

[CRM-242] [Claims] BNP - Transportation - UT Claims Created: 09/29/23 Updated: 10/19/23

Status:	New	Priority:	Major
Project:	CRM	Assignee:	jim.huang
Component/s:	None	Votes:	0
Affects Version/s:	None		
Fix Version/s:	None		
Type:	Story		
Reporter:	Bassel Matta		
Resolution:	Unresolved		
Labels:	BNP, Claims, UT		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original Estimate:	Not Specified		

Attachments:			
Issue Links:	Relates relates to CRM-169 [Claims] BNP Claims - Master New		
Story Points:	0		
Test Hours:	0		
Dev Hours:	0		

Description

Search & Filters Function:

unis

Account Receivable Invoice User Management User Role Permission Report Account Management Claims & Disputes

Claim Management

Search Request #

MM/DD/YY - MM/DD/YY

Filters

Status

Claim Type

Category

Account Name

Reset

Save

Apply

TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AM
PRO0000014	08/02/2023	Evanston	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00
PRO0000013	08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Buena Park	Damage	Download	\$770.00	\$200.00
PRO0000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00
PRO0000011	08/01/2023	Gillig Livermore	Pending Controller Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00
PRO0000010	08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00
PRO0000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00

Allow user to search for an invoice #, ticket #, account name, shipper name, consignee name.

click "Filters" to view

"Reset" will make all the filters go to blank.

click "save" to make this filter selections the default for the future searches.

click "apply" to search for the selected filters.

Date Filter:

unis

Account Receivable Invoice User Management User Role Permission Report Account Management Claims & Disputes

Claim & Dispute Management

Search Request #

08/17/2023 - 08/31/2023

Filters

TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AM
PRO0000014	08/02/2023	Evanston	New	Dispute	Joliet			\$120.00	
PRO0000013	08/02/2023	Flyers Skate zone	Pending Controller Approval	Claim	Buena Park			\$200.00	
PRO0000012	08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet			\$120.00	
PRO0000011	08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park			\$120.00	
PRO0000010	08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park			\$200.00	
PRO0000009	08/01/2023	Flyers Skate zone	New	Claim	Joliet			\$120.00	
PRO0000008	07/31/2023	Evanston	User Updated	Claim	Buena Park	Loss/Damage	Download	\$158.00	\$200.00
PRO0000007	07/31/2023	Evanston	Final Denied	Claim	Joliet	Loss/Damage	Download	\$158.00	\$200.00
PRO0000006	07/31/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Freight Charge	Download	\$770.00	\$120.00
PRO0000005	07/30/2023	Gillig Livermore	New	Dispute	Buena Park	Compliance Charge	Download	\$1,320.00	\$200.00

User can click the date section to filter disputes that were created in a specific timeframe.

select start date

select end date

Filters:

Filter - Status: Once the user clicks on the Status dropdown menu they should be able to see the options below, if they select an option and click "Apply" then they will be able to see the claims with that specific status.

New: when a new claim is submitted by the user but no one from BNP or internal claims team have looked at it yet or modified it.

On the frontend on the client portal for the customer, it will show status as "New".

Submitted to carrier: when the internal user on BNP from claims department forward the claim to the carrier we used to ship the package and we are still waiting for them to reply s we can update our customer.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Operations Approval: this is the first step, once a claim is created, it will get assigned to the operations team so they can approve/deny/request docs for the claim.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Controller Approval: when a claim is approved by the operations, it will then get assigned to Controller to approve/deny the claim.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Final UT Approval: when a claim is approved by the Controller, it will then SOMETIMES get assigned to Controller to approve/deny the claim ONLY if the claim amount is over a certain amount. Please refer to the workflow to see the amount. We want to have internal settings to change the amount, so if claim amount is >= over or equal to \$X.XX then we send the claim to Final UT Approval so they can approve. However if the claim amount is under that amount, then we will consider the controller approval as final approval.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Supporting Documents: when someone from internal team claims department request more documents from the customer, the ticket will still be assigned to the same party in BNP but it will have a new status that is listed above so that way we know that there is some missing documents and we have requested them from the user to upload on the client portal.

On the frontend on the client portal for the customer, it will show status as "Processing".

User Updated: if the user upload new documents that we have requested so we can review, then it will be under "User Updated" so that way someone from BNP claims department who is assigned to the claim can go back and see that the user has uploaded these documents that internal user has requested in the step above.

