Mitchell Connect for Independent Appraisers Using the Collector Workflow

UltraMate or Non-Mitchell Estimating Systems

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Welcome to Mitchell Connect, a comprehensive solution for independent appraisers to receive assignments and send estimates to insurance companies. You can receive assignments from an insurance company, communicate through messaging, and send back estimates, photos, and other supportive documents.

This workflow guide is tailored for independent appraisers using UltraMate or non Mitchell estimating systems.

Independent Appraiser Workflow Summary

1. Insurance Company assigns Appraisal Assignment to the Collector.
2. Collector assigns the Appraisal Assignment to the regional office and sends notification to the Independent Appraiser (IA).
3. IA logs into Mitchell Connect to review the appraisal assignment.
4. IA downloads appraisal assignment to an estimating system and writes the estimate.
5. IA commits the estimate and adds completed estimate to Mitchell Connect.
6. IA adds photos and attachments as per company process.
7. IA notifies Head Office/Review Desk that the estimate is ready for review.
8. Head Office/Review Desk logs into the Regional Office system, reviews the estimate, and validates photos and attachments.
9. Head Office/Review Desk sends to insurance for approval.
10. Insurance company reviews the estimate and either approves, rejects or requests a supplement.
11. If approved, the insurance company proceeds as per standard process.
12. If a supplement is requested, the IA will need to login to Mitchell Connect, open the job, and click **Supplement** on the **Estimate** card.
13. IA edits the estimate in an estimating system and commits changes.
14. IA adds the completed estimate to Mitchell Connect and notifies Head Office/Review Desk that the supplement is ready for review.
15. Head Office/Review Desk logs into the Regional Office system and repeats steps 8 through 10.
16. The supplement process repeats Steps 8 & 9 until final version of the estimate is submitted.

1. Getting Started

Before you start using Mitchell Connect, you need to set up your accounts. Head Office receives a registration email for the Collector, as well as the Regional Offices. Click on the link and the **Set Up Your Account** page appears automatically. Accounts created using the **Set Up Your Account** page are automatically assigned administrator access.

Head Office is responsible for setting up user accounts for the Collector as well as each of the Regional Offices. Follow the account setup instructions provided below to assist with user account creation.

Required Accounts:

- **Head Office/Collector**: Responsible for dispatching insurance assignments to regional offices and/or Independent Appraisers.
- **Review Desk**: Responsible for estimate and supplement approval, task assignment, estimate submissions and insurance communications.
- **Independent Appraisers (IA's)**: IA's – Responsible for writing and supplementing estimates.

Go to one of the following locations for Mitchell Connect:

- **Canada**: https://repaircenterca.mymitchell.com/connect/account/#/login
- **United States**: https://repaircenter.mymitchell.com/connect/account/#/login

Set Up Your Account

1. On the **Set Up Your Account** page, in the **Your Name** fields, type your first and last name.
2. In the **Your Email** field, type your email address.
3. Pick a username and type it in the **Create Username** field.

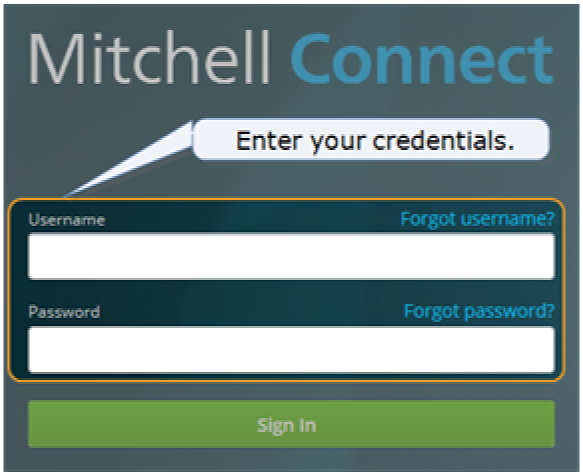
> **Note:** If the user name is already in use, a message appears asking you to select another user name.

4. Pick a password and type it in the **Create Password** field. Passwords are a minimum of 6 characters and a maximum of 10.
   - To hide your password as you type, select the **Hide** check box.
5. Click **Complete Set Up** to complete registration.

> **Note:** It may take a few moments for Mitchell Connect to complete your registration. Please wait a few moments before signing on to Mitchell Connect.

Sign In

Use your current credentials (user name and password) to sign in to Mitchell Connect.



1. On the Mitchell Connect page, in the **Username** field, type your user name.
   - If you forgot your username, click **Forgot username?** and follow the instructions to reset it.
2. In the **Password** field, type your password.
   - If you forget your password, click **Forgot password?** and follow the on-screen instructions to reset it.
3. Click **Sign In**.

Note: Mitchell Connect access will now be blocked after multiple failed login attempts. If you are locked out of Mitchell Connect, contact your organization's Administrator. The Administrator can reactivate your account from the Settings page in Mitchell Connect.

User Accounts

Create user accounts for independent appraisers in each Region.

Add a user account to Mitchell Connect by completing the fields on the **New User Account** page in **Settings**. Required fields are easily identified by an orange bar with an asterisk at the beginning of the field.

Add User Accounts

1. On the navigation pane, click **Settings**.
2. On the Settings page, click **User Accounts**.
3. On the **Settings** page, click **+ User Account**.
4. On the New User Account page, enter user information in the required fields.
5. Enter the user's estimating business license number and select the state in the corresponding fields (as needed).
6. Click **Permissions** to set landing page or assign tasks (optional). Do the following on the Permissions page:
   - Click the button next to **Jobs** or **Tasks** to have Mitchell Connect open with the corresponding page when the user signs in each session.
   - Click **Assign Tasks** to allow the user to assign tasks.
6. Click **Done** to create the user account and return to the Settings page, where the new account is listed under **User Accounts**.

