# SIMSOL software 6.0

Simsol | Software Release Notes | Version 6.0 | April 2015

- Multiple Estimates
- New Camera Module
- ClaimsWire Live View (Main Screen)
- Claim Jumper
- Improved Claim Activity Tracking (History) for:
    - Important Dates
    - Photo Added
    - Drawing Added
    - Form Added
    - Report Added
    - Scanned Doc Added
    - Additional Estimate Added
    - Additional Estimate Area Created
    - Activity Log Entry
- Updated History View
- Added New Claim Notes for History
- New Claim History Printout
- SFA Detects if Touch is Available and Expands Main Menu to Make SFA Work Better with Touch (Especially Small Tablets)
- Improved Contents Estimate Importer
- New Building and APS Estimate Importer
- Photo Preview (Main Screen)
- Updated Area Screen (Photo Gallery & Updated Design)
- Updated Roof Screen (Photo Gallery & Updated Design)
- Updated Elevation Screen (Photo Gallery & Updated Design)
- Updated Loss Types and Printouts
- Added Auto Claim Close Functionality with Close Date Preference (Check Claim Creation date and any claim older than preference closes the claim)
- New Thumbnail View for:
    - Diagrams
    - Photos
    - Attachments
    - Notes
    - Scanned Docs (Read-Only)
- Added File Size to Archive Dialog
- Scheduled Inspection and Additional Appointments Dialog
- Map Upcoming Inspections and Scheduled Appointments
- Added Printing Appointments
- Ability to Rename PDF Documents in SFA
- External PDF Utility – Allows Users to Rotate PDF Documents and Save it Back in SFA
- Auto Updater – The Ability to Show Version and Fixed Updates
- Update All Drawers with Current GMT After New DB Installation (Auto Updater or Stand-Alone)
- Updated CW Utility
- Multiple Bug Fixes and Other User Interface Enhancements

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The latest version of Simsol Software 6.0 presents many new features and enhancements to the software that makes claims estimation faster, easier, more accurate, and effective. Simsol 6.0 provides a spectrum of newly added features to improve workflow and ensure accurate results. The software is built and enhanced based on feedback from industry professionals.
A wide range of improvements and new features appear in Simsol 6.0. Among the most significant are:

Multiple Estimates | Add multiple building estimates that tie into the Statement of Loss.
New Camera Module | A clear image module for Windows 8 Tablets.
Improved Claim Activity Tracking | Time-stamped history, allowing for rock-solid analytics.
Enhanced Contents Estimator Importer | Import the PDF and total from the estimate.
New Building + APS Estimate Importer | Import the PDF and total from the estimate.
Intuitive User Interface | Updated to improve efficiency and streamline workflow.
Touch Point Technology | SFA detects if touch is available and expands the main menu.

High-volume users will find the multiple estimates, additional analytics, and the intuitive user interface enhancements are easily scalable to a large workflow or network of users.

Simsol 6.0 is extremely well-documented and, as always, easy-to-use. Please find the following documentation and training options that will get you started using Simsol 6.0 right away and do not hesitate to contact us with any questions you may have.

## MULTIPLE ESTIMATES FOR BUILDING USING ENHANCED STATEMENT OF LOSS

With SIMSOL 6.0, Adjusters and Contractors can create unlimited Building and A.P.S. Estimates without creating a new file and also applying coverage limits to each estimate. This function would be used by Staff Adjusters in dealing with Farm and Ranch Policies which contain multiple buildings located on the same property but with each building having their separate coverage limit. Amounts for all Building and A.P.S. Estimates reflect in an enhanced Statement of Loss. Contractors can create multiple building estimates for additions or supplements to current jobs without overriding the original estimates.

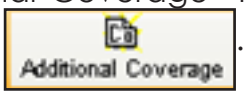
Creating Multiple Estimates is very easy in the new SIMSOL 6.0, using the steps listed below:

- Create a Claim or Estimate File.

- If it is an Insurance Claim, address the coverage for each building.

  Loss Information Screen click "Cover" Icon

.

  Click "Additional Coverage" Icon to add new coverage information including Title Coverage 

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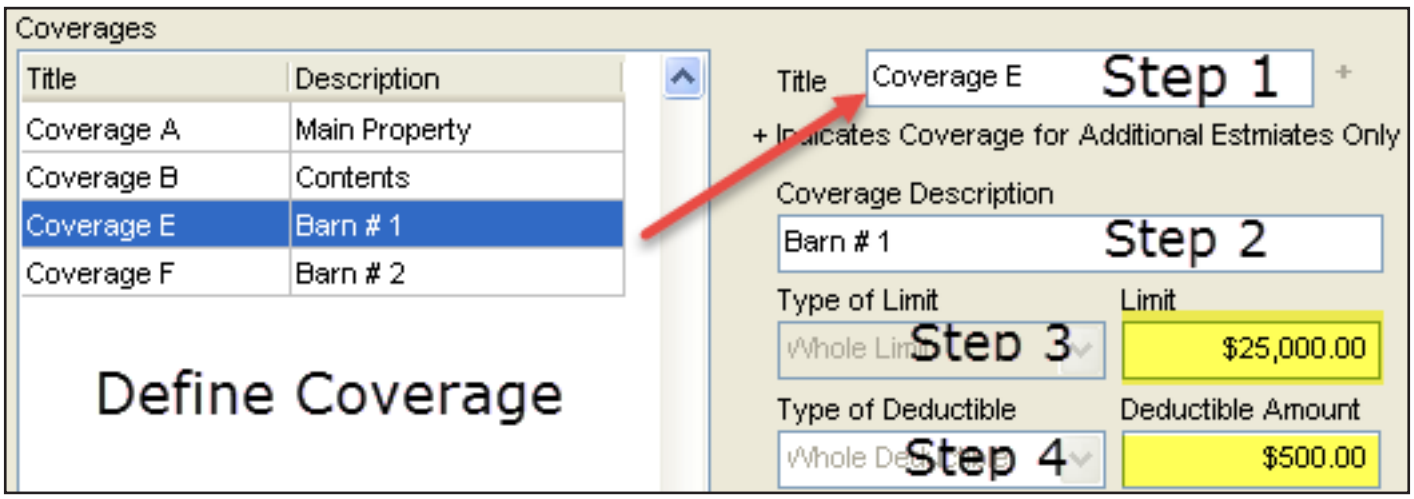


Excerpt of Additional Coverage Screen

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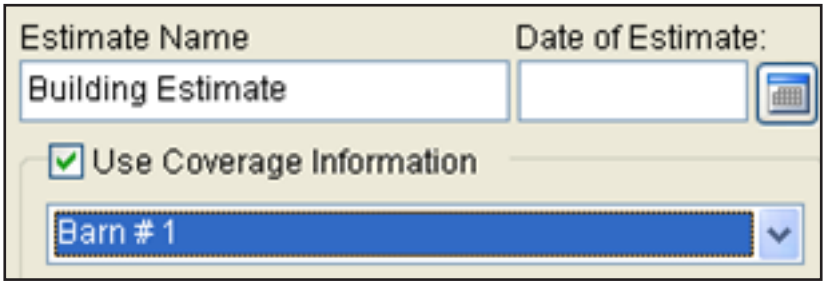
**MULTIPLE ESTIMATES FOR BUILDING USING ENHANCED STATEMENT OF LOSS**

- Contractors and Adjusters, locate the building, or A.P.S. estimate title section in the Claims Enclosure Tree Building Estimate or A. P. S. Estimate.

- Right "Click" on either Building Estimate or A.P.S. Estimate.

- Left "Click" on Additional Estimate Additional Estimate from the drop down menu.

- Upon creation of the New Building Estimate click "Use Coverage Information" check box and assign the coverage if applicable.




- From here the Adjuster or Contractor clicks Scope of Damage to write his/her scope.

- Special Note: Adjusters can address the Valuation Portion of the claim by clicking the Building Info Screen Bldg. Info.

- Once the estimate is complete the Adjuster has the option to create a Statement of Loss including all additional amounts generated by the new estimates.

  Click Loss Information Screen from the Claim Enclosure Tree.

  Click SOL SOL to access the Statement of Loss Generator Screen.

  Click the new Additional Coverage, i.e. Barn #1, and left click Copy All to transfer all amounts to the Statement of Loss.

- Repeat the above action for all remaining New Additional Buildings.
- Click Recap SOL Recap tab to view the totals for the entire estimate.

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## NEW ENHANCED PHOTO GALLERIES INCLUDING AREAS, ROOFS, AND ELEVATION

SIMSOL 6.0 has enhanced its look by adding digital thumbnails to the main Claims Grid Screen, as well as enhancements for users to add photos to various areas, i.e.(Area, Roof, and Elevation). The photo gallery provides a more professional work product when submitting either the claims or job estimates to the carriers or clients.

The new software features an additional column with a thumbnail view that can be accessed by double-clicking on the digital photo or document image to edit or access Digital Photos, Sketches, Scanned Documents, and Attached Documents. The update cuts down the amount of contents shown on the "Claim Enclosure Tree" itself and adds a more professional and logical interface to address and edit photos and documents within SIMSOL 6.0.

SIMSOL 6.0 has expanded the standard photo module to include importing new photos with a new sorting screen for one photo or a group of photos, along with sorting these photos alphabetically.

- Simsol has added a Photo Preview for every generated claim. Please note: a photo must be imported and assigned to the claim in order for the Photo Previewer to display.

Users have the ability to collapse the Photo Previewer by simply clicking the minus button which collapses the screen

.

In order to expand the Photo Preview screen, click the icon located on the right side of the screen
.

Insert the correct dimensions in the Area Component Entry Screen.

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## NEW ENHANCED PHOTO GALLERIES INCLUDING AREAS, ROOFS, AND ELEVATION

- SIMSOL 6.0 has enhanced the ability for users to add two digital photos from the Digital Photo module to the various Area Screens located in the Scope of Damage / Area Listing Screen. Areas included are all standard Areas, Roofs, and Elevations. Please see steps listed below:

  Select either Area, Roof or Elevation icons to create the area for the estimates.

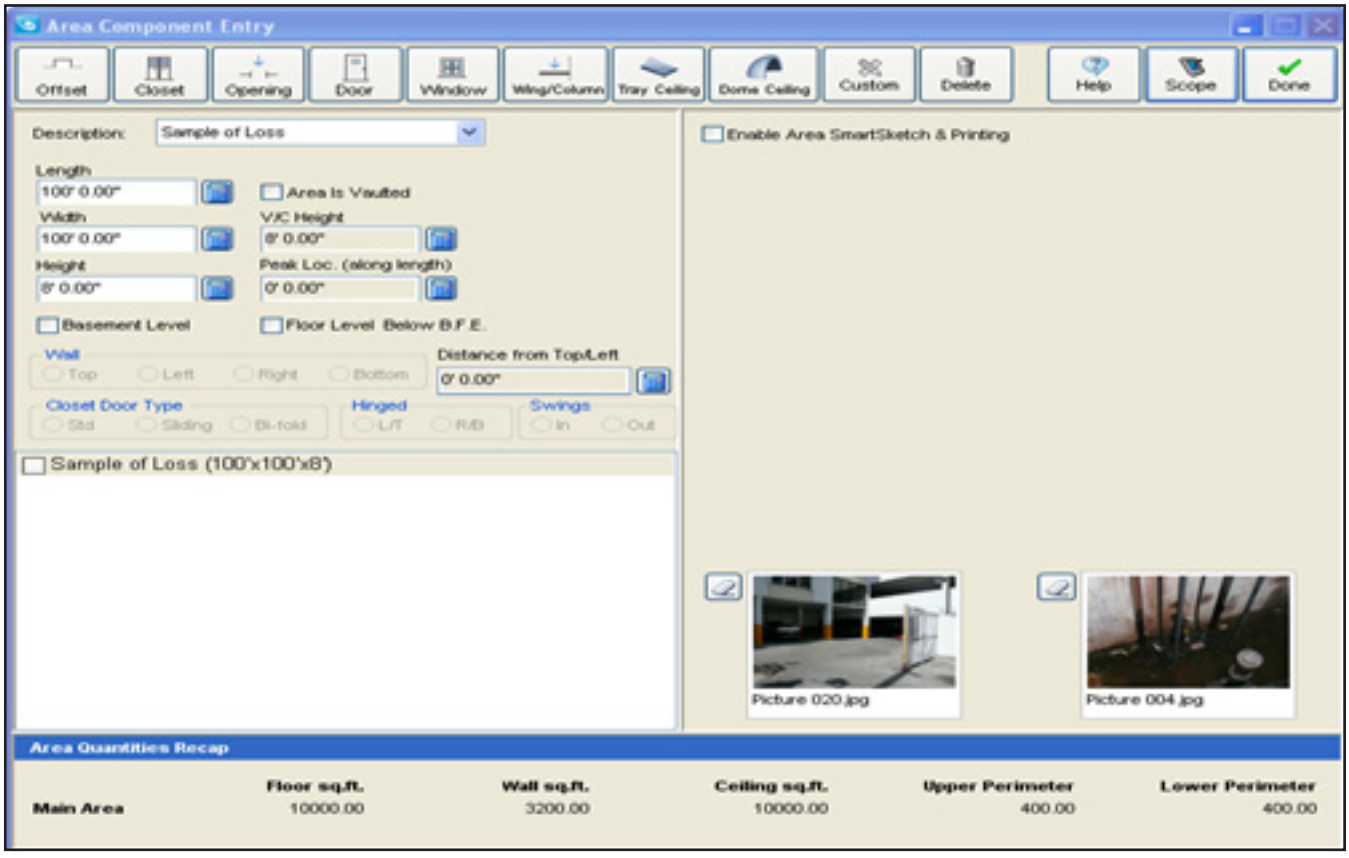
  Insert the correct dimensions in the Area Component Entry Screen.

  To the right, click the box labeled "Click here to Link Photo 1 and 2", to insert and assign a digital photo to the new Area.

  This same interface is common for all areas in the software including Area, Roofs, and Elevations.

  To delete a digital photo for an Area click the Eraser Icon located top left corner of the thumbnail.