On the frontend on the client portal for the customer, it will show status as "Processing".

Final Approval: if the claim is finally approved by "Controller" (Maria) if it is less than \$XX amount. Or if the claim is finally approved by "Final UT Approval" (Raul). Then it will be assigned this tag, and the user on the frontend will know that the claim has been approved for a \$XX.xx amount that the internal user in BNP approves.

On the frontend on the client portal for the customer, it will show status as "Approved".

Final Denied: if the claim is denied by the last approval party, it will get this status.

On the frontend on the client portal for the customer, it will show status as "Denied".

unis

Account ReceivableInvoiceUser ManagementUser Role PermissionReportAccount ManagementClaims & Disputes

Claim Management

Export+ Create claim request

Search Request #MM/DD/YY - MM/DD/YYFilters

User click on "status" dropdown menu

status

NewSubmitted to CarrierPending Operations ApprovalPending Controller ApprovalPending Final UT ApprovalPending Supporting DocumentsFinal ApprovedFinal DeniedUser Updated

COUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMT		
ston	New	Claim	Joliet	Compliance Change	Download	\$770.00	\$120.00		
ers Skate zone	Submitted to Carrier	Claim	Buena Park	Damage	Download	\$770.00	\$200.00		
g Livermore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00		
g Livermore	Pending Controller Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00		
ers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00		
PRO000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Change	Download	\$770.00	\$120.00

100 ResultsShow: 10<1>

Note: For Approval, when an internal user approves and put an amount in the "Approved Claim Amount" field, this value should carry to the next step in the workflow but it should still be editable so the next person in the workflow can make the necessary modifications to the amount if needed.

HANDLING PICK per Pallet

Shipped Date: 12/7/2022

HANDLING ORDER PROCESSING per Order, Outbound Shipmethod, TL

Shipped Date: 12/7/2022

Shipped Date12/7/2022

Invoice Amount\$28.70

Line item / DescriptionHANDLING PICK per Pallet

Claim / Dispute ReasonLorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.

Dispute amount\$28.70

Approved credit amount *\$200.00

Change Status *

Denied

Approved

Request more documents

Status Reason *Settlement

Manual Assign To

Operations

Controller (Maria)

Final UT (Raul)

Description *Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elem

CancelConfirm

Filter - Claim Type: Once internal user clicks here, they can filter claims based on a specific type that the user selected on the client portal.

unis

Account ReceivableInvoiceUser ManagementUser Role PermissionReportAccount ManagementClaims & Disputes

Claim Management

Export+ Create claim request

Search Request #MM/DD/YY - MM/DD/YYFilters

When user click here they can filter claims based on a specific type that the user selected on the client portal.

New **Claim Type** Account Name Reset Save Apply

TICKET #	CLAIM DATE	ACCOUNT ID	CLAIM TYPE	CATEGORY	FACILITY	SUPPORTING	INVOICE AMOUNT	DISPUTE AMOUNT
PRO0000014	08/02/2023	Evanston	Transportation Compliance Charge	Claim	Joliet	Download	\$770.00	\$120.00
PRO0000013	08/02/2023	Flyers Skate zone	Transportation Damage	Claim	Buena Park	Download	\$770.00	\$200.00
PRO0000012	08/02/2023	Gillig Livermore	Transportation Loss	Claim	Joliet	Download	\$158.00	\$120.00
PRO0000011	08/01/2023	Gillig Livermore	Others	Claim	Buena Park	Download	\$1,320.00	\$120.00
PRO0000010	08/01/2023	Flyers Skate zone	Others	Claim	Buena Park	Download	\$1,320.00	\$200.00
PRO0000009	08/01/2023	Flyers Skate zone	Compliance Charge	Claim	Joliet	Download	\$770.00	\$120.00

100 Results Show: 10 < 1 >

This is where the customer selects the claim type on the frontend on the client portal:

Claims & Disputes > File New Claim > Transportation > Claim > Select Claim Type:

Tracking

Claims & Disputes History

All Claims Dispute

File New Claim

Filter

What type of claim are you looking to file?

