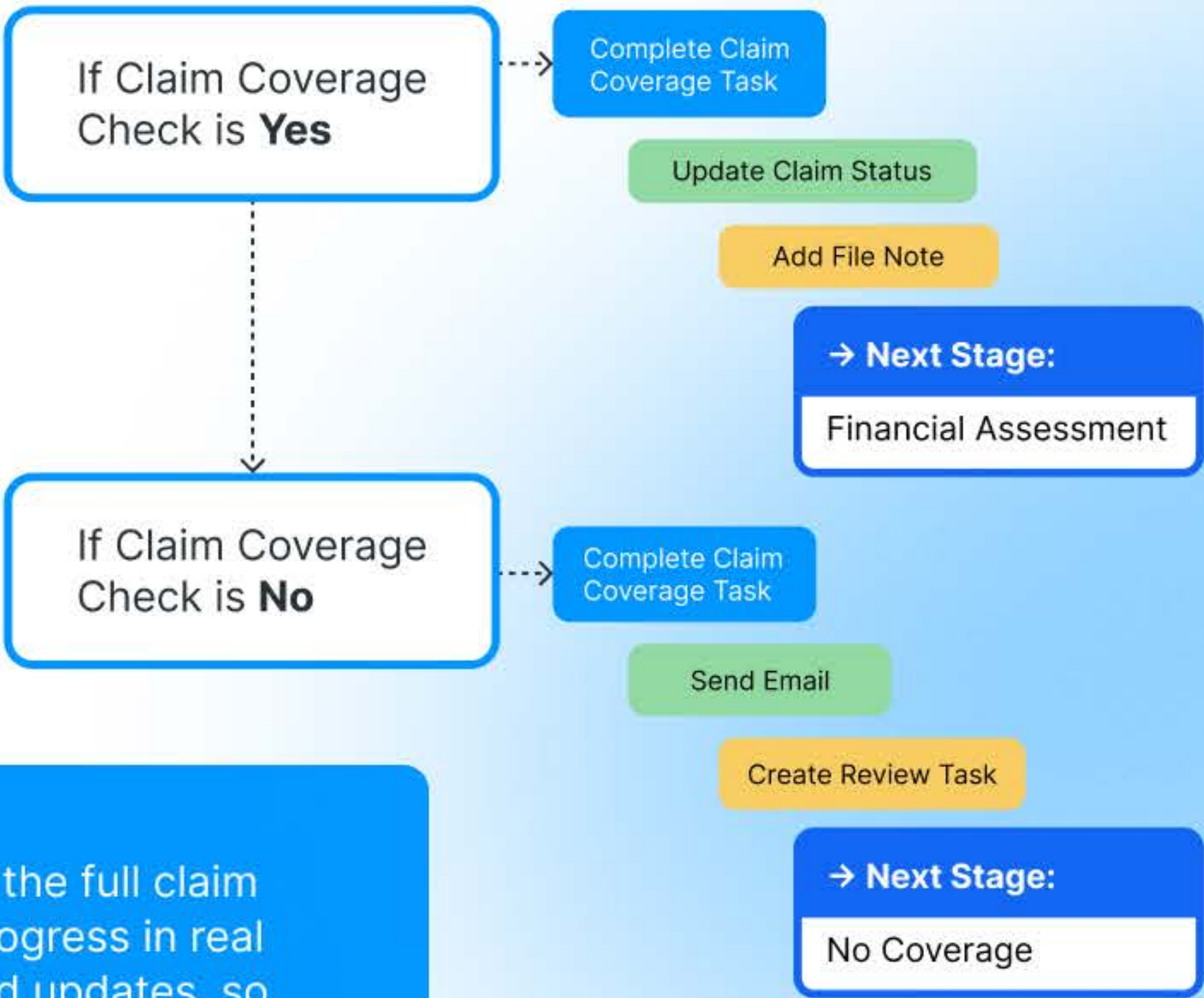


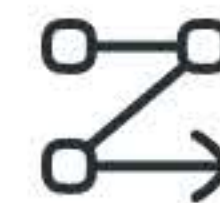
No-Code Workflow Engine

Execute with engineered precision, without engineering

A single claim requires dozens of small decisions as it moves through the lifecycle, and in legacy processes built on manual checks and data entry, those decisions compound fast. Simple automation keeps up with common scenarios, but stalls the moment a claim needs a nuanced reaction to what's actually happening in the file.

