

# ITEL Integration

## Automatic Asphalt Shingle Pricing in Mobile Claims

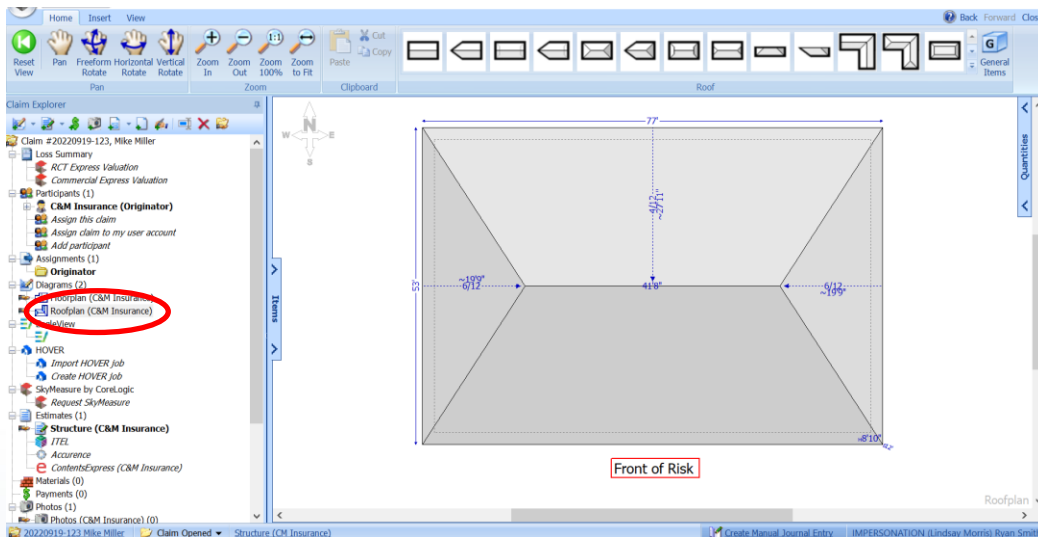
*Disclaimer: This job aid was created using a demo insurance company with generic settings. Please refer to your specific carrier guidelines for proper claim and estimate settings.*

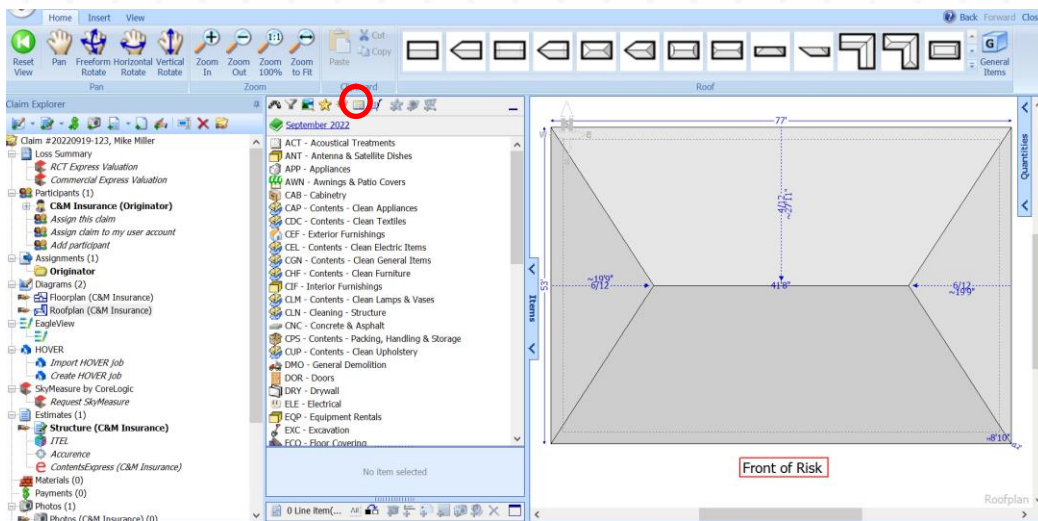
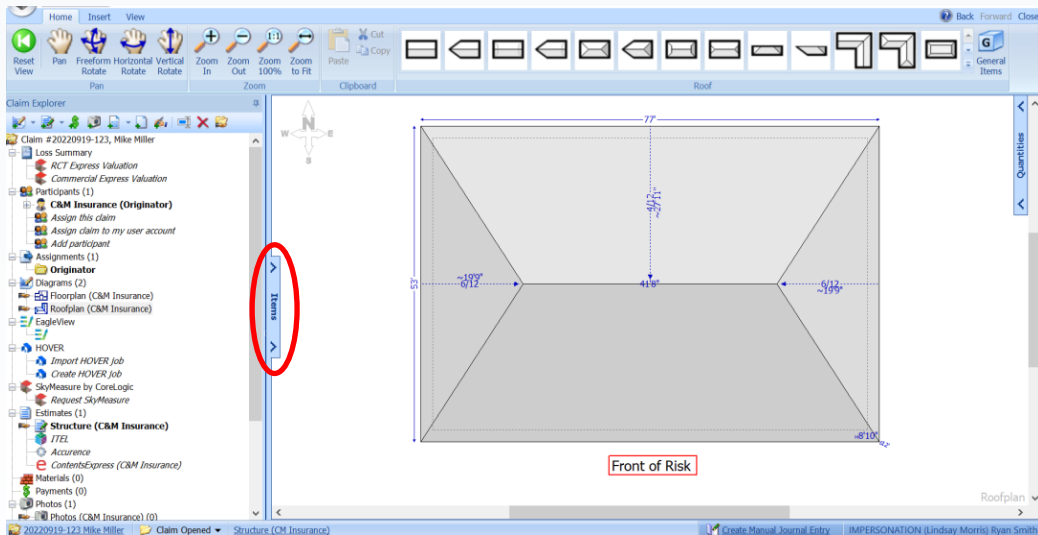
### Step 1 – Line Item or Assembly Steps

