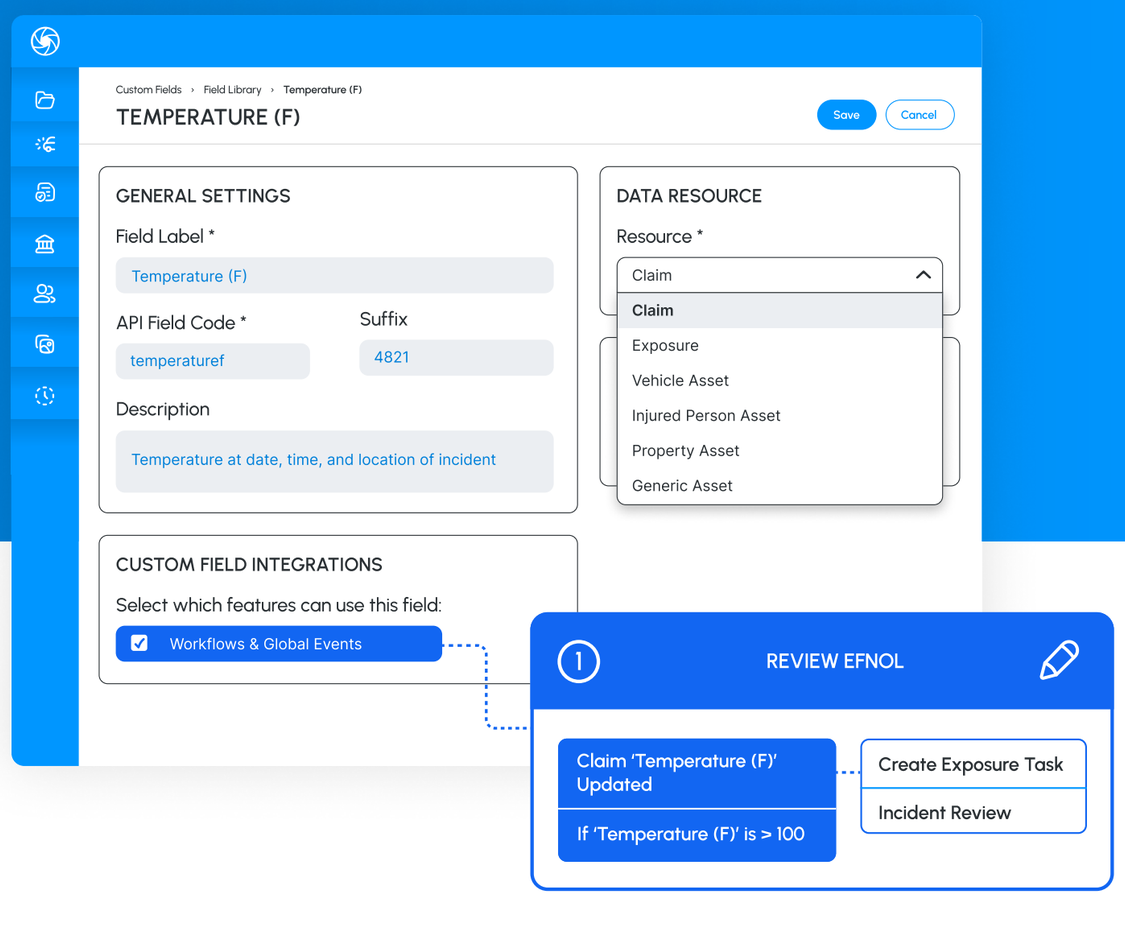