Please select your Claim Type

Loss
Damage
Compliance chargeback
Others

Please select your PRO #

Next

Filter - Account Name:

unis Account Receivable Invoice User Management User Role Permission Report Account Management Claims & Disputes

Claim Management

Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

New **Transportation Compliance Charge** **Account Name** Reset Save Apply

11986 - Waukegan
11997 - Chicago N Kimball
12067 - Flyers Skate Zone
12080 - Gillig Livermore
ACME FOOD SALES INC

TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	SUPPORTING	INVOICE AMOUNT	DISPUTE AMOUNT
PRO0000014	08/02/2023	Evanston	New	Claim	Joliet	Download	\$770.00	\$120.00
PRO0000013	08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Buena Park	Download	\$770.00	\$200.00
PRO0000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Claim	Joliet	Download	\$158.00	\$120.00
PRO0000011	08/01/2023	Gillig Livermore	Pending Controller Approval	Claim	Buena Park	Download	\$1,320.00	\$120.00
PRO0000010	08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Download	\$1,320.00	\$200.00
PRO0000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Download	\$770.00	\$120.00

100 Results Show: 10 < 1 >

Main dashboard columns:

unis Account Receivable Invoice User Management User Role Permission Report Account Management Claims & Disputes

Claim Management

Export + Create claim request

Claim Management Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

New Transportation Compliance Charge 12067 - Flyers Skate Zone Reset Save Reply

TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMT
PRO0000014	08/02/2023	Evanston	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00
PRO0000013	08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Buena Park	Damage	Download	\$770.00	\$200.00
PRO0000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00
PRO0000011	08/01/2023	Gillig Livermore	Pending Controller Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00
PRO0000010	08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00
PRO0000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00

100 Results Show: 10 < 1 >

All of the data and columns data shown in the image above are from the user on client portal. They enter this info when they are creating the claim, then all the data will get mapped to here. A lot of the data they do not enter, it is set automatically based on the selections they make on the client portal claims pages.

The ticket # is created automatically. In this case we will use the PRO # as the ticket number.

When the user click the "Download" button under "SUPPORTING", they will see a popup box that looks like this:

Claim & Dispute Management Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

Ticket # PRO0000014

customer selected which document this is

document name set by the user

Download a zip file compressed with all the attachments in it

Download to computer

This opens a new tab with the PDF or image opened

Download

Uploaded file	Document Type	View	Download
Claim-1.pdf	Repair Invoice	View	Download
Claim-2.pdf	Commercial Invoice	View	Download
Claim-3.pdf	Sales Invoice	View	Download
Claim-4.pdf	ROI	View	Download
Claim-5.pdf	Proof of delivery	View	Download

5 Results Show: 10 < 1 >

Download

When "View Data" is clicked on claim:

Claim & Dispute Management Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMOUNT	
08/02/2023	Evanston	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00	1
08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Buena Park	Damage	Download	\$770.00	\$200.00	2
08/02/2023	Gillig Livermore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00	3
08/01/2023	Gillig Livermore	Pending Controller Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00	4
08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00	5
08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00	6
07/31/2023	Evanston	Final Approved	Claim	Buena Park	Damage	Download	\$158.00	\$200.00	7
07/31/2023	Evanston	Final Denied	Claim	Joliet	Damage	Download	\$158.00	\$200.00	8
07/31/2023	Flyers Skate zone	View Details	Claim	Buena Park	Loss	Download	\$770.00	\$120.00	9

View Data Change Status

07/30/2023 Gillig Livemore Pending Supporting Documents Claim Buena Park Compliance Charge Download \$1,320.00 \$200.00

100 Results Show: 10 < 1 >

Claim & Dispute Management

Ticket # PRO0000010 Denied Status

Ticket number

Customer ID * DELPRD0002 Customer Name * DELTA ELECTRONICS (Americas) LTD - NEW

Po # * 123456 Reference Number

Ship to * TESTER Shipped Date * 08-08-2023

Location * UT-Grand Prairie Claim amount * \$28.70

Address 2250 Lion Country Parkway, Suite 100, Grand Prairie, TX 75051, UNITED STATES

Description * Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.