#### Assembly Steps

#### Assembly Step A

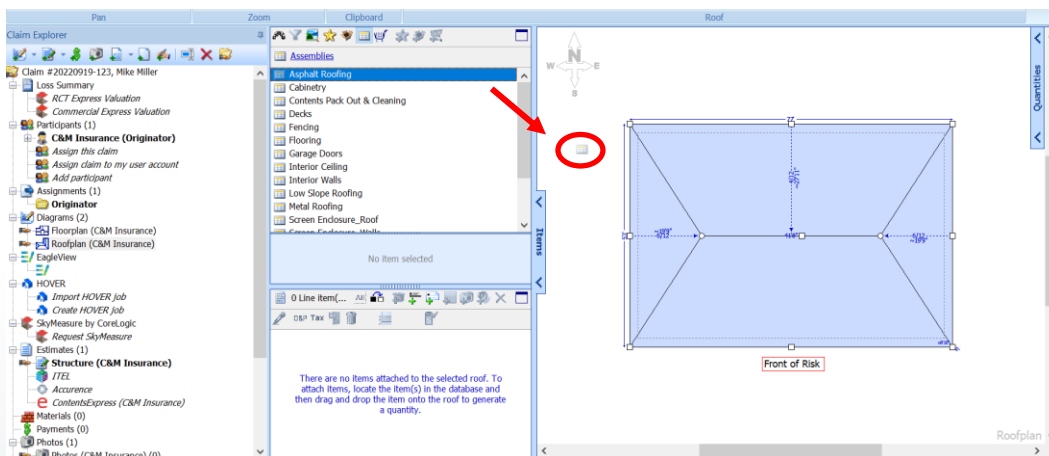
Within a claim, choose the desired Roofplan from the Claim Explorer menu and click to open. Click the 'Items' blade to open the database, then select the Assemblies icon from within the 'Items' blade.





## Assembly Step B

Choose 'Asphalt Roofing' from the Assemblies menu, then drag & drop it onto the whitespace of the Roofplan for the assembly to apply to the whole roof, or drag & drop it directly onto a single roof facet for the assembly to apply to that facet.



## Assembly Step C

The 'Assemblies / Asphalt Roofing' questionnaire will open automatically. Click 'Yes' for 'Using ITEL?' and answer all other pertinent questions within the Asphalt Roofing Assembly as they apply to the roof, then click the 'Next' button.

Assembly  
ASPHALT ROOFING

Overview

ASSEMBLIES | Asphalt Roofing

Select Coverage: Structure

Select Damage Severity: ☒ Full Replacement ☐ Repair

Select Primary Roof Age: 15

Select Material (Asphalt): 3-Tab 25 Year

Using ITEL? ☒ Yes ☐ No

Assembly  
ASPHALT ROOFING

Overview

ASSEMBLIES | Asphalt Roofing

Select Coverage: Structure

Select Damage Severity: ☒ Full Replacement ☐ Repair

Select Primary Roof Age: 15

Select Material (Asphalt): 3-Tab 25 Year

Using ITEL? ☒ Yes ☐ No

Next

## Assembly Step D

On the Validation screen, click 'Generate' to be presented with the estimate items box.

Assembly  
VALIDATION

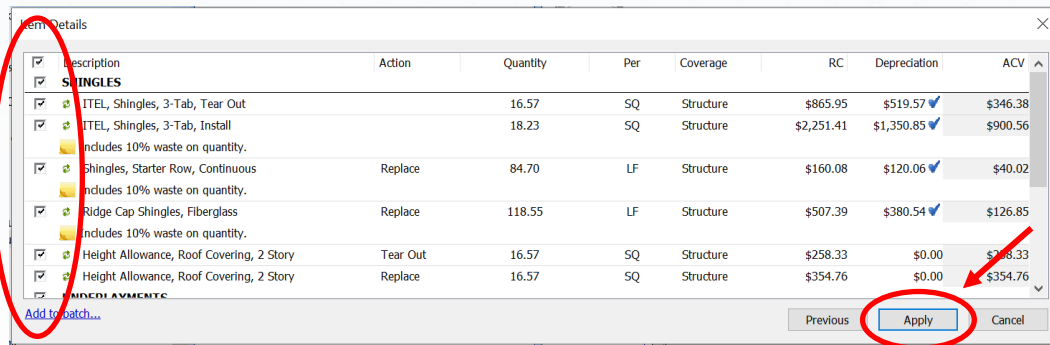
Validation

All questions have been properly answered. Click Generate to generate the estimate items.