Excerpt of the Standard Area Screen

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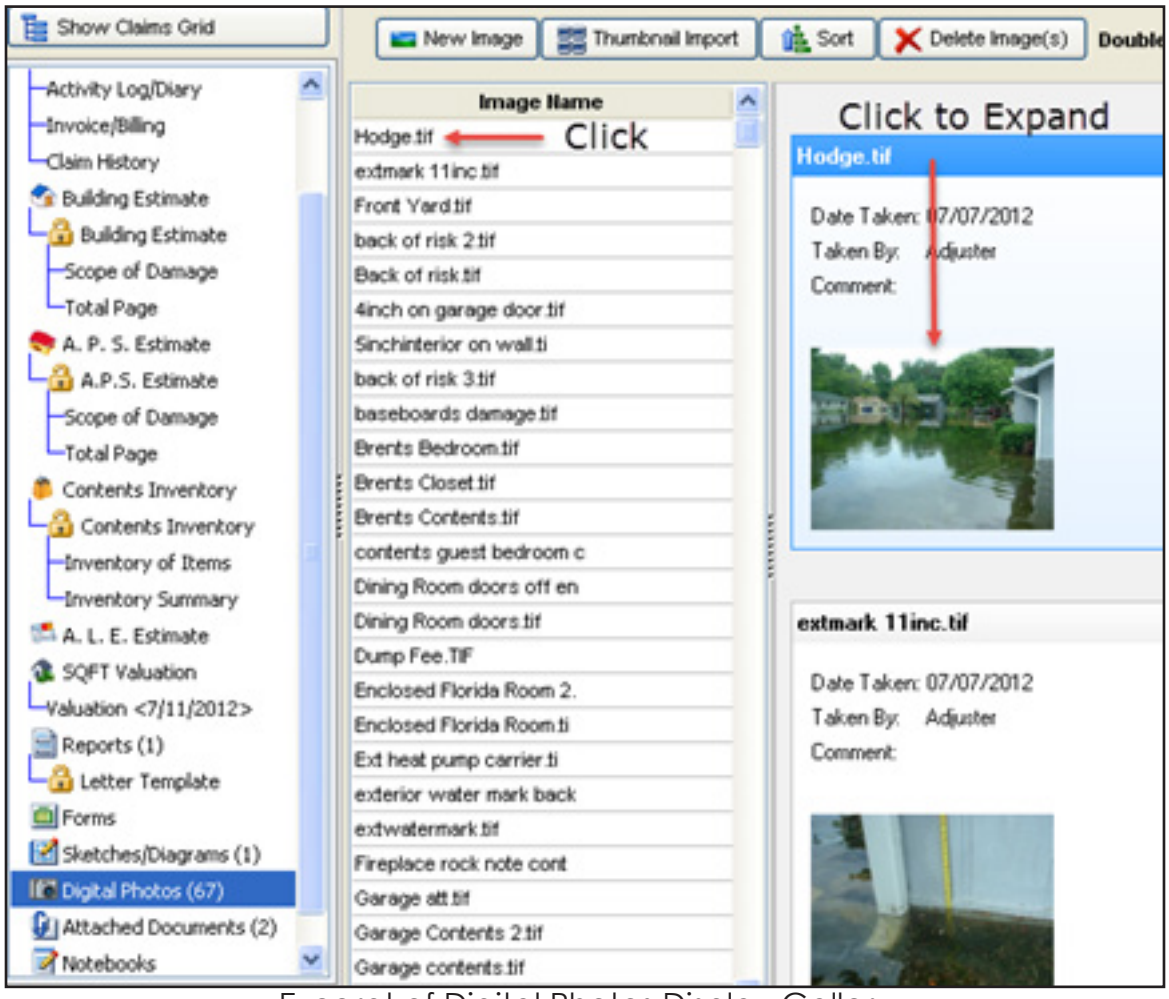
**NEW ENHANCED PHOTO GALLERIES INCLUDING AREAS, ROOFS, AND ELEVATION**

As stated above, SIMSOL 6.0 has enhanced the Display Galleries by adding the middle column from the Claim Enclosure Tree. Effectively, this cuts down the number of items displayed in the Claim Enclosure Tree.

The Display Gallery applies to Digital Photos, Sketches/Diagrams, Attached Documents, and Notebook components of the Claims Enclosure Tree. Specific categories are updated due to the number of items most likely to be generated throughout the claim.

The process is automatic when a new Digital Photo, Sketch or Attached Document is selected or created.



Excerpt of Digital Photos Display Gallery

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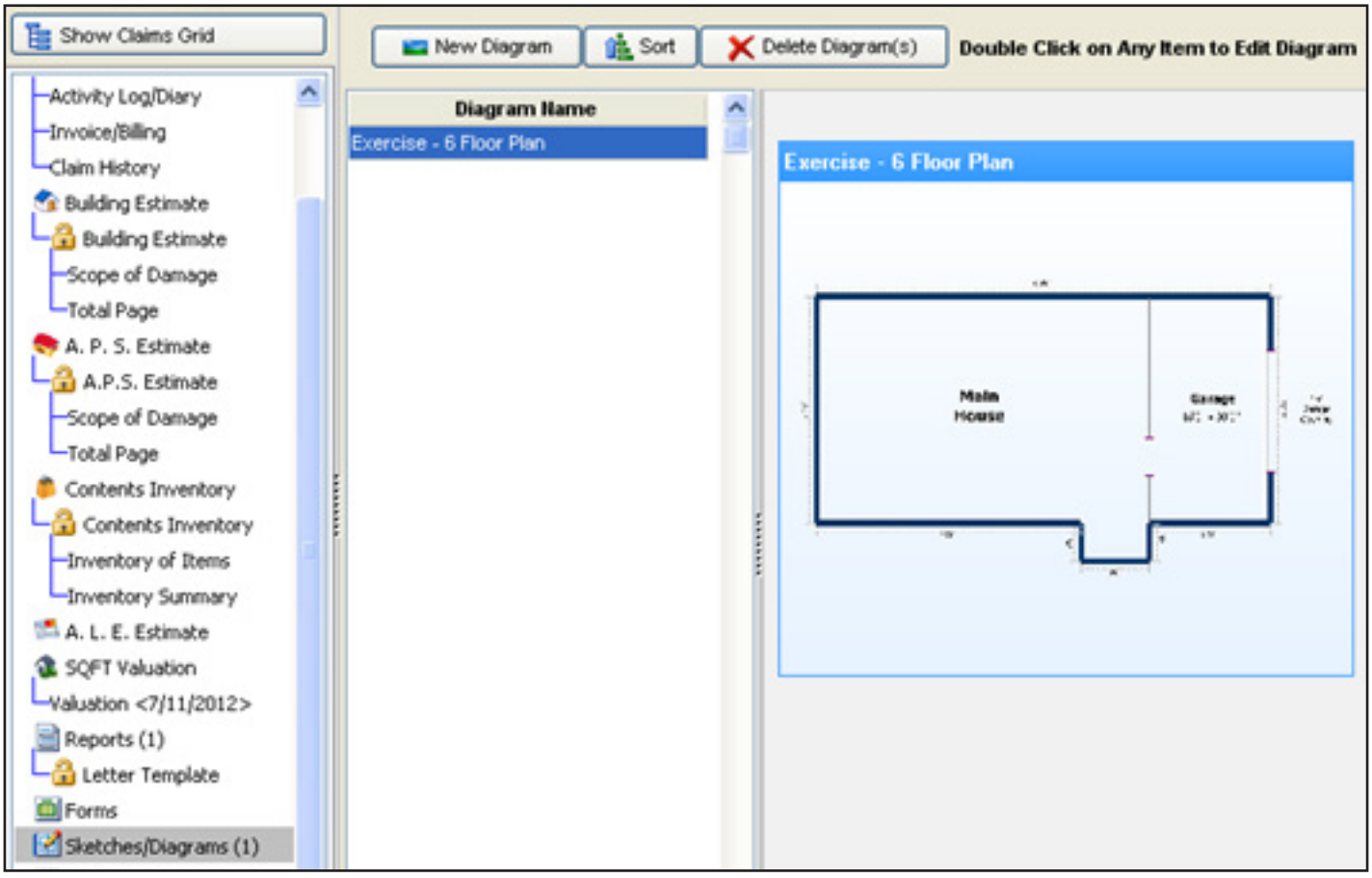
## NEW ENHANCED PHOTO GALLERIES INCLUDING AREAS, ROOFS, AND ELEVATION




Excerpt of Sketch/Diagrams

SIMSOL has enhanced its Digital Photo module by adding expanded sort screen so users can re-sort one photo or a group of photos:

To sort a single photo, users can select the desired photo and use the up or down arrow to place the photo in the desired location.

To move a group of photos, users select all the digital photos to move by the use of "Control/Left Click" button. Once all the photos are selected in dark blue, users can then drag all the selected blue photos to the desired location and then release the mouse.

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**NEW ENHANCED PHOTO GALLERIES INCLUDING AREAS, ROOFS, AND ELEVATION**

The new Digital Sort Screen can also re-sort all digital photos alphabetically if needed by clicking the

icon.

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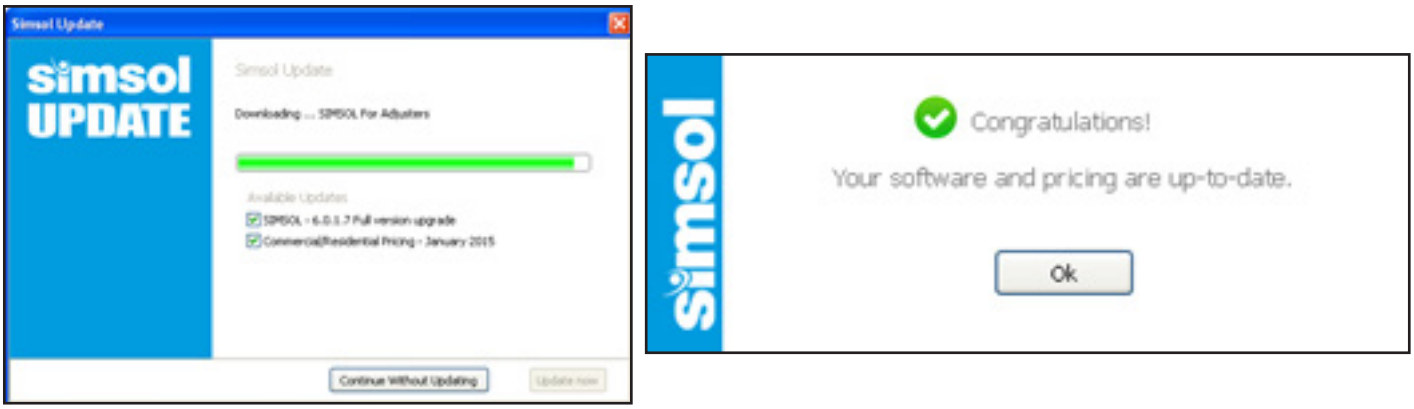
## AUTO (PRICE & PROGRAM) UPDATES INCLUDING UPDATED DRAWERS

SIMSOL 6.0 has integrated an Auto Price and Program Update Feature to alleviate users in the field from going to SIMSOL's website to manually download any new price database or software updates.

When users log on and connect to the internet, SIMSOL 6.0 automatically checks to see if any updates are available. If updates are available, the system will notify the user with a selection box.

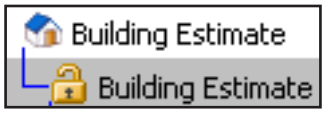
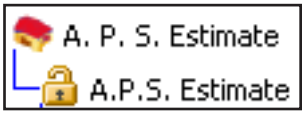
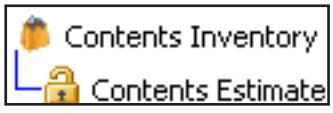



Excerpt of Update and Congratulations Window

- SIMSOL 6.0 can now update all User Drawers to the current price (GPT) automatically when prompted by the user. This feature eliminates the extra step of updating to the current (GPT) to all the current drawers listed in the users Claims Enclosure Tree. ***Special Note: Simsol does not auto update (GPT's) Global Pricing Tables for existing individual claim files.*** For individual claim files, users will need to go to the individual claim and manually update to the current Global Pricing Table. Please see the steps listed below for that action:

  Open the desired claim.

  Click to display either the Building, APS or Contents Estimate Information Window.

  Select the Database Icon from the Information Window.
  

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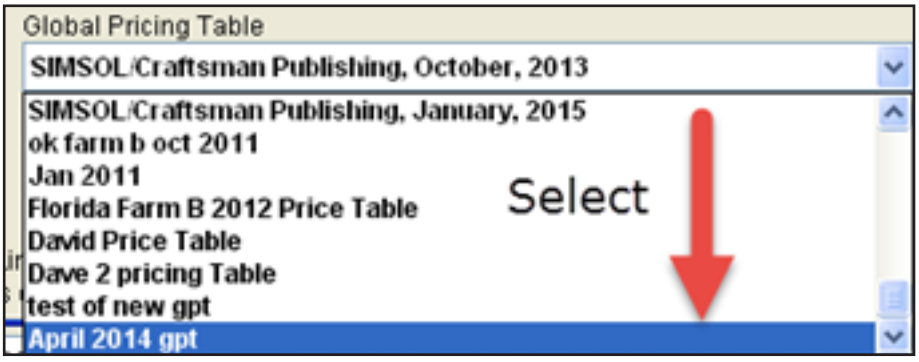
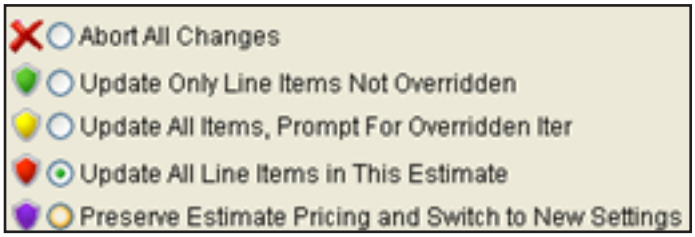
**AUTO (PRICE & PROGRAM) UPDATES INCLUDING UPDATED DRAWERS**

- From the Global Pricing Table Selection Window, click the down arrow on the Global Pricing Table and select the new updated (GPT).



