

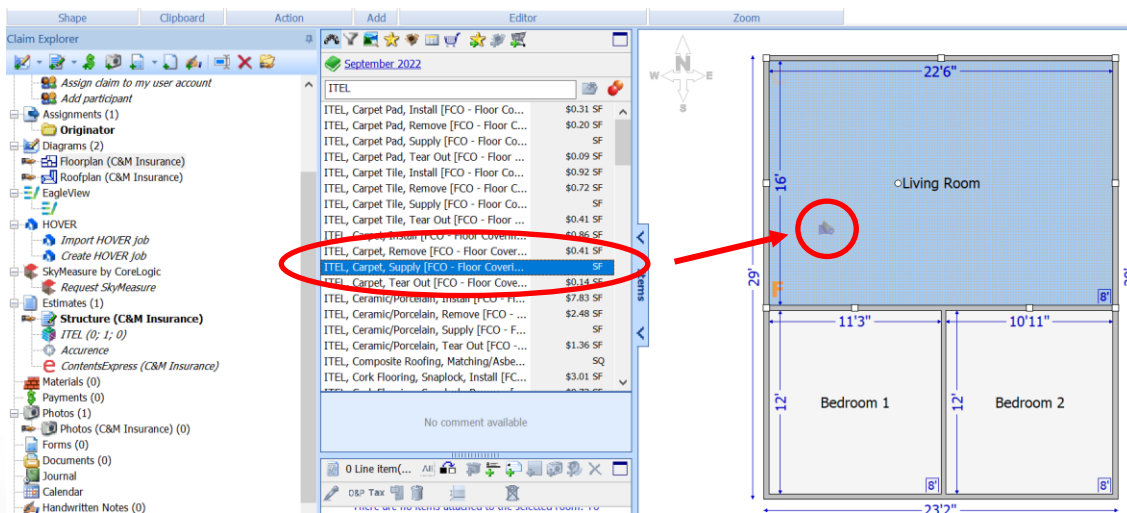
# ITEL Integration

## ITEL Now Test Starts within Mobile Claims

*Disclaimer: This job aid was created using a demo insurance company with generic settings. Please refer to your specific carrier guidelines for proper claim and estimate settings.*

### Step 1

Within a claim, choose the desired Floorplan from the Claim Explorer and click to open. Click the 'Items' blade to open the database, and find the appropriate ITEL line item(s). Drag the ITEL item(s) to the desired room(s). Or within the 'Items' blade, click on the 'Assembly' node and select the appropriate assembly for the claim. Drag & drop the Assembly to the location on the Floorplan where you wish to have it applied.



If using an Assembly, proceed to the questionnaire, make sure to click 'Yes' on the 'Using ITEL?' question and answering all other pertinent questions of the Assembly. Click 'Next', then 'Generate' when prompted to finish the Assembly and generate the estimate items. Select the line items to add to the estimate and click 'Apply' on the Item Details screen.

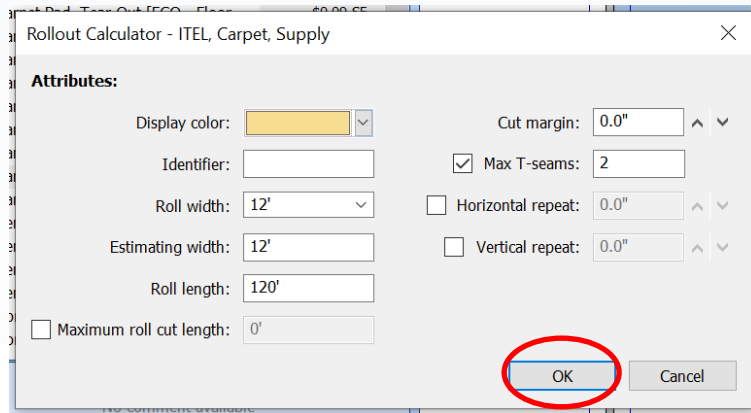
Description	Action	Quantity	Per	Coverage	RC	Depreciation	ACV
<b>CARPET AND PAD ITEMS</b>							
ITEL, Carpet Pad, Tear Out		131.00	SF	Structure	\$11.79	\$0.00	\$11.79
ITEL, Carpet Pad, Supply		137.55	SF	Structure	\$0.00	\$0.00	\$0.00
Includes 5% waste on quantity.							
ITEL, Carpet Pad, Install		137.55	SF	Structure	\$42.64	\$0.00	\$42.64
Includes 5% waste on quantity.							
ITEL, Carpet, Tear Out		131.00	SF	Structure	\$18.34	\$0.00	\$18.34
ITEL, Carpet, Supply		131.00	SF	Structure	\$0.00	\$0.00	\$0.00
ITEL, Carpet, Install		131.00	SF	Structure	\$112.66	\$0.00	\$112.66
<b>CARPET EXTRA ITEMS</b>							