Generate

## Assembly Step E

Select the desired line items from the list and click 'Apply' to add the line items to the associated Roofplan estimate.



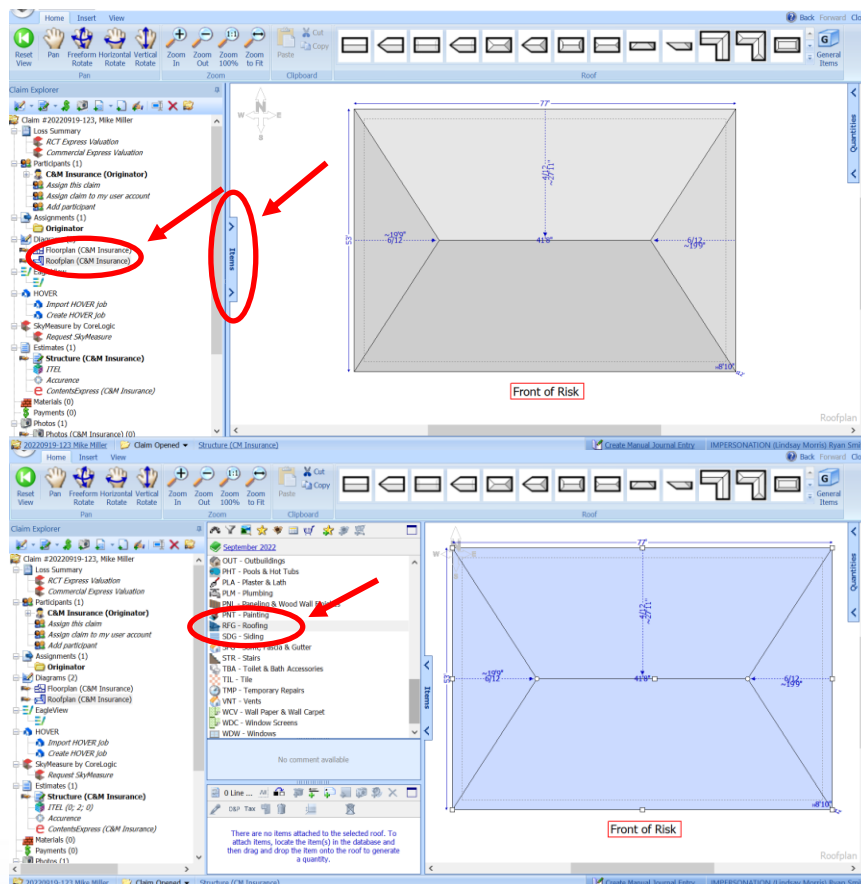
Description	Action	Quantity	Per	Coverage	RC	Depreciation	ACV
<b>SHINGLES</b>							
ITEL, Shingles, 3-Tab, Tear Out		16.57	SQ	Structure	\$865.95	\$519.57	\$346.38
ITEL, Shingles, 3-Tab, Install		18.23	SQ	Structure	\$2,251.41	\$1,350.85	\$900.56
Includes 10% waste on quantity.							
Shingles, Starter Row, Continuous	Replace	84.70	LF	Structure	\$160.08	\$120.06	\$40.02
Includes 10% waste on quantity.							
Ridge Cap Shingles, Fiberglass	Replace	118.55	LF	Structure	\$507.39	\$380.54	\$126.85
Includes 10% waste on quantity.							
Height Allowance, Roof Covering, 2 Story	Tear Out	16.57	SQ	Structure	\$258.33	\$0.00	\$258.33
Height Allowance, Roof Covering, 2 Story	Replace	16.57	SQ	Structure	\$354.76	\$0.00	\$354.76
<b>WIND DAMAGE</b>							

