



# Job Aid

## Reordering Print Pages and Print to PDF Updates – Claims Connect

**Version 7.2**

Issue 1  
November 15<sup>th</sup>, 2023

# Reordering Print Pages in Claims Connect

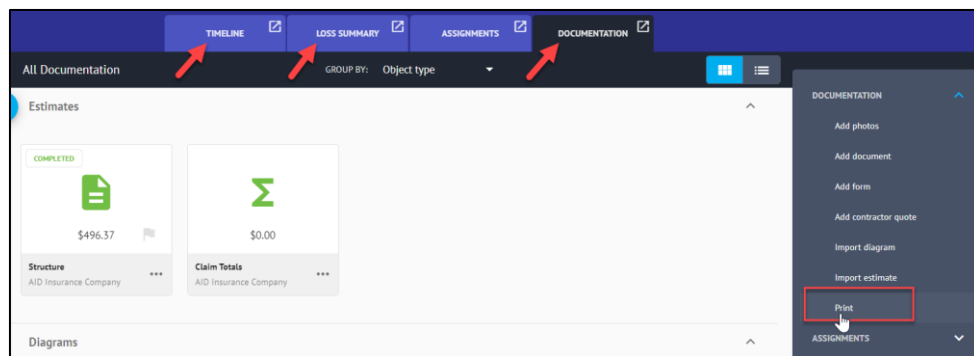
This job aid will guide a User through the steps to reorder print pages when printing from Claims Connect, as well as walk through some of the changes to the Print to PDF screen in Claims Connect.

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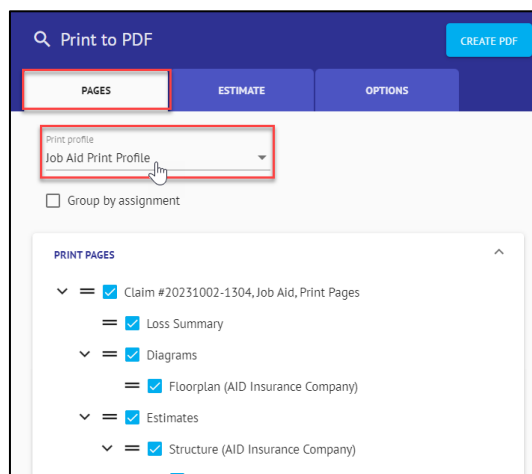
**Note:** This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

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1. Within a Claim, from the Timeline, Loss Summary or Documentation tabs, select **Print** from the dropdown menu.



2. The **Print to PDF blade** will slide open from the right, and if there is a default Print Profile for your company, it will be selected from the **Print Profile** dropdown menu. If not, it will default to <Custom Settings>.

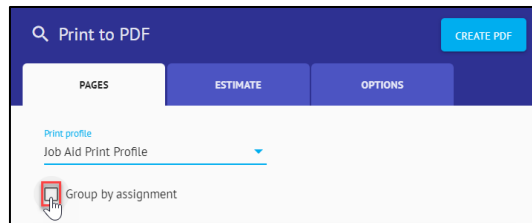


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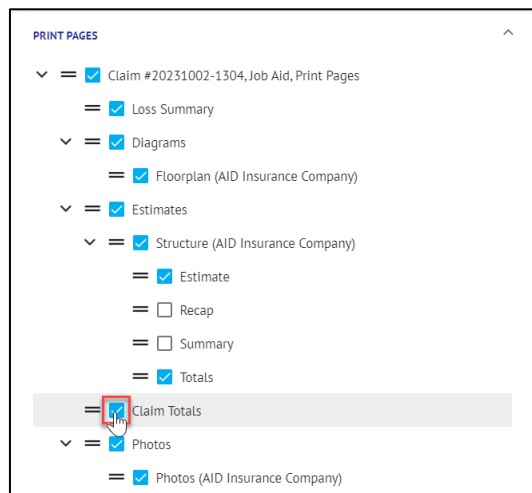
**Note:** If a Print Profile is used, settings throughout the Print to PDF blade will already be selected or unselected based on that particular Profile.

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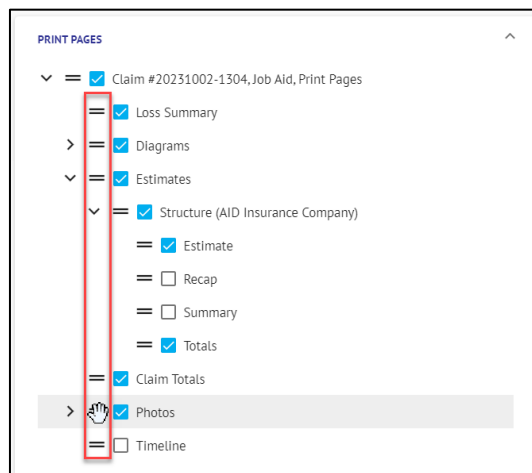
3. Check the box next to **Group by Assignment** if you wish to group the claim elements together by assignment when printing.



4. Next, in the **Print Pages** section, check the boxes (or uncheck if they were checked by default) next to the Claim elements you wish to include in the print package.