## Step 2

The ITEL Item Order dialog will appear. 'Order a new ITEL report for this item' button will be selected by default. Originating company billing preferences will be selected by default in the 'Bill to' dropdown. 'ITEL Now' will be selected by default in the 'Test Method' dropdown. Double check the selections are proper and then click 'OK'.

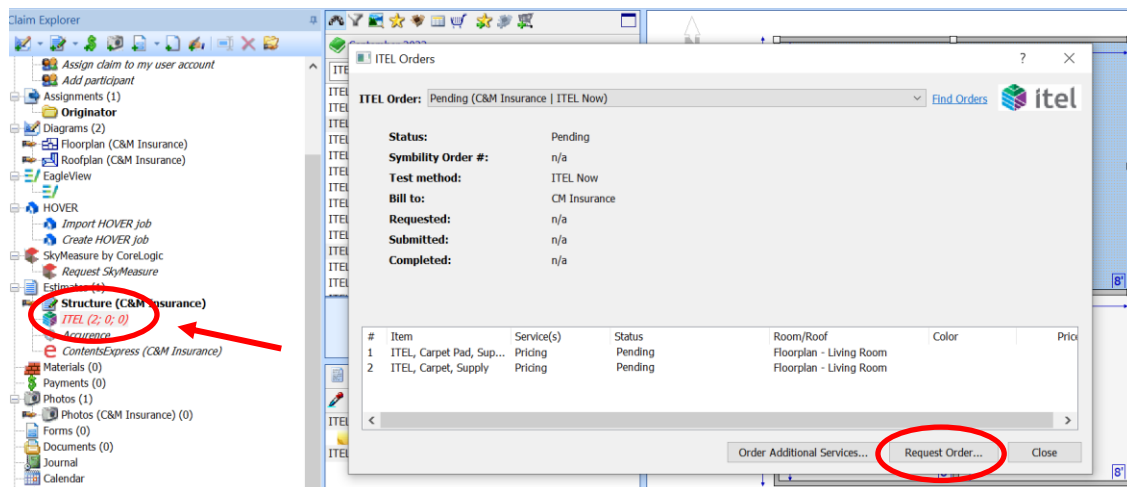
### Step 3

If the Rollout Calculator is enabled for your company and you are estimating for a material that utilizes the rollout method, the RC dialog box will appear next. Verify the flooring attributes and click 'OK'.