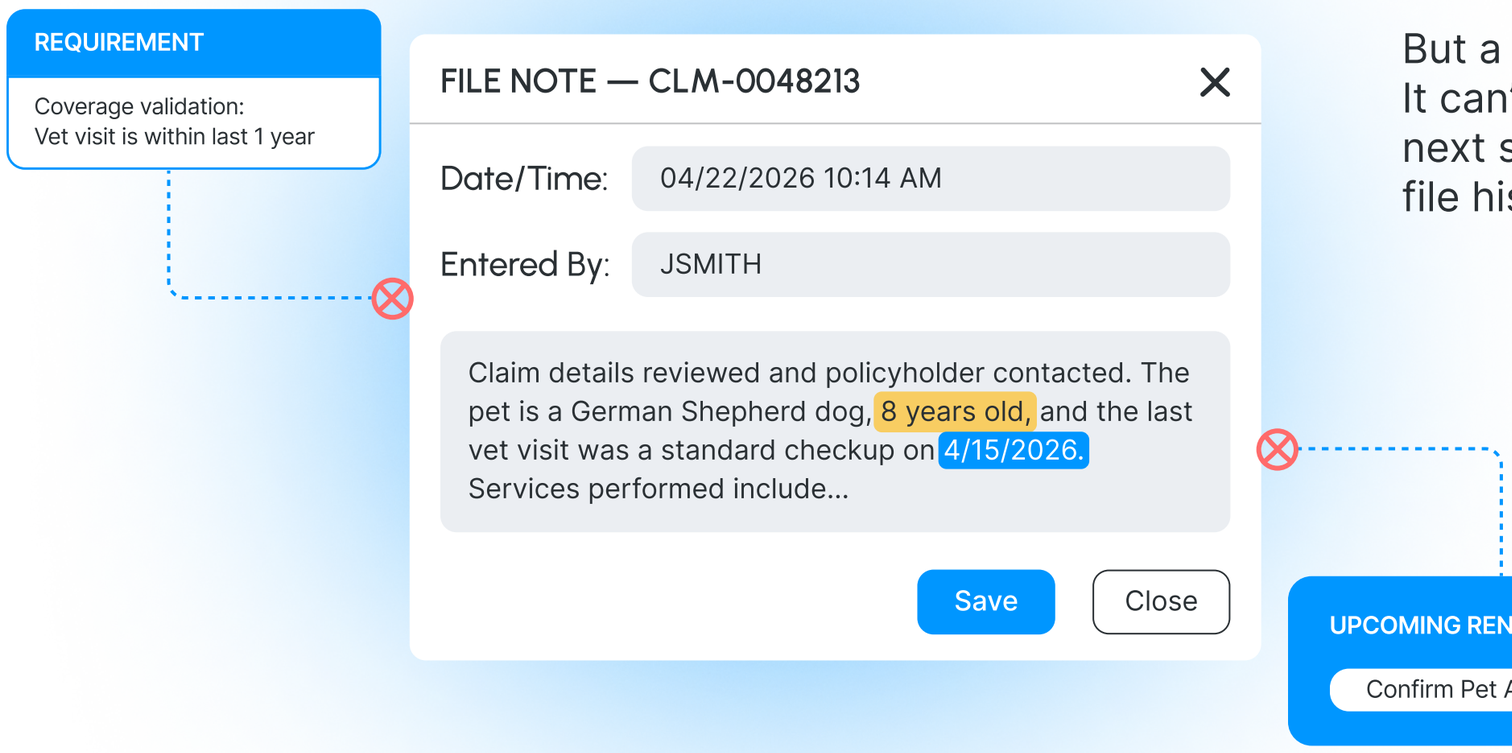
Custom Fields & Views

