

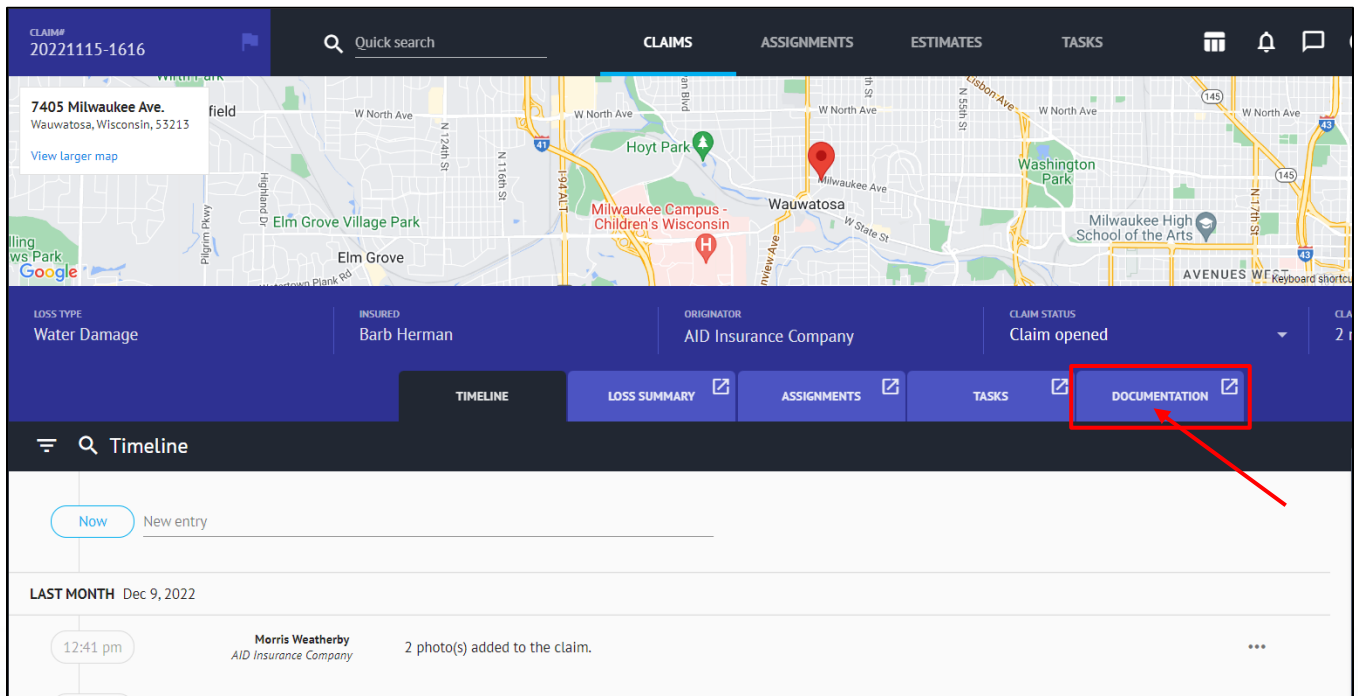
# In-Line Editing

## In-Line Editing in Claims Connect

*Disclaimer: This job aid 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.*

### Step 1

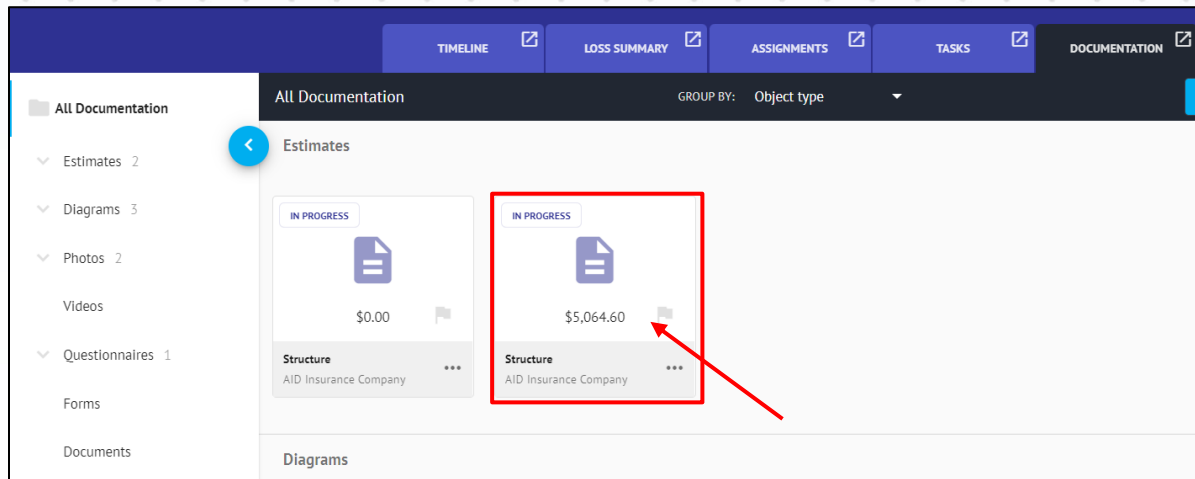
Within a claim in Claims Connect, click on the Documentation tab to view available estimates to edit.