Modify Users

User accounts have their own User page in Settings. Use this page to modify the user's account or change the password.

Administrators can modify any active user account. You can also change the password for the account, or edit the user's name, username, or contact information.

Modify a User Account

1. On the navigation pane, click **Settings**.
2. Click **User Accounts**.
3. On the **Settings** page, under **User Accounts**, click the account you want to edit.
4. On the **User** page, add, or modify, the information as needed. You can change name information, email, and password but you cannot delete information from required fields.
5. Click **Done** to save your work and return to the **Settings** page.

Change a Password

1. On the navigation pane, click **Settings**.
2. Click **User Accounts**.
3. On the **Settings** page, under **User Accounts**, click the account you want to edit.
4. Click **Change Password**.
5. Type the user's current password in the **Current Password** field.
6. Type the new password in the **New Password** field.
   - Click **Hide** if you want to hide the password while you type.
7. Click **Done** to save your work and return to the **Settings** page.

Deactivate a User

1. On the navigation pane, click **Settings**.
2. Click **User Accounts**.
3. On the **Settings** page, under **User Accounts**, click the account you want to edit.
4. On the **User Account** page, click **Permissions**.
5. Click **Inactive User**.
6. Click **Done**.

Reactivate a User

1. On the navigation pane, click **Settings**.
2. Click **User Accounts**.

> **Tip**: If you cannot see any inactive users, check the **Show Inactive** users toggle button at the top of the **User Accounts** page. Click to the right of the **Show Inactive** accounts toggle button to show inactive accounts.

3. On the **Settings** page, under **User Accounts**, click the account you want to edit.
4. On the **User Account** page, click **Permissions**.
5. Click **Active User**.
6. Click **Done**.

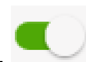
Email Notifications

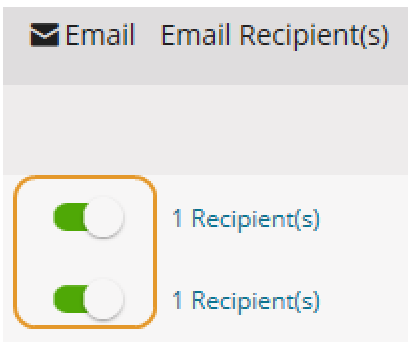
You can configure which email and in-app notifications you receive using the Notification Preference page in Settings. The Notification Preferences page shows a list of all insurance companies where you can individually set preferences for email and in-app notifications for Appraisal Assignments, Supplement Assignment requests and more.

> **Note**: Some insurance companies may require shops to receive certain email notifications.

Set Email Notification Preferences

1. On the Navigation pane, click **Settings**.
2. On the Settings page, click **Notifications**.
3. Insurance company names appear on the left of the page. Click the insurance company name.
4. Under the Email column, use your mouse to do one of the following:

    - **Activate an email Notification**: Click to the right of the toggle button. 
    - **Deactivate an email Notification**: Click to the left of the toggle button. 



5. Click **Done**.

Tip: You can add or remove email notification recipients by clicking **Recipients** under the Email Recipient(s) column.

Assign Email Notifications to Mitchell Connect Users

1. On the navigation pane, click **Settings**.
2. On the **Settings** page, click **Notifications**.
3. Insurance company names appear on the left of the page. Click the insurance company name.
4. Click **Recipients** under the **Email Recipients** column. The **Email Recipients** window appears.
5. Select or clear the check box next to the user you want to add or remove. You can scroll down through the user list or use the **Search by name or email** box to search for a user.
6. Click **Done** when complete.

Assign Email Notifications to Non-Mitchell Connect Users

1. On the navigation pane, click **Settings**.
2. On the **Settings** page, click **Notifications**.
3. Insurance company names appear on the left of the page. Click the insurance company name.
4. Click **Recipients** under the **Email Recipients** column. The **Email Recipients** window appears.
5. Click **Add Recipient(s)**.
6. Enter the email address and contact name in the corresponding boxes, and then click **Save**.
7. Click **Done** when complete.

2. Open Assignments

After you register, you will continue to receive email notifications for new assignments. The assignment email includes basic information about the assignment and a button that opens the corresponding assignment in Mitchell Connect.

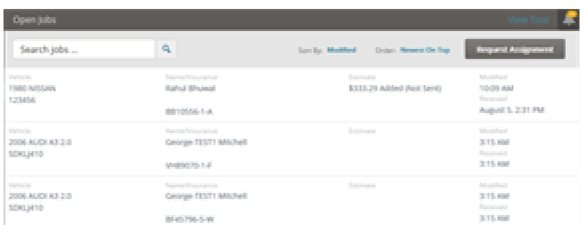
> **Note**: User Accounts will need to be setup prior to users accessing their first assignment. Clicking on the assignment link will bring the user to the Mitchell Connect login page.

Open Assignment from Email

1. In the assignment email, review the assignment information. Scroll down to review more information about how Mitchell Connect works.
2. Click **Create Account and Start Assignment**. The Set Up Your Account page appears.

See All your Jobs

Use the My Jobs page to navigate to your shop's assignments. The My Jobs page also gives you access to the Job Overview page that provides you with details and functionality needed to complete the assignments sent by the insurance company.

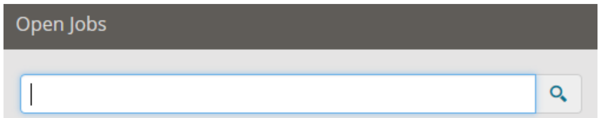


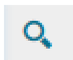
Access the My Jobs Page

- From anywhere in Mitchell Connect, click **Jobs** on the Navigation pane.

Search for Jobs

1. On the My Jobs page, enter your search criteria in the field at the top of the page.



2. Click .

Click **Cancel** to clear your search and restore the page.

