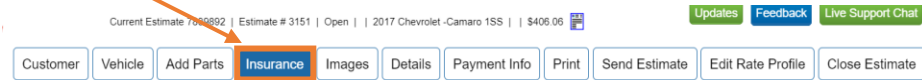


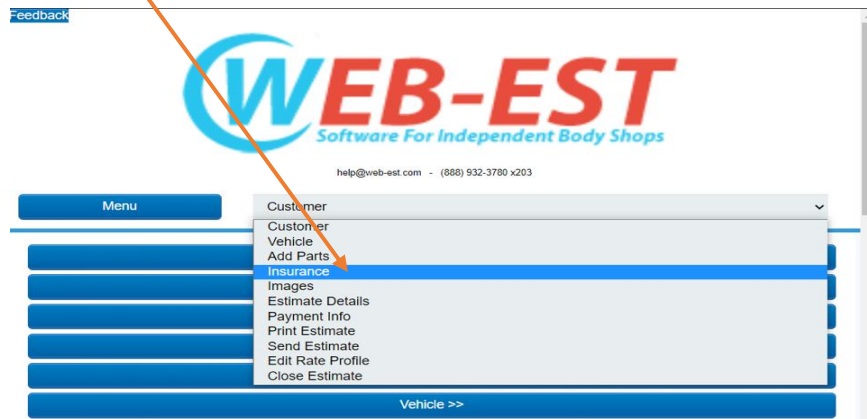
## How Save and Select Insurance Companies & Adjuster / Claim Reps on the Insurance page

1. Once you have opened your estimate, navigate to the “Insurance” page.

a. On a **PC**:



b. On a “**Mobile**” device:



2. On the “Insurance” page, in Section 2, you can select an existing saved insurance company, or enter a new insurance company, along with Adjusters and/or Claim Reps. To enter a new insurance company, type in the company name in the “**Insurance Company Name**” field and then select the “**Save Insurance Profile**” check box.

### 2 Insurance Company

A screenshot of the 'Insurance Company' section. It features a dropdown menu for 'Existing Insurance Company' with the text '--Select Saved Insurance Company--'. Below this is a text input field for 'Insurance Company Name' containing the text 'Example Insurance Company'. To the right of this field is a checkbox labeled 'Save Insurance Profile' which is checked. Below these fields are several input fields for contact information: Adjuster First Name, Adjuster Last Name, Adjuster Phone, Adjuster Fax, Adjuster Email, Claim Rep First Name, Claim Rep Last Name, Claim Rep Phone, Claim Rep Fax, and Claim Rep Email.

3. Next, fill in the information for the “**Adjuster**” and/or “**Claim Rep**”, then select the “**Save**” button at the top of the page.

2 Insurance Company

Existing Insurance Company --Select Saved Insurance Company--

Insurance Company Name Example Insurance Company

☒ Save Insurance Profile

Adjuster First Name Sarah Adjuster Last Name Smith

Adjuster Phone (111) 111-1111 Extension 111

Adjuster Fax (222) 222-2222 Adjuster Email ss@email.com

Claim Rep First Name Joe Claim Rep Last Name Johnson

Claim Rep Phone (333) 333-3333 Extension 333

Claim Rep Fax (444) 444-4444 Claim Rep Email jj@email.com

Save

4. After you have selected the “Save” button, you will now have the option to save the Adjuster and Claim Rep info, and have it associated with the saved insurance company for future use. Multiple Adjusters & Claim Reps can be associated with the same saved Insurance company for quick selection on future estimates. (Notice that the previously entered Insurance company has now been moved into the “**Existing Insurance Company**” field, after selecting the Save button in step # 3.) Select the “**Save**” button below each section. Then select the “**Save**” button at the top of the page.

2 Insurance Company

Existing Insurance Company Example Insurance Company

Insurance Company Name

☐ Save Insurance Profile

Saved Adjusters --Select Saved Adjuster--

Adjuster First Name Sarah Adjuster Last Name Smith

Adjuster Phone (111) 111-1111 Extension 111

Adjuster Fax (222) 222-2222 Adjuster Email ss@email.com

☒ Save Adjuster

Saved Claim Reps --Select Saved Claim Rep--

Claim Rep First Name Joe Claim Rep Last Name Johnson

Claim Rep Phone (333) 333-3333 Extension 333

Claim Rep Fax (444) 444-4444 Claim Rep Email jj@email.com

☒ Save Claim Rep

Save

5. After you have saved the Adjuster and/or Claim Rep info, you will notice they are now listed in the “**Saved Adjusters**” and “**Saved Claim Reps**” field(s).

2 Insurance Company

Existing Insurance Company Example Insurance Company

Insurance Company Name

☐ Save Insurance Profile

Saved Adjusters Sarah Smith

Adjuster First Name Sarah Adjuster Last Name Smith

Adjuster Phone (111) 111-1111 Extension 111

Adjuster Fax (222) 222-2222 Adjuster Email ss@email.com

☐ Save Adjuster

Saved Claim Reps Joe Johnson

Claim Rep First Name Joe Claim Rep Last Name Johnson

Claim Rep Phone (333) 333-3333 Extension 333

Claim Rep Fax (444) 444-4444 Claim Rep Email jj@email.com

☐ Save Claim Rep

6. To select a previously saved Insurance company, select the “**Existing Insurance Company**” field. (It appears slightly greyed out but is an active field.) You will see a dropdown listing your saved Insurance Companies for selection. Select the correct Saved Insurance Company.

2 Insurance Company

Existing Insurance Company --Select Saved Insurance Company--

Insurance Company Name

Adjuster First Name

Adjuster Last Name

Adjuster Phone

Extension

Adjuster Fax

Adjuster Email

7. After you have selected the correct insurance company, you will notice that you now have the option to select a Saved Adjuster and/or a Saved Claim Rep. Select the “**Saved Adjuster**” and “**Saved Claim Rep**” dropdowns to make your selection(s).

2 Insurance Company

Existing Insurance Company Example Insurance Company

Insurance Company Name

☐ Save Insurance Profile

Saved Adjusters --Select Saved Adjuster--

Adjuster First Name Sarah Smith

Adjuster Phone

Extension

Adjuster Fax

Adjuster Email

☐ Save Adjuster

Saved Claim Reps --Select Saved Claim Rep--

Claim Rep First Name

Claim Rep Last Name

Claim Rep Phone

Extension

Claim Rep Fax

Claim Rep Email

☐ Save Claim Rep

8. The selected “Saved” **Adjuster & Claim Rep** now populate the contact information fields and will print on the header of the estimate PDF. Once selected, you also have the option to edit the contact information and update it. Make any necessary changes, then select the “**Save**” button under the appropriate field(s). Then select the “**Save**” button at the top of the page.

Save

2 Insurance Company

Existing Insurance Company Example Insurance Company

Insurance Company Name

☐ Save Insurance Profile

Saved Adjusters Sarah Smith

Adjuster First Name Sarah

Adjuster Last Name Smith

Adjuster Phone (111) 111-1111

Extension 111

Adjuster Fax (222) 222-2222

Adjuster Email ss@email.com

☐ Save Adjuster

Saved Claim Reps Joe Johnson

Claim Rep First Name Joe

Claim Rep Last Name Johnson

Claim Rep Phone (333) 333-3333

Extension 333

Claim Rep Fax (444) 444-4444

Claim Rep Email jj@email.com

☐ Save Claim Rep

9. Complete the data entry on this page and then move to Add Parts to write your estimate.