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Job Aid

FieldAssist/SettleAssist Integration – Claims Connect
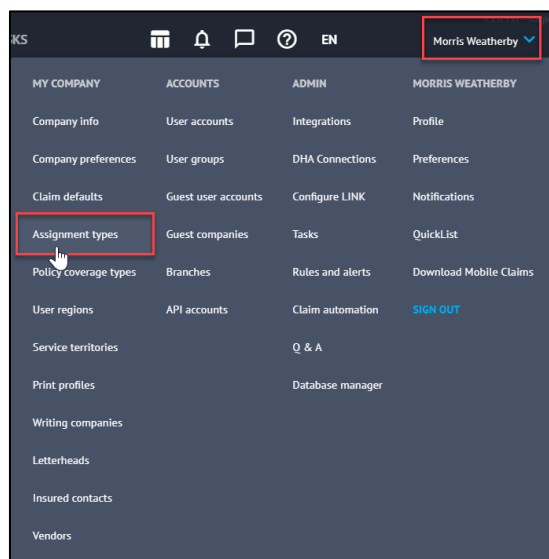
Version 7.2.50X

FieldAssist/SettleAssist Integration Assignment Configuration in Claims Connect

This job aid will guide an Administrator of a company that has the FieldAssist/SettleAssist Integration enabled through the steps to configure assignment types to automatically create FieldAssist or SettleAssist Orders.

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. Navigate to the User Menu and click **Assignment Types.**

2. Select the Assignment Type to update.

Note: *These settings can also be applied to newly created Assignment types.*

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3. The Assignment Type blade will open from the right. On the **General** tab, scroll down to view the new settings options.

4. Check the box next to the order type desired for the Assignment. Only one order type can be selected per Assignment Type and the unselected option will be grayed out.

5. If **Automatically create SettleAssist order** was selected, an additional option will appear. Check the **Eligible for headless workflow** box ONLY if these Assignments/orders are going to a 3rd party company who utilizes their own proprietary inspection app.

6. Click **Save** to save the settings and close the blade. Clicking **Cancel** will discard any changes made and close the blade.

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