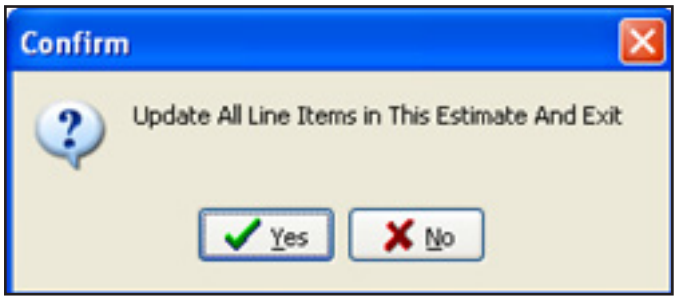

Excerpt for the GPT Selection Window

- From the Global Pricing Table Window, select the desired options to update, i.e. Update All Line Items in This Estimate.




Excerpt from the Global Pricing Table Selection Window

- Select Done located in the upper right section and click on Yes from the Confirm Window.




- The Location and Mark-Up Factory Entry screen will be displayed to verify the correct regional location factors. Click "Done" to accept the entry.

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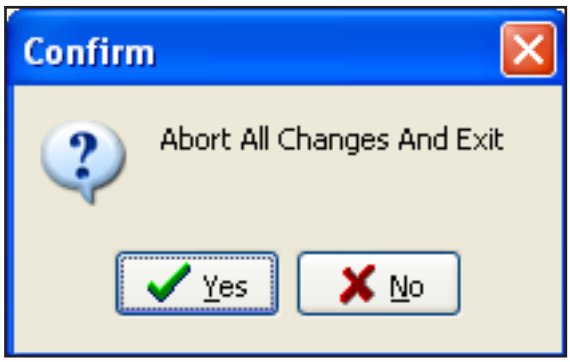
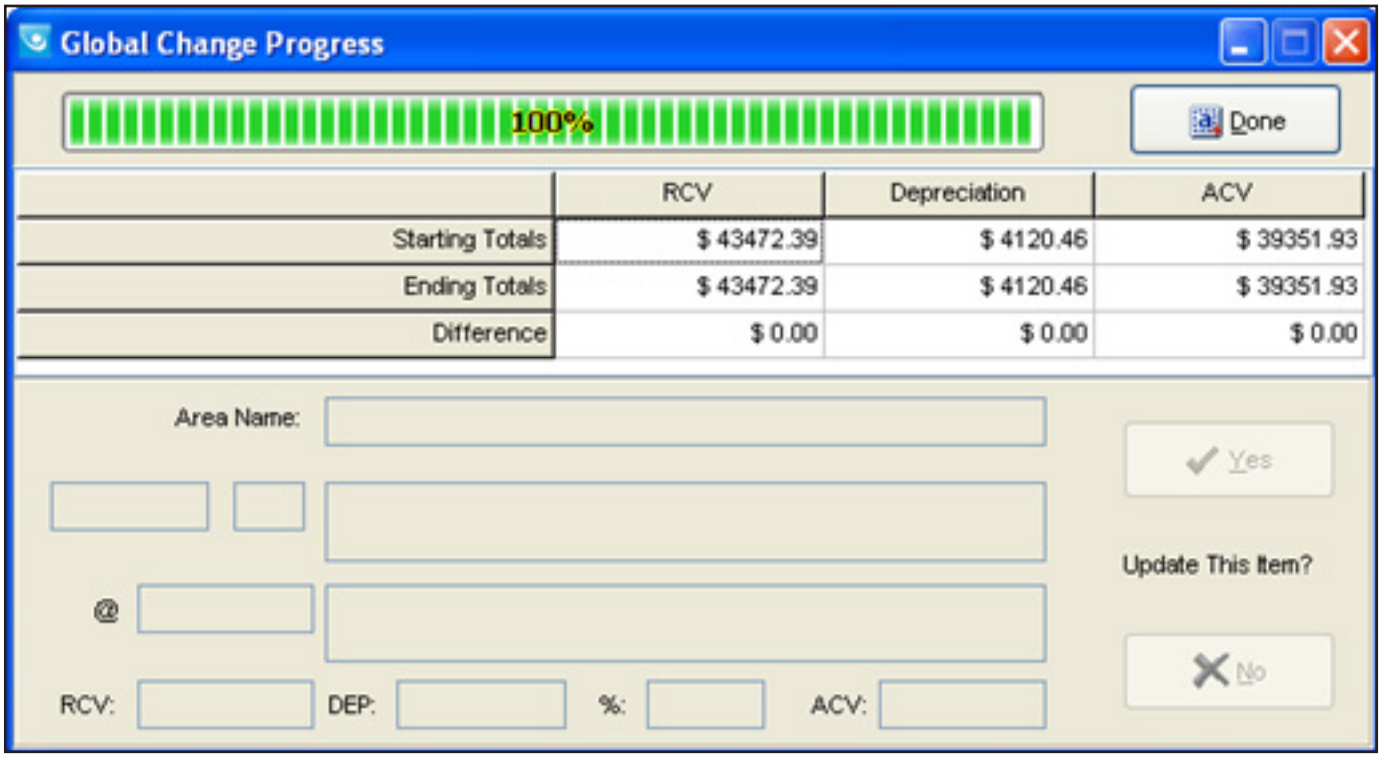
**AUTO (PRICE & PROGRAM) UPDATES INCLUDING UPDATED DRAWERS**

***Special Note: If the location factors remain the same, the user will receive an "Abort All Changes and Exit" confirmation screen. Click "Yes" to accept.***




Abort All Changes And Exit Screen

- The Global Change Progress Window is then displayed. Click "Done" to accept the changes and exit.




Excerpt of Global Change Progress Screen

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**INTERNET WEB-BASED BROWSER INTERFACE USING CLAIMSWIRE**

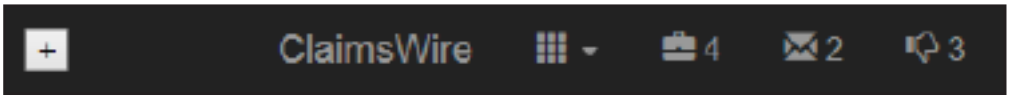
The new SIMSOL 6.0 incorporates a new ClaimsWire (CW) browser, built into the Estimating Program. When connected to the web, the CW browser will display at the bottom of the main Claims Grid. This immediately alerts the Adjuster of a new Claim Assignment or Revision Request on an existing claim.

There are two separate claim notifications within the SIMSOL Program using ClaimsWire:

- ClaimsWire Service located in the adjuster's system tray on the bottom right of the screen where the date is displayed. When a claim is assigned by CW to the adjuster, the icon of the Globe will change to display a pair of eyes to signify a new ClaimsWire file is ready for download.

Example of New Claim Arrival Assignment

- The second notification to the adjuster is a new internet browser built right into SIMSOL 6.0. notifying the adjuster they have received a new claim and have a diary item due or previous packets that were rejected and needed correction.




Example of New Browser Embedded into the SIMSOL Program

The suitcase icon represents new claim assignments, the envelope represents diary items due or received messages, and the thumbs-down icon represents rejected packets on previously submitted claims.

***Special Note: This notification bar cannot accept claims into the SIMSOL program, however, it is a visual indication that a claim is awaiting for import.***

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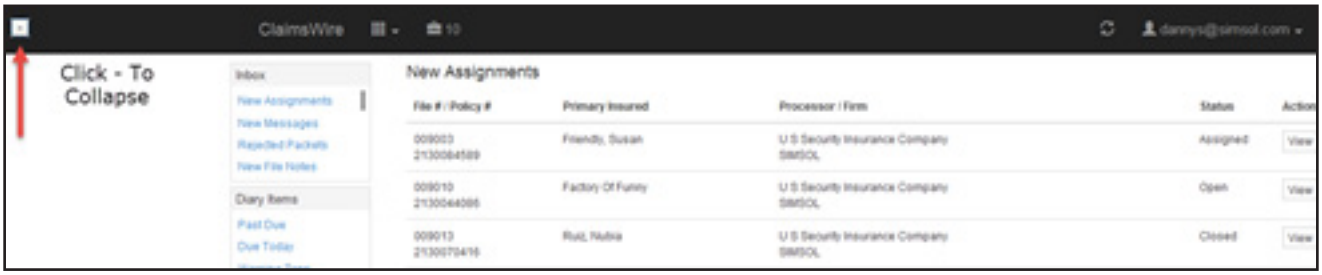
**INTERNET WEB-BASED BROWSER INTERFACE USING CLAIMSWIRE**

- SIMSOL's browser has the ability to expand showing New Assignments, Messages, Rejected Packets, File Notes, Diary Items (Past Due, Due Today, and in Warning) and Claim Status (Open, Closed, and In For Review).

- To expand the browser window left click + icon located the left corner of the browser window.




Example of SFA's Browser Expanded

- The Adjuster now can see the full status on all claims while in the SIMSOL Program. Status includes: New Assignments, Rejected Packets, Diary Items, Messages, and Claim Status.

- In the expanded view of the browser, the adjuster can select the topic (i.e. Past Due Diary Items) which brings up all claim past due diary items that need status reports or closings. Click the View icon on the claim to see the Diary specifics.

| Description | Status | Due |
|---|---|---|
| Closing Packet Due | PAST DUE | 07/13/2013 |
| Preliminary Report Due | COMPLETED | 05/19/2013 |

Example of Past Diary Due

- This is an exciting new feature for SIMSOL 6.0 which gives the adjuster in the field a full adjusting picture of all currently working claims.

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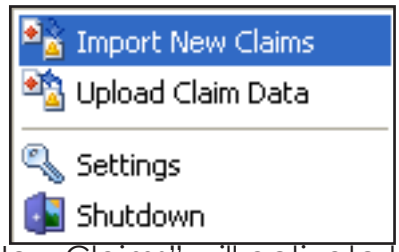
- Accepting Claim Assignment using ClaimsWire by the adjuster.

- The adjuster now has been notified of a new claim assignment by means of the two methods listed above. The adjuster now needs to import the claim into their SIMSOL program and work the claim. As stated in the ClaimsWire overview, this is a simple Two Click operation by clicking the ClaimsWire Import Icon located on the lower right of the Windows SYS Tray.

Right click on the Eye Ball icon to show the drop-down screen.




Clicking "Import New Claims" will activate the import screen.

Excerpt of ClaimsWire Import Screen

- Click the Import Icon located bottom left of the ClaimsWire Import Screen

in order to complete the import task. ***Special Note: By default, the claims imported into the Simsol For Adjusters Program (SFA) will be placed in the "Inbox" Drawer.***

***Hint:*** Use the Select All icon and Move To icon to move the new claim assignments to the desired drawer to work the claim. Instructions on this topic can be found later in this manual.
***Special Note:*** Adjusters have 24 hours to Accept or Reject all CW generated assignments. After 24 hours, CW notifies management of all delinquent claim assignments which can be re-assigned to the same adjuster or other adjusters handling claims in the area. Claim assignment notifications will also be emailed to the Adjuster in the field. It is important to accept the claim assignment from CW within the 24-hour period or risk losing the assignment.

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## CREATING AND SENDING CLAIMSWIRE PACKETS

What is a Packet? A Packet is a cluster of documentation specifically attributed to the type of pre-determined group being submitted by ClaimsWire, i.e. Prelim Packet, Final Packet, Advance Payment Request and others.

**Please note, for the existing Claimswire Users, you need to be aware of a new procedure in receiving new claim assignments and sending up packets.**

The "Up and Down Arrows" located in the previous versions of SIMSOL have been removed. The new procedure is to use the SIMSOL ClaimsWire Service to import new claims and export packets by right clicking on ClaimsWire "Globe" located next to the "date and time" on the SYS-Tray Please follow the steps listed below to upload a Packet from SIMSOL 6.0 to ClaimsWire:

The Adjuster completes his inspection and is ready to send the Preliminary Report to the Adjusting Company for approval and submittal. No more e-mail bog downs and pdf's misplaced by the Adjusting Company or if the Adjuster knows that the Preliminary Report was even accepted by the Adjusting Company. ClaimsWire solves all these problems effortlessly. Follow the instructions below in completing this task:

1. Create a Preliminary Report in SIMSOL 6.0.

2. Import and label your photographs as needed for the Preliminary Report.

3. Select Global Print from the claim menu.

4. Global Print Screen is displayed.

5. Select all required documentation needed for the packet, i.e. NFIP Preliminary Report and Digital Photos and move to the "Selected Print Items" window. Hint: Do not forget to select the images from the "Images Available" screen to the "Order of Printed Images" screen.

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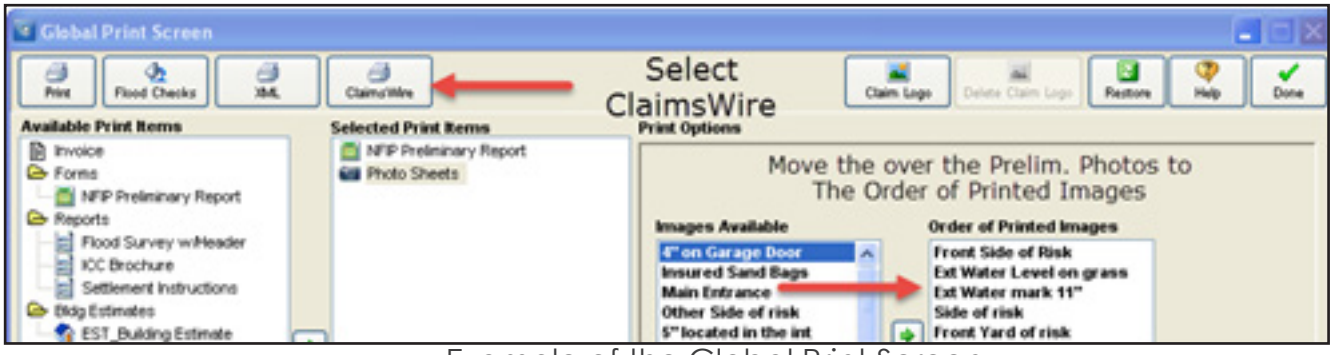
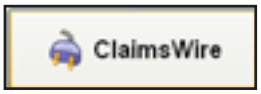
## CREATING AND SENDING CLAIMSWIRE PACKETS




Example of the Global Print Screen

6. Select "ClaimsWire" 

icon from the Global Print Screen Menu.

