Job Aid

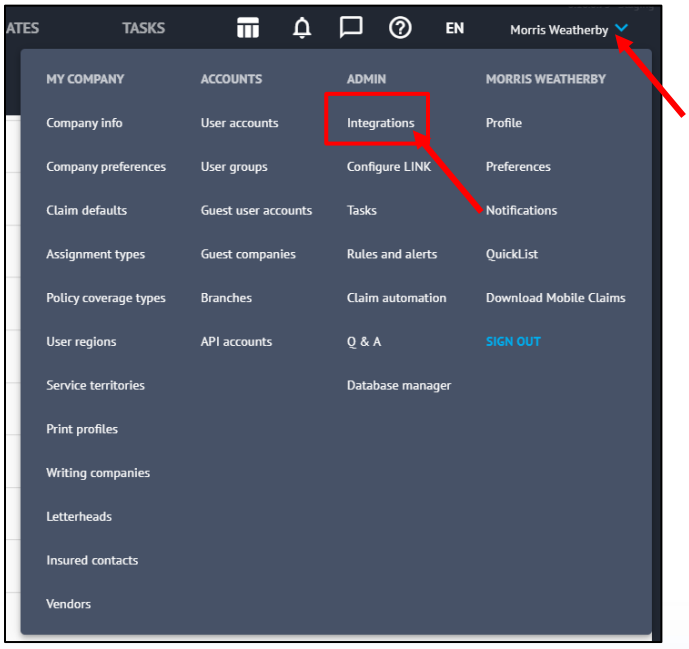
ITEL Integration

Automatic Notes for ITEL Items

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.

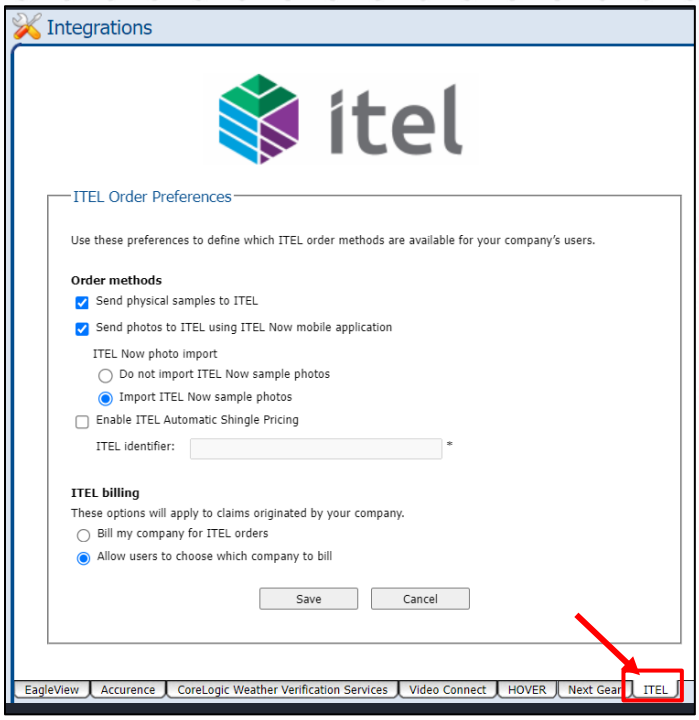
Step 1

As a Company Admin, navigate to the Integrations page within Claims Connect by clicking on the User Menu in the top right corner and selecting 'Integrations' from the Admin Menu.



