Claims Connect™ Setup Manual

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Claims Connect Integration - Setup

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Overview

CoreLogic is the restoration industry's premier job management software and service company. Leveraging the key features of our software will help you to easily steer your business in the right direction, increase your profits, and streamline all of your operations. Our web-based application provides an effective wayto track the status of all of your jobs and measure your performance, customer service, and marketing efforts. Such a vast application can seem a little overwhelming in the beginning. This manual is designed to simplify your migration.

The goal of the Integration feature on your Claims Connect License and Estimate Import feature on your applicable platform is to allow you to streamline the process of moving dates, documents, notes, and photos from your NextGear platform environment to Claims Connect and bringing notes and estimates from Claims Connect into your Next Gear platform environment. Please follow the steps below for set up in both Claims Connect and your CoreLogic platform.

Claims Connect Side

1. Get your Claims Connect I.D. by clicking on your name in the upper right hand corner and selecting "CompanyInformation"

MY COMPANY	ACCOUNTS	ADMIN	ANTHONY HITCHCOCK
Company info	User accounts	Rules and alerts	Profile
Vendor profile	User groups	Q & A	Preferences
Company preferences	Guest user accounts	Database manager	Notifications
Claim defaults	Guest companies	Billing	QuickList
Assignment types	Branches	Invoices	Download Mobile Claims
Policy coverage types	API account		Go back to the old site
User regions			
Service territories			
Print profiles			
Client companies			
Letterheads			
Peers			
Vendors			

- 2. Click on your name in the upper right hand corner and select "API Account"
 - **Note: If you do not have this option, you may need to have your Administrator do this.

MY COMPANY	ACCOUNTS	ADMIN	ANTHONY HITCHCOCK
Company info	User accounts	Rules and alerts	Profile
Vendor profile	User groups	Q & A	Preferences
Company preferences	Guest user accounts	Database manager	Notifications
Claim defaults	Guest companies	Billing	QuickList
Assignment types	Branches	Invoices	Download Mobile Claims
Policy coverage types	API account		Go back to the old site
User regions			SIGN OUT
Service territories			
Print profiles			
Client companies			
Letterheads			
Peers			
Vendors			



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- 3. Inside of API Account, click on the Configuration (SOAP) tab.
- 4. Make sure your Account Status is Active
- 5. For Account number, put in your Claims Connect I.D.
- 6. Come up with a password here, and remember it for use later.**Note: Do not check box HTTPS and leave Remote IP Addresses empty

Getting Started (SOAP) Configuration	(SOAP) Notifications (SOAP) IP Addresses External Codes Usage Log Notification Log						
API Account Information							
Account status	Active ~						
Account number:	627-024-866 *						
New password:							
Confirm password:							
Require secure connection (HTTPS):							

- 7. Click Save
- 8. Click on the Notifications (SOAP) tab
- 9. Set API Version to: 3.12
- 10. Make sure the "Send notifications for all branches" box is checked.
- 11. Under Primary Client, check the box for Web service URL and use the address below:
 - a. https://dash-ngs.net/webservices/SymbilityEventRx/EventRx.svc
 - b. For Webservice Key: Enter your Claims Connect I.D. here.

Getting Started (SOAP)	Configuration (SOAP)	Notifications (SOAP)	IP Addresses	External Codes	Usage Log	Notification Log	
API Notifications							
API version:	2.00	~					
Send notifications	for claims of all branche	25					
Primary client							
e-mail:		*					
Web service U	RL: https:	//dash-ngs.net/webservi	es/SymbilityEve	ntRx/EventRx.svc	*		
Web service ke	ey: 627-0	24-866					
Basic authenti	cation username:						
Basic authenti	cation password:						
	The w	eb service must use the de	efault port numb	er for https (443).			

12. Under Events Filter, make sure the first box is checked so all options below are checked.

Events Filter

\checkmark	Event Name
\checkmark	CalendarEventAdded
\checkmark	CalendarEventDeleted
\checkmark	CalendarEventModified
\checkmark	ClaimAccurenceOrderFailed
\checkmark	ClaimAccurenceOrderRequested
\checkmark	ClaimAccurenceOrderRoofPlanCompleted
\checkmark	ClaimAccurenceOrderSconeCompleted

13. Click Save.

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Next Gear Application

1. Hover over Administration and click on API Configuration

4	dministration 👻 Dashboards	•
Li	Show Admin Jobs	t
-	Accept Job	-
	Administration	
5	API Configuration	
	Company Settings	
	Configure Job Fields	
	Contact Category	
	Default Documentation Standards	
	Employee	
	Employee / Security Settings	0
	Equipment	a
	Job Settings	
	Maintenance Type	
	Manage Assignments	vi
	Mass Assignment for Jobs	
	My Surveys	
	Reset Purchase Order	
	Workflow Builder	

2. Click on Add Region

Symbility Configuration Settings						
The below setting is for Symbility Claim Connect/ Symbility Claim Mobile interface. Below are some fields that will enable you to set the interface between Symbility and Dash Enterprise.						
Region Notification API Key API Account Number API Account Password						
No API Accounts at this time. Please add an API Account.						
Add Region Back to Homepage						

- 3. Select your Region then enter your Claims Connect ID as both the Notification API Key and the API AccountNumber.
- 4. Enter the password you came up with earlier during the Claims Connect part of the set up
- 5. Click Insert
- 6. Hover over Administration and click on Company Settings



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7. Click on Office

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Company Settings					
Change Logo Change your company logo	Company Display Name Change your company name	\$ Compensation Plans Customize compensation plane by role	Create Survey Create survey for feedbad	Data Import Tool Import a list of your contracts with an excel sheet	E-mail Distribution List Create lists of contacts for e-mail marketing
Equipment type Customize the type of equipment that you have in your inventiony	Job Title Create custom job titles that fit your business structure	Location and Truck Create surform locations and truds for training equipment	Foo Note Visibility Configuration Cuatomize note visibility default settings	Office Edit office information, Xadnet address, and more	EFF Standard Note Create standard quick access notes for quick notes feature

8. Click Edit Claims Connect Company IDs

View/Edit Office

	Location(s)
	Y
Edit Office Edit XactNet Addresses Edit Symbility Company IDs	Test

9. Enter your Claims Connect ID and click Add Addresses

**Note: If you have multiple Office locations, enter the Claims Connect ID into each office.

Provider Level Symbility ID	¢	×
No records to display		^
r and a second se		
	Add Address	es
		_ •

Support

CoreLogic' support specialists are available to help you fully leverage your company's training. Simplyclick the Live Support link on any page or contact us through the channels below.

Phone: 1-866-769-7855

Email: support@nextgearsolutions.com

Hours: 24/7

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