Tailor your data to fit your operations



The "standard" fields run out fast

Every line of business tracks something another one doesn't. A pet policy needs age, breed, and medical history while a personal property claim needs the manufacturer and model year of a damaged appliance. And when those data points don't have a designated home, they end up buried in file notes.

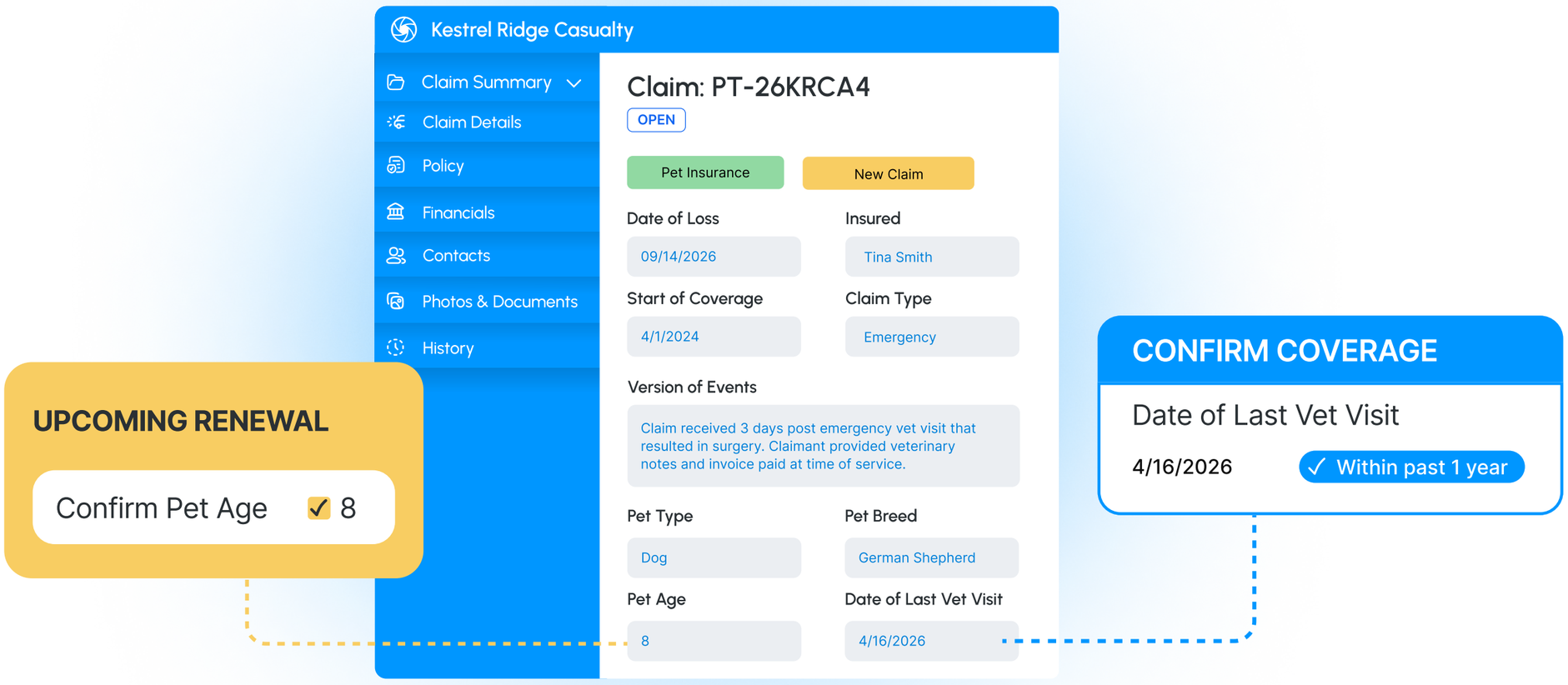


But a detail in a note stays siloed in that note. It can't be validated, reported on, or trigger next steps when it's sitting dormant in a static file history.

Custom Fields enables system admins and claims managers to create and add specific data points to claims, exposures, assets, and vendor tasks, and then put them to work in workflows and operations.

Capture and track what every line of business needs

Custom fields give every niche line and claim type it's own set of data, and workflows can take action against every field created. When the characteristic of a pet meets designated criteria, for example, a workflow can trigger a coverage validation step, deliver renewal information to an underwriter, or simply give adjusters a deeper look at the details.



Tailor layouts by claim type

Admins can designate where custom fields live in the claim details view and in what order they appear. New cards can be added to group related details, and different claim types are assigned unique formats so adjusters aren't working around information that doesn't apply.