Signature *

Email Tester@unisco.com Name Tester

Phone Number 1234567890

Data inputted by the customer when creating the claim

Close

When "Change Status" is clicked on claim:

Claim & Dispute Management

Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMOUNT
08/02/2023	Evanston	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00
08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Buena Park	Damage	Download	\$770.00	\$28.70
08/02/2023	Gillig Livemore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00
08/01/2023	Gillig Livemore	Pending Controller Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00
08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00
08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00
07/31/2023	Evanston	Final Approved	Claim	Buena Park	Damage	Download	\$158.00	\$200.00
07/31/2023	Evanston	Final Denied	Claim	Joliet	Damage	Download	\$158.00	\$200.00
07/31/2023	Flyers Skate zone	View Details	Claim	Buena Park	Loss	Download	\$770.00	\$120.00
07/30/2023	Gillig Livemore	Pending Supporting Documents	Claim	Buena Park	Compliance Charge	Download	\$1,320.00	\$200.00

100 Results Show: 10 < 1 >

1 2

View Data Change Status

-**Override approval** option is only available for "Controller" access to click on it. Once clicked, it will mean that this is final approval and the claim will not be assigned to "Final UT Approval" if it were to go to that department. Sometime this department is travelling or unavailable so allow the "Controller" to take the final decision sometimes.

-"Approved Claim amount" field is only available for fill-out if the status "Approved" or "Override Approval" is selected.

Claim & Dispute Management

Export + Create claim request

Search Request # Filters

Ticket # PRO0000010 Submitted ticket status

ticket number

Shipped Date 12/7/2022 Invoice Amount \$28.70

Line Item / Description HANDLING PICK per Pallet Claim / Dispute Reason Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.

Dispute amount \$28.70 Approved credit amount * user enter amount

Change Status *

Data from claim provided by customer on client portal.

09/01/2023Flyers

06/01/2023Flyers

07/31/2023Evanst

07/31/2023Evanst

07/31/2023Flyers

07/30/2023Gillig Livemore

Denied

Approved

Request more documents

Override Final Approval

Description *

Only available for "controller" account to click.
For other accounts, it should be unclickable.

presert message that the user can change and edit.

Cancel

Confirm

Pending Supporting Documents

Claim

Buena Park

Compliance Change

Download

\$1,320.00

\$200.00

120.00

120.00

120.00

120.00

100 Results

Show: 10

-After each "Status Reason" is selected from the dropdown menu, we will have a template message to show for each of the options from the dropdown menu in the "Description Box". The text in the description box will be editable in case the internal user want to change it.

"Approved" Option:

The user can select from the dropdown menu called "Status Reason" the message that they like, then they can change the message after it shows in the text box.

Auto populate "Description" message 1:

- Your claim has been approved with a settlement amount of \$X.xx

Auto populate "Description" message 2:--

- Your claim has been approved with a settlement amount of \$X.xx. Once your account is current payment will be released.

Mapping:

Account Receivable

Invoice

User Management

User Role Permission

Report

Account Management

Claims & Disputes

Claim & Dispute

Ticket # PRO0000010

Submitted

Shipped Date

12/7/2022

Invoice Amount

\$28.70

Line Item / Description

HANDLING PICK per Pallet

Claim / Dispute Reason

Approved credit amount *

make this field available when the user select "Approved"

Dispute amount

\$28.70

Change Status *

Approved

Denied

Request more documents

Status Reason *

Settlement

Description *

Only available for "controller" account to click.
For other accounts, it should be unclickable.

presert message that the user can change and edit.

Cancel

Confirm

Approved Claim Amount

\$1200.00

Reason/Notes

Email update: Pending supp docs, please submit the required docs within 30 days or your claim will be closed.

Claim Type

Claim Amount

Invoice

Customer ID

Company Name

Location

Inventory Loss

\$1500.00

3513213

136180

RAZOR GROUP

Buena Park

Attachments (Please submit invoices related to the case)

Drop your files here or browse

Maximum size: 50MB

Update

"Denied" Option:

Once the user select "Denied" they will not be able to enter an amount.

And they will see different options in the dropdown menu of "Status Reason".

Account Receivable

Invoice

User Management

User Role Permission

Report

Account Management

Claims & Disputes

Claim & Dispute

Ticket # PRO0000010

Submitted

Shipped Date

12/7/2022

Invoice Amount

\$28.70

Line Item / Description

HANDLING PICK per Pallet

Claim / Dispute Reason

Approved credit amount *

Dispute amount

\$28.70

Change Status *

Approved

Denied

Request more documents

Status Reason *

Settlement

Description *

Only available for "controller" account to click.
For other accounts, it should be unclickable.

presert message that the user can change and edit.

Cancel

Confirm

Approved Claim Amount

\$1200.00

Reason/Notes

Email update: Pending supp docs, please submit the required docs within 30 days or your claim will be closed.