Buttons: Previous, Apply, Cancel

## Line Item Steps

### Line Item Step A

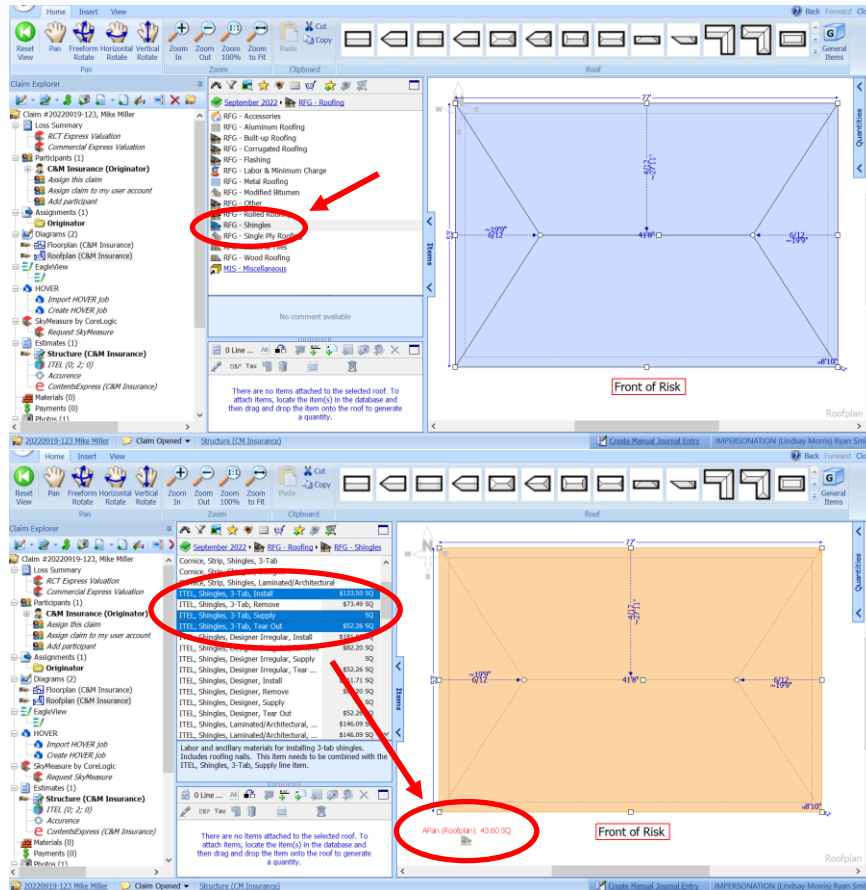
Within a claim, choose the desired Roofplan from the Claim Explorer menu and click to open. Click the 'Items' blade to open the database, then click RFG-Roofing to open the roofing category.



## Line Item Step B

In the RFG-Roofing category, click RFG-Shingles and then select the appropriate 'ITEL, Shingles, Supply' line item for the estimate. Drag & drop the line item onto the whitespace of the Roofplan for the item to apply to the whole roof, or drag & drop it directly onto a single roof facet for the item to apply to that facet.

(Keep in mind to include proper Tear out/Removal line items and the Install line item, as well. All line items may be applied at the same time by multi-selecting while holding down the CTRL key.)





## Step 2

The 'ITEL Item' box for the shingle that was selected will populate at this point. 'Order a new ITEL report for this item' will be selected by default. The originating company preferences will be selected by default in the Bill to dropdown. 'Automatic Shingle Pricing' will be selected by default in the Test Method dropdown. Double check the selections are proper and then click 'Submit to ITEL'.

\*If the type of asphalt shingle or pertinent details of the asphalt shingle is not known by the user, it is recommended to use the ITEL Now mobile Asphalt Shingle Pricing on the app or Physical Sample Test method, which can be initiated within Mobile Claims or can be initiated in the ITEL Now app.

ITEL Item - ITEL, Shingles, 3-Tab, Supply

☒ Order a new ITEL report for this item.  
☐ This item is included in an ITEL order:

ITEL Report  
Bill to: C&M Insurance  
Test method: Automatic Shingle Pricing

Submit to ITEL Add Order Cancel

## Step 3

Based on the shingle item selected in the Assembly, you may be presented with additional dropdown choices in the ITEL Item box. Select the proper Shingle Quality from the dropdown, if this menu appears, and click 'Yes' for Impact Resistant or Solar Reflective, if either of these apply. 'No' will be selected by default.

ITEL Item - ITEL, Shingles, Laminated/Architectural, Supply

☒ Order a new ITEL report for this item.  
☐ This item is included in an ITEL order:

ITEL Report  
Bill to: C&M Insurance  
Test method: Automatic Shingle Pricing

Shingle Quality  
Good (30 years)  
Very Good (40 years)  
Excellent (50 years)  
Elite (60 years)

Impact Resistant:  
Solar Reflective:

Submit to ITEL Add Order Cancel

ITEL Item - ITEL, Shingles, Designer, Supply

☒ Order a new ITEL report for this item.  
☐ This item is included in an ITEL order:

ITEL Report  
Bill to: C&M Insurance  
Test method: Automatic Shingle Pricing

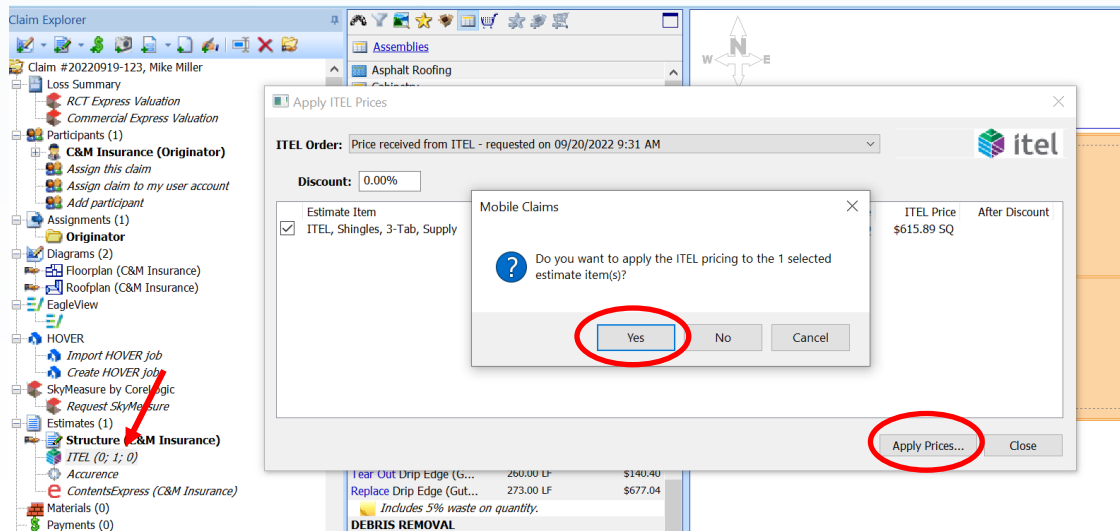
Shingle Quality  
Impact Resistant:  
Solar Reflective:

Yes No  
Yes No

Submit to ITEL Add Order Cancel

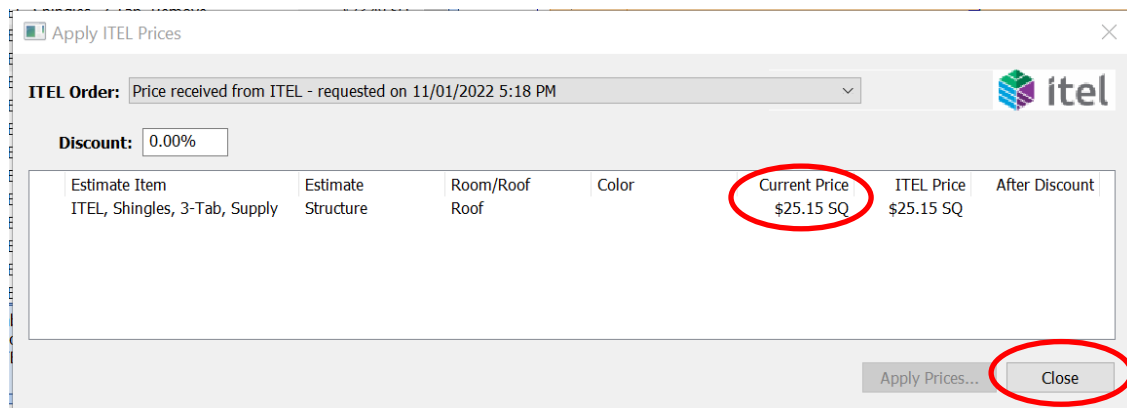
## Step 4

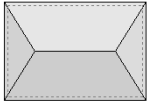
Next, the 'Apply ITEL Prices' dialogue appears and the order shows in the ITEL node within the Claim Explorer tree. Click 'Apply Prices', then 'Yes' to apply the ITEL pricing to the selected estimate item(s).



## Step 5

You will notice the 'Current Price' update within the line item in the 'Apply ITEL Prices' dialogue to the current 'ITEL Price', and the 'Apply Prices...' button is now grayed out. Click 'Close'. The pricing will update on the line item.



ROOFPLAN: Roofplan							
Roof							
Roof area: 4,361.62 SF    Squares: 43.6 SQ    Soffit: 504.00 SF							
Gutters: 260.00 LF    Ridge: 41.67 LF							
							
14	ITEL, Shingles, 3-Tab, Install	47.96	\$123.50	SQ	\$5,923.06	\$0.00	\$5,923.06
	Includes 10% waste on quantity.						
15	ITEL, Shingles, 3-Tab, Supply	47.96	\$25.15	SQ	\$1,206.19	\$0.00	\$1,206.19
	Includes 10% waste on quantity.						
16	ITEL, Shingles, 3-Tab, Tear Out	43.60	\$52.26	SQ	\$2,278.54	\$0.00	\$2,278.54

## Step 6

If you have multiple roofplans in the claim with the same shingles and would like to apply the pricing from the ASP report previously ordered, first, you simply need to navigate to the other roofplan and follow the “Line Item or Assembly Steps” from above. The ‘ITEL Item’ box for the shingle 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. ‘Automatic Shingle Pricing’ will be selected by default in the Test Method dropdown. ‘Automatic Shingle Pricing’ will be selected by default in the Test Method dropdown. Double check the selections are proper and then click ‘Update Order’.

ITEL Item - ITEL Shingles, 3-Tab, Supply

☐ Order a new ITEL report for this item.

☒ This item is included in an ITEL order:

Roofplan - Roof, Roofplan - Roof (SYM20221101-171811-5235)

**ITEL Report**

Bill to: C&M Insurance

Test method: Automatic Shingle Pricing

Impact Resistant: ☐ Yes ☒ No

Submit to ITEL **Update Order** Cancel

Next, click the ITEL node from the Claim Explorer tree to open the ITEL Orders window.