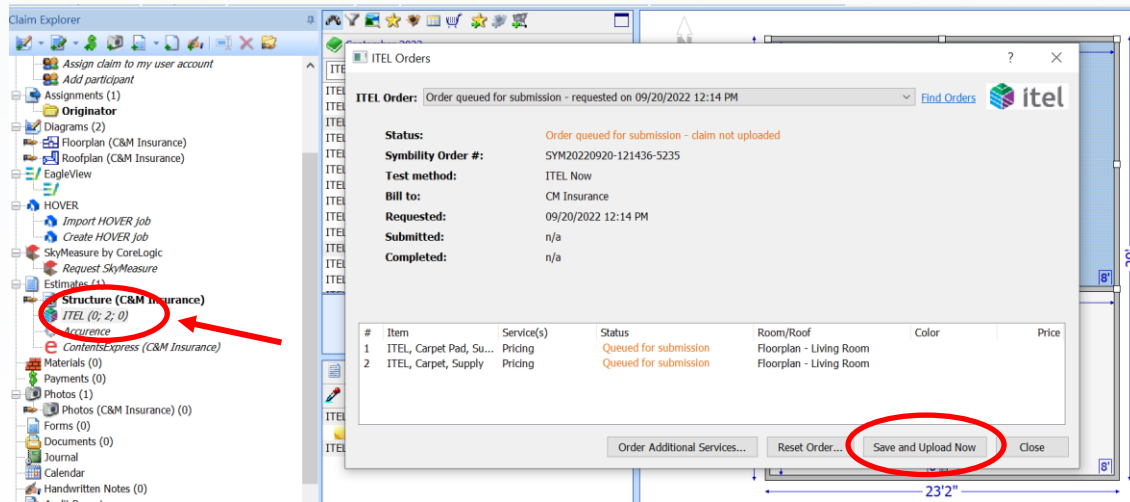
### Step 4

Click on ITEL in the Claim Explorer tree to open the ITEL Orders box. Then, click on 'Request Order' to initiate the order in ITEL Now.



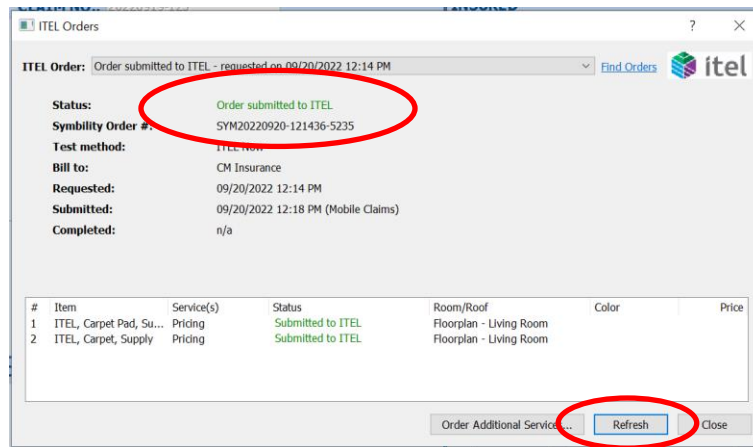
## Step 5

The Order will now be Queued for Submission and appear 'in process' on the ITEL node within the Claim Explorer. Click 'Save and Upload Now'.



## Step 6

Refreshing the 'ITEL Orders' dialog will show the order(s) as 'Submitted to ITEL' after queuing.



## Step 7

Claim information is sent to the ITEL Now app on the mobile device. Log into the app, select the product to be tested, the test method and select 'Search Symbility Mobile Claims' to find the claim. Follow the prompts through the ITEL Now app to process the order.

12:46

Test Info Next

**Test Info**

Claim # Enter Claim Number

Location Enter Damage Location

Comments *Optional*

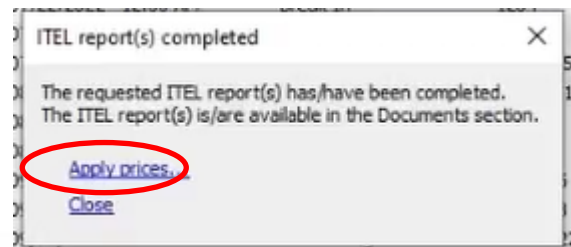
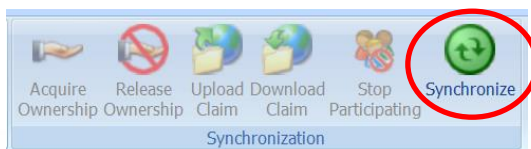
[Search Symbility Mobile Claims](#)

Make sure the Damage Location in the field above matches the name of the Room in your Symbility Floorplan.

