CoreLogic®

Job Aid

Applying a Roof Assembly to an Estimate
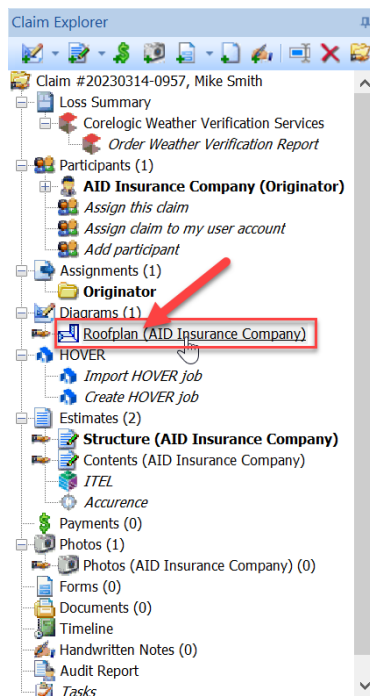
How to Apply a Roof Assembly to an Estimate

This job aid will guide you through the steps that will allow you to apply a Roof Assembly to an Estimate.
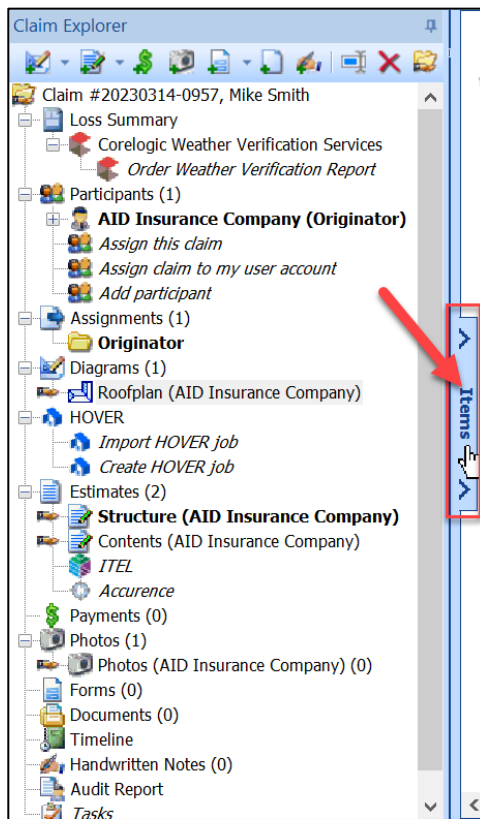
> **Note:** *This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.*

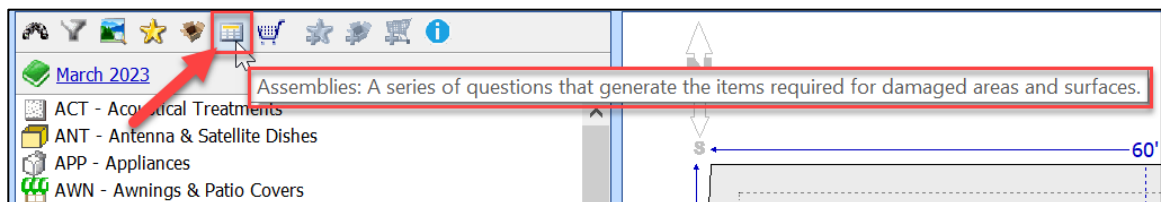1. Start by navigating to the Roofplan from the Claim Explorer.

> **Note:** *The Roofplan can be a natively drawn Roofplan or an imported Roofplan from an aerial imagery partner.*
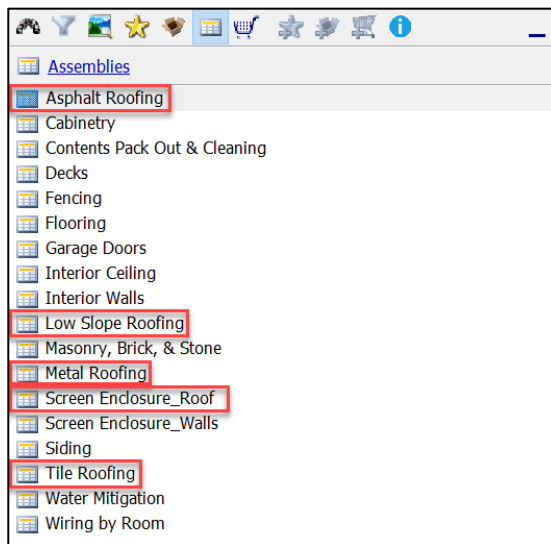
2. Click the **Items** blade to be presented with the Pricing Database and different methods of adding line items to the estimate.
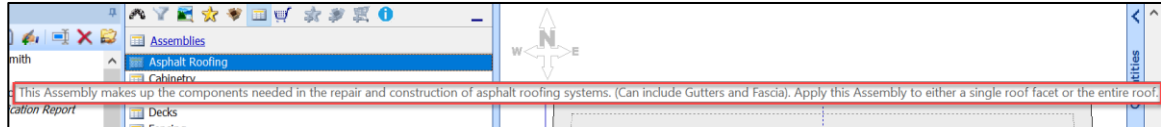

3. Click on the table icon at the top of the **Items** blade to be presented with the list of available assemblies to use with the estimate.