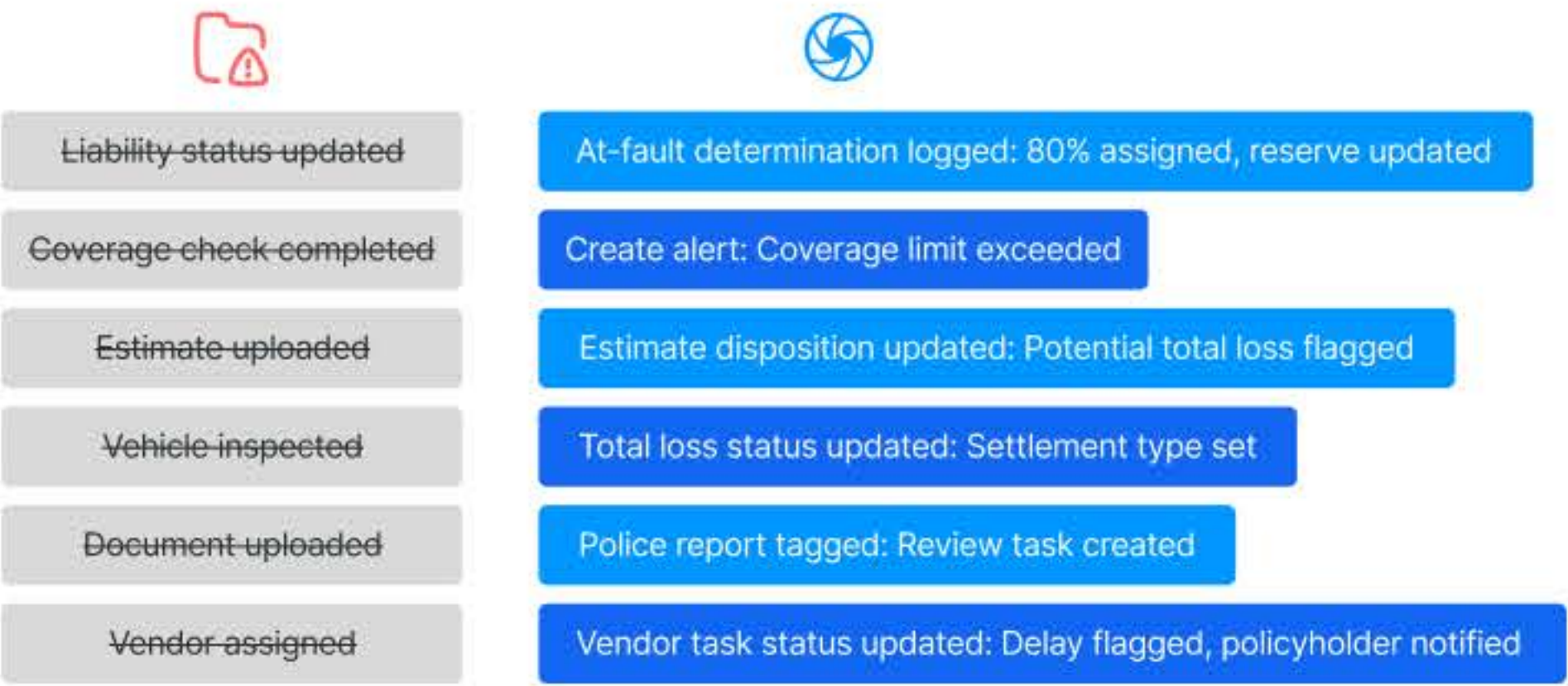


The Screenshot No-Code Workflow Engine automates the full claim lifecycle based on how claims change, update, and progress in real time. It reacts to the data itself, down to individual field updates, so one event triggers the right downstream action on every file.