Build automations on field values

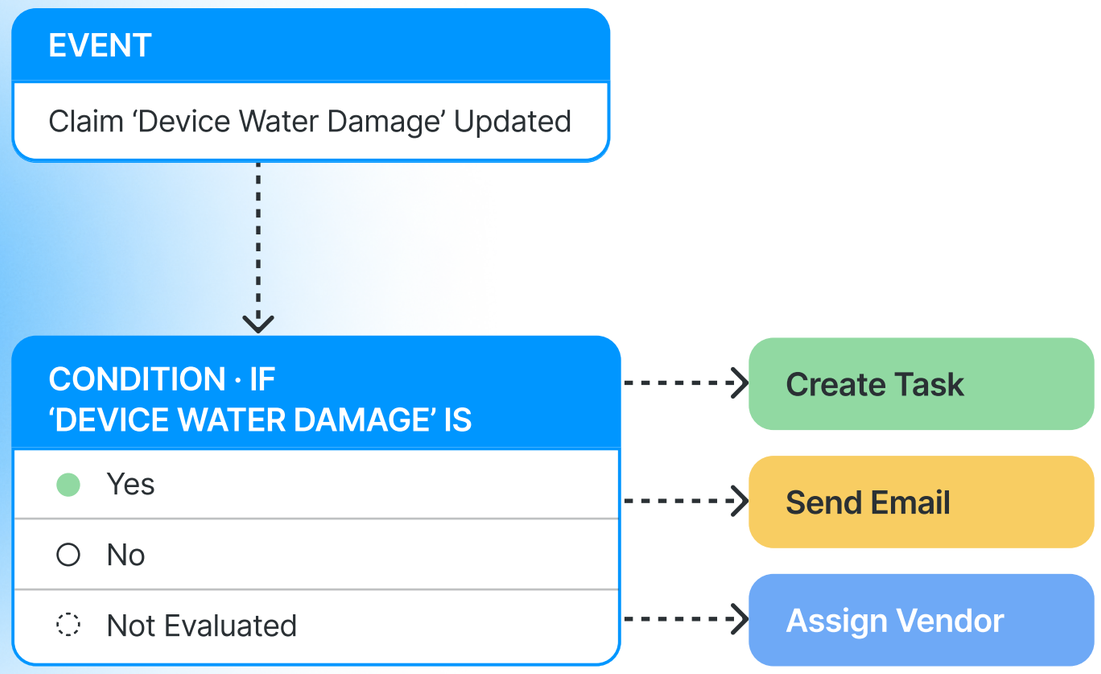
Custom fields work as workflow events, conditions, and actions so each answer in a field can start the next step. A value update can fire an event, conditions can check the field alongside other claim and policy data, and the workflow can take action.

Add fields without IT

Admins choose where a field lives, its type, and its validation rules. Fields start as drafts, so admins can test validations before publishing, then add the field to the page.

Automate vendor processes

"Is this a title express assignment?" or "invoice status" can sit on a dedicated card inside a vendor assignment, and still becomes an actionable value that can be used to trigger workflow steps.