The screenshot displays the Claims Connect user interface. At the top, a navigation bar includes tabs for CLAIMS, ASSIGNMENTS, ESTIMATES, and TASKS. Below this, a map shows the location of 7405 Milwaukee Ave. in Wauwatosa, Wisconsin. A sidebar on the left lists claim details: LOSS TYPE (Water Damage), INSURED (Barb Herman), ORIGINATOR (AID Insurance Company), and CLAIM STATUS (Claim opened). The main content area features a horizontal menu with tabs for TIMELINE, LOSS SUMMARY, ASSIGNMENTS, TASKS, and DOCUMENTATION. The DOCUMENTATION tab is highlighted with a red box and a red arrow pointing to it. Below the menu, the TIMELINE section shows a list of events, including a recent entry from Morris Weatherby at 12:41 pm stating "2 photo(s) added to the claim."

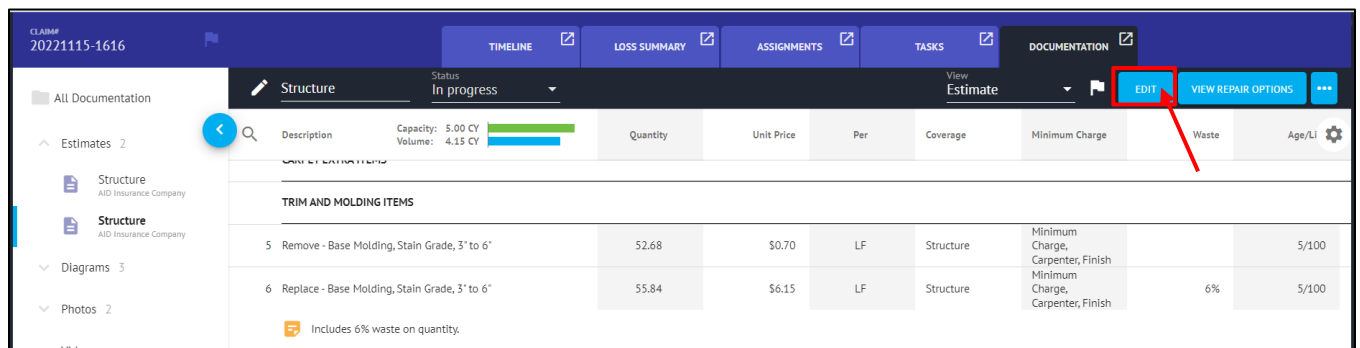
## Step 2

Open the estimate to edit by clicking on it from the Documentation page.



## Step 3

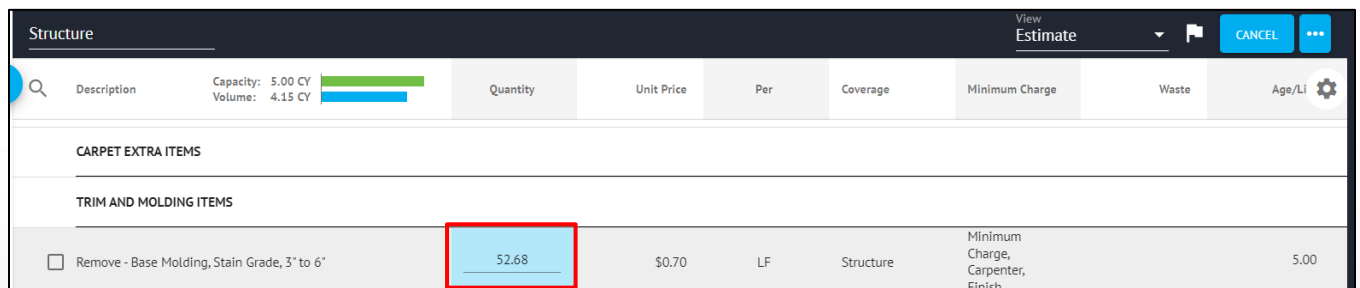
Within the Estimate view, click on 'Edit' to enter edit mode.