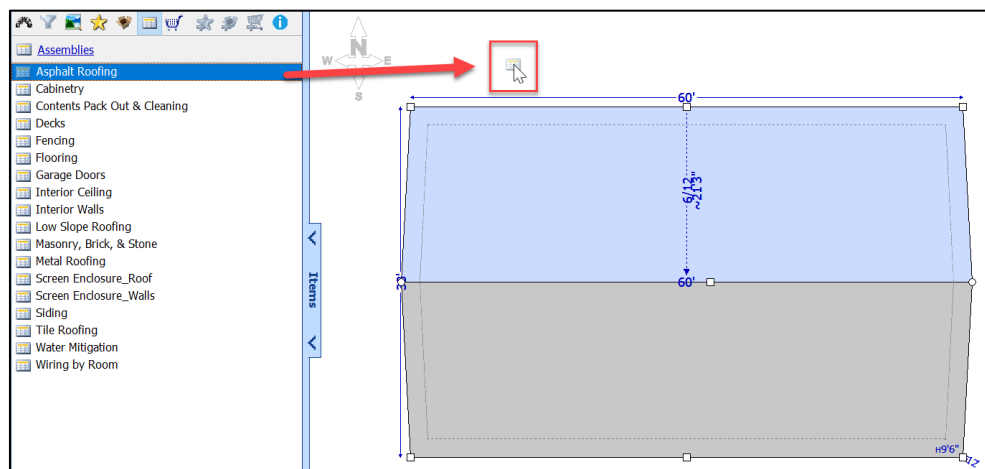*Five of the 18 available Assemblies are related to roofing:*

Note: *If you hover your mouse over an assembly name, a brief description with instructions on which surfaces or objects that assembly can be applied to in a diagram will display.*
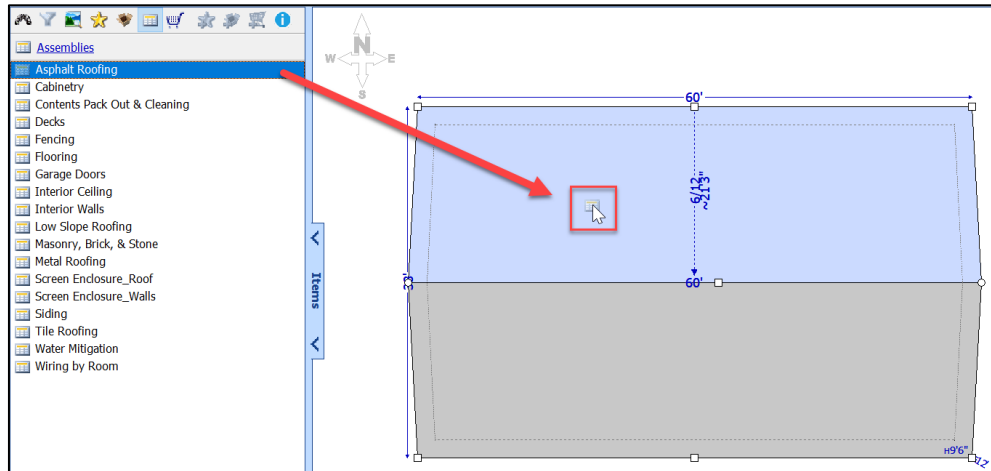

4. Select the desired **Roof Assembly**, then drag-and-drop it onto the desired location of the **Roofplan**.

   For any type of Roofplan, drag the Assembly icon to the whitespace of the Roofplan for the Assembly to apply to the entire roof.

For a natively drawn Roofplan, to apply an Assembly to a specific roof facet:
highlight the facet by clicking on it, and then drag-and-drop the Assembly icon
directly onto the facet.

5. After the Assembly window opens automatically, begin the process of answering the questions. Scroll down to ensure that all sections of the questionnaire are addressed.

Note: *Click on the Question Mark in the blue circle to see a preview image of the item or material that the question is asking about.*

6. Once all pertinent questions have been answered, click **Next** to proceed.

7. The **Validation** screen will then display.

If all questions have been answered properly, click **Generate**.

If a mandatory question was missed, click the **Red Question Hyperlink** to be taken back to the missed question within the Assembly.

Answer the missed mandatory question, then click **Next** and **Generate** as outlined in previous steps.

Note: *Mandatory questions are indicated with an asterisk.*

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8. The **Item Details** window will open next. Within the **Item Details** window, customize the assembly line items by modifying or removing items from the list before applying them to the estimate.

- To remove an item from the list, simply uncheck the checkbox next to the item description.

- To modify a line item's properties, certain fields are editable within the line item via dropdown menus (**Action, Coverage**) or editing the text in the field (**Quantity**).

- Other item properties are available via the **Item Properties** window by double-clicking on the item. Make any needed modifications, then click **OK** to save changes or **Cancel** to exit the window.

9. Click **Apply** to add the items to the estimate.

Note: Click Previous to go back to the Assembly questionnaire if there was something missed or if a question's answer needs amending. Click Cancel to cancel the process of adding line items to the estimate and close out the Item Details window.

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10. The line items have now been added to the estimate and the assembly process is complete.

About CoreLogic

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