	
Define logic down to the details Build and configure automations based on the data that drives claims: coverage limits, estimates, contents reports, approval thresholds, photo analysis, stakeholder communication, and document review.	Adjust conditions to adapt across LOBs Tailor workflows with simple if/then at the claim or exposure level to maintain precision even across complex dependencies, high-value losses, coverage overlaps, and multiple stakeholders.
	
Trigger multiple sequences from one event One milestone can send an email, fire a text, log a file note, update a field, and assign a task all within one workflow step. Coordinated action replaces chasing down data, sending manual follow-ups, and performing re-check after re-check (after re-check, after re-check...).	Take action without unnecessary intervention Workflows can initiate adding claim tags, updating data fields, logging file notes, creating tasks, and assigning vendors without an admin changing drop downs behind the scenes. Routine decisions don't have to wait for additional confirmation, and Global Events can apply critical business rules and compliance requirements across the board when there's no room for exceptions.

Track visual logic, not lines of code

Build automations with if/then logic and conditions that use the claims data, exposures, fields, tags, and rules that already live in your claims system. Admins review full logic sequences at a glance instead of parsing lines of code to figure out what happens and when.



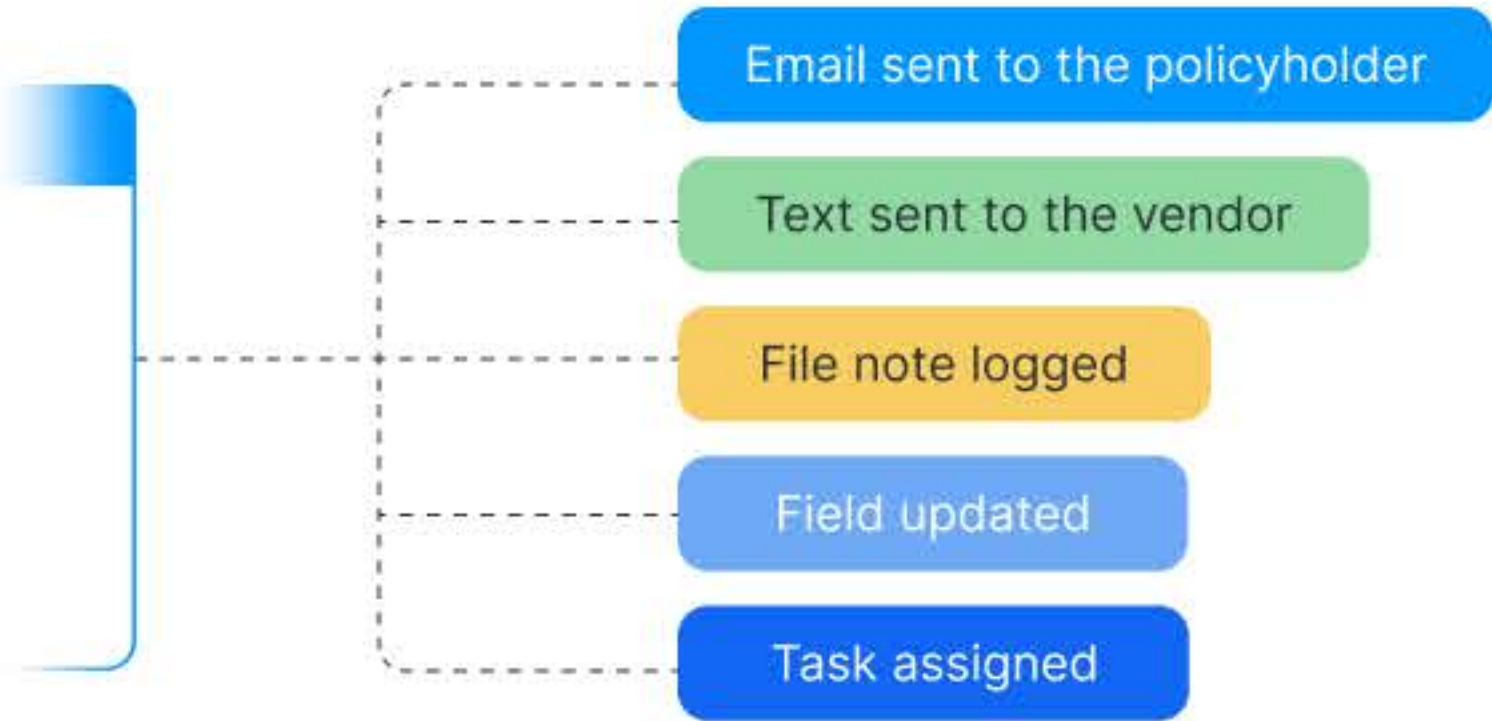
Nothing that happens in a claim sits in isolation