7. Click the down arrow and select "Preliminary Report."

8. New "Audit" Screen runs the Audit function in the background.

9. Audit will not upload the packet if the Audit finds any issues for the submitted type of packet, i.e. Prelim Report.

10. Fill out any Comments or Description pertaining to the Preliminary Report.

11. Select "ClaimsWire" icon to continue to the next screen.

12. Preliminary Confirmation Screen is then displayed - click Yes

to accept.

13. Right Click located lower right corner of the SYS-Tray (Hint: where the time field is located).

14. Select "Upload Claim Data."

15. ClaimsWire Attachment Upload Screen is then displayed.

16. Click "Upload Now"

to complete the task.

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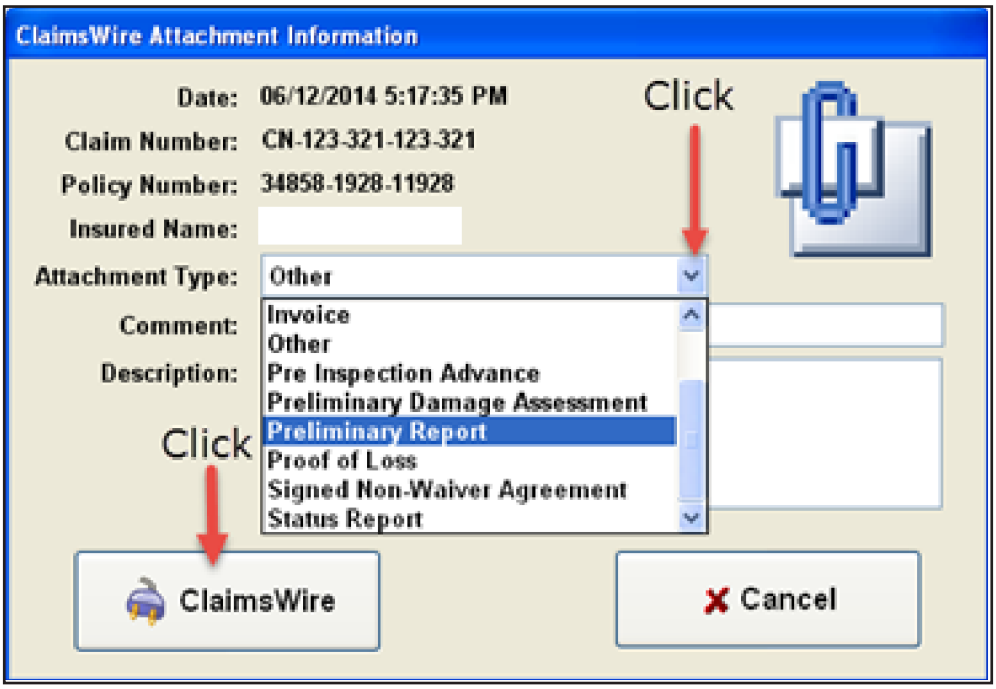
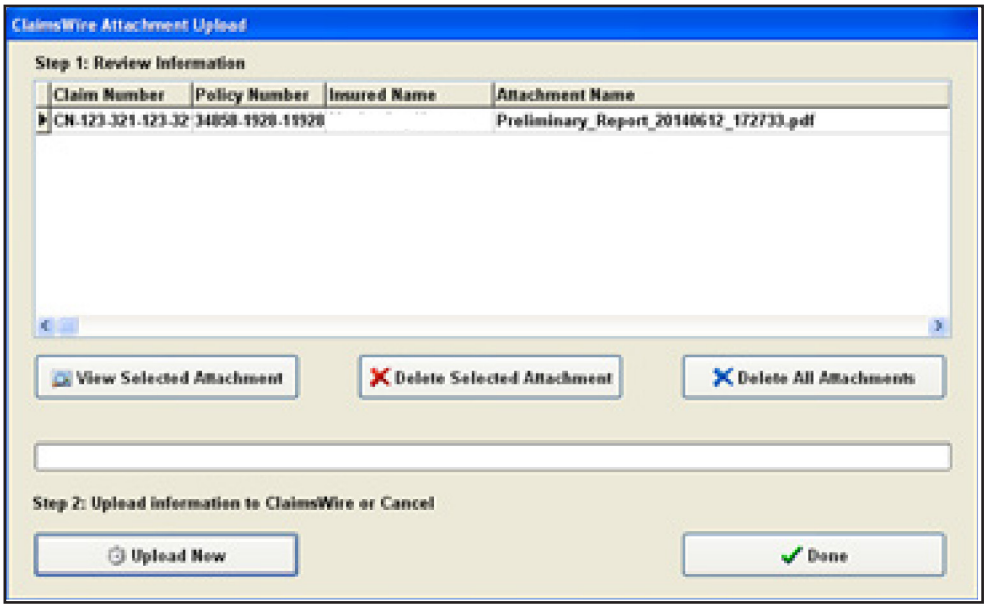
## CREATING AND SENDING CLAIMSWIRE PACKETS

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**THIRD PARTY INTERFACE WITH SIMSOL 6.0**

SIMSOL has developed import functions to work with Third Party Vendors including, Pictometry and Geo Estimator for Area Roof Dimensions; Building Estimate Vendors such as Xactimate or Symbility; along with Personal Property Vendors such as Encircle or Enservio.

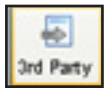
SIMSOL 6.0 can take any Third Party Estimate and create a Statement of Loss while also populating all the required forms and attaching the Third Party Estimate to the Simsol Claim. SIMSOL 5.0 did have the ability to import Geo Estimator XML files for Roof Area Creation, but not Pictometry. The new SIMSOL 6.0 version has added Pictometry to be imported as well. The following steps will illustrate how to import all reports.

- The steps are exactly same to import Geo Estimator or Pictometry reports into the SFA System:

  Order the report from Geo Estimator or Pictometry. It is imported to request the XML and PDF file, or the *import function will not work*.

  Click Scope of Damage from the Claims Enclosure Tree.

  Select the Area of Roof from the menu.

  Click 3rd Party Icon 

 from the Roof Dimensional Calculator Screen.

  Click the down arrow and select Pictometry from 3rd Party Roof Screen and click OK.

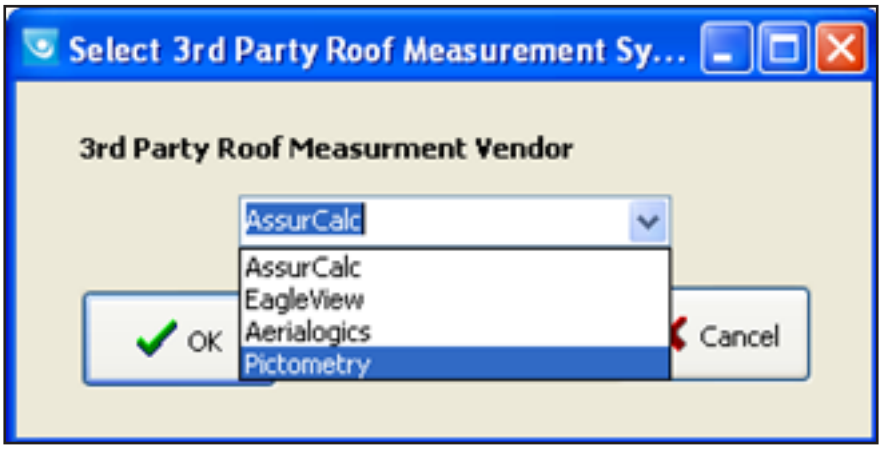



Image of the 3rd Party Roof Measurement Screen

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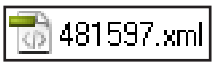
**THIRD PARTY INTERFACE WITH SIMSOL 6.0**

The browser screen is displayed, and users select the directory where the XML file is located 

and click "Open".

The Roof Dimensional Calculator is populated with all the areas associated with the roof.

**Remember YOU must Adjust for Waste Factor before leaving this screen.**

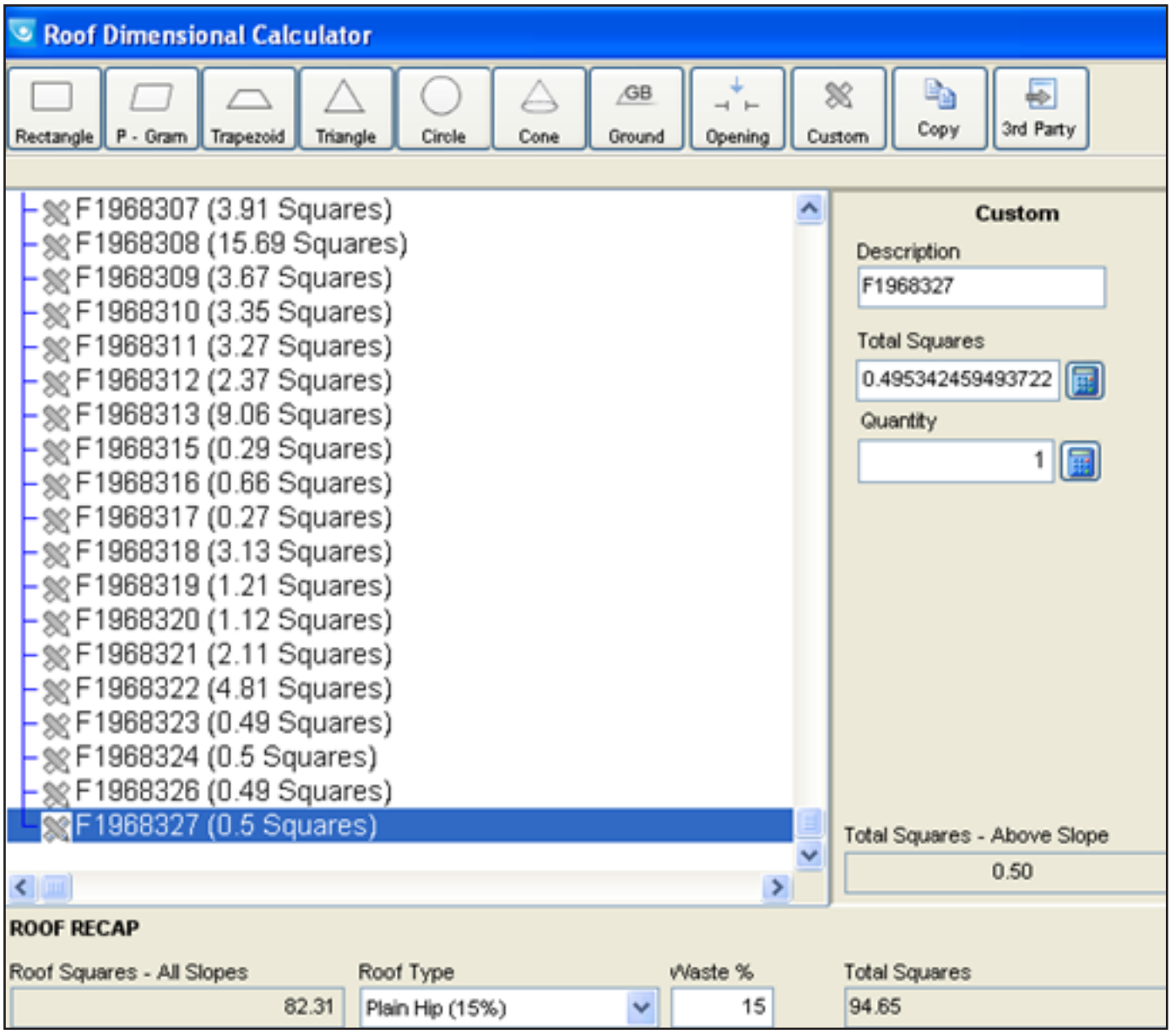



Image of Roof Dimensional Calculator

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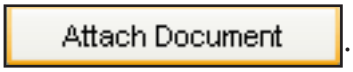
**THIRD PARTY INTERFACE WITH SIMSOL 6.0**

- Click "Scope" and proceed to write your scope for the Roof.
- Add the PDF file to the estimate by using the Attachment Function.
- Click the Attachment

icon to create a new attachment.
- Click "Attach Document" 

.
- Browser Window is then displayed and select the PDF provided by Vendor (Pictometry).
-

Click Open to import the report into SIMSOL 6.0.
- The PDF Report may be displayed for Review and acceptance. Click "Done" to finish.

SIMSOL 6.0 can import Third Party Building Estimates such as Xactimate or Symbility. There are a number of reasons for this feature, but the main reason is if a Carrier or Adjustment Company using ClaimsWire for their management system, has amounts associated with the claim, it must be uploaded to the ClaimsWire System. This feature provides this action if the adjuster has SIMSOL and (Xactimate or Symbility).

- Click Import Estimate

from the Scope of Damage Menu.
- Estimate PDF Import Screen is displayed and select Open File icon from the menu.
- Locate the Third Party PDF Estimate and select it by clicking "Open".
- Enter the Estimate Name

- Enter the Estimate Numbers from the Third Party Estimate such as Total Replacement Cost (RCV), Total Depreciation (DEP) and Total Actual Cash Value (ACV).
- Once completed, click Import

to complete.