Note: The Jobs Search searches by information in each column (e.g. Last Name, Year, Model, etc.). If you would like to continue searching the entire database for your search criteria, click **Search More Jobs**.

Tip: You can also use the Jobs List Search to filter the Job List by specific criteria (e.g. Enter the year 2007 to only show 2007 vehicles).

Sort the Jobs List

Sort and order jobs in the **Jobs** list from the **Open** or **Closed Jobs** pages.

1. Click the **Sort By** list, and then select a field to sort by.
2. Click **Newest on Top** or **Oldest on Top** to sort the list.

> **Tip**: Your sort changes are saved when you sign out of Mitchell Connect.

Notifications

Use the Notifications feature to view real-time notifications of new jobs and updates to existing jobs in the **Jobs** list. Updates include changes to estimate status, new tasks, new messages, and more. You can navigate directly to a modified or new job from the **Notification** list on any page in Mitchell Connect. A number appears next to the Notification icon to notify you about how many jobs are new or updated.

1. Click the **Notification** icon  at the top of any page in Mitchell Connect. The **Notification** list appears.
2. Click the job you want to view in the **Notification** list.

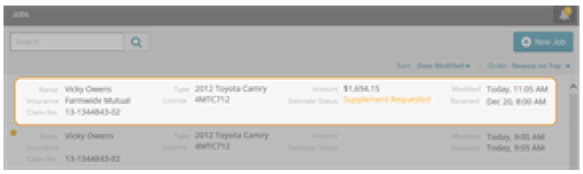
Tip: You can also click **See All** in the **Notification** list and view a list of all changes in chronological order, with newest shown first. Scroll down in the **Notification** list to view jobs.

Assignment Details

Mitchell Connect enables Collectors to send appraisal assignments directly to Regional Offices.

Use the **Job Overview** page to view details for appraisal assignments. The J**ob Overview** page appears when you click the link from the **New Assignment Notification** in your email or by clicking a job on the **My Jobs** page. The **My Jobs** page is the main workspace for assignments.

View Assignment Details

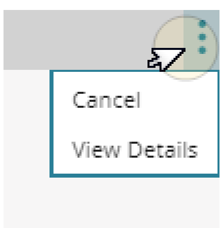


- From the **My Jobs** list, click the desired job.

View and Print Details

You can view and print appraisal and supplement assignment details as a PDF to view and print.

1. On the **Job Overview** page, on the **Estimate** card or **Repair Assignment** card click  .



2. Click **View Details**. The **Assignment Details** window appears.
3. Review the details, and then click **Print** to print or **Close** to close the window.

Print Job List

You can print the jobs that appear on the job list.

1. Filter the **Jobs** list as needed to avoid printing more jobs than you need (e.g., If you want to print a list of open jobs, filter the list to Open jobs before printing).
2. On the **Jobs** list, click **Print** at the top right of the page.

Note: If you attempt to print more than 750 jobs, a warning message appears confirming your selection. Click **Print 750 Jobs** to limit the print or click **Print Anyway** to print more than 750. The print job will take quite some time if you select more than 750.

3. Download Assignments to Your Estimating System

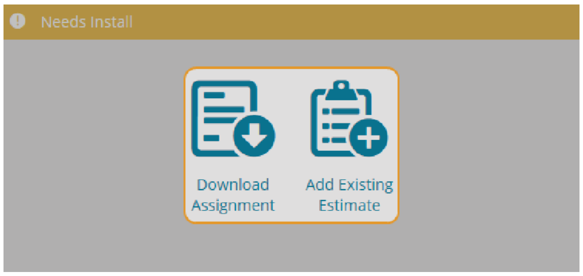
Download the Appraisal Assignment details from Mitchell Connect to your estimating system.

Note: Always create your estimate from the downloaded Appraisal Assignment. This ensures Claim details are in-synch with the Insurance Company. Failing to do so can result in estimate mismatch issues downstream in the workflow leading to unnecessary processing delays.

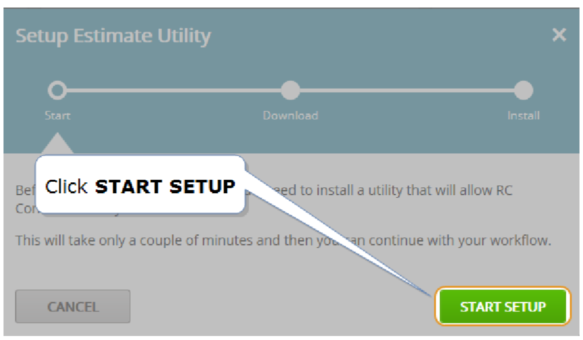
Install Desktop Utility

Before you can download assignment details to your estimating system, you will need to go through a quick installation. During your first attempt to download an assignment you will see the **Needs Install** banner, complete the installation on each system running Mitchell Connect. You will only need to complete this step once. You may see the **Needs Update** banner at a later time.

1. On the **Job Overview** page, click **Download Assignment** or **Add Existing Estimate**. The **Setup Estimate Utility** window appears.



2. On the **Setup Estimate Utility** window, click **Start Setup**.



3. On the **Setup Estimate Utility** window, click **Download**.
4. Depending on your internet browser, do one of the following:
   - **Chrome Browsers**: Click the Mitchell Connect .exe file at the bottom of your browser. Click **Run** and follow the prompts to complete the setup.
   - **Internet Explorer**: Click **Run** at the security prompt at the bottom of your browser and follow the prompts to complete the setup.

> **Note:** Install procedures vary depending on your internet browser and security settings. The install file typically displays at the bottom of the page.