Automation has to react to both the obvious and what's between the lines. A coverage check can be completed, but if the workflow doesn't catch the limit is exceeded, an adjuster still has to step in and move the claim forward. Screenshot Workflows carries those reactions forward automatically via updating reserves, routing claims, assigning tasks, and logging file notes the moment the trigger occurs. Claims move as one continuous process instead of a string of updates someone has to piece together.

Trigger multiple actions in a single workflow step

An approved estimate creates real work: a policyholder to notify, a vendor to update, a record to keep. Each one can create risk for something to fall through.

Multi-action sequences fire the entire sequence at once from the same step instead of relying on manual orchestration (which only leads to delays). Actions fire together, reliably, even as volume increases.



Policy Lapse

Event Trigger

Claim Created

CONDITIONS

IF

Event Property

Policy Lapse Date

Operator

Has Value

Property Value

Yes

ACTIONS

Action Category

Dynamic Tags

Action Type

Add Claim Tag

Tag

Coverage Dispute

Keep compliance consistent where there aren't exceptions

Some rules can't bend regardless of what claims they're applied to. Individual rules can be applied to individual workflows when flexibility is needed; Global Events can be used to apply guidelines that don't change regardless of claim type, loss details, or data variant. Configure once and enforce them across the board, even when new workflows, fields, or rules are added.

Never let routine decisions sit in a work queue

Tags need editing, fields need updating, tasks need creating and assigning. When those steps wait on someone to notice and act, the claim waits with them. Snapshot Workflows applies tags, updates claim data, and creates and escalates tasks the moment a condition is met, so routine decisions move at the speed of the workflow, not the speed of someone's queue.