**Claim Explorer**

- Commercial Express Valuation
- Participants (1)
  - C&M Insurance (Originator)
  - Assign this claim
  - Assign claim to my user account
  - Add participant
- Assignments (1)
  - Originator
- Diagrams (4)
  - Floorplan (C&M Insurance)
  - Roofplan (C&M Insurance)
  - Roofplan 2 (C&M Insurance)
  - Roofplan 3 (C&M Insurance)
- EagleView
- HOVER
  - Import HOVER job
  - Create HOVER job
- SkyMeasure by CoreLogic
  - Request SkyMeasure
- Estimates (1)
  - Structure (C&M Insurance)
  - Accurance
  - ContentsExpress (C&M Insurance)
- Materials (0)
- Payments (0)
- Photos (1)
  - Photos (C&M Insurance) (0)

**Assemblies**

- Asphalt Roofing
- Cabinetry
- Contents Pack Out & Cleaning
- Decks
- Fencing
- Flooring
- Garage Doors
- Interior Ceiling
- Interior Walls
- Low Slope Roofing
- Metal Roofing
- Screen Enclosure\_Roof
- Screen Enclosure\_Walls

No item selected

12 Line Item(s) \$2,8... 10% 20.00%

**SHINGLES**

Line Item	Description	Quantity	Unit	Price
ITEL, Shingles, 3-Tab, Tear Out		8.60	SQ	\$449.44
ITEL, Shingles, 3-Tab, Supply		9.46	SQ	\$0.00
Includes 10% waste on quantity.				
ITEL, Shingles, 3-Tab, Install		9.46	SQ	\$1,168.31
Includes 10% waste on quantity.				
Replace Shingles, Starter Row, ...		70.95	LF	\$134.09
Includes 10% waste on quantity.				
Replace Ridge Cap Shingles, Fib...		35.48	LF	\$151.85

Diagram showing dimensions: 32'3" x 23'0" x 32'3" x 23'0" x 32'3" x 23'0" x 32'3" x 23'0"



Verify the order in the ITEL Order dropdown is correct, and click 'Apply Prices...'

ITEL Orders

ITEL Order: Order completed by ITEL - submitted on 11/01/2022 5:18 PM

Status: Order completed by ITEL

Symbility Order #: SYM20221101-171811-5235

Test method: Automatic Shingle Pricing

Bill to: CM Insurance

Submitted: 11/01/2022 5:18 PM (Mobile Claims)

Completed: 11/02/2022 12:09 AM

Item	Shingle Quality	Attributes	Roof	Price
ITEL, Shingles, 3-Tab, Supply	None		Roofplan - Roof, Roofplan - R...	\$25.15 SQ

Order Additional Services... Apply Prices... Close

Select the line item to the pricing is to be applied to by checking the box, and then click 'Apply Prices...'. The verification dialog box will pop up, then click 'Yes' to apply the price to the estimate line item.

ITEL Orders

ITEL Order: Order completed by ITEL - requested on 11/01/2022 5:18 PM

Discount: 0.00%

Estimate Item	Estimate	Room/Roof	Color	Current Price	ITEL Price
ITEL, Shingles, 3-Tab, Supply	Structure	Roof		\$25.15 SQ	<a href="#">\$25.15 SQ</a>
ITEL, Shingles, 3-Tab, Supply	Structure	Roof		\$25.15 SQ	<a href="#">\$25.15 SQ</a>
ITEL, Shingles, 3-Tab, Supply	Structure	Roof		\$25.15 SQ	<a href="#">\$25.15 SQ</a>
<input checked="" type="checkbox"/> ITEL, Shingles, 3-Tab, Supply	Structure	Roof		\$0.00 SQ	<a href="#">\$25.15 SQ</a>

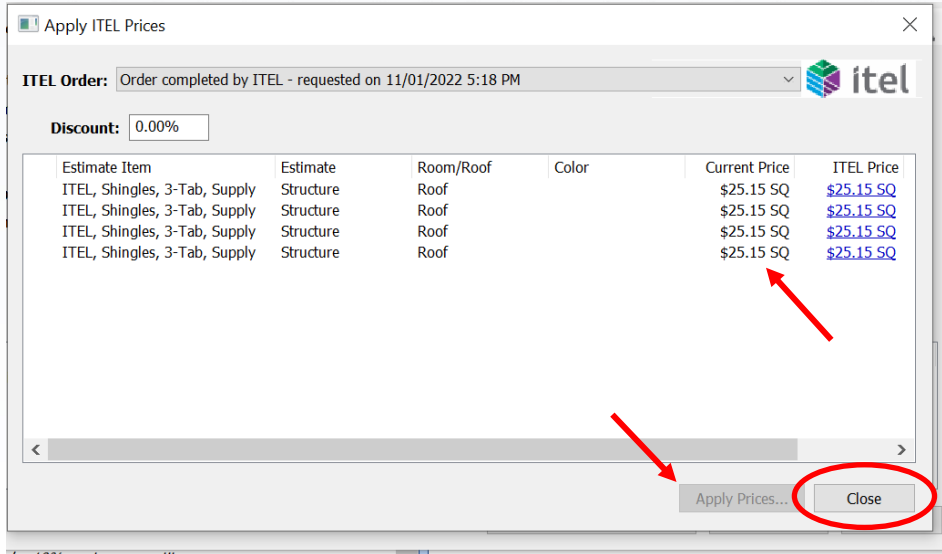
Mobile Claims

Do you want to apply the ITEL pricing to the 1 selected estimate item(s)?