Download Assignment Details to Estimating System

1. On the **Job Overview** page for the assignment, click **Download Assignment**.
2. When the assignment details successfully download, a success message displays on the card.
3. If you are using UltraMate:
   a. Open UltraMate.
   b. Click the **Assignments** tab.
   c. Double-click the required assignment and proceed with creating your estimate.

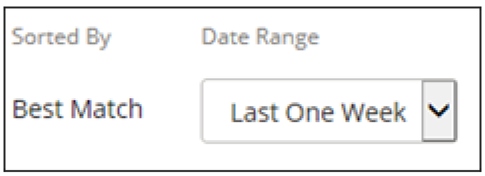
4. Add the Estimate to Mitchell Connect

Write and save the estimate in your estimating system, then add the estimate to the job in Mitchell Connect.

Add the Estimate to Mitchell Connect

Note: If another user in your shop has already added an estimate, you cannot upload another estimate. The **Estimate** card displays the name of the estimator.

1. On the **Job Overview** page for the assignment, click **Add Existing Estimate**.
2. The **Add Estimates** page shows all estimates written in the last week. If your estimate doesn't show, try the following:
    - Expand the date range in the **Date Range** list.

    - Click **View & Edit Locations** at the bottom of the page and add the paths to where your estimating system exports estimates.

    Tip: Mitchell Connect places the most likely estimate at the top of the list.

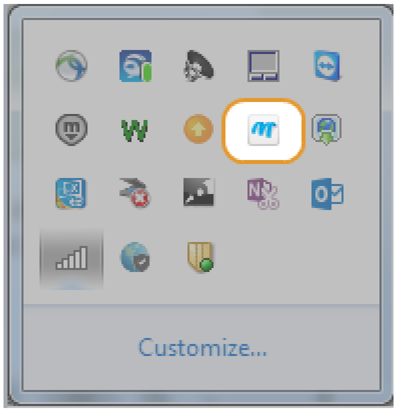
3. Click **Select Estimate**. A PDF estimate automatically appears if you are using UltraMate. If you are using CCC or Audaexplore, you can drag and drop a PDF version of the estimate that you already created and saved to your machine.
4. Once you see the PDF added, do one of the following:
    - Click **Add Estimate** if you're ready to use the estimate.
    - Click **Use Different PDF** and navigate to a different PDF estimate.
5. When the estimate is successfully uploaded to the job, the estimate value displays on the **Job Overview** page. Attach photos and other documents as needed.

Note: You can add more than one committed estimate at once. Multiple estimates display in order on the **Estimate Manager** page.

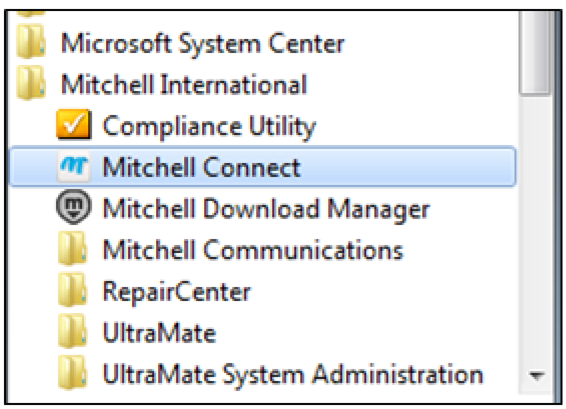
Trouble Shooting Tips

If you're having additional trouble not related to finding your estimate, try the steps below:

- **Check to make sure that the installed agent is running**:
  a. Go to your system tray and make sure the desktop agent for Mitchell Connect is running. Right-click the Mitchell Connect icon in your system tray to Exit the agent.

  b. Restart the agent: Click **Start** in Windows, click **All Programs**, open the **Mitchell International** folder, and then click Mitchell Connect.

- **Protection Mode in Internet Explorer**: If you are on Internet Explorer, check to see if your settings have Enhanced Protection Mode turned on. If it is turned on, turn the setting off and try the workflow again.

5. Add Attachments

Use the attachments feature on the **Job Overview** page to add photos, vendor invoices, towing bills, and other artifacts to an assignment. You can add a description of the attachment after you add it.

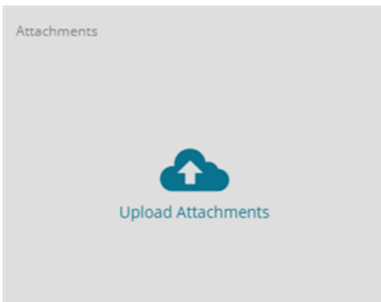
Note: Recommended file formats include .jpg, .jpeg and .pdf.

Add Attachments

Tip: For best results, download photos from your camera to your hard drive prior to adding them to Mitchell Connect.

Note: The attachments limit for a single upload is 200. A warning message appears if you attempt to upload more than 200 attachments at once.

1. On the **Job Overview** page, click **Upload Attachments**.



2. On the **Attachments** page, click **Upload**.
3. Browse to the files you want to attach.
4. Select all of the files you want to attach and click **Open**. Your images load in the **Uploading Attachments** window.

Tip: You can select multiple files by holding down **Ctrl** on your keyboard while selecting attachments.

5. If you are uploading multiple images, Mitchell Connect shows a progress bar for each image as it uploads. Click to the left of **Show Completed** toggle button if you only want to show images that failed to load. Click the **Retry** icon next to the failed upload if you want to try to upload a failed file again.

> **Note**: If an attachment fails to upload, Mitchell Connect will automatically retry the upload three times per attachment. On the third failed attempt, the Mitchell Connect Upload window clearly identifies any attachments that failed to upload. At the prompt, click **Retry All** to attempt to upload all attachments again or click **Exit Anyway** to close the window without loading those attachments.