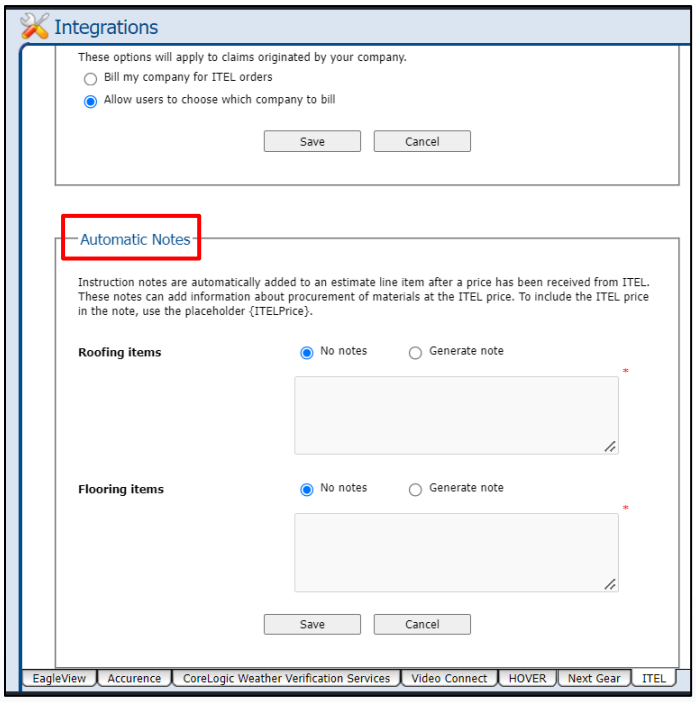
Step 2

Navigate to the ITEL Integrations page by clicking ITEL from the tabs at the bottom of the page.



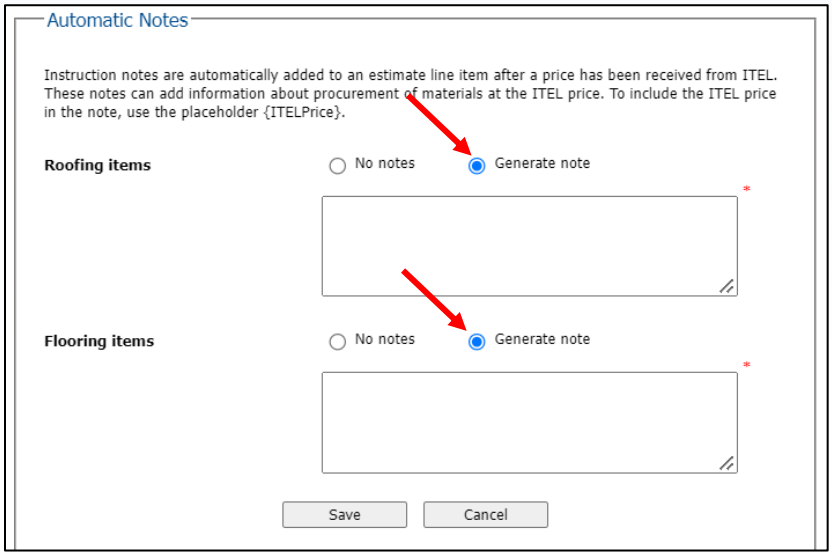
Step 3

Scroll down until the Automatic Notes section is visible.



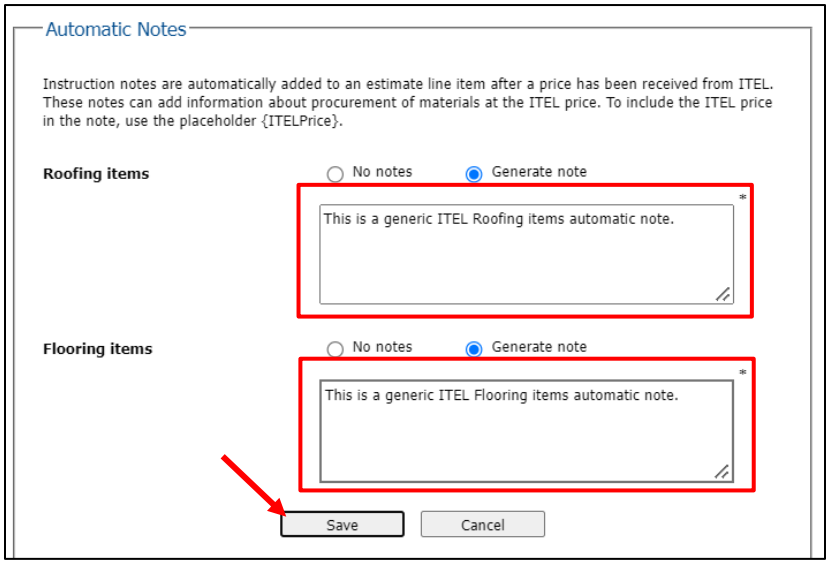
Step 4

For Roofing items or Flooring items or both, select the radial button next to Generate Note. The border on the text box(es) will bolden and the asterisk will turn red indicating text must be entered in the box(es).



