

Quick Access Panel

Put the actions adjusters use most in one-click range.

Adjusters juggle texts, emails, file notes, tasks, and constant claim updates (just to name a few) all throughout the lifecycle of one claim. When every move requires leaving the file, all that information gets scattered to the winds. Multiply it by 20 claims, and now your adjusters are spending most of their day just trying to track it all down.

Send Email

Exposure

Subaru Impreza 2013

Recipient

Phil Dunphy

To

pdunphy1224@gmail.com

Cc

Bcc

Subject

Claim #00000101 - Estimate Started

B i U A Templates & Drafts

Dear Phil,

We're just letting you know that an appraiser has been assigned to your vehicle, and an estimate is in progress based on the photos you submitted.

I'll send another update as soon as your estimate is complete or if I have any questions. If there is anything else I can help with in the meantime, please don't hesitate to ask.

Thanks,
Jane Smith
License No: 44-15678901
Snapshot Insurance

Would you like to set a follow-up?

☐ Yes ☒ No

Send

Snapshot Insurance

Claim: 231998741

First Party At-Fault

MedPay

Templates & Drafts

TEMPLATES DRAFTS

Search...

Internal

English (US)

Estimate Management

Estimate Received Communication

Customer - Estimate Started

Customer - Estimate Completed and Attached

Claim Received + Photo Request

Vendor Followup

Jamie Tart

Bodily Injury

The Quick Access Panel puts the actions adjusters use daily directly into their unified view. Log a file note, send a letter or text, manage emails and tasks, and monitor claim and exposure statuses from a single tab.



Stay in the file

Add notes, send communications, and manage tasks without opening a new window.



Act at the right level

Log notes, policyholder communications, and vendor updates to both the full claim and the right individual exposure.



Turn conversations into tasks

A follow-up toggle on a note, email, or text automatically generates a scheduled task to avoid missed deadlines or lapses in communication.



Get a fast look at claim activity

The QAP gives quick visibility into open and completed tasks, recent claim activity, and active workflows statuses so where a claim stands is evident in seconds.

Quick access = quick action

Add a note

Log a call, update, or note of context to a claim or exposure, and tag who's involved.

New Note

Exposure Note

File Note

Exposure

Honda Civic

Clear selection

Honda Civic

Type message here...

Would you like to send a follow-up? Yes No

Save



Send an Email

Send emails directly from the claim view. Draft messages on demand or create and store templates for common use cases.

Templates & Drafts

TEMPLATES DRAFTS

Search...

Internal English (US)

Collapse All

Estimate Management

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Vendor Followup



Mail a Letter

Launch preconfigured SmartComm letter templates and pick up saved drafts without losing progress.

Send Letter

Exposure

Honda Civic

Recipient

Snapshot

RECIPIENT ADDRESS

Country

United States of America

Address

500 W Madison St Suite 3110

City, State, Zip Code*

Chicago, Illinois, 60602

Print Options*

Color

Delivery Options*

USPS First Class



Update via SMS

Text a policyholder, vendor, or third party without leaving the claim. Schedule follow-ups that create a task automatically.

Send SMS

Exposure

Honda Civic

Recipient

Please select...

Country To

+1 5555555555

Select Template ->

Type Something...

Would you like to set a follow-up? Yes No

Send



Create and view tasks

Create, assign, and view tasks at the claim or exposure level with time stamps, comments, and automatic escalation timeframes.

Tasks

View

All + New Task

MY TASKS ALL TASKS HISTORY

CURRENT (2)

Followup Email to Sarah White

Today at 5:38 | Sean Jackson

UPCOMING (2)



Access event activity

Track the name, version, and current stage of any active workflow for a claim or any of its exposures.

Active Workflows

View

System User 081120210

View advanced history

Item	Item Type
Event	Claim Handler Assigned
Event	Policy First Saved
Event	Claim Tag Added
Action	Send Webhook
Action	Send Webhook