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**THIRD PARTY INTERFACE WITH SIMSOL 6.0**

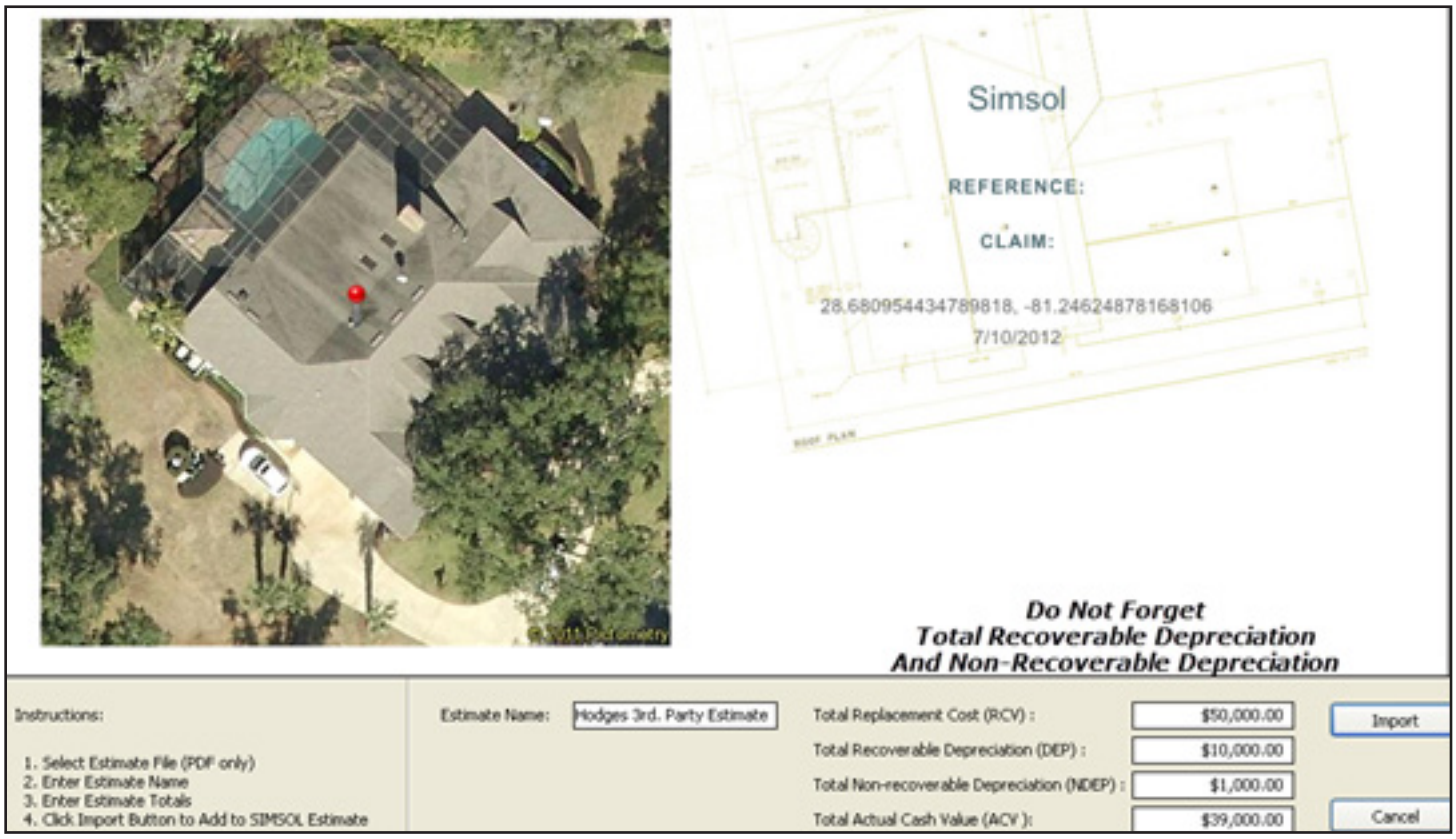


Image of Third Party Import Estimate Screen

SIMSOL 6.0 also can import Third Party Estimates from Personal Property Vendors such as Encircle or Enservio. Please note, it is the same steps for importing as covered in the building portion listed above.

- Click Import Estimate

from the Scope of Damage Menu.
- Estimate PDF Import Screen is displayed and select Open File icon from the menu.
- Locate the Third Party PDF Estimate and select it by clicking Open.
- Enter the Estimate Name

- Enter the Estimate Number from the Third Party Estimate such as Total Replacement Cost (RCV), Total Depreciation (DEP) and Total Actual Cash Value (ACV).
- Once completed, Click Import

to complete.

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**PROGRAM ENHANCEMENTS**

Program Enhancements: SIMSOL 6.0 is packed with new program enhancements which will improve the productivity and ease of use for users in producing a professional Claim/Estimate to be submitted to the Carriers and Clients. Program Enhancements were developed based upon requests from User Forum Groups and social media outlets. Please see the following enhancements listed below:

- New Camera Module Feature:

  An automatic feature will detect a Windows-Based Tablet Operating System.

  The automatic feature enables the user to take all or selected photos in the field using the built-in camera from the Windows-based tablet.

    In a SIMSOL 6.0 Claim File, the Camera Icon is displayed in the top claim icons when a tablet or laptop is detected, and when selected, all photos will be placed in the Digital Photo Section of SIMSOL.

    Users have the ability to take a single picture and then apply a File Name and Description before posting to the claim file. The user then Clicks "Accept" to import the digital photo to the claim file.

    The user may use the Multi-Digital Photo Option by simply clicking the Red Camera Icon located on the right side of the screen. Please note the user can provide the description of the photos after the photos have been imported into the claim file.

  The ability to assign a Room Name prior to the Photo being taken.

    The user clicks the Gear icon that displays an Area Name listing screen. A user then assigns the Area Room Name and SIMSOL remembers the Area Name for all future pictures until the user changes the name.

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**PROGRAM ENHANCEMENTS**

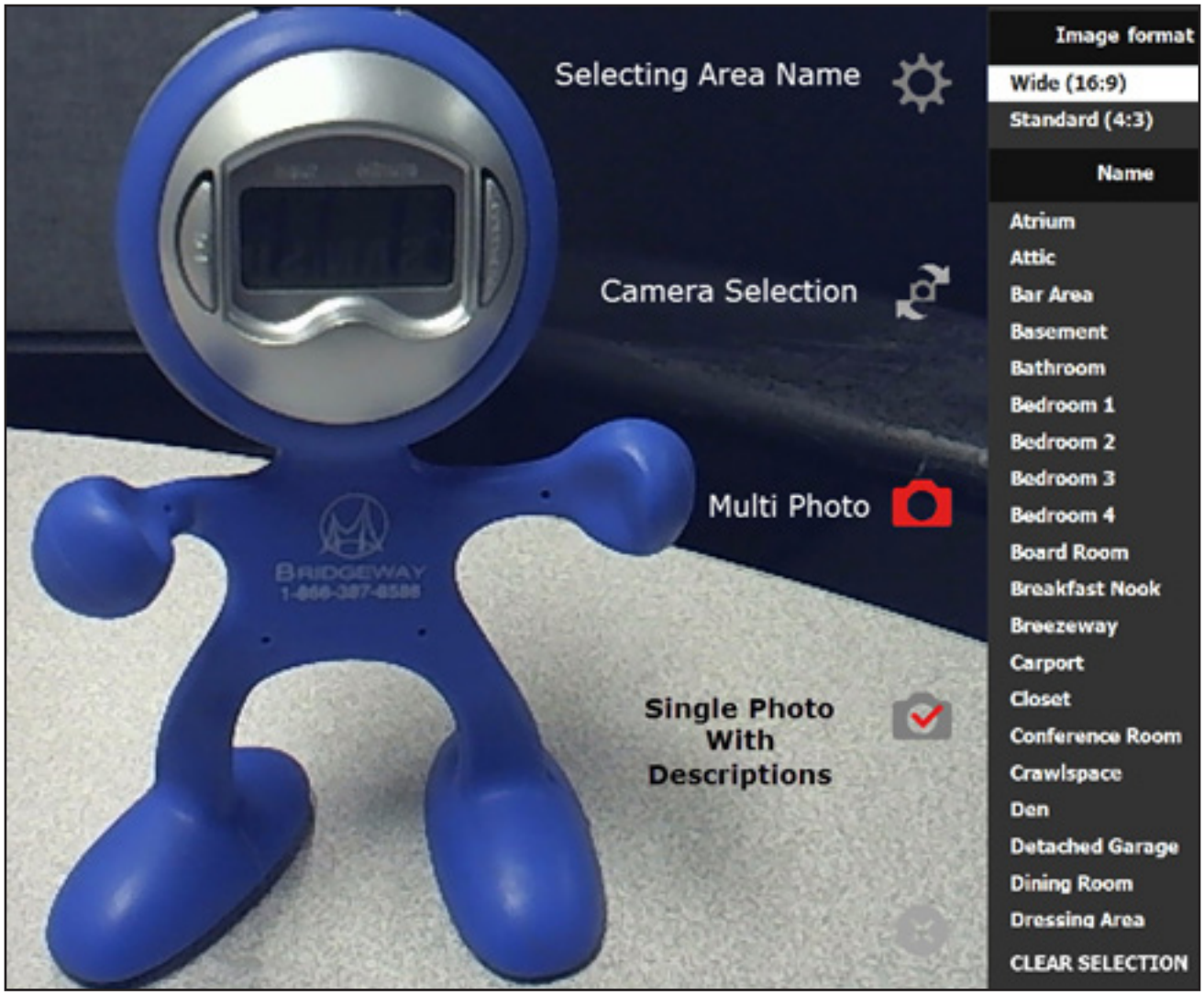


Image of Windows Tablet Photo Module

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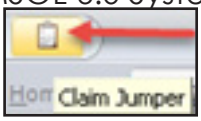
**PROGRAM ENHANCEMENTS**

- Claim Jumper Feature:

  Claim Jumper is a new feature that affords users greater efficiency in handling multiple claims at the same time. One click inside your Simsol Claim File, a Claim Jumper screen will appear to allow users to search and add time-stamped notes to any claim without having to exit the claim being prepared.

  The user has the ability to multi-task claim assignments by working on a claim/job file when a different insured called needing to provide additional information pertaining to their claim/job. The User may then create a date-stamped note in the claim file about the call without ever leaving the claim file they were currently working on.

  How to use Claim Jumper:

  From any location in the SIMSOL 6.0 System click the Claim Jumper Icon located top left of screen. 


  Claim Jumper Screen is displayed.

  User may just scroll down and find the Claim/Job and left click to see date-stamped history of the file.

  With a large number of claims in the SIMSOL 6.0 System the user may simply use the Search Field located at the top the screen.

  User may fill out any field such as Policyholder, Claim Number, Our File Number, Date of Loss. **Please note**, more fields selected the smaller the search results display.

  Date of Loss Field has a Calendar Icon that displays a full year calendar as well as a clear function using the icon.

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**PROGRAM ENHANCEMENTS**

Image of the Calendar Screen

- Once the Claim/Job file is located, click to display "Claim History" and "Notes" associated with the claim.

Excerpt of Claim Screen

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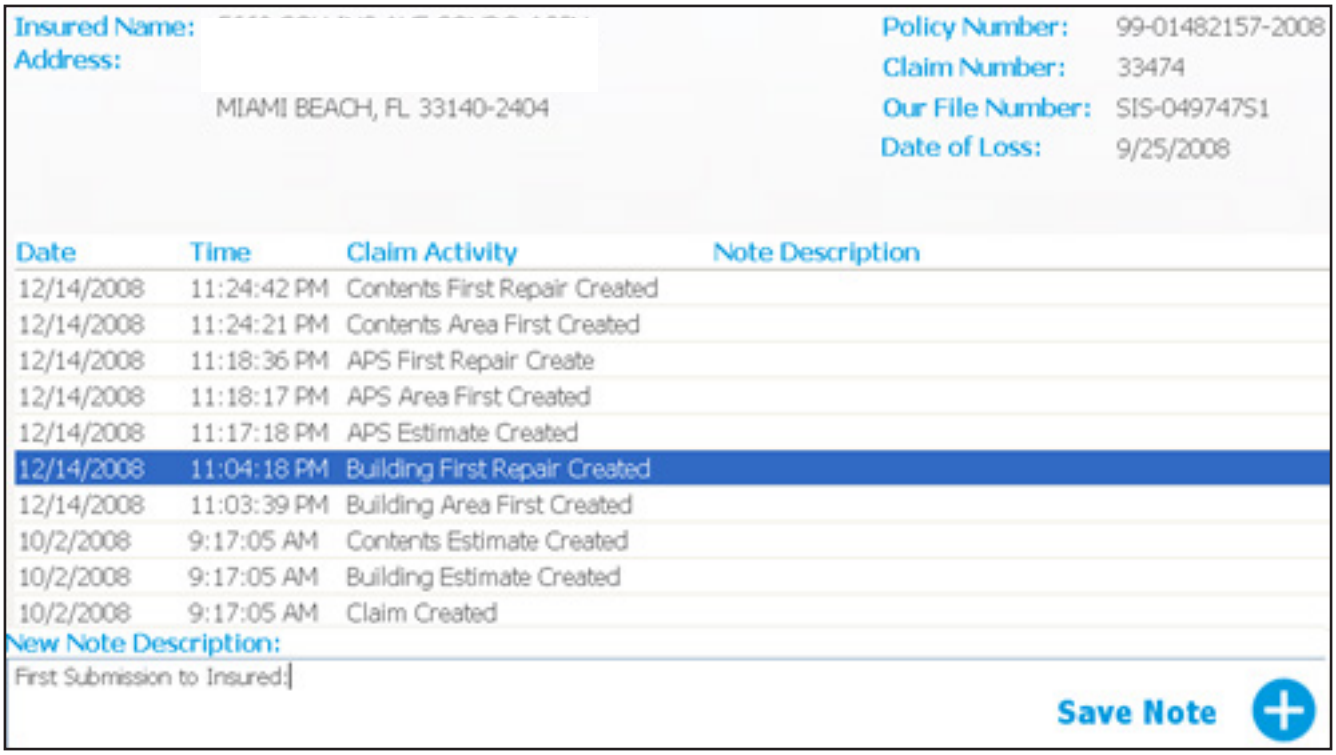
**PROGRAM ENHANCEMENTS**




Excerpt of Claim Jumper History /Notes Screen

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**PROGRAM ENHANCEMENTS**

- Auto Claim Close Functionality with Close Date Preference Feature:

  Based upon the original file creation date, SIMSOL 6.0 has the ability at startup to check and see if this claim should have been closed.