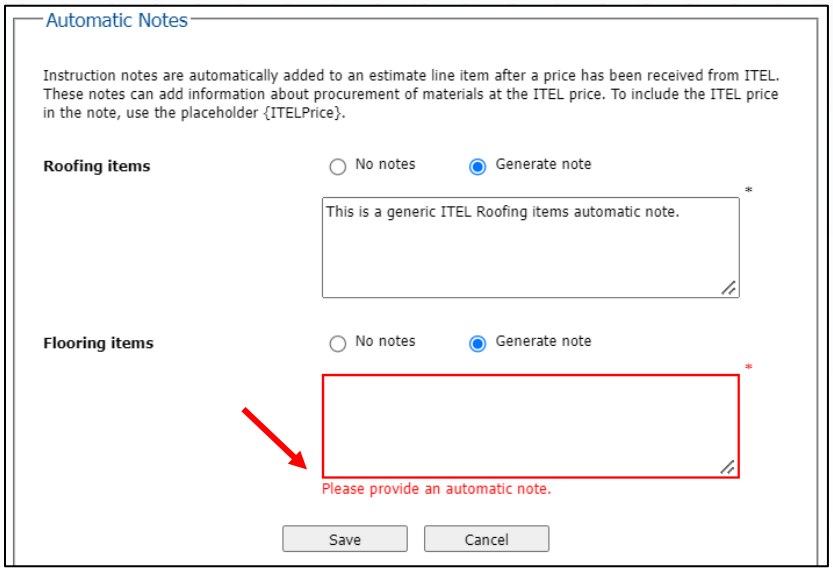
Step 5

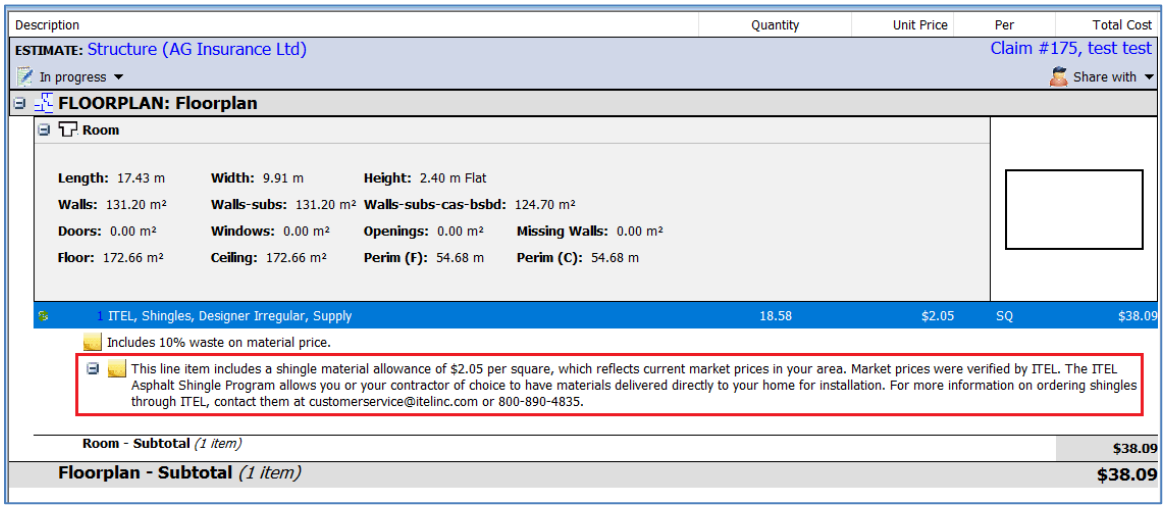
Enter the desired Automatic Note text into the respective text boxes. Once text has been entered, the asterisk will turn black. Click 'Save' to save the notes, or 'Cancel' to discard the changes.



Step 6

An error message will appear if ‘Generate note’ is selected, no text was entered in the text box and the Admin attempts to save.



Step 7

An Automatic note will now be populated for ITEL, Supply Roofing/Flooring line items when the ITEL report is returned completed, and the user applies the prices from the report to the estimate.