Claim Type

Claim Amount

Invoice

Customer ID

Company Name

Location

Inventory Loss

\$1500.00

3513213

136180

RAZOR GROUP

Buena Park

Attachments (Please submit invoices related to the case)

Drop your files here or browse

Maximum size: 50MB

Update

Note that if we are at the "Controller" level to make the decision, and the controller decide to "deny" the claim, then it will be sent back to the previous party to verify, so in this case the claim will be sent back to "Operations" team to review the claim again. Please refer to the workflow below for visual representation.

Auto "Description" messages for each selection will be as follows:

- Mitigation/Other**
Per NMFC guidelines, it is the responsibility of a shipper to mitigate the costs of a claim to the least amount possible, which essentially means shippers are required to do their part to help minimize financial loss. Mitigation is usually done by selling the damaged item at a discount, selling it for parts or scrap, or by repairing the item rather than replacing it completely. If making repairs, the cost of repairing the item would be the amount filed for in the claim.
- Freight Charges**
Under NMFC regulations the freight bill must be paid. Please contact our claims department once the charges have been satisfied.
- Clear Delivery**
We have concluded our investigation and determined that no exceptions were noted by the receiver at the time of delivery. Since there is no evidence of carrier mishandling to show that the damage or loss occurred before delivery, we respectfully decline participation in this claim.
- Past Allotted Time**
We have concluded our investigation and determined your claim was filed past the allotted time; therefore, we respectfully decline participation in this claim.
- Salvage Availability**
We have concluded our investigation and determined that damaged freight should be available for carrier pick-up until claim settlement. Since the salvage is unavailable for carrier pick up, carrier liability cannot be established, we respectfully decline participation in this claim.
- Properly Packaged**
We have concluded our investigation and determined there's no sufficient evidence that the damage was caused by the carrier. Our investigation revealed the product was not properly packaged for transit by a motor carrier.
- Spotted Delivery**
After further review, it was determined that the shipment was delivered to a customer that requests their shipments be spotted for delivery. This prevents the driver from being present during the unloading process. Our checking records indicate the complete shipment was intact when tendered to the consignee. Without our representative being present when the product is delivered, there is no way to validate any loss or damage regarding this shipment. Considering this circumstance, we must respectfully decline participation in your claim at this time.

"Request more documents" Option:

Status of the claim will change to "Pending more documents".

Once the user select "Request More Documents" they will not be able to enter an "approved claim amount".

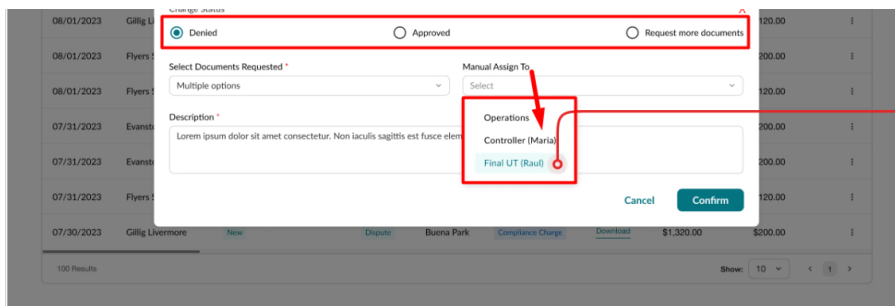
And they will see different options in the dropdown menu of "Status Reason". They can select multiple documents missing.

Auto "Description" messages for each selection will be as follows:

- Incomplete/Inadequate Documentation**
Our initial review of your claim finds the file to be incomplete. The following indicated documentation is needed:
- Pictures of claimed goods to establish the nature and extent of the damage.
- This claim is respectfully closed as filed until the requested documentation is received.

----->> The bullet points above will be the selected documents that the user is requesting the customer to upload.

Manual Assign To:



The user will have an option to manual assign a claim to someone in their team.

If they use this option, then they will not be able to use the circle buttons to approve, deny, override approve. The selection circles above will be unclickable, they will be gray. And if the user clicks on them, then the dropdown menu for "Manual Assign To" will be grey. So they can use either option but not both.

The user will have a dropdown menu where they can select to assign the claim to a specific team in the claim department. Once the user make the selection and click confirm, then the claim will be assigned to that user that has been selected.

This feature should only be available as Turn ON/OFF for specific accounts, allow permission level for this feature. Not all accounts will be able to use the "Manual Assign To" feature. And it should be selected by admin as who will be able to use this feature from account settings.

Workflow:

