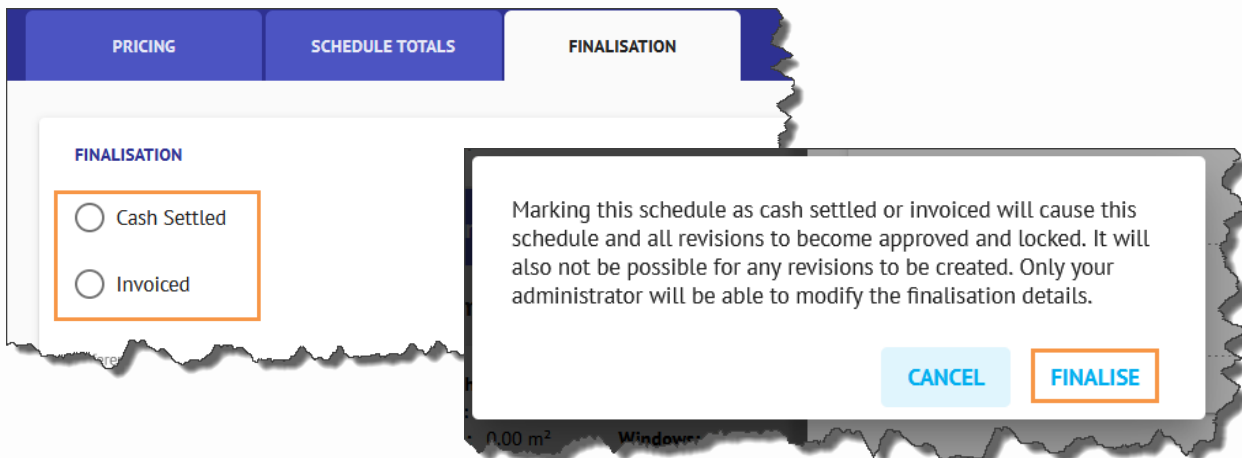
Click the [...] button to access the menu on a schedule with the status of Completed* or Approved.



Select the [Finalise] option from the menu



Select the type of Finalisation and when prompted click [Finalise] to confirm.



Enter the reference if required and then click [Save]

Search Schedule Options

CANCEL SAVE

PRICING SCHEDULE TOTALS FINALISATION

FINALISATION

☐ Cash Settled

☒ Invoiced

Reference *




ABC-12345

Settlement or invoice date *





21 Dec 2022

*Schedules at Completed Status can only be finalised by Originator or system Delegated authority

Rename schedule

Either clicking the  icon or clicking on the Schedule name text will enable it to be edited. Click the  or  when finished. Note: Company settings can prevent renaming.

TIMELINE RISK SUMMARY ASSIGNMENTS TASKS DOCUMENTATION

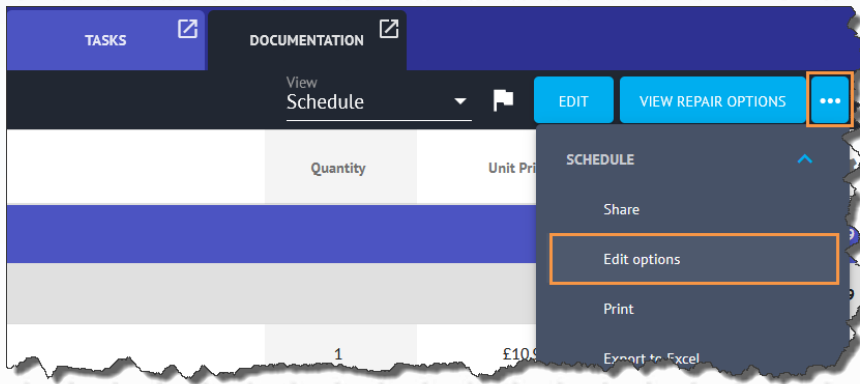
 Cash settlement   Status In progress View Schedule  EDIT

< Search Description Quantity Unit Price

Desk Adjuster 2 (1 item)

Update schedule options (OH&P, VAT, Minimum Charges, Excess...)

Click the [...] button and select [Edit options]



On the Schedule Totals tab click the relevant option and make the required changes, then click [Save].

Schedule Options [CANCEL] [SAVE]

PRICING **SCHEDULE TOTALS** **FINALISATION**

OVERHEAD AND PROFIT

STRUCTURE SALES TAX

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input type="checkbox"/> Labour VAT	20.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Other VAT	20.000%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Custom VAT	20.000%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Cumulative taxes

MINIMUM CHARGES
Apply adjustments for minimum charges

DEPRECIATION

About CoreLogic

CoreLogic, 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.

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