## Step 4

Line-item editing may be done now from this view within the individual line items. Editable fields will highlight blue when scrolled over. If a field is not eligible for in-line editing, it will remain gray.

(Note: The tab button may be used to navigate from editable field to editable field within one line item.)



## Step 5

### Text Field

To edit a text field, click on anywhere in the text or highlight all the text with a double mouse click. Proceed to edit the field as necessary.

TRIM AND MOLDING ITEMS							
<input type="checkbox"/>	Remove - Base Molding, Stain Grade, 3" to 6"	52.68	\$0.70	LF	Structure	Minimum Charge, Carpenter, Finish	5.00

TRIM AND MOLDING ITEMS							
<input type="checkbox"/>	5 Remove - Base Molding, Stain Grade, 3" to 6"	62.00	\$0.70	LF	Structure	Minimum Charge, Carpenter, Finish	5.00

### Dropdown Field

To edit a dropdown field, click anywhere on the field to be presented with the dropdown box of options. Click on the option you wish to change it to.

(Note: May need to scroll to see additional available options.)

Description		Capacity: 5.00 CY Volume: 4.15 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge
TRIM AND MOLDING ITEMS							
5	Remove - Base Molding, Stain Grade, 3" to 6"		62.00	\$0.70	LF	Structure	Minimum Charge, Carpenter, Finish
6	Replace - Base Molding, Stain Grade, 3" to 6"		55.84	\$6.15	LF	Structure	Minimum Charge, Carpenter, Finish
Includes 6% waste on quantity.							
<input type="checkbox"/>	Stain & Finish - Base Molding, 6" & Under		52.68	\$3.44	LF	Structure	Minimum Charge, Painter

Description		Capacity: 5.00 CY Volume: 4.15 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste
TRIM AND MOLDING ITEMS								
5	Remove - Base Molding, Stain Grade, 3" to 6"		62.00	\$0.70	LF	Structure	<none>	
6	Replace - Base Molding, Stain Grade, 3" to 6"		55.84	\$6.15	LF	Structure	Minimum Charge, Carpenter, Finish	
Includes 6% waste on quantity.								
7	Stain & Finish - Base Molding, 6" & Under		52.68	\$3.44	LF	Structure	Minimum Charge, Painter	

7	Stain & Finish - Base Molding, 6" & Under	52.68	\$3.44	LF	Structure	Minimum Charge, Carpenter, Finish
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## Step 6

If editing is not complete, but you want to view the changes to the estimate subtotals or total, you may click on 'Apply Changes/Recalculate' above the column headers at the top of the estimate. The estimate will remain in Edit mode.

Structure		APPLY CHANGES / RECALCULATE				View Estimate		SAVE	CANCEL	...
Q	Description	Capacity: 5.00 CY Volume: 4.15 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li	Settings

## Step 7

Once edits are complete, click 'Save' to save the changes and exit Edit mode.

(Note: Save will not present as an option if no changes have been made to the estimate.)

Structure		APPLY CHANGES / RECALCULATE				View Estimate		SAVE	CANCEL	...
Q	Description	Capacity: 5.00 CY Volume: 4.16 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li	Settings
5	Remove - Base Molding, Stain Grade, 3" to 6"		62.00	\$0.70	LF	Structure	Charge, Carpenter, Finish			5.00
6	Replace - Base Molding, Stain Grade, 3" to 6"		55.84	\$6.15	LF	Structure	Minimum Charge,	6%		5.00

If you do not wish to save the changes you made, click 'Cancel'.

Structure		APPLY CHANGES / RECALCULATE				View Estimate		SAVE	CANCEL	...
Q	Description	Capacity: 5.00 CY Volume: 4.16 CY	Quantity	Unit Price	Per	Coverage	Minimum Charge	Waste	Age/Li	Settings
5	Remove - Base Molding, Stain Grade, 3" to 6"		62.00	\$0.70	LF	Structure	Charge, Carpenter, Finish			5.00
6	Replace - Base Molding, Stain Grade, 3" to 6"		55.84	\$6.15	LF	Structure	Minimum Charge,	6%		5.00