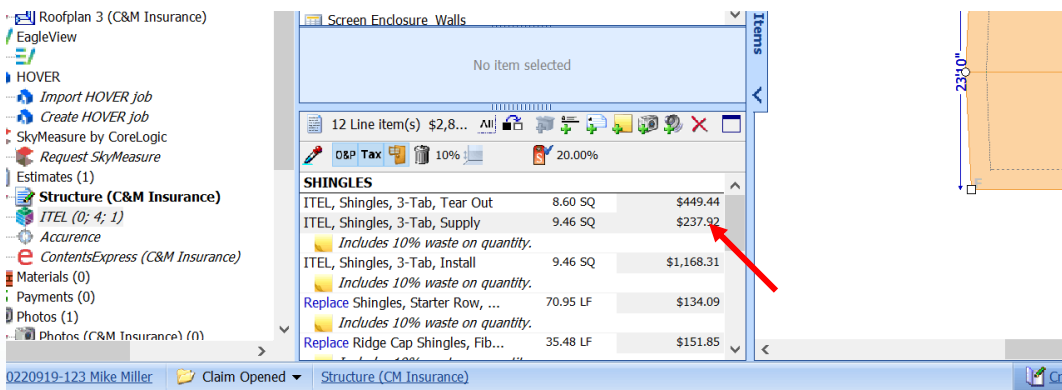
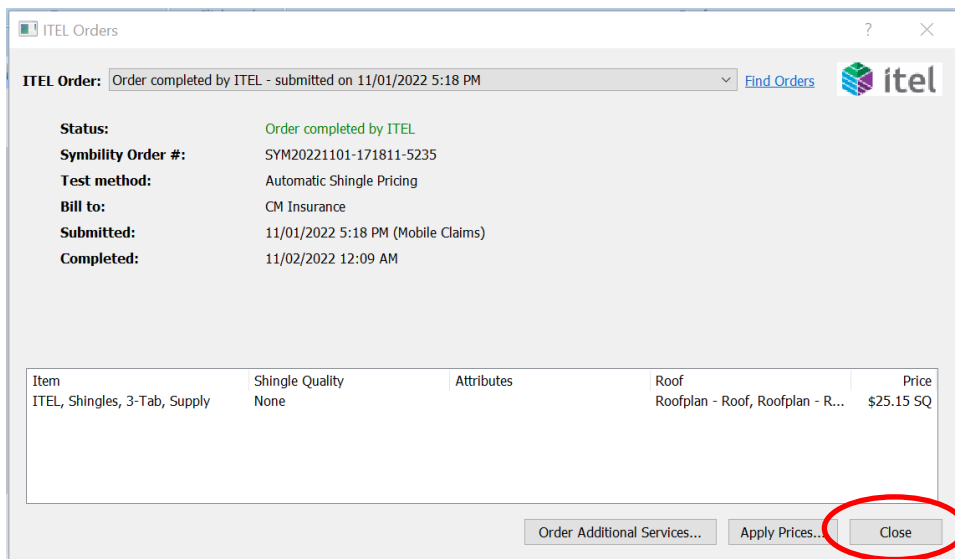
Yes No Cancel

Apply Prices... Close

Current Price is updated and the 'Apply Prices...' box will gray out. Click 'Close'.



Click 'Close' on the ITEL Orders box to get back to the estimate. The price will have updated on the line item.



## Step 7

To view the ITEL Order Status, you can click on 'ITEL' from the Claim Explorer, and the 'ITEL Orders' box will open, reflecting all information for the order and that the Price was received from ITEL.

ITEL Orders

ITEL Order: Price received from ITEL - submitted on 09/20/2022 9:31 AM [Find Orders](#)

**Status:** Price received from ITEL

**Symbility Order #:** SYM20220920-093105-5235

**Method:** Automatic Shingle Pricing

**Bill to:** CM Insurance

**Submitted:** 09/20/2022 9:31 AM (Mobile Claims)

**Completed:** n/a

Item	Shingle Quality	Attributes	Roof	Price
ITEL, Shingles, 3-Tab, Supply	None		Roofplan - Roof	\$615.89 SQ

Order Additional Services... Apply Prices... Refresh Close

Includes 10% waste on quantity.

ITEL Chinlac 3-Tab 47 96 SQ 479 538 SR

## Step 8

The ITEL report will be available in the Documents section of the Claim Explorer once you complete a Synchronization of Mobile Claims.