My Tests New Test Action Req. Archive Settings

## Step 8

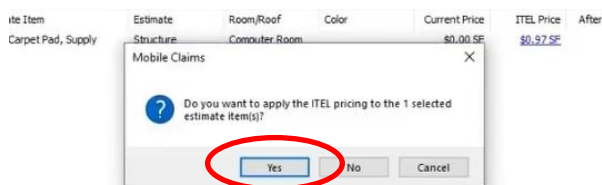
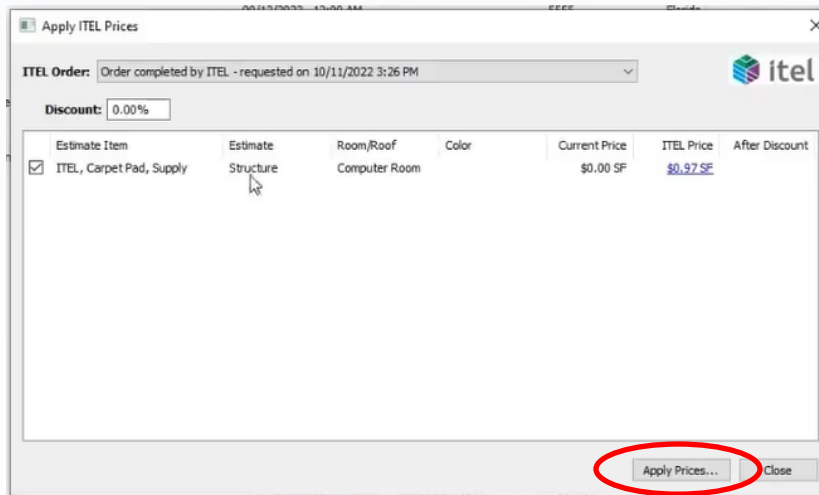
Once notification is received that the order(s) is ready, Synchronize Mobile Claims and open the claim assignment. The 'ITEL reports completed' dialog will promptly open and click 'Apply Prices...'.  
[ITEL Now App](#)



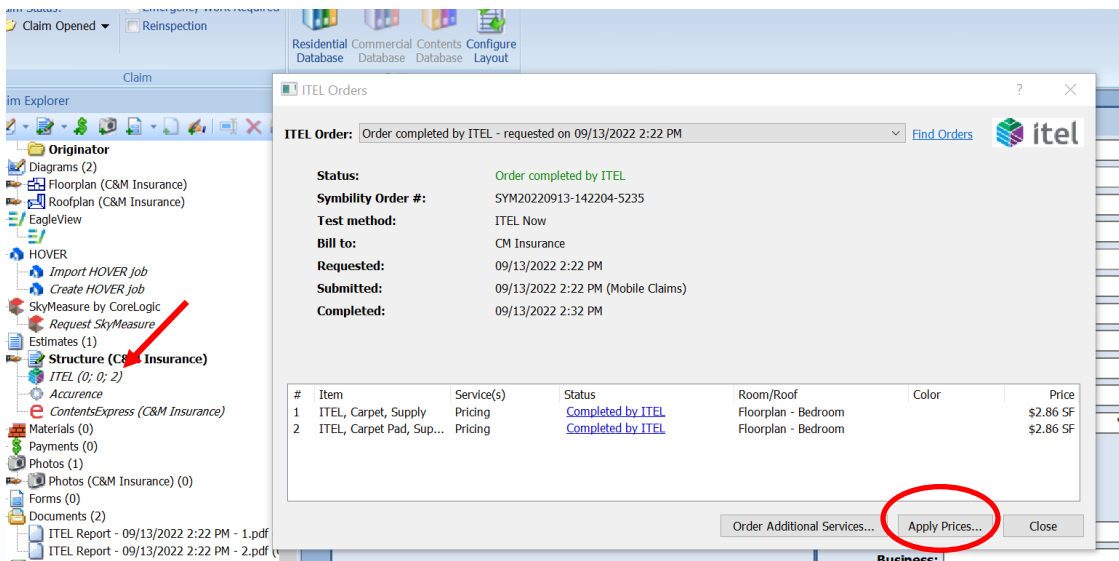


## Step 9

The 'Apply ITEL Prices' box will then open, select the line item(s) you wish to apply pricing to and click 'Apply Prices' again. Finally, click 'Yes' to confirm that you wish to apply the ITEL pricing to the selected estimate item(s).