  The system will close the claim automatically if it exceeds the days of service set by the user in the System Preferences Screen.

  Advantages of setting this option:

  Keep Days of Service Reports in perspective.

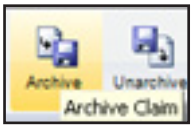
  

  Prevent Activity Report (Open/Closed) from being out of order, due to a claim that was not closed by the Adjuster/Contractor.

- Added File Size Estimator Archive Dialog Screen.

  Requested by our users to illustrate approximate file size when archiving a single file or batching multiple files together.

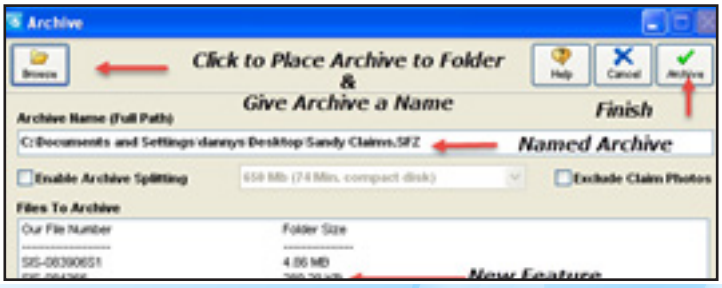
  Navigate out of Claim/Job and on to the Claims/Jobs Grid.

  Click "Archive Claim" 
  
  Icon from the "Main Menu".

  Click Browse to locate desired location of Archive File.

  Name Archive File and Click "Open".

  Click "Archive" from the Archive Window to complete the task.
  

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**PROGRAM ENHANCEMENTS**

- Claim/Job History with Tracking and Printing Feature:

  SIMSOL 6.0 has an improved Claim/Job History that is Time-Stamped that can be expanded to accept Notes for:

  Important Dates, i.e. Date Inspected, Date of Loss, Date Received, Date Closed, Appointment Date, and others.

  Photos Added – Time-Stamped when new photos are imported into the SFA System. A note can always be added to this category.

  Drawing Added – Time-Stamped when any new Sketch/Diagram is created along with a unlimited notes pertaining to the Sketch/Diagram.

  Form Added – Time-Stamped for any creation of New Forms along with unlimited Notes.

  Report Added- Time-Stamped for any creation of New Report along with unlimited Notes.

  Scanned Docs Added – Time-Stamped for any creation of New Scanned Documentation along with unlimited Notes.

  Additional Estimate Added – New Additional Estimates, either Building or Contents, created by the system will be Time-Stamped and can have Notes assigned to the History Section.

  Additional Estimate Areas – Any new Areas Created by the users will be Timed-Stamped, i.e. Bedroom and others, along with any new Notes can be created and assigned.

  All Activity Logs will have a Time-Stamp along with the ability for a new Note.

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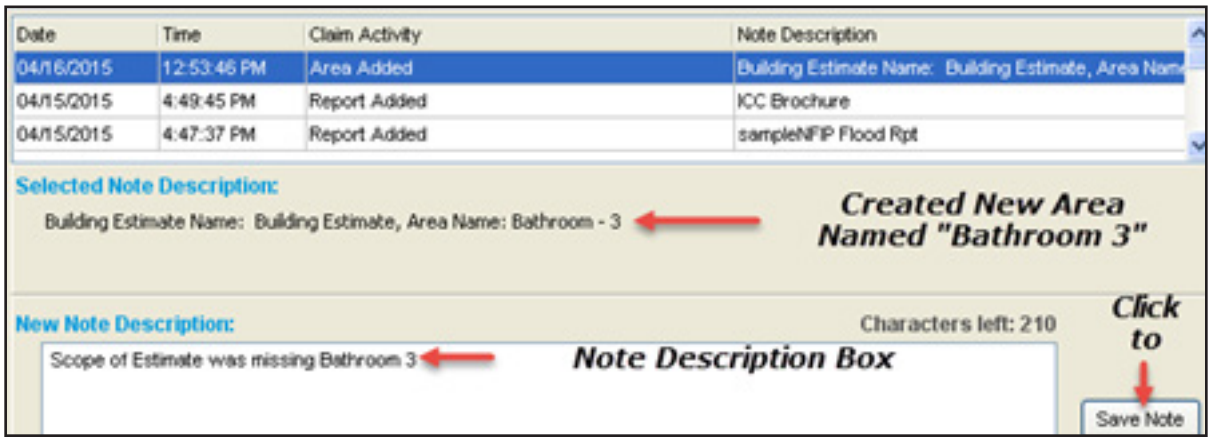
**PROGRAM ENHANCEMENTS**




- Adding a Note directly from Claim History Section:

  Select Claim History from the Claims Enclosure Tree.

  Find and Select (Click) the Claim Activity to be associated to the Note.

  From the "New Note Description" Field Box typed the new note.

  Click "Save Note" to add the note to the system. **Please note**, this procedure is exactly the same for all Claim Activities from "Important Dates" to Activity Logs mentioned above.

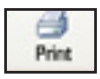
- Printing Claim History Report:

  The Claim History Report is associated to the "Global Print Screen"

  Click Global Print Screen from the Claim/Job "Main Menu"

.

  From the Available Print Items select "Claim History" and either move it to the Selected Print Items Field Box or simply click the Right Arrow located center screen between the two Print Items Field Boxes .

  Click Print Icon 

to either print to the selected printer or create a PDF document.

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**PROGRAM ENHANCEMENTS**

- Enhanced Milestones Assigned to the Claim/Job:

  Milestones have replaced the "Important Dates" Icon and Screen in SIMSOL 6.0.

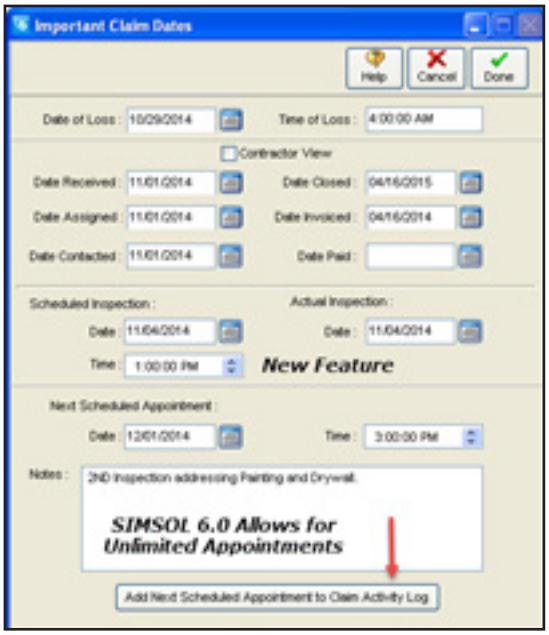
  Milestones is linked to the Claims Diary Section of the program which notifies the adjuster for upcoming events that will need their attention. Contractors and Adjusters benefit from this enhanced feature.

  Simsol is a Date-driven program which triggers the diary system to activate, i.e. Scheduled Appointment, Date Inspected and Date Closed.

  Simsol's new "Milestones" feature also will track the Adjuster/Contractor appointments and "Actual Inspection" date which clears the "Scheduled Appointment" Milestone.

  Simsol has a Contractors View for Milestones by just selecting Contractor's View from the "Milestones Claim Dates" Screen.

  Milestones screen enables the user to set unlimited appointments pertaining to the claim/job. Once created, it will appear in the Claim/Job Diary section of the program.




Milestone Important Date Screen

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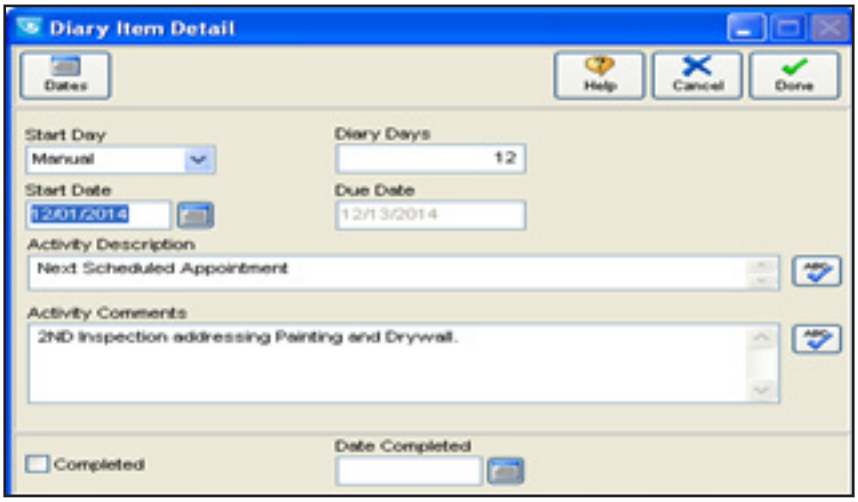
**PROGRAM ENHANCEMENTS**




Diary Item Detail Screen

- Milestones Using ClaimsWire Utility:

  ClaimsWire Management System (CW) works seamlessly with the new SIMSOL 6.0 version. Dates placed in the "Milestone Important Dates" Screen are then applied to the Dates section of the CW Program with the Auto Diary function for CW is instantly updated.

  Any claim which was issued by Claims Wire will have a special Milestone Date Screen. The Adjuster will have the ability to review and set the various Milestones in the SIMSOL 6.0 System and Claims Wire Program will be automatically updated.

  Adjuster can insert first "Inspection Scheduled" date along with any Milestone Note.

  Adjuster can insert Actual "Inspection Preformed" date along with any Note.

  Estimate Complete  date that sent for initial review to the  Adjusting Company.

  Date of first "Insured Contacted" along with any Milestone Note.

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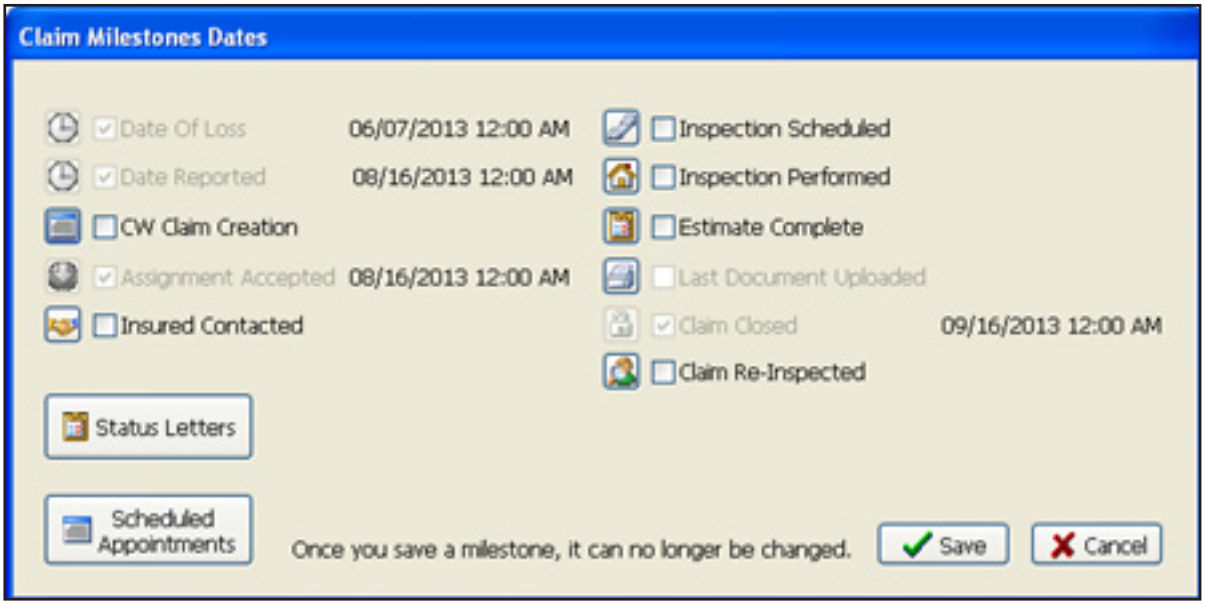
**PROGRAM ENHANCEMENTS**

"Status Letters" sent to the Carrier can be tracked and time-stamped along with any Notes.

Date for "Claim Closed" can be inserted along with a Milestone Note.

"Claim Re-Inspection" Date can be inserted and tracked.

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**PROGRAM ENHANCEMENTS**

- Appointment Mapping and Scheduling Using 3rd Party Mapping Software:

  SIMSOL 6.0 now has the ability to provide loss information to 3rd Party Mapping Software such as Google Maps, Bing and others.

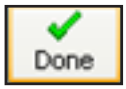
  Obtains information stored in the Milestone Screen, such as Appointment Date.

  Steps for Mapping Appointments for the Days Inspections:

  Select Claim /Job File to enter appointment date.

  Click "Milestones" from the Loss Information Screen.

  Select and Input Appointment Date and any other relevant date information.

  Click Done 
  

  Exit out of the Claim/Job File and select another File and repeat the steps listed above for assigning an "Appointment Date" from the Milestone Screen.

  Select Tools from the Main Menu of SIMSOL 6.0.

  Select "Map Appointments"
  
  from the Sub Function Menu.

  Upcoming Appointments Window is displayed showing all appointments for the week.

  Click all Appointments for the day's inspection.

  Fill out your current location with Street, City, State and Zip.

  Click "View Upcoming Appointments" Icon.
  