Edit Event

EVENT

Event Name

Payment Updated

CONDITIONS

IF

Event Property

Cost Type

Cost Category

Cost Type

Payment Type

Request Stage

Transaction Value

ACV Uploaded

Account Type

Operator

Is one of

ACTIONS

Action Category

Exposure

Action Type

Complete Exposure Task

Task Type

Issue Payment

Delete Event

Save Event

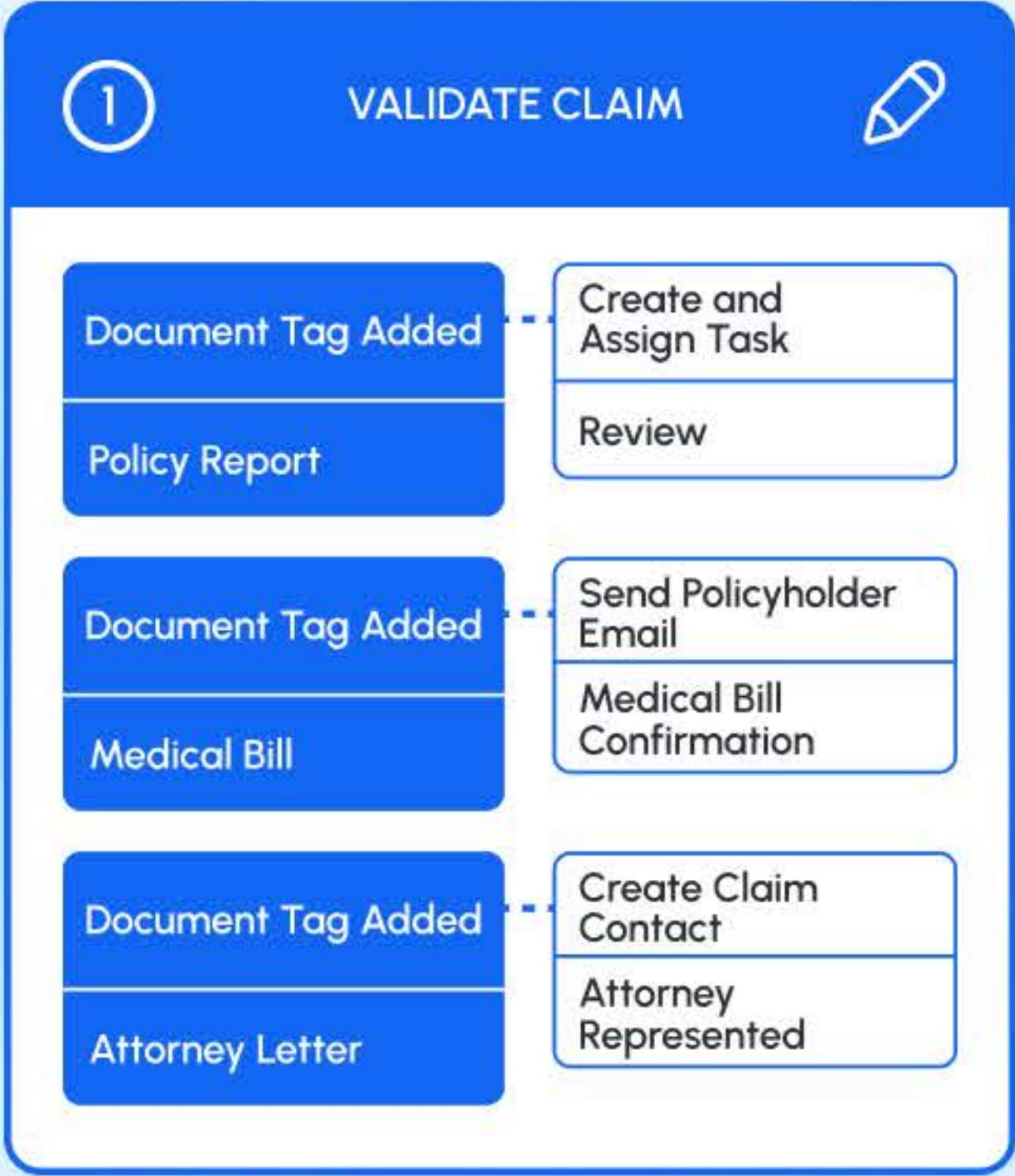
Operationalize AI directly in the workflow engine

Snapshot AI

Deploy AI Agents within the workflow builder to trigger actions behind the scenes, using the context, data, and directions you define through no-code prompt engineering. Agent outputs like claim health scores, true/false values, and liability percentages feed directly into if/then logic to alert adjusters, create and assign tasks like document review, or move claims to the next stage of a workflow.

Tag and take action on documents

The Snapshot AI Document Assistant Navigator analyzes documents the moment they're received, extracting and mapping data to the right claim fields for adjusters to accept, edit, or reject. As document types are identified, tags can be applied and used as workflow conditions to trigger the right next step.



Move claims forward with clear logic trails

AI Agents can instantly analyze claims for key determinations like fault percentage, and outputs can trigger the right next actions. Claims above a set threshold can trigger one sequence, while those below it follow another without requiring a separate workflow. Reviews get assigned, fields update to reflect risk factors, and claims are transitioned to the next workflow stage all within one automation.