Or you may apply the prices from within the claim by clicking on the 'ITEL' node in the Claim Explorer tree of the claim assignment. The 'ITEL Orders' box will open, select the completed order from the 'ITEL Order' dropdown menu, and click 'Apply Prices'. Follow the same prompts as above to then apply the pricing to the line item(s) in the estimate.

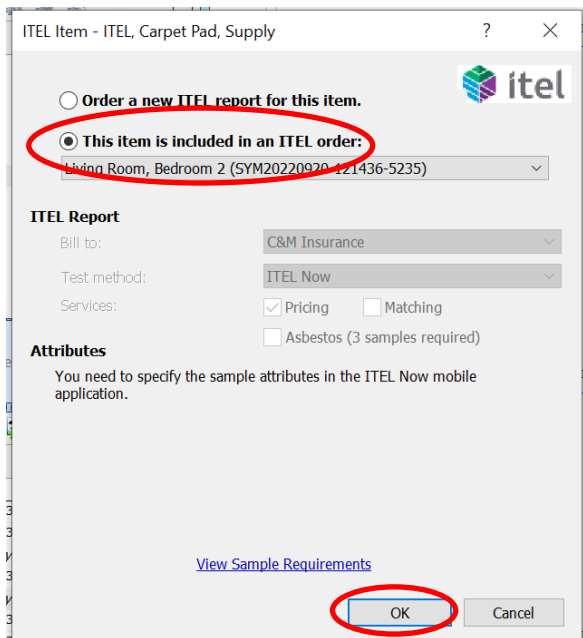


## Step 10

If your ITEL order contains multiple items that are being priced (ex: carpet & pad, or flooring & underlayment), please refer to the **ITEL Tips & Tricks** reference document for the steps on applying the additional item(s) pricing to the estimate.

## Step 11

If you have multiple Floorplans in the claim with the same flooring and would like to apply the pricing from the ITEL report previously ordered, first, you simply need to navigate to the other Floorplan and follow Step 1 from above. The 'ITEL Item' box for the flooring that was selected will populate at this point. Select 'This item is included in an ITEL order' and select the order from the dropdown menu. The originating company preferences will be selected by default in the Bill to dropdown. Double check the selections are proper and then click 'OK' for the pricing from within that ITEL report to apply to your line item(s).

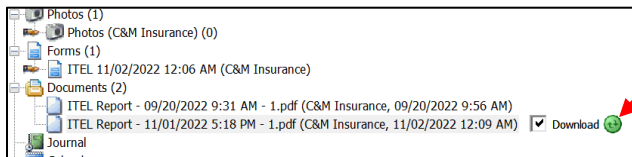
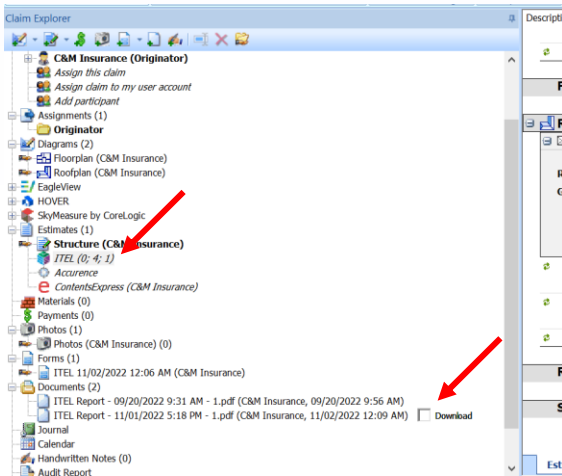


The screenshot shows a dialog box titled "ITEL Item - ITEL, Carpet Pad, Supply". It contains two radio button options: "Order a new ITEL report for this item." and "This item is included in an ITEL order:". The second option is selected and circled in red. Below it is a dropdown menu showing "Living Room, Bedroom 2 (SYM20220920-121436-5235)". The "ITEL Report" section includes "Bill to:" (C&M Insurance), "Test method:" (ITEL Now), and "Services:" (Pricing checked, Matching unchecked, Asbestos unchecked). The "Attributes" section has a note about specifying sample attributes. At the bottom, there is a link "View Sample Requirements" and two buttons: "OK" (circled in red) and "Cancel".

