



Job Aid

FieldAssist/SettleAssist Integration – Claims Connect

Version 7.2.50X

Issue 1
January 31st 2024

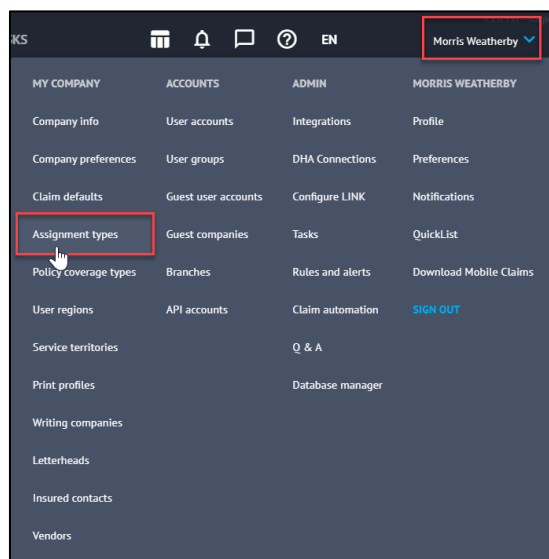
FieldAssist/SettleAssist Integration

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.

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



2. Select the Assignment Type to update.

The screenshot shows the 'Assignment Types' table. At the top right, there are two buttons: 'CREATE ASSIGNMENT TYPE' and 'COPY TO BRANCHES'. The table has the following columns: 'Type - English', 'Type - Français (CA)', 'Name - English', 'Name - Français (CA)', 'Code', 'Default', 'Group Assignment - Class', and 'Group Assignment - Group'. The first row, 'Automatic Inspection Order', is highlighted with a red box and a mouse cursor. The table contains several rows of data, including 'Automatic Inspection Order', 'Automatic Inspection Order', 'Automatic Inspection Order', 'Automatic Inspection Order', 'Automatic Inspection Order', 'Automatic Inspection Order', and 'Automatic Inspection Order'.

Type - English	Type - Français (CA)	Name - English	Name - Français (CA)	Code	Default	Group Assignment - Class	Group Assignment - Group
Automatic Inspection Order						Vendor	***
Automatic Inspection Order						Vendor	***
Automatic Inspection Order						Vendor	***
Automatic Inspection Order						Vendor	***
Automatic Inspection Order						Vendor	***
Automatic Inspection Order						Vendor	***
Automatic Inspection Order						Vendor	***

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

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

Automatic Inspection Order

GENERAL STATUSES CUSTOM FIELDS

GENERAL

Type - English *

Automatic Inspection Order

Type - Français (CA)

Name - English

Name - Français (CA)

Code

Default notes

Default class: ☒ Vendor ☐ User

Default group

Only applies to the API and the group assignment process.

☐ Set as default assignment type

Automatic Inspection Order

GENERAL STATUSES CUSTOM FIELDS

Default class: ☒ Vendor ☐ User

Default group

Only applies to the API and the group assignment process.

☐ Set as default assignment type

☐ Set assignee as insured contact

☐ Prevent external assignees from adding estimates

☐ Prevent external assignees from sub-assigning

☐ Prevent assignees from setting estimate as completed

☐ Prevent assignees from using another pricing database

☐ Allow Next Gear Auditing Tools

☐ Allow Next Gear MICA

☐ Roll up status changes to parent assignments

☐ Automatically create FieldAssist order

☐ Automatically create SettleAssist order

GROUP ASSIGNMENT PROCESS

DEFAULT ITEM FILTERS

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.

Automatic Inspection Order

SAVE CANCEL ...

GENERAL STATUSES CUSTOM FIELDS

Default class: ☒ Vendor ☐ User

Default group

Only applies to the API and the group assignment process.

- ☐ Set as default assignment type
- ☐ Set assignee as insured contact
- ☐ Prevent external assignees from adding estimates
- ☐ Prevent external assignees from sub-assigning
- ☐ Prevent assignees from setting estimate as completed
- ☐ Prevent assignees from using another pricing database
- ☐ Allow Next Gear Auditing Tools
- ☐ Allow Next Gear MICA
- ☐ Roll up status changes to parent assignments
- ☒ Automatically create FieldAssist order
- ☐ Automatically create SettleAssist order

Automatic Inspection Order

SAVE CANCEL ...

GENERAL STATUSES CUSTOM FIELDS

Default class: ☒ Vendor ☐ User

Default group

Only applies to the API and the group assignment process.

- ☐ Set as default assignment type
- ☐ Set assignee as insured contact
- ☐ Prevent external assignees from adding estimates
- ☐ Prevent external assignees from sub-assigning
- ☐ Prevent assignees from setting estimate as completed
- ☐ Prevent assignees from using another pricing database
- ☐ Allow Next Gear Auditing Tools
- ☐ Allow Next Gear MICA
- ☐ Roll up status changes to parent assignments
- ☐ Automatically create FieldAssist order
- ☒ Automatically create SettleAssist order
- ☐ Eligible for headless workflow

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.

Automatic Inspection Order

SAVE CANCEL ...

GENERAL STATUSES CUSTOM FIELDS

Default class: ☒ Vendor ☐ User

Default group

Only applies to the API and the group assignment process.

- ☐ Set as default assignment type
- ☐ Set assignee as Insured contact
- ☐ Prevent external assignees from adding estimates
- ☐ Prevent external assignees from sub-assigning
- ☐ Prevent assignees from setting estimate as completed
- ☐ Prevent assignees from using another pricing database
- ☐ Allow Next Gear Auditing Tools
- ☐ Allow Next Gear MICA
- ☐ Roll up status changes to parent assignments
- ☐ Automatically create FieldAssist order
- ☒ Automatically create SettleAssist order
- ☒ Eligible for headless workflow

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

Automatic Inspection Order

SAVE CANCEL ...

GENERAL STATUSES CUSTOM FIELDS

Default class: ☒ Vendor ☐ User

Default group

Only applies to the API and the group assignment process.

- ☐ Set as default assignment type
- ☐ Set assignee as Insured contact
- ☐ Prevent external assignees from adding estimates
- ☐ Prevent external assignees from sub-assigning
- ☐ Prevent assignees from setting estimate as completed
- ☐ Prevent assignees from using another pricing database
- ☐ Allow Next Gear Auditing Tools
- ☐ Allow Next Gear MICA
- ☐ Roll up status changes to parent assignments
- ☐ Automatically create FieldAssist order
- ☒ Automatically create SettleAssist order
- ☒ Eligible for headless workflow



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