6. If all files are successfully uploaded, the **Uploading Attachment** window closes for you. A total attachments count appears at the top left of the **Attachments** page.
7. To add more attachments, click **Upload** to reopen the **Open** dialog box.
8. To add a description to an attachment, click **Add a Description** on the image and then type a description in the text box.
9. When you're finished, click **Job Overview** to return to the **Job Overview** page.

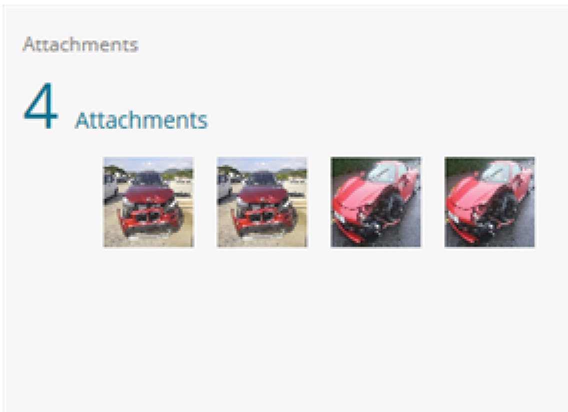
> **Note:** Attachments that have already been sent to the insurance company cannot be deleted and descriptions cannot be edited.

Add Additional Attachments

Add additional attachments.

> **Note**: The attachments limit for a single upload is 200. A warning message appears if you attempt to upload more than 200 attachments at once.

1. On the **Job Overview** page click anywhere on the **Attachments** card.



2. On the gallery view, click **Upload** and browse to the files you want to attach.
3. Select all of the files you want to attach and click **Open**. Your images will load in **Upload Complete** window.

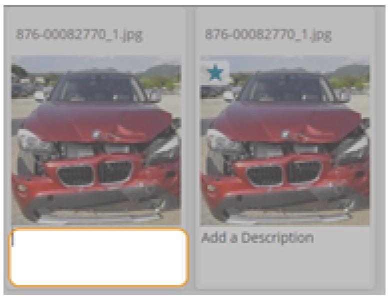
> **Tip:** You can select multiple files by holding down **Ctrl** while clicking each file or drag and drop your images directly on the attachments page.

4. If you are uploading multiple images, Mitchell Connect shows a progress bar for each image as it uploads. Click to the left of **Show Completed** toggle button if you only want to show images that failed to load. Click the **Retry** icon next to the failed upload if you want to try to upload a failed file again.

> **Note**: If an attachment fails to upload, Mitchell Connect will automatically retry the upload three times per attachment. On the third failed attempt, the Mitchell Connect Upload window clearly identifies any attachments that failed to upload. At the prompt,

click **Retry All** to attempt to upload all attachments again or click **Exit Anyway** to close the window without loading those attachments.

5. Click **Done** when the attachments complete loading.
6. To add more attachments, click **Upload** to reopen the **Open** dialog box.
7. To add a description to an attachment, click **Add Description** and then type a description in the text box.



8. When you're finished, click **Job Overview** to return to the **Job Overview** page.

Add Descriptions to Existing Attachments

You can add descriptions to images you add on the **Attachments** page as long as they have not already been sent to the insurance company.

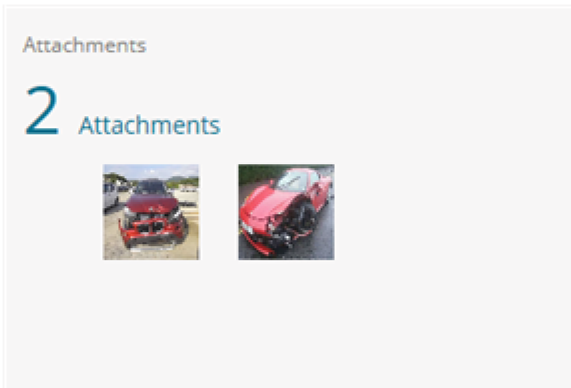
1. On the **Job Overview** page, click **Attachments**. The **Attachments** page appears.
2. Click the image you want to add a description to, and then type the description in the **Description** field.
3. Click **Done**.
4. When you're finished, click **Job Overview** to return to the **Job Overview** page.

Remove Existing Images

You can remove existing images from a job.

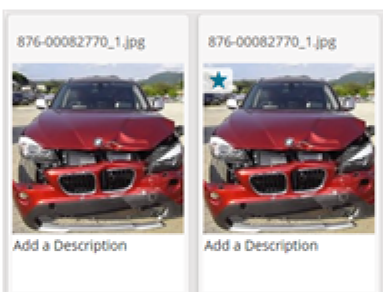
Note: Attachments already sent to the insurance company cannot be deleted. Attachments already sent to the insurance company are labeled as such.

1. On the **Job Overview** page, click **Attachments**. The **Attachments** page appears.



2. Click the attachment you want to remove.

Tip: Click the arrows to scroll left or right to locate other images.



3. Click **Delete Attachment**.

Note: If you have a smaller screen resolutions, the **Delete Attachment** option may not appear. Click ⋮ at the top of the page, and then click **Delete Attachment**.

4. At the prompt, click **Delete**.

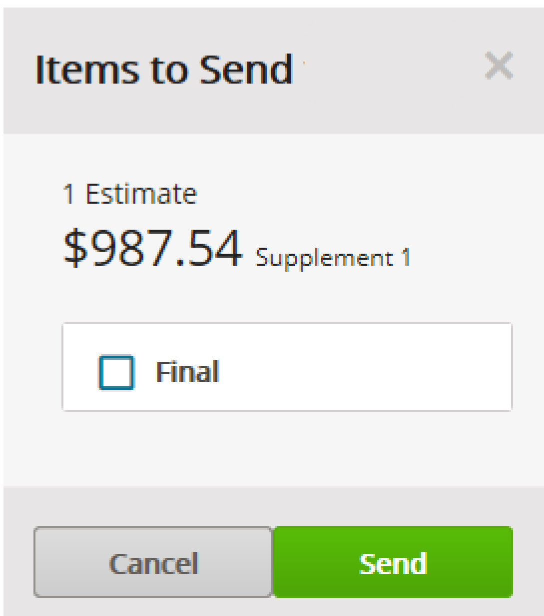
6. Send Estimates

Send your work directly to an insurance company or partner. You can include an estimate only, attachments and an estimate, or just attachments if you have already sent an estimate up in a previous upload.