## Step 12

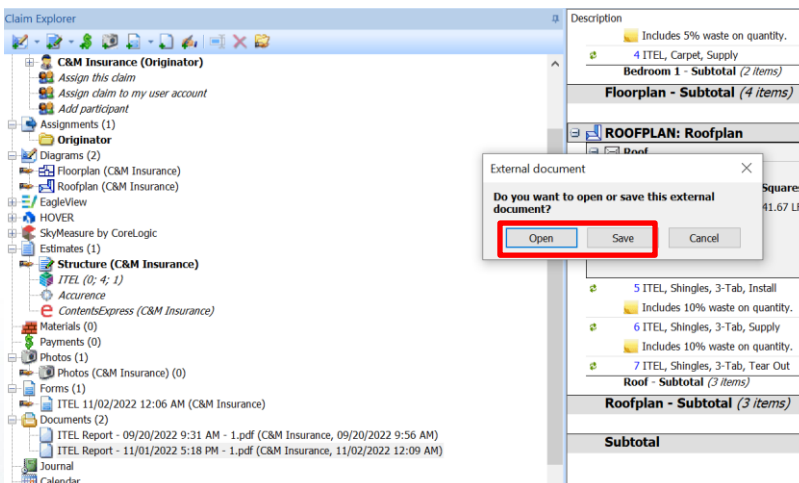
The ITEL price will be applied to the item(s) and the ITEL node in the Claim Explorer will show the items moved to the 'Order Completed' position. The ITEL report will also be available in the 'Documents' section of the Claim Explorer tree, where you can check the box next to Download, then click the green icon to download the report to the claim.

FLOORPLAN: Floorplan					
Dining Room					
Length: 23'2"	Width: 17'5"	Height: 8' Flat			
Walls: 649.32 SF	Walls-sub: 649.32 SF	Walls-sub-cas-bsbd: 625.66 SF			
Doors: 0.00 SF	Windows: 0.00 SF	Openings: 0.00 SF	Missing Walls: 0.00 SF		
Floor: 403.49 SF	Ceiling: 403.49 SF	Perim (F): 81.18 LF	Perim (C): 81.18 LF		
1 ITEL, Carpet, Supply			Building	846.04	\$13.59 SF
Includes 4.84% waste on quantity calculated by Rollout Calculator.					
Dining Room - Subtotal					



## Step 13

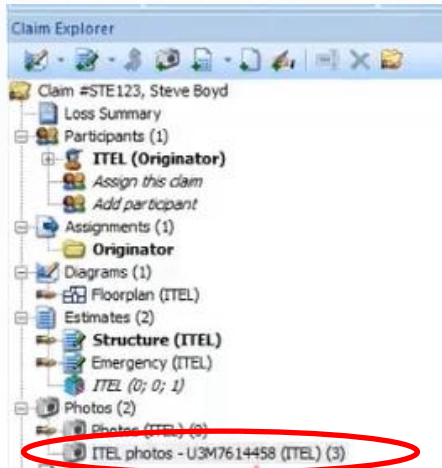
To view the downloaded ITEL report, double click on the report link and click 'Open' to view in a PDF reader or click 'Save' to save to your desktop files.





## Step 14

Photos taken using the ITELNow app will also be sent and can be downloaded by selecting the ITEL photos link, checking the box next 'Download' on each photo, then clicking the green download icon.



## Step 15

The ITEL pdf report will also be available in Claims Connect in the Documentation page under Documents and the ITEL order form will be available under Forms. Any downloaded photos will show in the Photos section of Documentation.