  **Please Note:** No Driving Instructions available for this feature.

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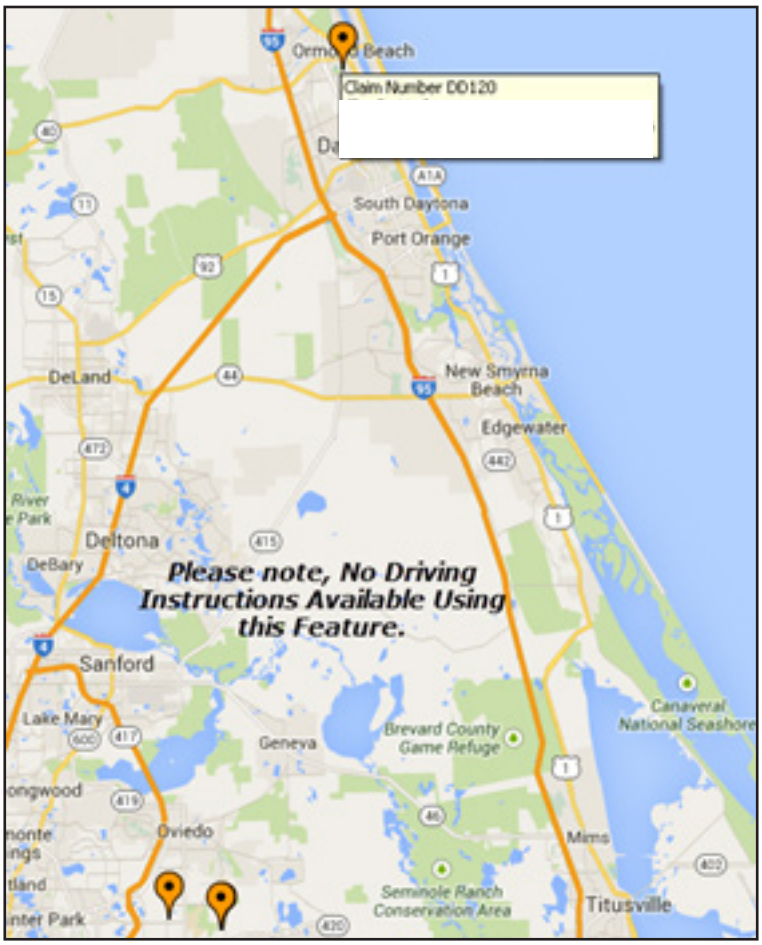
**PROGRAM ENHANCEMENTS**

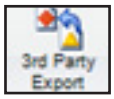



Excerpt of Google Map from Appointment Screen

- Mapping Turn by Turn Directions Using "Mapping Export"(3rd Party Export)

  SIMSOL 6.0 has the ability to provide export data to 3rd Party Mapping Software such has Delorme, Streets & Trips and a brand new Web-Based Application called "Mapquest Route Planner". These programs can work on Windows-Based Tablets and provide Turn-by-Turn directions using a G.P.S. device.

  Steps for using Mapquest Route Planner:

  Main Menu select 3rd Party Export 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**PROGRAM ENHANCEMENTS**

Mapping Export Screen is displayed, use the Selected Drawer Options and select desired drawer, i.e. Storm Drawer.

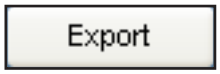
Select the Application for Mapping, "Map Quest Route Planner".

Expand the contents of the Drawer by selecting the icon.

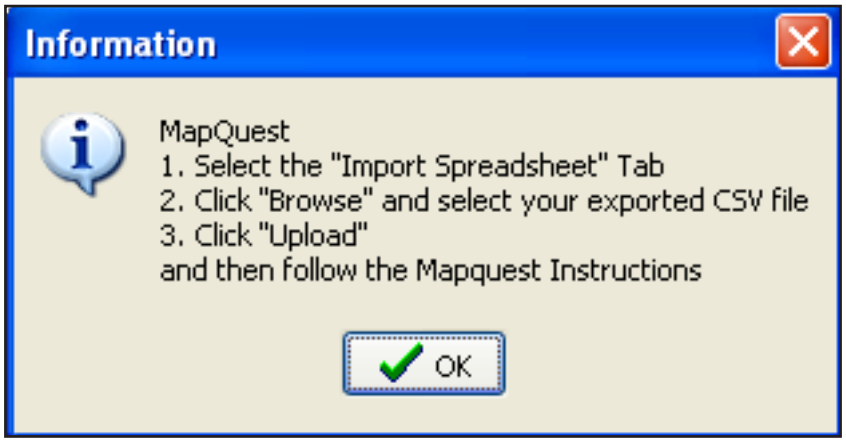
Select all Claim/Job Files for today's appointments.

Excerpt of Mapping Export Screen

Name the Export file or use the default.

Click  Confirmation Information Window is then Displayed Click "Yes" to continue.



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**PROGRAM ENHANCEMENTS**

- The 2nd Information Window is displayed with Instructions to complete:

  Click OK which launch's "Mapquest Route Planner".

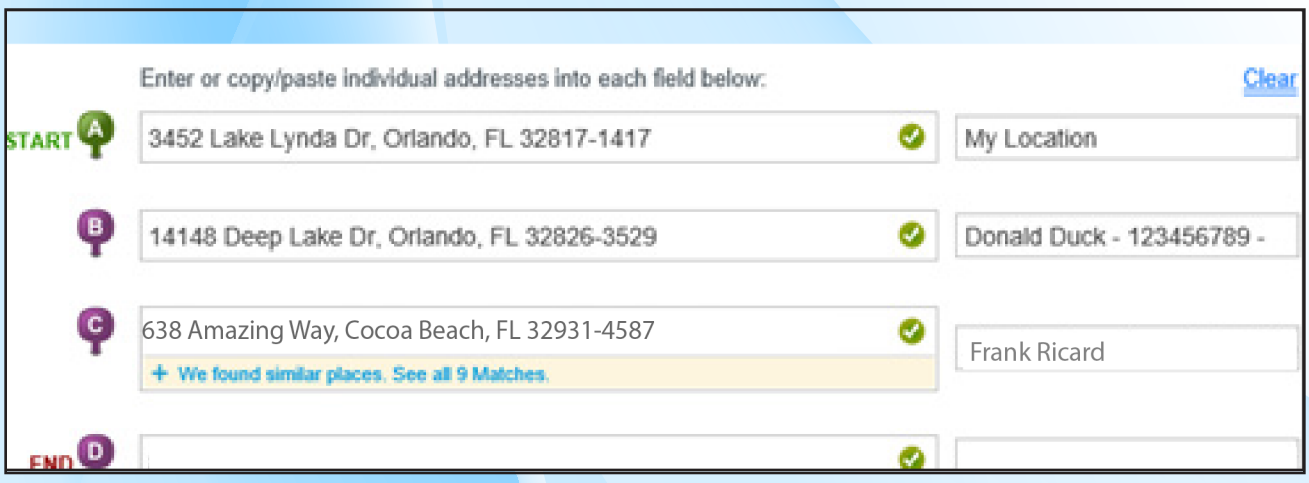
  Select "Import Spreadsheet" Tab.

  Select "Browse" and select your exported CSV file. The default is located in "Documents" folder.

  Click the "Upload" Icon.

  MapQuest Planner is displayed with the route for the day's appointments.

  Verify the "Start" and "End" location along with the various "Stop" locations in the middle. **Hint:** To move an individual "Stop" location, left click (holding down) your mouse and move the stop point to the desired location and release the mouse. This will move the original stop to the new location.




Excerpt of Mapquest Route Planner Import Screen

Click "Get Directions" to complete the process. Turn-by-Turn directions will be displayed along with a map with starting, stop and end points displayed by alphabetic letters.

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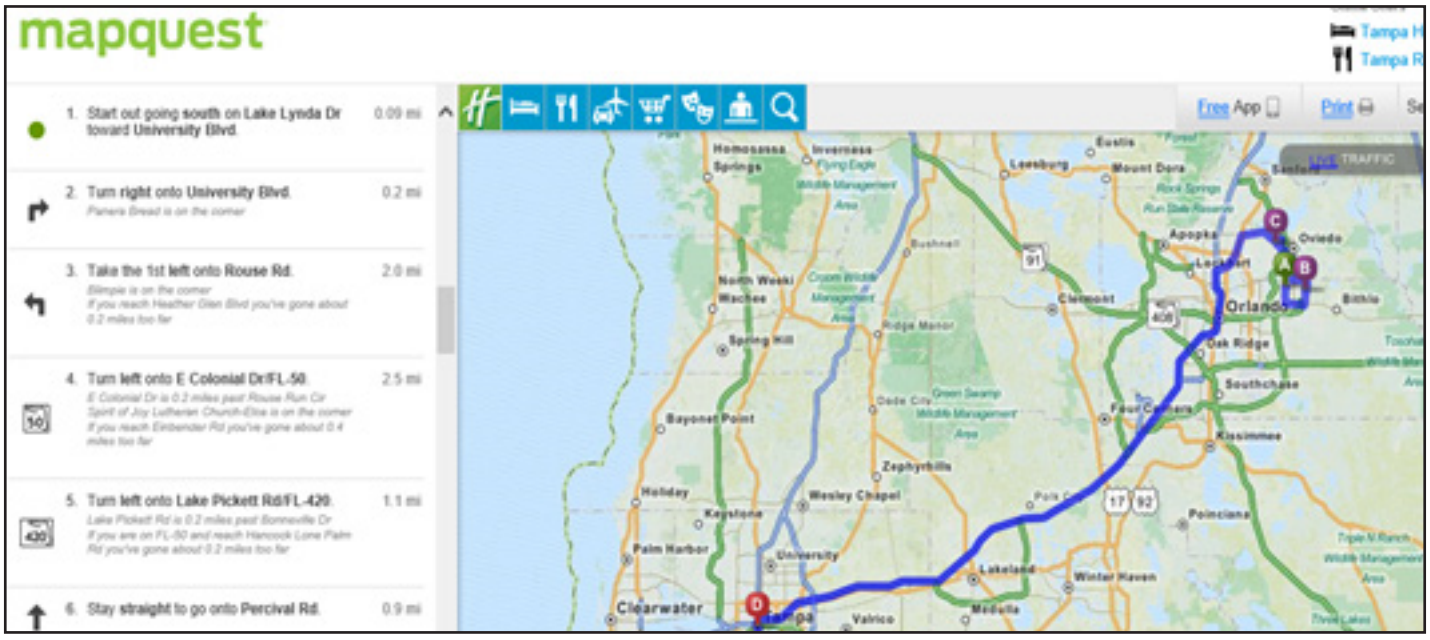
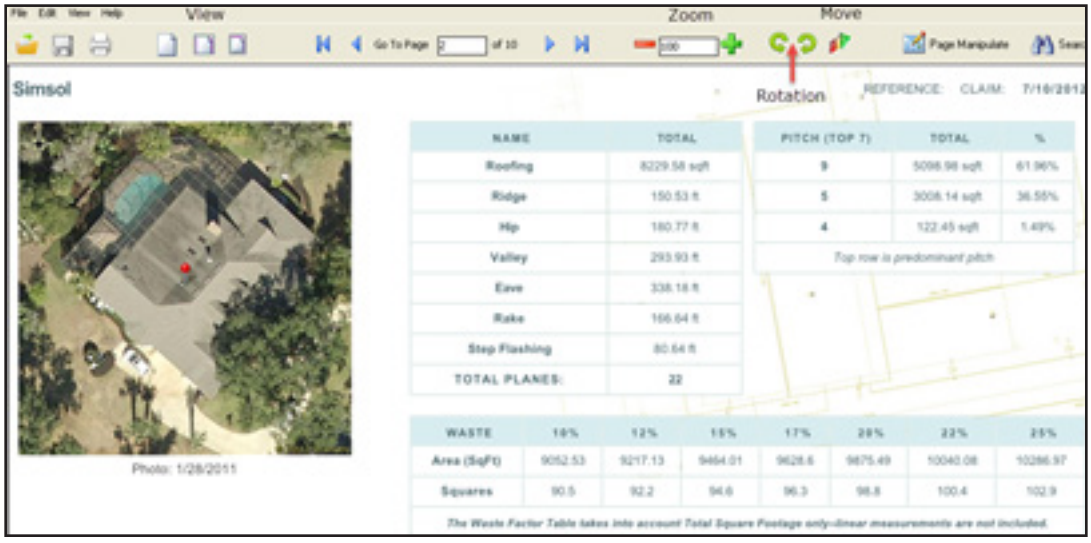
**PROGRAM ENHANCEMENTS**




Excerpt of Turn-by-Turn Directions along with Map

- SIMSOL 6.0 Incorporates New External PDF Utility:




This utility gives the user the ability to easily manipulate a PDF document with multiple editing tools including rotation (left and right), page manipulation, fit to screen, and page selection.

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**PROGRAM ENHANCEMENTS**

New External PDF Utility can combine multiple PDF documents into the current document.

The External PDF Utility works with the Attached Document feature in SIMSOL 6.0 when attached to the claim/job file.

PDF Utility corrects the previous PDF reader for rotation problems and in rare occasions blanking out content of the document to properly be displayed in ClaimsWire product.

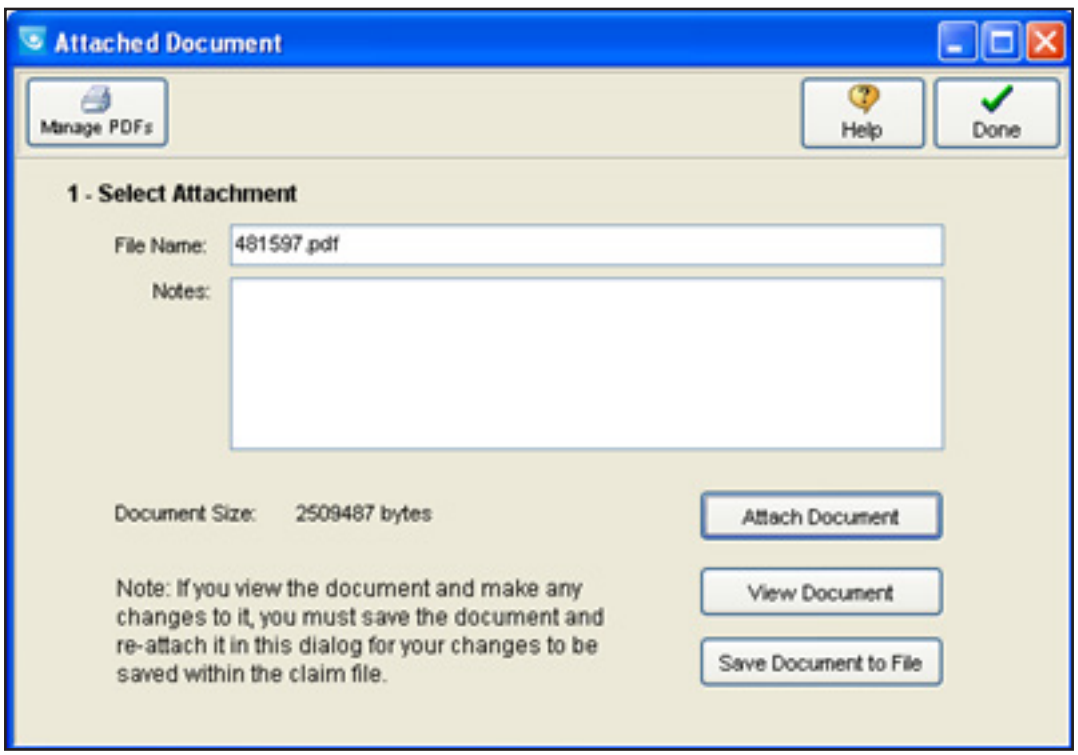
How to Use:

The PDF must be attached to the Claim/Job file, use the steps listed below:

User must be in a Claim/Job file, click "Attachment"

from the Main Menu or "Right" click the Attached Documents section of the Claims Enclosure Menu.