Send Estimate and final Estimate

1. On the **Job Overview** page for the assignment, click **Send**.
2. In the **Items to Send** dialog box, do any of the following as needed:
   - Click **Final** to use the invoice for payment.
   - Click **Total Loss** if the vehicle is beyond repair (if available).

> **Note**: The Total Loss check box does not appear if you flagged the estimate as a Partial Loss in UltraMate. If you flagged the estimate as a Total Loss in UltraMate, the Total Loss check box appears and is automatically selected.



3. Click **Send**.

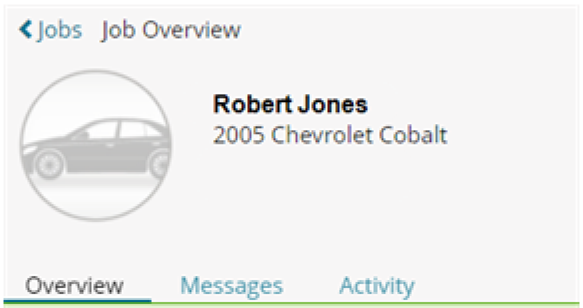
> **Tip:** You can send in increments if needed if you've already sent an estimate. For example: If you forgot to add two photos, you can send them at a later date.

7. Use Messaging

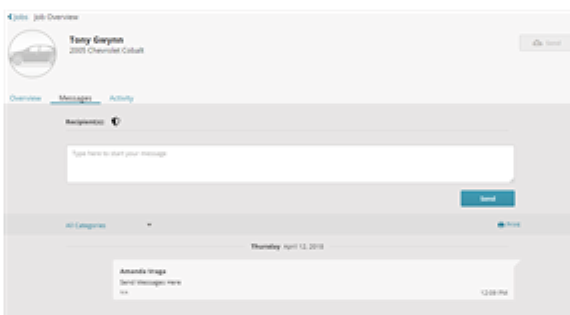
Use the messaging feature to send important messages to the insurance company directly from Mitchell Connect.

View Messages

1. On the Job Overview page, click the **Messages** tab. If no number displays, there are no messages.

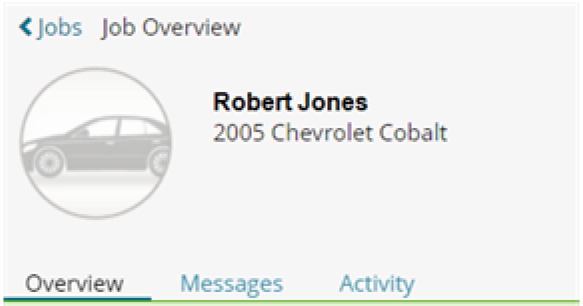


2. Messages display in the order they were sent. Scroll down to see additional messages, or click **Overview** to return to the Job Overview page.



Send Messages

1. On the Job Overview page, click the **Messages** tab.



2. Enter your message, and then click **Send**.

> **Tip**: If your workflow includes journal entries, you can also select a journal category for the message. Select the category in the **Category** list. If you only have one category configured, then that category is automatically applied to the message and the category list does not appear.

3. Click **Overview** to return to the Job Overview page.

8. Manage Locked Estimates and Supplements

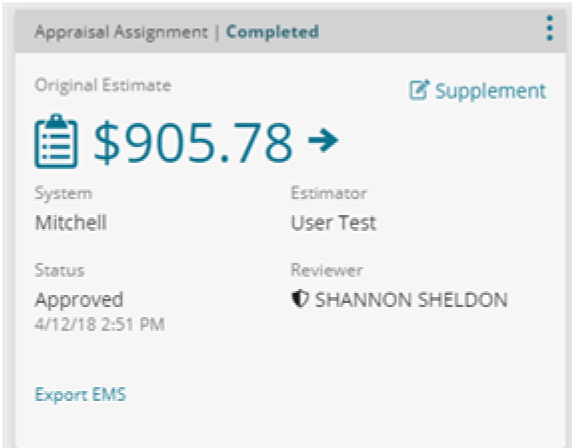
After you send an estimate, the insurance company can review the estimate and set a status. A lock symbol appears in the right corner of the **Estimate** card. The lock indicates the ownership of the estimate is held with the insurance company. Supplements cannot be created when the lock is present.

When the ownership lock is released, the lock symbol is no longer visible, and you can add a supplement.

The estimate is unlocked when the insurance company changes the status to Approved, Manual Closed, Supplement Assignment Sent, or Annotated.

Add a Supplement

1. Open a job with an existing estimate.
2. On the **Estimate** card, click **Supplement**. A message appears letting you know when the supplement is downloaded.



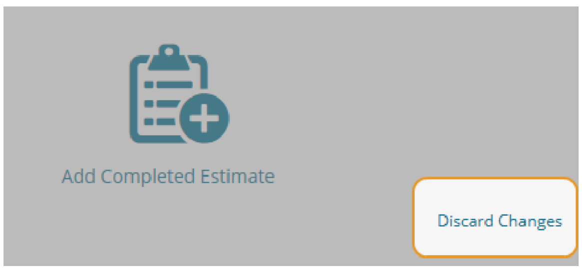
3. Complete and set your Supplement to **Committed** in your estimating system.
4. In Mitchell Connect, click **Add Completed Estimate**.
5. Mitchell Connect automatically opens the corresponding PDF. Click **Add Estimate**.
6. If you are ready to send to the insurance company, click **Send**.