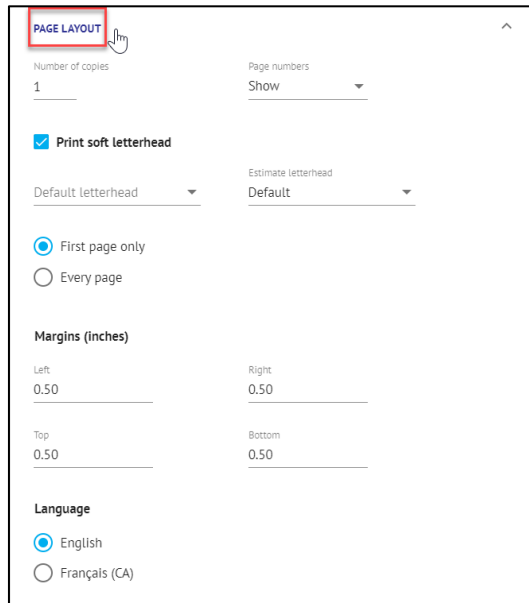


5. Rearrange the printing order of claim elements by grabbing the double bar next to the check box of the claim element with the hand cursor, then drag & drop into place.



**Note:** Claim elements may be moved into any order, however only within elements of the same level. Elements that are within a subgrouping may only be reordered within elements of that specific grouping.

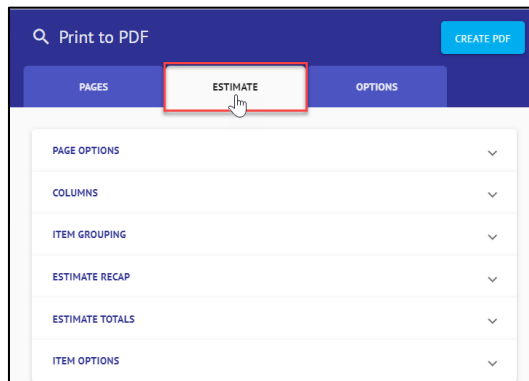
6. Open the **Page Layout** section to verify or adjust page layout settings, such as printing letterhead, margins, and page orientation.



The screenshot shows the 'PAGE LAYOUT' settings panel. At the top, 'Number of copies' is set to 1, and 'Page numbers' is set to 'Show'. Below this, the 'Print soft letterhead' checkbox is checked. There are dropdown menus for 'Default letterhead' and 'Estimate letterhead', both currently set to 'Default'. Under 'Margins (inches)', the 'First page only' radio button is selected, while 'Every page' is unselected. The margin values are: Left 0.50, Right 0.50, Top 0.50, and Bottom 0.50. At the bottom, the 'Language' section shows 'English' as the selected option, with 'Français (CA)' as an alternative.

**Note:** If your company or user profile has multiple languages configured, the option to select the default print language will appear in the Page Layout section. If not, this section will not display.

7. Next, navigate to the **Estimate** tab to explore many more printing options like column selection, how to group items, estimate and claim totaling options, etc.



The screenshot shows the 'Print to PDF' interface with the 'ESTIMATE' tab selected. The interface has a top bar with a search icon, the text 'Print to PDF', and a 'CREATE PDF' button. Below the top bar are three tabs: 'PAGES', 'ESTIMATE' (which is highlighted with a red box and a mouse cursor), and 'OPTIONS'. The 'ESTIMATE' tab content is a list of expandable sections: 'PAGE OPTIONS', 'COLUMNS', 'ITEM GROUPING', 'ESTIMATE RECAP', 'ESTIMATE TOTALS', and 'ITEM OPTIONS'. Each section has a downward arrow icon to its right.

**Note:** These sections will display differently depending on the type of estimate(s) chosen to print in the package. For example, if both Structure and Contents estimates were selected to print, both types will display for all Estimate options. If a particular option does not apply to a type of estimate, that option will be grayed out for that estimate type. See example pictured below:

Structure	Contents	Item
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Room/Partial room
<input type="radio"/>	<input type="radio"/>	Room/Item details
<input type="radio"/>	<input type="radio"/>	Item
<input type="radio"/>	<input type="radio"/>	Category
<input type="radio"/>	<input type="radio"/>	Category/Sub-category
<input type="radio"/>	<input type="radio"/>	Action
<input type="radio"/>	<input type="radio"/>	Trade
<input type="radio"/>	<input type="radio"/>	Coverage
<input type="radio"/>	<input type="radio"/>	Coverage/Subcoverage

8. Next, navigate to the last tab, **Options**, and review or adjust the settings in the **Diagrams** section.

**DIAGRAMS**

- ☒ Print dimensions on diagrams
- ☐ Print exterior dimensions on floorplans
- ☐ Print room surface area on floorplans

**Orientation**

- ☒ Automatic
- ☐ Portrait
- ☐ Landscape

**Water mitigation layer**

- ☒ Do not print
- ☐ Print on floorplan
- ☐ Print as separate floorplan

9. Click **Create PDF** to finalize the printing package.

Print to PDF

**CREATE PDF**

**DIAGRAMS**



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