



Job Aid

Reply to Manual Timeline Entries – Mobile Claims

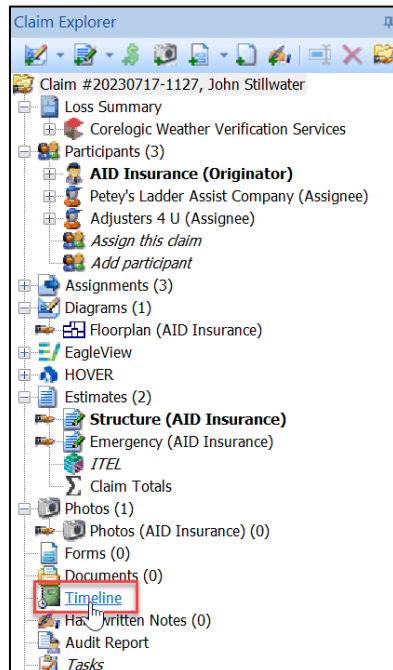
Issue 1
August 9, 2023

Reply to Manual Timeline Entries in Mobile Claims

This job aid will guide a User through the steps to reply to manual timeline entries in Mobile Claims.

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. Within a Claim, navigate to the Timeline by clicking on the **Timeline node** from the Claim Explorer.



2. Within the Timeline, open the **Manual Timeline Entry** with a double click.

Date/Time	Details	Author
07/24/2023 11:26 AM	Claim ownership acquired.	Daniel Murphy (AID Insurance)
07/21/2023 4:38 PM	Bonjour.	Peter Peterson (Petey's Ladder Assist Company)
07/21/2023 4:38 PM	De fortes pluies sont prévues pour les 4 prochains jours. Surveillera la capacité d'inspecter.	Peter Peterson (Petey's Ladder Assist Company)
07/21/2023 3:45 PM	Hello.	Peter Peterson (Petey's Ladder Assist Company)
07/21/2023 3:01 PM	Heavy rain in the forecast for the next 4 days. Will monitor for ability to inspect.	Peter Peterson (Petey's Ladder Assist Company)
07/21/2023 2:32 PM	Claim assignment "Independent Adjuster - Independent Adjuster" received.	Heather Truman (Adjusters 4 U)
07/21/2023 2:30 PM	Claim assignment "Ladder Assist - Ladder Assist" received.	Peter Peterson (Petey's Ladder Assist Company)
07/21/2023 1:55 PM	Heather Truman (Adjusters 4 U) added as a new participant (assignment "Independent Adjuster - Independent Adjuster").	Morris Weatherby (AID Insurance)
07/21/2023 1:55 PM	Claim assigned to Adjusters 4 U (assignment "Independent Adjuster - Independent Adjuster").	Morris Weatherby (AID Insurance)
07/19/2023 3:51 PM	An EagleView roofplan order has been requested (1752 N. 53rd St., Milwaukee, WI, 53208).	Daniel Murphy (AID Insurance)
07/18/2023 4:37 PM	Peter Peterson (Petey's Ladder Assist Company) added as a new participant (assignment "Ladder Assist - Ladder Assist").	Daniel Murphy (AID Insurance)
07/18/2023 4:37 PM	Claim assigned to Petey's Ladder Assist Company (assignment "Ladder Assist - Ladder Assist").	Daniel Murphy (AID Insurance)
07/17/2023 12:40 PM	The insured has been contacted.	Daniel Murphy (AID Insurance)
07/17/2023 12:28 PM	Claim created.	Daniel Murphy (AID Insurance)

Note: Manual timeline entries can be identified by the journal with pen icon, while the automatic timeline entries are identified by the green notebook with clock icon.

- Once the Timeline Entry Properties window has opened, click the **Reply** button to initiate a reply to this entry.

Timeline Entry Properties

Date/Time: 07/21/2023 3:01 PM
By: Peter Peterson (Petey's Ladder Assist Cor
From: Ladder Assist - Ladder Assist (Petey's

To

Originator (AID Insurance)*
Independent Adjuster - Independent Adjuster (Adjusters 4 U)*

Entry

Heavy rain in the forecast for the next 4 days. Will monitor for ability to inspect.

Visible To

AID Insurance
Adjusters 4 U
Petey's Ladder Assist Company

Reply **OK**

- A new **Create Manual Timeline Entry** window will open with the **To** parties pre-checked based on the original manual timeline entry.

Create Manual Timeline Entry

From

Originator (AID Insurance)

To

Assignments

☒ Originator (AID Insurance)

☐ Ladder Assist - Ladder Assist (Petey's Ladder Assist Com...

☒ Independent Adjuster - Independent Adjuster (Adjusters ...

Other

[Email address](#)

Claim Users

☐ Daniel Murphy (AID Insurance)

☐ Heather Truman (Adjusters 4 U)

☐ Peter Peterson (Petey's Ladder Assist Company)

Entry

[QuickList](#)

The entry cannot be edited later - please write with care and professionalism

Capture Signature...

☐ Send immediately if connected

☒ Send upon next synchronization

OK **Cancel**

Your company and Adjusters 4 U will see the entry.

☐ Visible for all current and future companies

5. Proceed to adjust and/or fill out all necessary **Timeline Entry** sections, as with a normal Manual Timeline Entry.

Create Manual Timeline Entry

From
Originator (AID Insurance)

To

Assignments

- ☒ Originator (AID Insurance)
- ☒ Ladder Assist - Ladder Assist (Petey's Ladder Assist Com...
- ☒ Independent Adjuster - Independent Adjuster (Adjusters ...

Other

[Email address](#)

Claim Users

- ☐ Daniel Murphy (AID Insurance)
- ☐ Heather Truman (Adjusters 4 U)
- ☐ Peter Peterson (Petey's Ladder Assist Company)

Entry [QuickList](#)

Thank you for the update. Please inspect as soon as safely possible.

The entry cannot be edited later - please write with care and professionalism

[Capture Signature...](#)

☐ Send immediately if connected
☒ Send upon next synchronization

☒ Visible for all current and future companies

[OK](#) [Cancel](#)

6. Click **OK** to save the Reply Timeline Entry or **Cancel** to discard.

Create Manual Timeline Entry

From
Originator (AID Insurance)

To

Assignments

- ☒ Originator (AID Insurance)
- ☒ Ladder Assist - Ladder Assist (Petey's Ladder Assist Com...
- ☒ Independent Adjuster - Independent Adjuster (Adjusters ...

Other

[Email address](#)

Claim Users

- ☐ Daniel Murphy (AID Insurance)
- ☐ Heather Truman (Adjusters 4 U)
- ☐ Peter Peterson (Petey's Ladder Assist Company)

Entry [QuickList](#)

Thank you for the update. Please inspect as soon as safely possible.

The entry cannot be edited later - please write with care and professionalism

[Capture Signature...](#)

☐ Send immediately if connected
☒ Send upon next synchronization

☐ Visible for all current and future companies

[OK](#) [Cancel](#)



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