Discard Changes to an Estimate

You can delete changes you made to the estimate before you send your changes to the insurance company. The estimate reverts back to the previous estimate. Your changes are removed from Mitchell Connect and your estimating system.

1. On the **Estimate** card with a completed Supplement, click **Discard Changes**.

> **Note**: You can only discard changes if you haven't uploaded your updated estimate or Supplement to Mitchell Connect.



2. Click **Continue**, at the prompt. Any changes you made to your estimate are removed from your estimating system.
3. Click **Done** at the prompt.

Estimate Status Card Descriptions

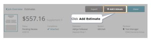
> **Note:** Not All Statuses described below are used in all workflows.

Status of the estimate:

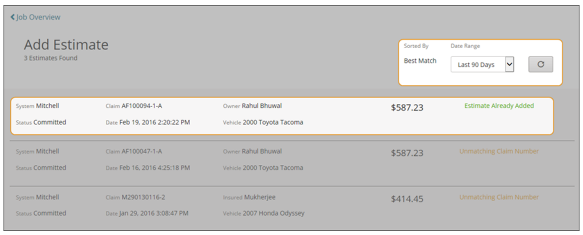
- **Sent**: Sent to the insurance company.
- **Not Sent**: Estimate hasn't been shared with the insurance company by the shop.
- **Pending Review**: Sent to insurance but locked pending review by the insurance company. A lock may appear on the Estimate card on the Job Overview page. Contact the insurance company to remove the lock. You can also send a message to the insurance company from the Messages tab to request to have an estimate unlocked.
- **Approved**: The Estimate has been approved by the insurance company.
- **Rejected**: Estimate rejected. Contact the insurance company to determine if another estimate is required.
- **Recommend Total Loss**: The insurance company recommends total loss rather than an estimate.
- **Supplement Requested**: The insurance company is requesting a Supplement to the estimate.
- **Supplemented**: The estimate includes a supplement.
- **Marked Closed**: Claim closed by the insurance company. No need to take additional action.

Add Supplements from the Estimate Management Page

1. On the **Estimate Manager** page, click **Add Estimate**. The existing estimate is loaded back to your estimating system for editing.

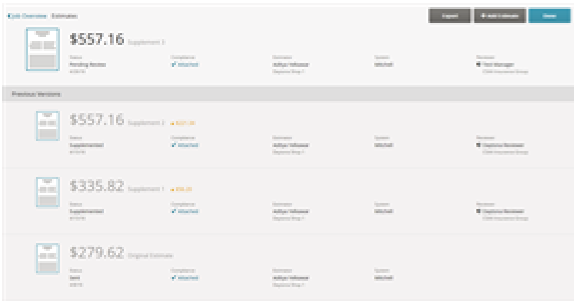
2. Complete and commit your supplement in your estimating system.
3. Mitchell Connect shows your most recent estimates. Use the **Date Range** list to search for older estimates if needed.

4. Select the desired estimate.
5. Submit your update and supportive documents when complete.

9. Manage Estimates

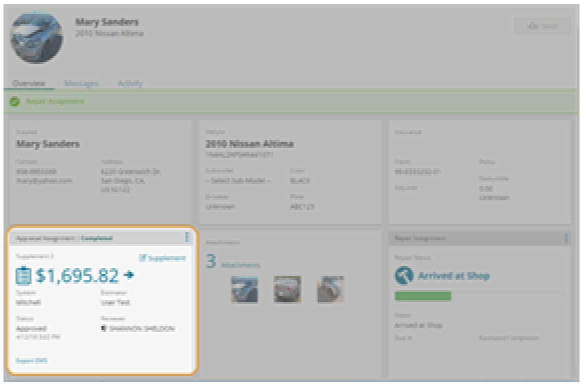
Use the **Estimate** page to view a time line of previous versions of your estimate. You can also view and print details on your estimates, add supplements, and view a delta report that shows changes made to your estimate.



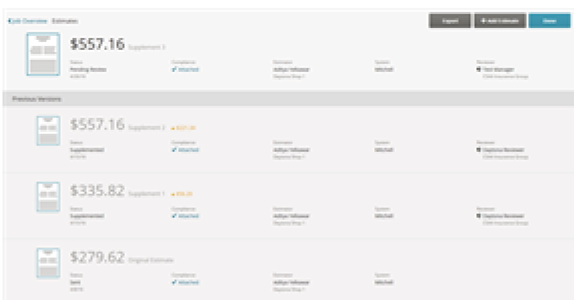
Open the Estimate Manager

1. Open a job on the **Open Jobs** page.
2. On the **Job Overview** page, click on a blank section on the **Estimate** card.

   Note: To open the estimate manager, do not click on the estimate amount, PDF, Export EMS, or other highlighted links.

3. On the **Estimate Manager** page, scroll down as needed to view previous versions of your estimate. Your original estimate appears on the bottom of the time line.

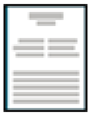
   

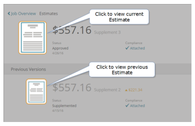
4. Click **Done** or click **Job Overview** to return to the **Job Overview** page.

Tip: You can access the **Estimate** page after you add a supplement by clicking **View Estimates** on the **Job Overview** page.

View Estimates on the Estimate Page

View details about the estimate and any previous versions.

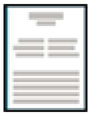
1. On the **Estimate Manager** page, click the **Estimate** icon  next to the current or previous estimate.