Drop down menu is displayed, click "New".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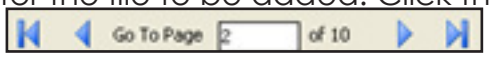
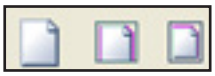
**PROGRAM ENHANCEMENTS**

The Attached Document screen is then displayed, click "Attach Document" to browse for the file to be added. Click the file and select "Open" to complete the import. 


The New PDF Utility Screen is then displayed.

Using the External PDF Utility:

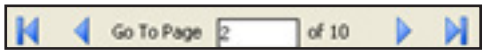
Excerpt of Menu System of External PDF Utility

View Tools: 

Actual Size

Fit to Width, shows document to the width of the page.

Fit to Page, shows document to fit the page.

Go to Page: 


User has the ability select any page for view or to edit.

First Page of the document. Last Page of the document.

Previous Page of the Document. Next Page of the document.

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**PROGRAM ENHANCEMENTS**

Zoom Tool:

PDF External Utility has to ability to zoom in but also zoom out, very beneficial when trying to read very small print or images in the document.

Zoom In Tool: Magnifies the document for viewing and increases when the Zoom-Up Icon is selected.

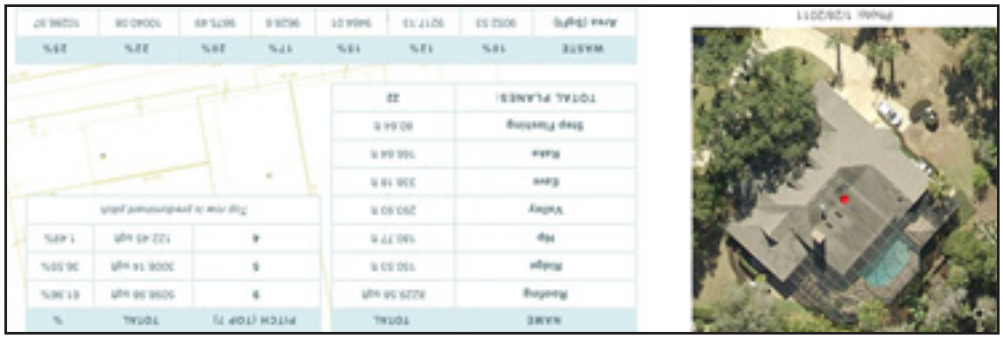
Zoom Out Tool: Shrinks the document down when the Zoom-Out Icon is selected. Please note, if the Zoom-Out Tool is multi-selected then the viewer will show multiple pages of the document in a condensed state.

Rotation Tool:

Sometimes portions of documents come into the PDF Viewer upside down or sideways. The rotation tool can select the individual page which is the wrong orientation and correct it by the use of the rotation tool.

Counterclockwise direction in 90 degree increments.

Clockwise direction of in degree increments.



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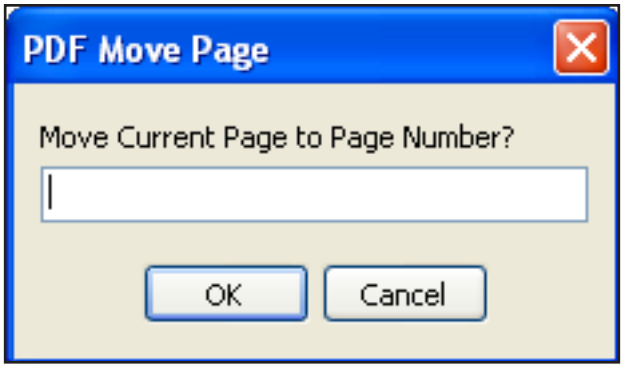
**PROGRAM ENHANCEMENTS**

Moves the current page to the selected page shown on the PDF Move Page Screen. Click "OK" to complete move.




Excerpt of the PDF Move Page Screen

Page Manipulate screen is back with state-of-the-art editing tools from Appending a page to Reversing the whole document from last page to the first page.


The Page Manipulate feature is divided into two main sections:

Left is the view side that shows how the document will look after "Merge and Save" has been selected.

Right column is the application side to select and make corrections to the document by either Append, Extract, Insert, Delete or Reverse.

Append: Gives the user the ability to add to the current document.

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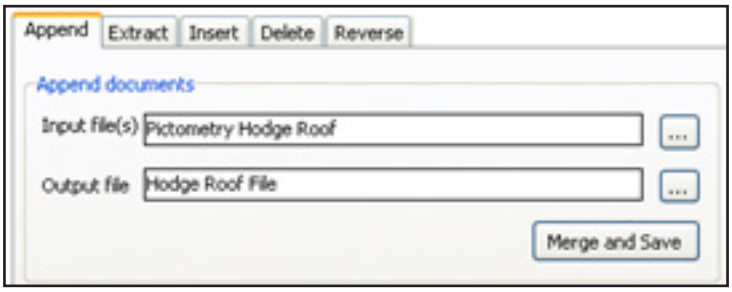
**PROGRAM ENHANCEMENTS**

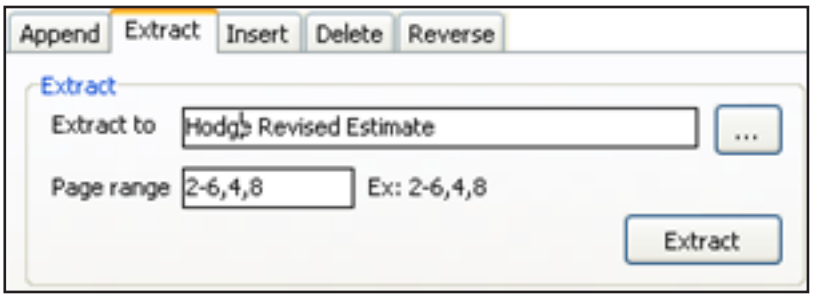



Excerpt of Append Screen

Select the file(s) to append to the current PDF file.

Enter a file name to save the merged document.

Click "Merge and Save." **Note:** Output document will automatically be displayed in the Viewer window.




Excerpt of Extract Screen

Extract: Gives the user the ability to extract the number of pages from the document.

Select the output file name of extracted pages.

Select the pages numbers to extract. **Hint:** 2-6, 4, 8

Click "Extract." Note: Original document with extracted pages will automatically be displayed in the Viewer window located on the left side column.

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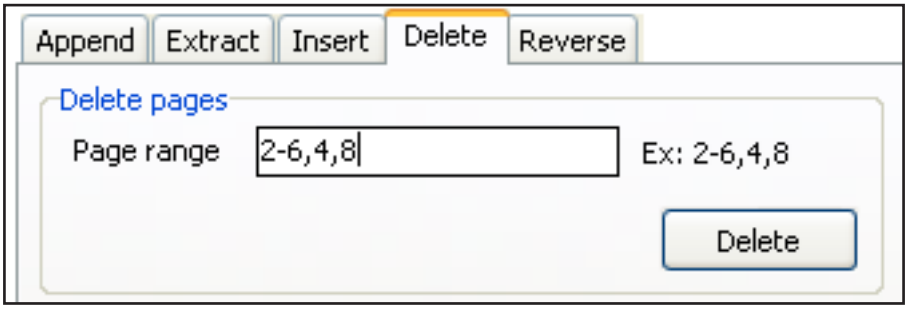
**PROGRAM ENHANCEMENTS**




Insert and Delete: Gives the user the ability to Insert Page or Delete Pages.

Select the pages to insert or delete and click "Insert or Delete" icon.

- Reverse will take all the document pages and bring them to the front to the rear as the name implies. Select the output file and select Reverse icon.
- **Hint:** If you make a mistake, just exit out of the view and try the process again. This is why SIMSOL prompts you for a new file name in order to preserve the original.

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**PROGRAM ENHANCEMENTS**

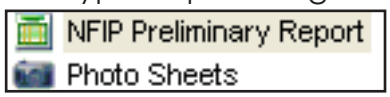
- XML Exporter for Third Party Claim Management Systems:

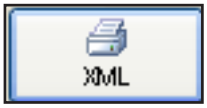
  One of the most sought after requests was to provide an XML file output for the "Preliminary Reports" and "Final Reports". The XML file is imported into Third Party Claims Management Systems, such as File Trac and many others on the market today.

  XML export is found on the Global Print Screen in SIMSOL 6.0. It is divided into "Packets." One for the "Preliminary Report" and the other is the "Final Report."

  Packets are pre-defined fields for that certain type of report generated. This file can then be imported into a Third Party Claims Management System. Please use the steps listed below to create this XML file:

  Click the "Global Print Screen" from the Main Menu.


  Select the file components for that type of packet generated, i.e.: NFIP Preliminary Report with Photos. 


  Select "XML" 


  XML Exporter Information Screen is displayed:

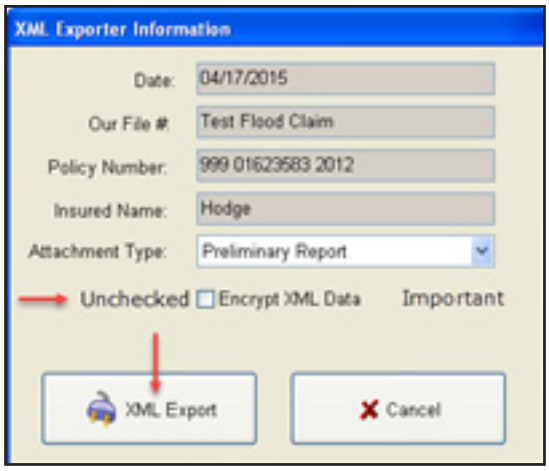



Image of XML Exporter Information Screen

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**PROGRAM ENHANCEMENTS**

Select Preliminary Report (Packet)

Important: Uncheck Encrypt XML Data. If not, the recipient program will not be able to open the file without an encryption key.

XML Export

to create the file.

Important: XML files are located c:\simsol\sfa\data\xml_output file.

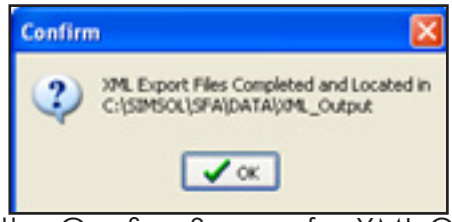

Image of the Confirm Screen for XML Out Creation File

To find and extract the XML files, exit out of SIMSOL 6.0.

Select Windows Explorer Program under C: Drive and find Simsol.

In the Simsol folder, Click "Desktop" folder followed by the "Data" folder.

Select "XML-Output" folder and two files are created with the name of the Claim/Job file:

PDF is for File Review and Claim Acceptance.

XML file is the import file which goes into the Claims Management Program or other Third Party Programs.

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**SUMMARY**

SIMSOL 6.0 has incorporated time-saving features targeted for Staff, Independent, and Public Adjusters along with Contractors in producing the easiest, most accurate, and professional claims and estimates. SIMSOL 6.0 now incorporates the use of the internet for automatic claim acceptance and submission of property, flood, and personal property type claims using ClaimsWire, our web-based claims management system. SIMSOL 6.0 also developed a Web Application interface browser for ClaimsWire on the SIMSOL 6.0 Claims Grid, which notifies the adjuster for incoming new claim assignments along with requests for claim revisions from management.

SIMSOL 6.0 enhanced its claim/job tracking notification system known as "Milestones" along with other important information and documentation about the claim/job by an enhanced history section. We accomplish this with a new feature called Claim Jumper which allows for effortless real-time communication on claim activity when used with ClaimsWire.

SIMSOL 6.0 now works with third party software developers to import customized XML files, i.e. Pictometry, for producing roof estimates, and also exporting customized XML files for NFIP Direct Flood Claims to the carrier. SIMSOL 6.0 can also import and apply third party reports from software such as Encircle or Enservio for personal property claim submittal.

One of the most significant features of SIMSOL 6.0, is the ability to create Multiple Estimates for Buildings inside one claim file. Adjusters and contractors can now create unlimited building estimates and tie them to insurance claims. Enhancement of our digital photo manager, along with a new touchscreen feature for Windows-based tablets brings a more intuitive feel to Simsol 6.0. In developing a new camera interface for use with a Windows-based tablet camera, we are offering technology for use in the field. These are just some of the new features in SIMSOL 6.0. We welcome your feedback in making YOUR SIMSOL the BEST ESTIMATING PLATFORM on the market today.

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## SUPPORT

There are a variety of ways to obtain support for Simsol 6.0. Please take a look at the options Simsol provides. We appreciate your business and look forward to helping you any way we can.

### WEB-BASED SUPPORT

FAQ | http://simsol.com/faqs-2/

Tender App | https://simsol.tenderapp.com/

Training Courses | http://simsol.com/training/

### EMAIL

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### PHONE

1.800.447.4676

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