Mobile Claims - TEST

Claim Status: Claim Opened

Claim Explorer

Participants (1)

- CM Insurance (Originator)
- Assign this claim
- Assign claim to my user account
- Add participant

Assignments (1)

- Originator
- Diagrams (2)
- Floorplan (CM Insurance)
- Roofplan (CM Insurance)
- EagleView

HOVER

- Import HOVER job
- Create HOVER job
- SkyMeasure by CoreLogic
- Request SkyMeasure

Estimates (1)

- Structure (CM Insurance)
- ITEL (0; 2; 0)
- Accurance
- ContentsExpress (CM Insurance)

Materials (0)

Payments (0)

Photos (1)

- Photos (CM Insurance) (0)

Forms (0)

Documents (1)

- ITEL Report - 09/20/2022 9:31 AM - 1.pdf (CM Insurance, 09/20/2022 9:56 AM) [Download](#)

Journal

Calendar

Handwritten Notes (0)

Audit Report

Tasks

SmartScope

CLAIM NO.: 20220919-123

Policy No.: HO3-9876544

Type of loss: Windstorm Damage

Date of loss: 09/18/2022

Time of loss: 12:00 AM

Deductible: Fixed

Year built:

CAT No.:

Writing Company: CM Insurance

Broker:

Company:

Adjuster: Ryan Smith (CM Insurance)

Phone:

e-mail: cbatten@symbilitysolutions.com

CLAIM TOTALS

There are currently no approved estimates.

INSURED

Business name:

Title:

First name: Mike

Last name: Miller

Title:

First name:

Last name:

Address: 1402 N. 68th St.

City: Wauwatosa

Prov./State: Wisconsin

Postal/Zip code: 53213

Loss address is different than insured

Home: (414) 555-4689

Business:

Mobile:

Other:

e-mail:

DATES

Created: 09/19/2022

General Reports Claim Type/Pricing Policy Map and Directions Custom Fields

Create Manual Journal Entry IMPERSONATION (Lindsay Morris) Ryan Smith

## Step 9

Check the 'Download' box and then click the green icon to download the ITEL Automatic Shingle Pricing report to the assignment.

Mobile Claims - TEST

Claim Status: Claim Opened

Claim Explorer

Claim #2020919-123, Mike Miller

Loss Summary

Participants (1)

Originator

Diagrams (2)

Estimates (1)

Materials (0)

Payments (0)

Photos (1)

Forms (0)

Documents (1)

Journal

Calendar

CLAIM NO.: 2020919-123

Policy No.: HO3-9876544

Type of loss: Windstorm Damage

Date of loss: 09/18/2022

Time of loss: 12:00 AM

Deductible: Fixed

Year built:

CAT No.:

Writing Company: C&M Insurance

Broker: C&M Insurance

Adjuster: Ryan Smith (C&M Insurance)

Phone:

e-mail: cbatten@sybillysolutions.com

CLAIM TOTALS

There are currently no approved estimates.

INSURED

Business name:

Title:

First name: Mike

Last name: Miller

2nd Title:

First name:

Last name:

Address: 1402 N. 68th St.

City: Wauwatosa

Prov./State: Wisconsin

Postal/Zip code: 53213

Loss address is different than insured

Home: (414) 555-4689

Business:

Mobile:

Other:

e-mail:

DATES

Created: 09/19/2022

Download

## Step 10

To view the downloaded ITEL ASP 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.

Claim Explorer

Claim #2020919-123, Mike Miller

Loss Summary

Participants (1)

Originator

Diagrams (2)

Estimates (1)

Materials (0)

Payments (0)

Photos (1)

Forms (0)

Documents (1)

Journal

Calendar

CLAIM NO.: 2020919-123

Policy No.: HO3-9876544

Type of loss: Windstorm Damage

Date of loss: 09/18/2022

Time of loss: 12:00 AM

Deductible: Fixed

Year built:

CAT No.:

Writing Company: C&M Insurance

Broker: C&M Insurance

Adjuster: Ryan Smith (C&M Insurance)

Phone:

e-mail: cbatten@sybillysolutions.com

CLAIM TOTALS

There are currently no approved estimates.

INSURED

Business name:

Title:

First name: Mike

Last name: Miller

2nd Title:

First name:

Last name:

Address: 1402 N. 68th St.

City: Wauwatosa

Prov./State: Wisconsin

Postal/Zip code: 53213

Loss address is different than insured

Home: (414) 555-4689

Business:

Mobile:

Other:

e-mail:

DATES

Created: 09/19/2022

External document

Do you want to open or save this external document?

Open Save Cancel

Adjuster: Ryan Smith (C&M Insurance)

Phone:

e-mail: cbatten@sybillysolutions.com

CLAIM TOTALS

There are currently no approved estimates.

General Reports Claim Type/Pricing Policy

## Step 11

The ITEL ASP pdf report will also be available in Claims Connect in the Documentation page under Documents.