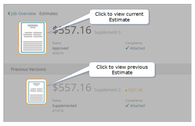
   

2. Scroll down to view details, and then click **Done** or click **Estimates** to return to the **Estimate Manager** page.

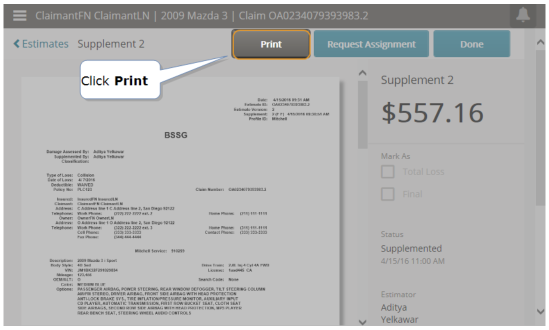
Print or Save the Estimate from the Estimate Page

Print or save the current estimate, previous estimates, or staff written appraisals.

1. On the **Estimate Manager** page, click the **Estimate** icon  next to the current or previous estimate.

2. On the **Estimate Details** page, click **Print**. The report appears as a PDF.

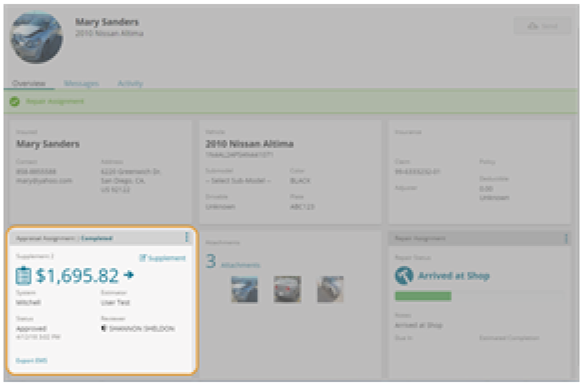
   

3. On your PDF reader, click **File**, and then click **Print** to print or click **Save As** to save.

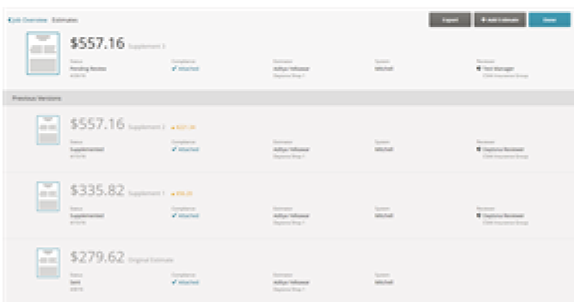
> **Note**: PDF options for printing and saving may vary.

Generate Delta Report to Show Estimate Changes

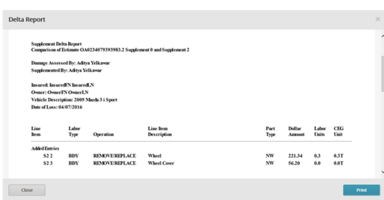
1. On the **Job Overview** page, click the **Estimate** card.



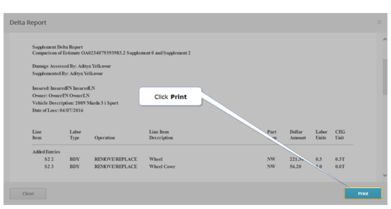
2. On the **Estimate Manager** page, scroll down as needed to view previous versions of your estimate. Your original estimate appears on the bottom of the time line.



3. Select the desired estimate or supplement in the **View Changes** list at the bottom of the page. The Delta Report appears.
4. On the Delta Report, scroll down to view details.



5. On the Delta Report, click **Print** to save or print a copy of the estimate. You can also click **Close** if you do not want to print or save the report.



6. On your PDF reader, click **File**, and then click **Print** to print or click **Save As** to save.

> **Note**: PDF options for printing and saving may vary.

10. Close Job

Use the Close Job feature to remove completed Jobs from the **Open Jobs** page. This helps to manage the number of jobs on the **Open Jobs** page by showing only open jobs. If you need to reopen a job, you can search for the job and reopen it.

> **Note**: You cannot delete jobs or assignments. You can close the job to remove it from your list of open jobs.

> **Note**: Close the job only when you have completed the full process and want to remove it from the **Jobs** list on the **Job Overview** page.

Close a Job

1. On the **Job Overview** page, click the **Open** list at the top of the page.
2. Click **Closed**. The job is closed and removed from the Open Jobs page.

Reopen a Job

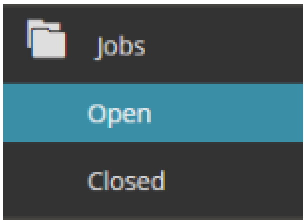
Reopen a job if you want the job to show on the **Open Jobs** page.

1. Search for the job and open it.
2. On the **Job Overview** page, click the **Closed** list at the top of the page.
3. Click **Open**. The job is reopened and shows on the **Open Jobs** page.

> **Note**: Reopening a job does not reopen the job with the insurance company. Reopening the job makes the job visible from the **Open Jobs** page.

Filter the My Jobs page to Open or Closed Jobs

1. On the **Jobs** page, click **Jobs** on the **Navigation** pane.
2. Click one of the following to sort:
   - **Open**: Show open jobs only.
   - **Closed**: Show closed jobs only.



Mitchell Connect for Mobile Devices

Improve workflow and shorten communication cycle times from any device, any browser, anywhere that has an internet connection. Access Mitchell Connect from a mobile device.

1. On your mobile device, go to one of the following based on your location:
   - **Canada**: https://repaircenterca.mymitchell.com/connect/account/#/login
   - **United States**: https://repaircenter.mymitchell.com/connect/account/#/login
2. On the **Sign In** page, enter your user name and password, and then click **Sign In**.

3. Click  to view the full navigation pane.