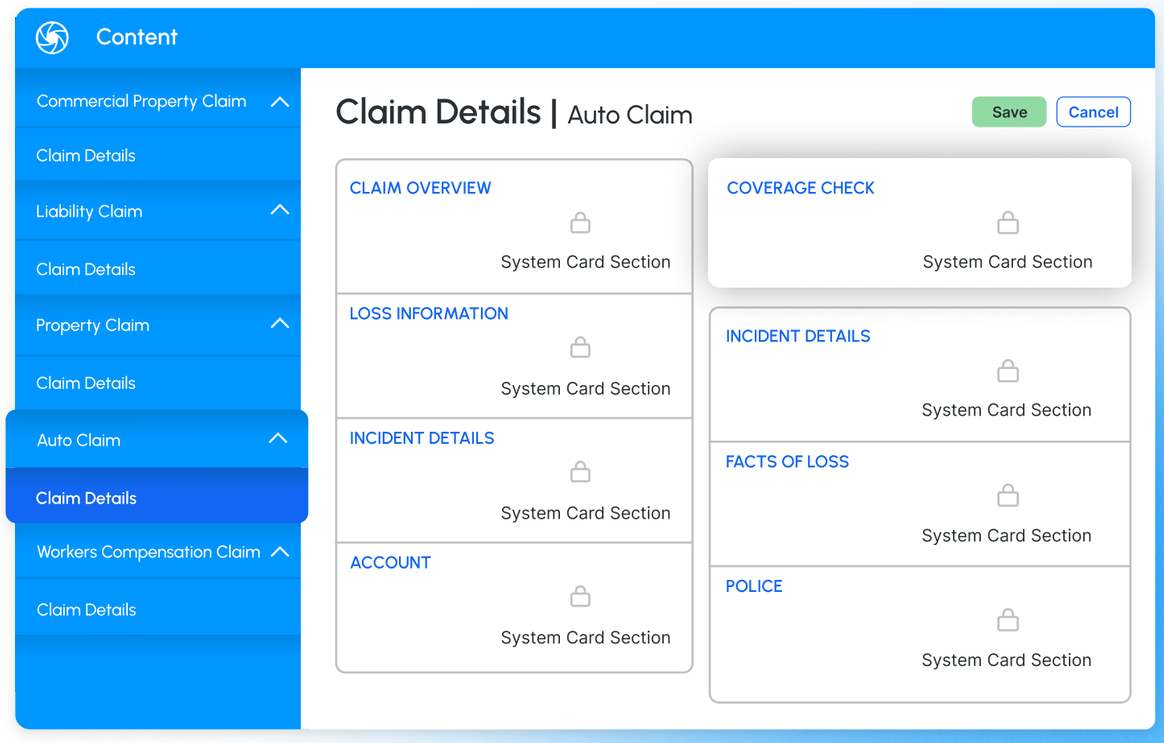


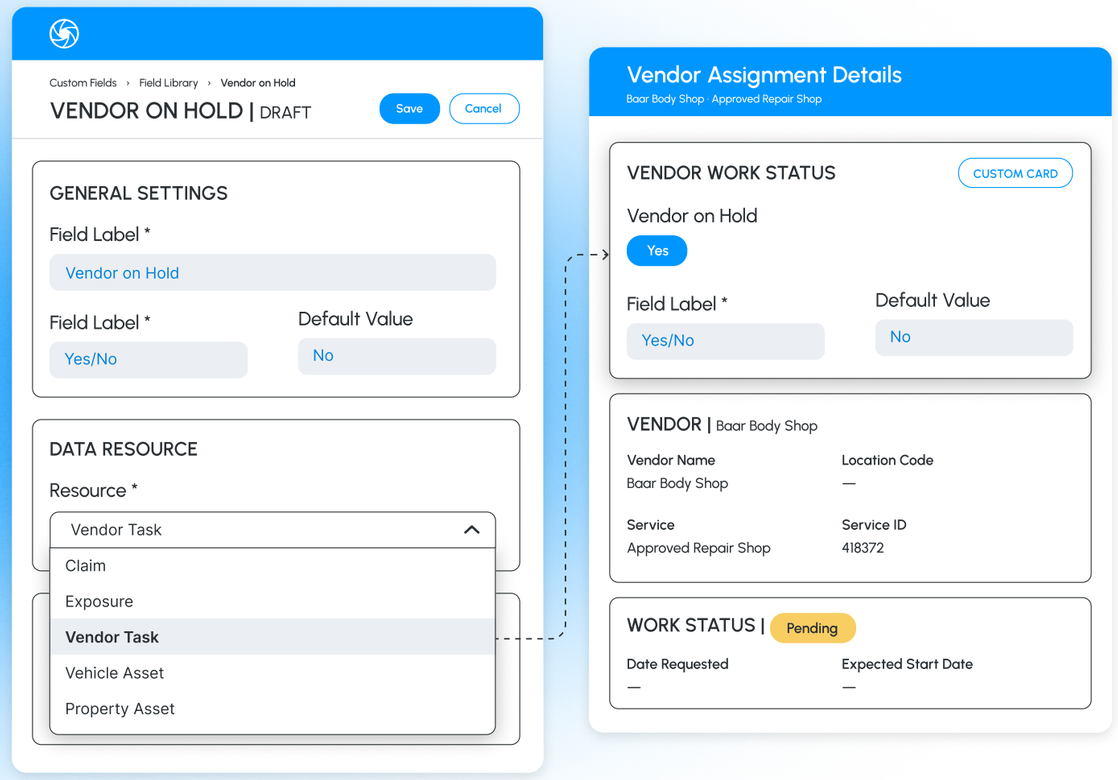
Let data take the next step

Custom Fields can be used as events—and their values a conditional statement—to initiate different work sequences based on whether a numerical value meets a threshold, a date falls in a certain range, or a status is updated to a certain stage. Different values can send claims down different paths to create tasks, send communications, or assign vendors.

Put the right details at the forefront

Configure custom views (that include your custom fields) for auto claims, property claims, and liability claims so the details specific to each are what adjusters land on first. “Sayonara!” to spending valuable minutes scrolling for the model number of a refrigerator in a sea of vehicle VIN, police report, and percent at fault fields.





Track what vendor jobs need

Add custom fields to vendor tasks and they appear inside the vendor assignment. Choose a field as an event in workflows or global events, and the workflow starts when its value updates, so the follow-up begins when the assignment changes instead of waiting for someone’s calendar reminder to prompt them to check-in.

Custom Fields is a native feature of the Snapsheet Claims Platform, the complete cloud-based solution built for the way claims work.

See it in action.

sales@snapsheet.me