RELEASE NOTES
Release 5.1.17

Version 1.2

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Revision History

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1.0	Mar-18-2013	Document Creation	Andra Postovaru
1.1	Mar-22-2013	Modifications to the document	Pascal Bégin
1.2	Apr-02-2013	Modifications to the document	Pascal Bégin

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1.   Introduction

This document describes the new features and enhancements that will be part of the upcoming version 5.1.17 of Symbility Claims Connect and Mobile Claims. The target date for this release is April 19th 2013 in North America.

2.   Major Enhancements

2.1   Enhancement # 20458 – Estimate Finalization

Symbility is now able to track when an estimate has been cash settled or invoiced against and can provide the invoice reference and date. This information triggers event updates on a claim and allows a client's external accounting software to be notified via the API and extract the financial information for the claim automatically.

A "Finalization" link will appear at the bottom of the estimate totals page. Clicking on this link will allow the user to choose from two options: Cash Settled and Invoiced. If a schedule has been invoiced against, the user will be able to input the invoice number for in the reference portion and the date of the invoice.

2.2   Enhancement # 20460 – Sharing Forms with Assignees

Symbility has added a feature that enables the Originator of a claim to share forms with Assignees. The client originating the claim can add a form and share it with all assignees, or choose from the list of assignees. Assignees can also share their forms with peers on the claim. When the form is created, the form owner has the ability to mark some of the fields in the form as Restricted, so even if the form is shared with write permissions only the form creator, originator or adjuster can modify or fill out these fields in the form. Each shared form has separate read and write permissions and only the claim's originator can delete a form.

2.3   Enhancement # 20462 – Tasks Manager

Symbility has improved and made the Task Manager tool currently available in Europe available for our North American users. The purpose of the Task Manager feature is for companies to create their own task queues like assignment queues, review queues or even payment queues.

This feature allows Users to access a list of tasks generated either manually or automatically by the system. Here are the 5 ways to generate a task:

- Manually from the task list
- automatically by creating a trigger linked to an event in the claim
- automatically when a task is completed
- automatically when a task is canceled
- automatically when a rule (from the Rules & Alerts module) is violated

The Tasks List is accessible from Claims Connect or Mobile Claims and contains the following information:

- Task Name
- Claim Number
- Task Due Date
- Task Owner
- Task Status
- Priority

The Users may order the list based on the above information or filter it according to the following criteria:

- Claim Number
- Task Number
- Task Name
- Task Group
- Priority
- Task Status
- Task Creation Date
- Task Due Date
- Task Owner
- Task Owner user group
- Tasks relating to claim participants

A review queue for instance could easily be generated using the Task Manager feature. The company could create a task trigger based on the Ready for Review estimate status. So, when an estimate is marked for Ready for Review, the system would automatically generate a task in the Tasks list (assigned or not to a specific user). The reviewers would work from their Tasks list and filter the list based on the status, owner, and name of the tasks to view only the tasks related to the Ready for Review status. They can then take ownership of a task, access the claim from the task, review the estimate, mark it as completed and change the task status to completed.

Contact your Symbility account manager to activate this feature or for more information on this feature.

3. Other Enhancements

3.1 Enhancement # 20282 – More effective item search capabilities within a Category

Symbility has improved the search capability allowing users to limit the search for an item within the category the search is initiated from.

3.2 Enhancement # 20283 – Ability to copy/paste 3D exterior plan

Users are now able to copy/paste a 3D exterior plan.

3.3 Enhancement # 20284 – Support for "combine related subrooms" in line item view

Symbility has improved the line items view by providing the option to combine line items when viewing line items of combined rooms or roofs. The option is available as in icon in the Line Item view toolbar.

3.4 Enhancement # 20288 – Ability to set background blueprint to help user with diagramming

Symbility has added a functionality that allows users to upload an existing blueprint, customize the scale factor and help users draw existing diagrams. The new feature, labeled Background Blueprint, is available from the View ribbon of the floorplan. It allows the user to browse his computer for the blueprint image (in .jpg or .png format). Once selected, the user simply has to set the scale and draw the rooms over the image.

3.5 Enhancement # 20452 – Supplement Reasons

Symbility now provides a list of reason types for users to choose from when creating and completing supplements. The originating company will be able to manage, from their Claim defaults, the list of reasons that can be associated with each supplement on their claims. The supplement reason can be entered in the Totals page of the estimate. These reasons are available for reporting through the use of the Report Builder.

3.6 Enhancement # 20453 – Estimate default for Applying Minimum Charges

Symbility now enables users to toggle the application of minimum charges on and off for each default estimate name. This new option is available in the Default Estimate Name section (Claim Structure tab) of the Claim Defaults. This will allow those clients who have supplier contracts that have clauses imposing minimum charges for labor in place to have these charges applied automatically.

3.7 Enhancement # 20461 – Estimate Default Coverage

Symbility now allows clients to determine default coverage from the Estimate section, instead of the Diagram section of the claim.

3.8 Enhancement # 20557 – LiveHailMap re-branding

Symbility has updated the user interface both in both Claims Connect and Mobile Claims to reflect the changes resulting from LiveHailMap's re-branding to Weather Fusion.

3.9 Enhancement # 20591 – New API method: UpdateClaim

Symbility now allows external system to update the claim loss summary information using the new UpdateClaim API method. The method will only work on claims that were created after the release of the Multiple Ownership feature (version 4.4). Please contact Symbility to learn more about the new method and to get the new version of the API documentation.

3.10 Enhancement # 20687 – Email option for franchisees

Symbility has improved the company profile to allow the storage of more than one email address.

3.11 Enhancement # 20688 – Originator changing claim number

Symbility has added a new API notification that will alert external systems when the originator of the claim modifies the claim number.

3.12 Enhancement # 20690 – No search/filter feature to search for individual branches

Symbility has added functionality that allows companies with multiple branches to search, or filter through the list of branches in their Manage Branches company list. Users can now search by company name, Symbility ID, contact name, tax ID number, city, state, zip code or within x miles from an address.

3.13 Enhancement # 20742 – Add an option in the company profile to allow/disallow removing the last adjuster on a claim

In order to help our clients manage their workflow, Symbility has added an option to toggle the feature that prevents clients from removing the last adjuster on a claim On or Off without first assigning the claim to another participant within the company.

3.14 Enhancement # 21166 – Ability to drop item to multiple rooms

Symbility enabled users to add items to multiple rooms at the same time. When an item is dropped onto a room, a tooltip "Apply to multiple rooms" appears. The user can click on the tooltip in order to switch to drop mode. Once in drop mode, the user will have the option to click on or tap each room and apply the selected items to every room as they were applied to the first room where they were dropped.

4. Major Resolutions

4.1 Resolution # 20524 – Client Issue - Unable to edit unit price with Itel items with Estimates marked "ready for review"

Symbility has resolved an issue that blocked Users from applying ITEL material prices to estimates marked as Ready for Review.

4.2 Resolution # 20624 – Claims Connect PDF Format Issues

Symbility has resolved an issue that caused formatting problems when printing the claim in PDF.

4.3 Resolution # 20799 – Estimate status issue

Symbility has resolved an issue that caused the system to set the same time stamp for multiple claim statuses.

4.4 Resolution # 20994 – Save as shape must be done 2 x to save for new users

Symbility has resolved an issue that caused new Mobile Users to lose their Saved Shape when using the Save as Shape feature for the first time.